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1. Introduction to ODT Service

1.1. ODT Service Permissions

In order to setup and process service, permission modeling is required to apply the proper level of security.

ODT Service has a service specific Permission Set called “ODT Service” which must be added to any users’ Permission Sets who require access to the service functionality.

All users require the D365 BASIC Permission Set as this is a required assignment for Microsoft Dynamics 365 Business Central.

In addition to the D365 BASIC and the ODT SERVICE Permission Sets, users will as well need to have other Dynamics 365 Business Central Permission Sets assigned to them in order to setup and/or process service quotes and tickets.

It may also be necessary to assign users the LOCAL permission set if they do not already have such permissions.

Example 1
The user who would be responsible for setting up Dynamics 365 Business Central, such as perhaps creating separate the General Product Posting Groups and General Posting Setup for Service would require the Permission Sets allowing them to do this.

Example 2
An Order Processor who would be entering and/or processing rentals will still require the Permissions Sets that are needed for a Sales Order Processor who would be entering, shipping and invoicing a Sales Order. As the ODT Service is built upon the Jobs module, users would also need the applicable Jobs and Journal, Post Permission Sets.

For information on assigning Permission Sets to Users or User Groups, see the Dynamics 365 Business Central help.

1.2. ODT Service Overview

1.2.1. Overview

Anyone who relies on servicing equipment in their business knows how important it is to both handle repairs, and manage ongoing planned maintenance. Improperly handling equipment preparation, return inspections and repairs can mean the loss of an expensive piece of equipment, because simple service was not carried out in a timely manner.

Should a company be servicing equipment for customers, the ability to manage equipment servicing and repairs in a timely manner is essential.

Fully integrated with Microsoft Dynamics 365 Business Central, the ODT Service functionality has been added to the Business Manager and Order Processor role centers, which provides you with a service focused interface that works from one database.

ODT Service extends the power of Microsoft Dynamics 365 Business Central, Jobs, by providing you with specialized tools that streamline daily business operations for servicing equipment.

The license required for ODT Service is the Essential license for Business Central.
As the default User Experience is Essential on the Company Information, this does not need to be modified.

The ODT Service 365 app adds the following functionality on top of Jobs:

- Service units, which track service work performed on customer or internal units. Internal units, can optionally be linked to Items and Fixed Assets for informational purposes. From the Service Unit, the Service History and Service Ledger Entries are provided for tracking and analysis purposes.
- Service templates are user defined service templates, which can be used to set up predefined service. A combination of service templates can be defined in a service template to create a service plan for a group of equipment.

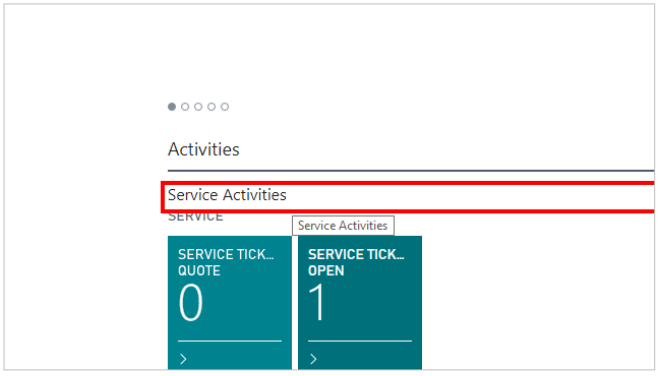
- Service Checklists can be created on a service template, which flow through to the Service Quote and/or Service Ticket, when the Service Template is assigned to the lines. Technicians can print the checklist and/or enter the checklist findings.

- Service Quotes can be used when servicing external customer equipment. The Service Quote is suitable for front line staff to create and modify service work and create a service ticket. Upon creation of a Service Quote, a Job is automatically created.
- Service Tickets can be used for both internal and external equipment servicing. The Service Ticket is suitable for front line staff and/or service technicians to create and modify service work in a simple work order format. Upon creation of a Service Ticket, a Job is automatically created.
- Planned Maintenance features can be used to create and process tickets for service that is performed at a later date. Planned Maintenance is suitable for front line staff and/or service technicians when scheduling service work that occurs after a specific period of time, or other scenarios where it is known in advance service is required.

1.2.2. Business Manager Profile

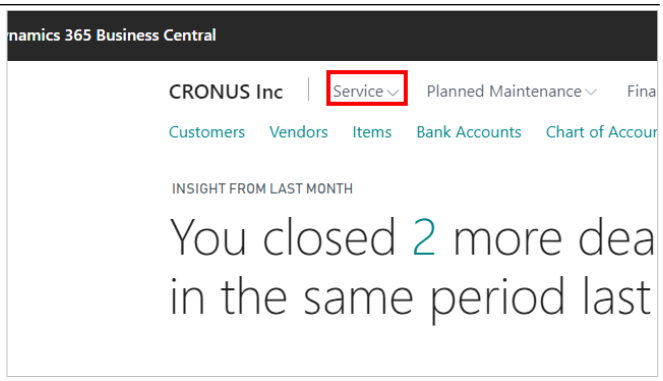
Click on the label **Service Activities**

Within the Activities part, there are 2 cues for open service tickets.
One for open Service Ticket Quotes and the other for open Service Tickets.

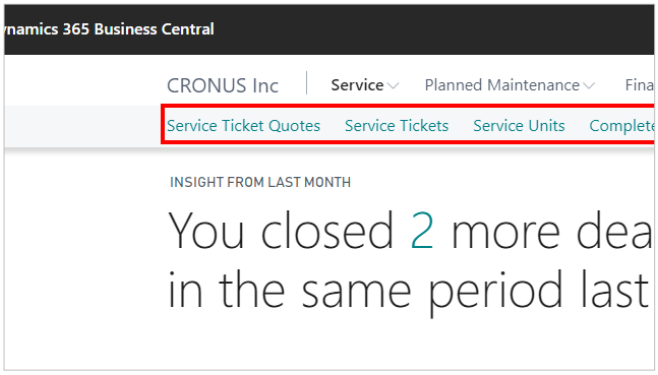


Click on the navigation menu item popup **Service**

On the main command bar of the Business Manager Profile the Service menu option is for ODT Service and contains sub-menu options.



Service sub-menu options

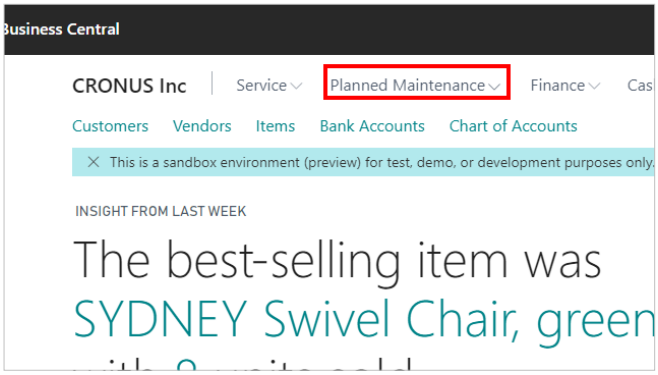


The Service sub-menu options include:

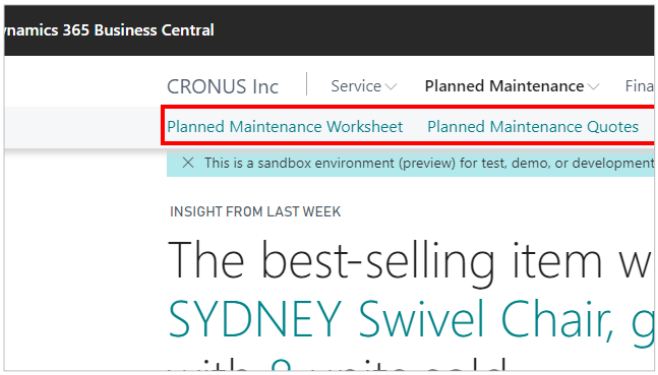
- Service Ticket Quotes, which opens a listing of open Service Ticket Quotes.
- Service Tickets, which opens a listing of open Service Tickets.
- Service Units, which opens a listing of Service Units.
- Completed Service Tickets, which opens a listing of Completed Service Tickets.

Click on the navigation menu item popup **Planned Maintenance**

On the main command bar of the Business Manager Profile the Planned Maintenance menu option is for ODT Service and contains sub-menu options.



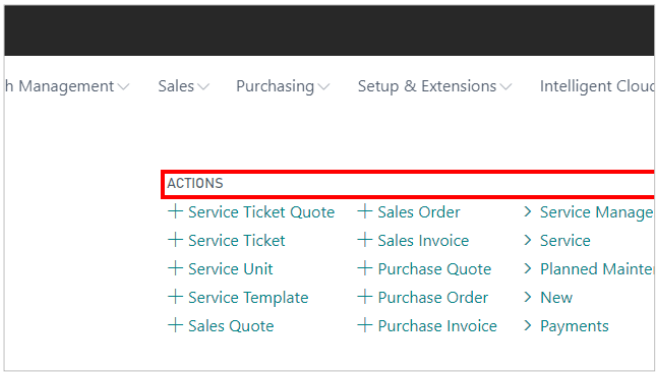
Planned Maintenance sub-menu options



The Planned Maintenance sub-menu options include:

- Planned Maintenance Worksheet, which opens the Planned Maintenance Worksheet.
- Planned Maintenance Quotes, which opens a listing of open Planned Maintenance Quotes.
- Planned Maintenance Tickets. which opens a listing of open Planned Maintenance Tickets.
- Service Units, which opens a listing of Service Units.
- Completed Planned Maintenance Tickets, which opens a listing of completed Planned Maintenance Tickets.
- Planned Maintenance Entry Archive, which opens a listing of Planned Maintenance Ticket history.

Click on **Actions**

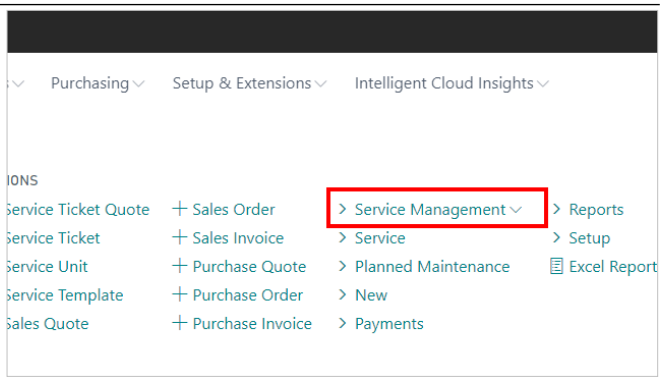


The Actions section of the profile contains the following options related to ODT Service:
Actions

- Service Ticket Quote, which opens a new Service Ticket Quote.
- Service Ticket, which opens a new Service Ticket.
- Service Unit, which opens a new Service Unit card.
- Service Management, which contains sub-menu options.
- Service, which contains sub-menu options.

- Planned Maintenance, which contains sub-menu options.

Click on the navigation menu item popup **Service Management**



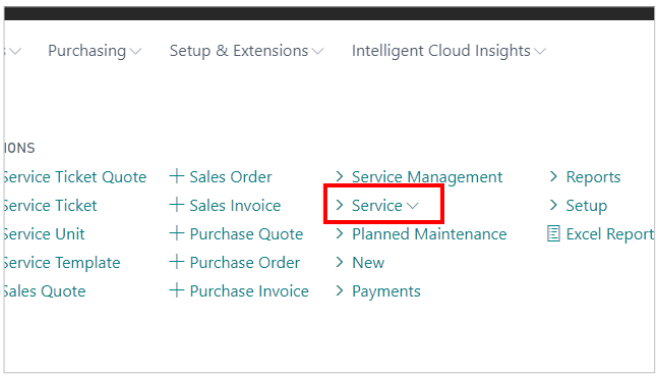
The Service Management sub-menu options include:

- Service Management Setup, which is for the specification of the No. Series for Service Units, Service Tickets and Planned Maintenance Tickets.
- Service Ticket Types, which is used to setup the types of service tickets.
- Maintenance Groups, which is used to setup the Maintenance Groups. Maintenance Groups are mandatory and are assigned to Service Units and Service Templates. The Maintenance Group controls which Service Templates are available to select, based on the Service Unit entered on a quote or ticket.

- Service Templates are user defined service templates which can be used to set up predefined service. A combination of service templates can be defined for a service plan for a Maintenance Group of equipment.
- Service Units, which are used for tracking service work performed on customer or internal units. Internal equipment service units can optionally be linked to Items and Fixed Assets for informational purposes.

- Manufacturers, which is used to setup user defined codes for the specification of the company that manufactured the Service Unit.
- Models, which is used to setup user defined codes for the specification of the equipment models.
- Service Statuses, which are used to specify the current status of Service Tickets
- Service Unit Meter Worksheet, Which can update meter readings on multiple units
- ODT Service Online Help, provides direct access to the user help for ODT Service.
- Utility, which contains an option to update item costs across Service Templates

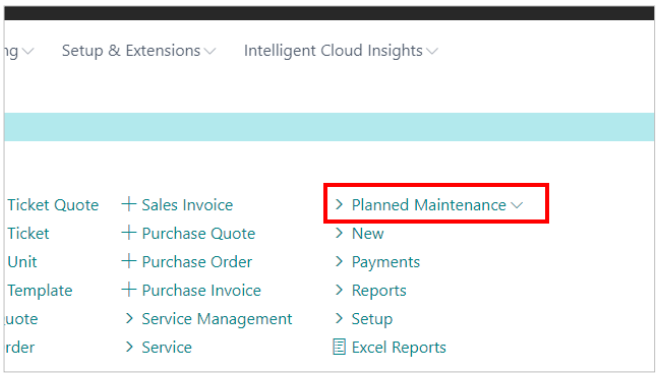
Click on the navigation menu item popup **Service**



The following Service sub-menu options display their respective listings.

- Service Ticket Quotes
- Service Tickets
- Service Units
- Completed Service Tickets

Click on the navigation menu item popup **Planned Maintenance**



The Planned Maintenance sub-menu options include:

- Planned Maintenance Worksheet, which can be used to filter, select, and process planned maintenance work for one or more Service Units. Users can also set up multiple different batch jobs depending on the task they are performing.
- Planned Maintenance Entry Archive, which provides a history of actions performed on the Planned Maintenance Worksheet. When an entry on the worksheet is processed or deferred, it will be displayed in the archive along with information about what action was performed with that entry. The following Planned Maintenance sub-menu options display their respective listings:
- Planned Maintenance Quotes
- Planned Maintenance Tickets
- Service Units
- Completed Planned Maintenance Tickets

1.2.3. Sales Order Processor Profile

The following provides a brief listing of the ODT Service menu options available on the Sales Order Processor Profile. For additional information on these menu options, please review the Business Manager Profile above. The Service option on the Navigation bar contains the sub-menu options:

- Service Ticket Quotes
- Service Tickets
- Service Units
- Completed Service Tickets The Planned Maintenance option on the Navigation bar contains the sub-menu options:
- Planned Maintenance Worksheet
- Planned Maintenance Quotes
- Planned Maintenance Tickets
- Service Units

The Actions section on the profile contains the following ODT Service options:

- Service Ticket Quote
- Service Ticket
- Service
- Planned Maintenance In the Actions section, Service contains the following sub-menu options:
- Service Ticket Quotes
- Service Tickets
- Service Units
- Completed Service Tickets In the Actions section, Planned Maintenance contains the following sub-menu options:
- Planned Maintenance Worksheet
- Planned Maintenance Quotes
- Planned Maintenance Tickets

2. ODT Service Setups

2.1. Service Setup Overview

Before you can manage service processes, you must configure the rules and values that define the company's service policies.

First, you must define the general setup, such as which service documents are required and classification of the types of service. This general setup is typically performed once during the initial implementation.

The majority of the required setups for service is completed using the Business Manager profile.

NOTE:

On the initial creation of a company a notification will be displayed, which provides a link to open the Service Management Setup and another to open the ODT Service Online Help.

The basic setup available to be completed by organizations using the Service Management, includes the following setups:

* No. Series setup, which is required for Service Units. The setup of Service Ticket No., and Planned Maintenance Ticket No. Series is optional.

• Service Management Setup is used for specifying the No. Series of the Service Units, Service Tickets and Planned Maintenance Tickets.

• Service Ticket Types are used to define the types of service the organization performs. For example, Regular Service and Walk Ins. The setup of Service Ticket Types is optional.

• Maintenance Groups, which is used for grouping various service templates that would apply to Service Units, which have been assigned to a Maintenance Group. The setup of Maintenance Groups is mandatory.

• Manufacturers, which are user defined codes used to specify the company that manufactured the Service Unit. For example, Bobcat, which manufactures Skid Steers. The setup of Manufacturers is optional.

• Models, which are user defined codes used to specify the Models of the product which the Manufacturers make. For example, the Bobcat could have models of S450 and S70. The setup of Models is optional.

• Service Templates, which are used to combine predefined service tasks including notes, items and resources that are included in a specific service. A simple example being an oil change, which would include a resource for the technician and items for the oil, oil filter and oil gasket. Setting up predefined Service Templates saves time in the creating of quotes and ticket. However, the setup of Service Templates is optional, as the service quote and ticket lines and the associated ticket details lines can be entered manually.

• Service Units, which define the product to be serviced, which requires the specification of the Manufacturer Code, Model No., Maintenance Group and the Customer that owns the produce. The customer can be an internal or a third party customer. The Service Unit can be linked to an item or Fixed Asset for informational purposes, when the product is owned by the organization. The setup of Service Units is mandatory.

• Customer for when servicing internally owned equipment. A separate Customer is mandatory, when an organization is serving internally owned equipment.

For information on performing these setups, see the ODT Service Online Help category, ODT Service Setups.

Standard setups within Dynamics 365 Business Central include the following and are not covered in the ODT Servicing Setups as there are no modifications for service to the following:
• Items, which are to be included in the service templates or used in servicing the equipment.

• Resources, which are to be included in the service templates or used in servicing the equipment.

• Additional setups, which can be used in the templates or tickets, such as Standard text Codes and G/L accounts for miscellaneous type costs/charges, such as Shop Supplies.

To learn about setting up these, please refer to the Dynamics 365 Business Central online help.

IMPORTANT

The user help was created from a Dynamics 365 Business Central for North America, United States company. Therefore the help refers to Tax Group Code.
Should your organization be using the Rest of World version of Business Central, then throughout the help, consider Tax Group Code to refer to VAT Prod. Posting Group.

2.2. Service Financial Setups

2.2.1. How to Setup Service Management Setup

2.2.1.1. Overview

The Service Management Setup contains the fields for specifying the No. Series to be used for Service Units, Service Tickets and Planned Maintenance Tickets.

Only the Service Units No. Series is mandatory.

The Service Ticket Nos. and Planned Maintenance Ticket Nos. are optional.
If these are not setup and the fields are left blank on Service management Setup, then the Job No. Series is automatically used.

In order to setup Service Units, and to process service tickets the setup of the No. Series for Service Units is required.

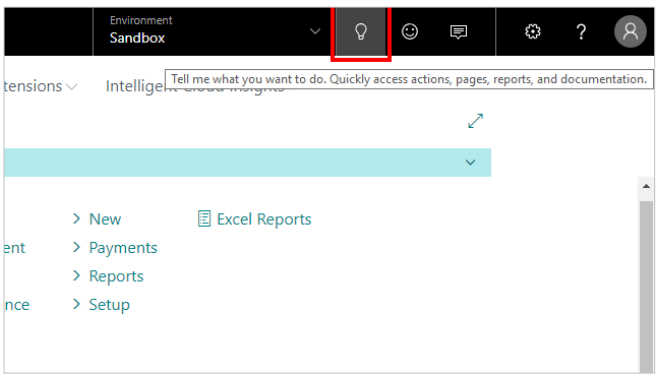
Subsequent to the setup of the No. Series, the No Series must be specified on the Service Management Setup.

2.2.1.2. How to Set Up No. Series for Service

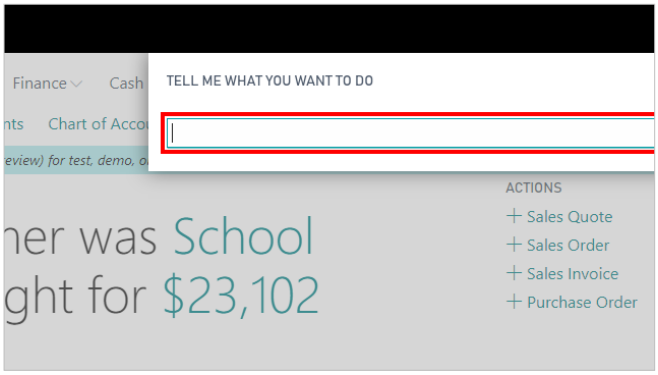
Business Manager Profile

The following steps demonstrate how to setup No. Series for Service Units, and Service and Planned Maintenance Ticket documents.

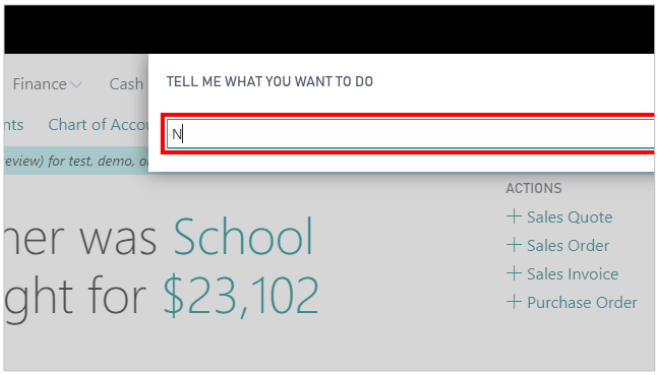
Click on the navigation menu item **Tell me what you want to do. Quickly access actions, pages, reports, and documentation.**



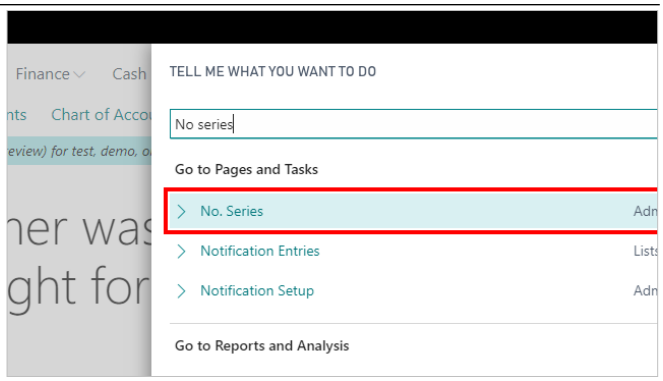
Click on the field **Type to start search:**



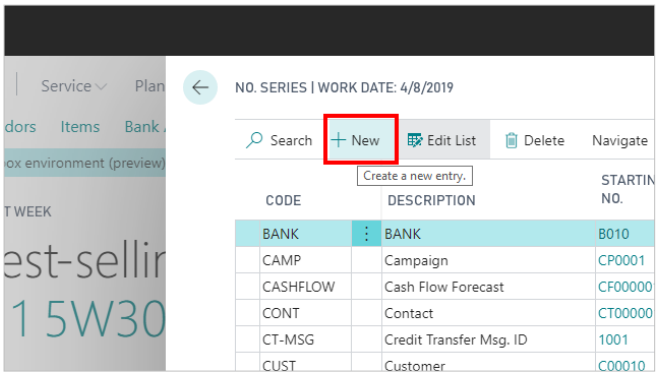
Enter the text **No series**.



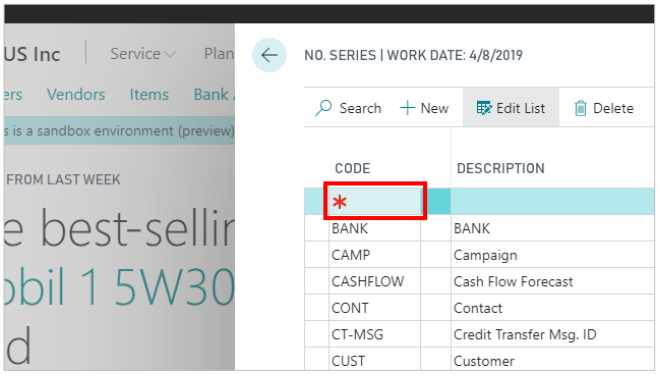
Click on **No. Series Administration**



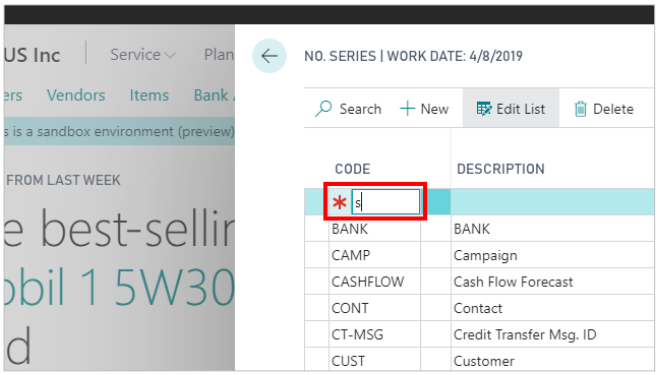
Click on the navigation menu item **New**



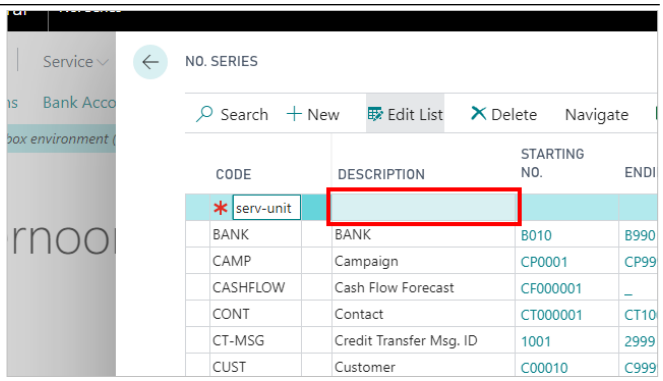
Click on the cell **Code**



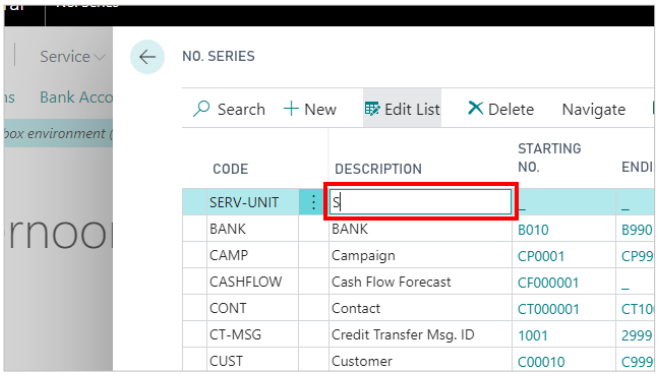
Enter the text **serv-unit**.



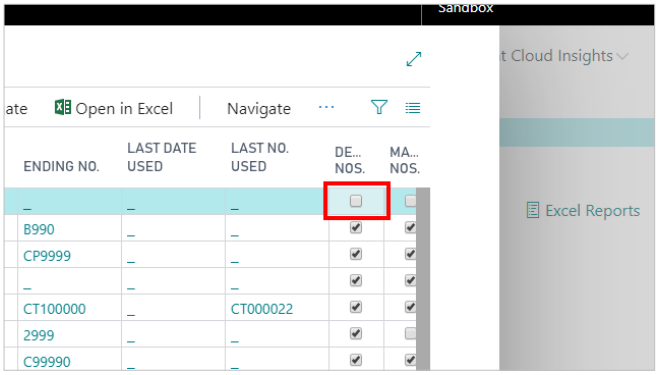
Click on the cell **Description**



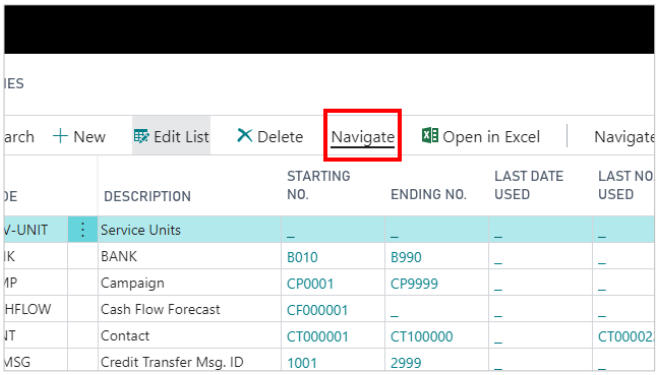
Enter the text **Service Units**.



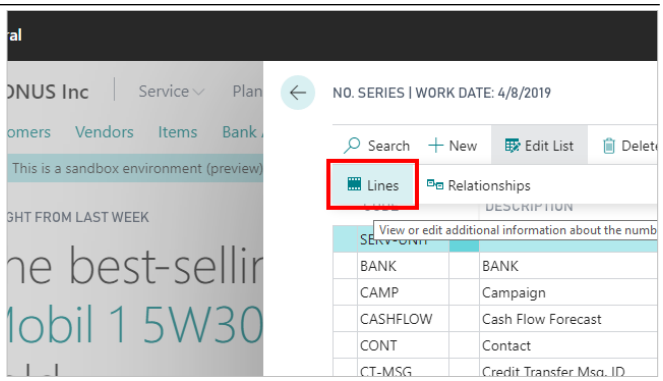
Click on **Default Nos.**



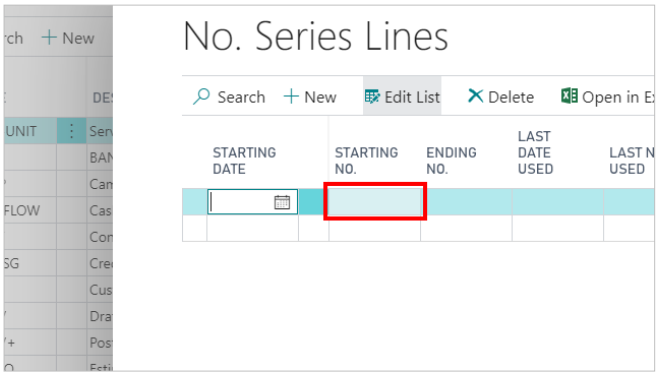
Click on the navigation menu item popup **Navigate**



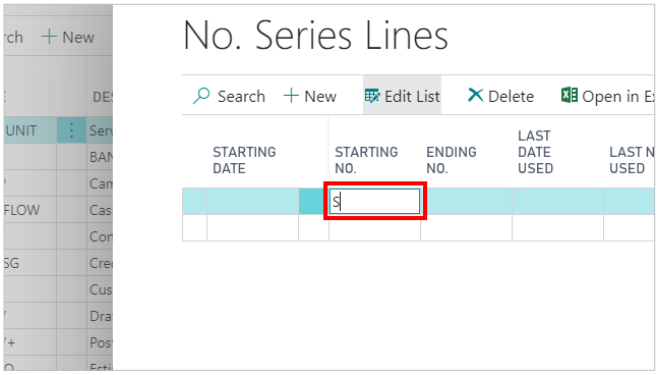
Click on the link **Lines**



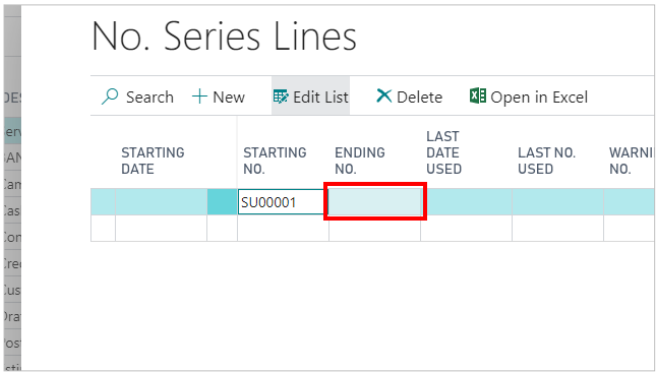
Click on the cell **Starting No.**



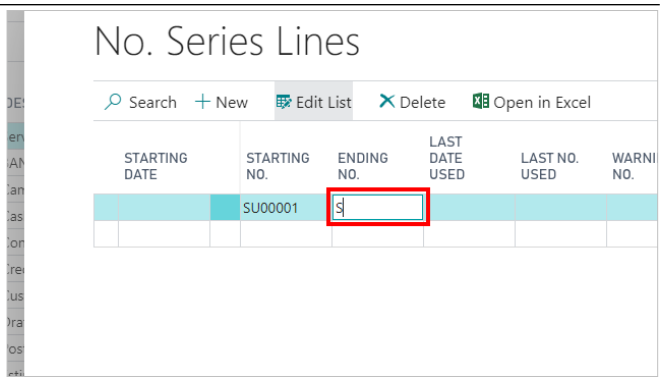
Enter the text **SU00001**.



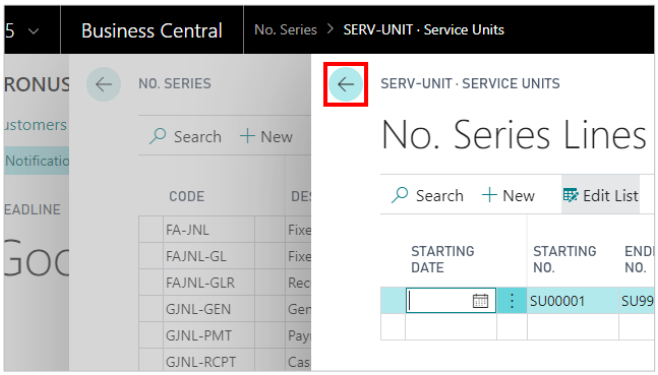
Click on the cell **Ending No.**



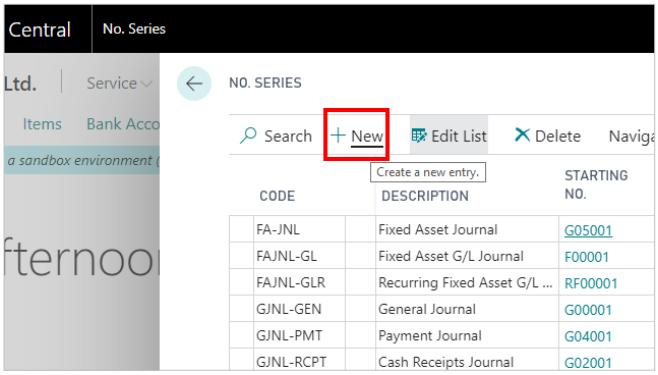
Enter the text **SU99999**.



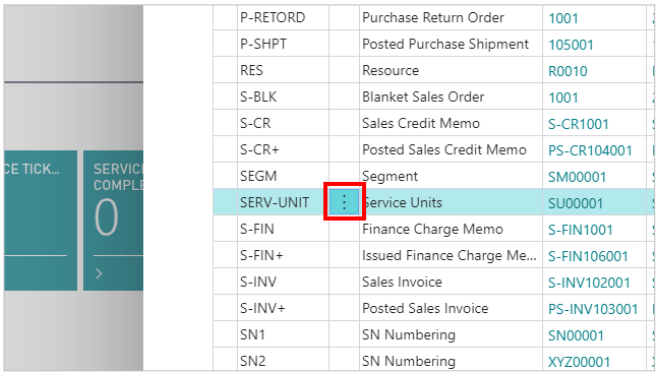
Click on the back button



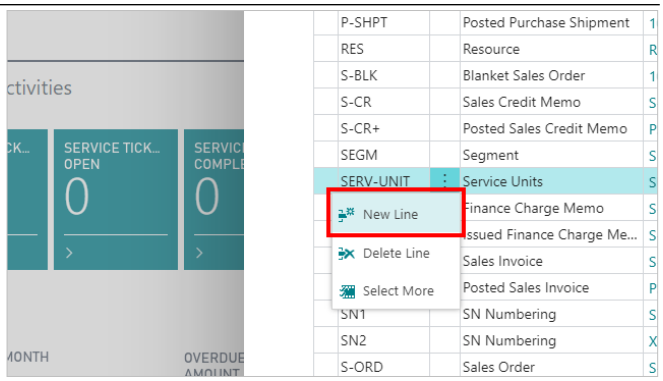
Click on the navigation menu item **New**



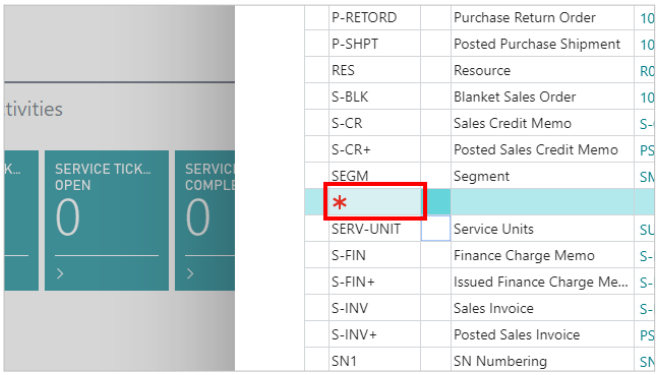
Click on the row menu button



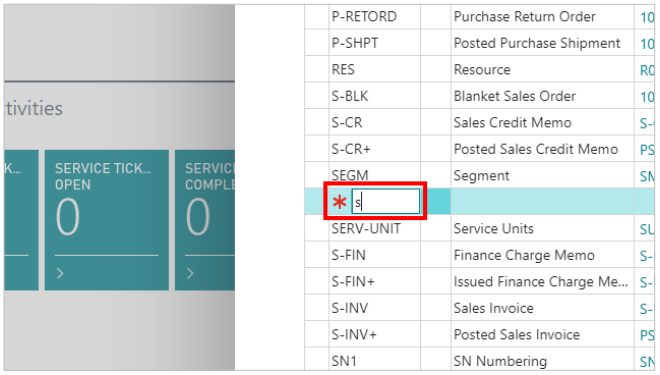
Click on the menu item **New Line**



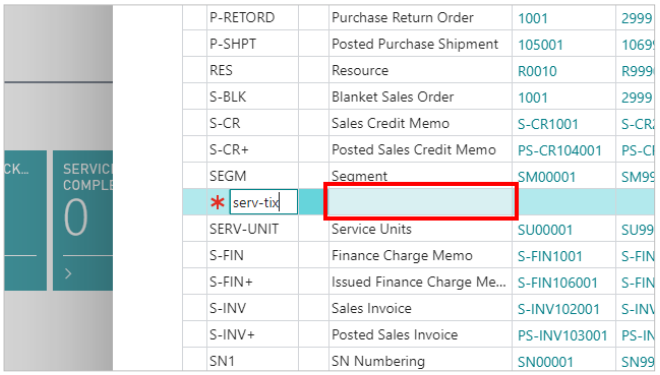
Click on the cell **Code**



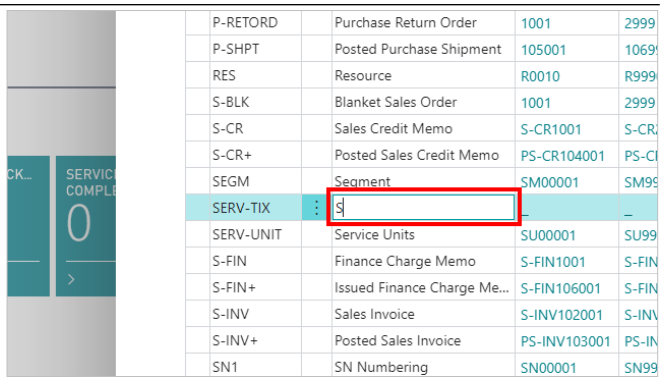
Enter the text **serv-tix**.



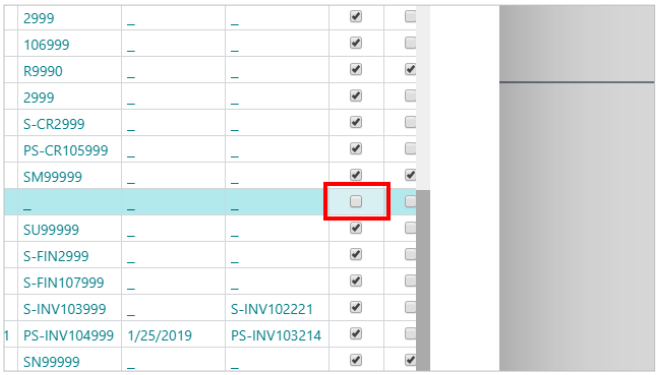
Click on the cell **Description**



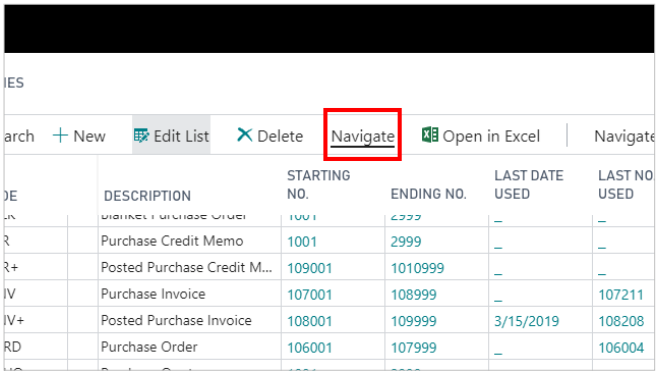
Enter the text **Service Tickets**.



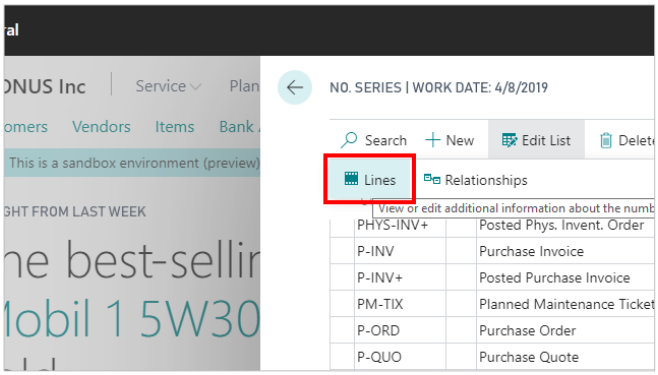
Click on **Default Nos.**



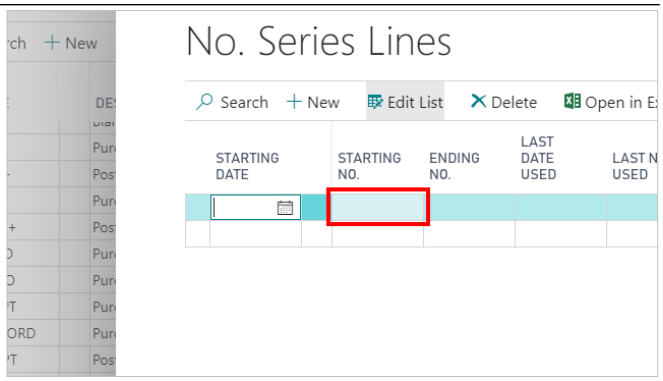
Click on the navigation menu item popup **Navigate**



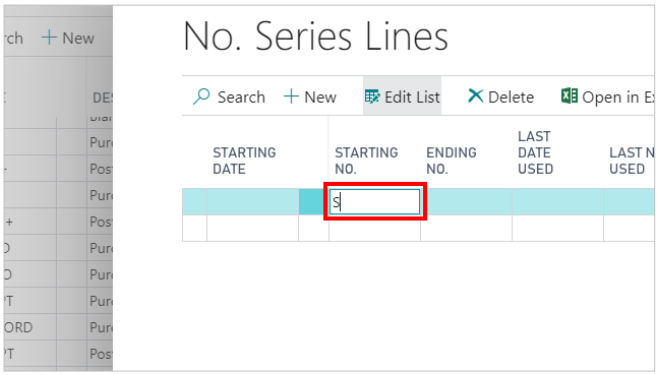
Click on the navigation menu item **Lines**



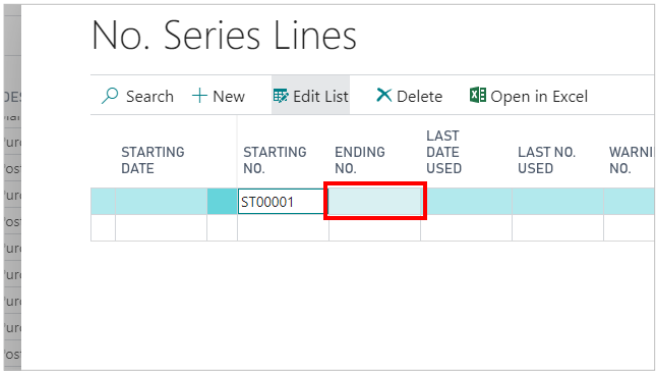
Click on the cell **Starting No.**



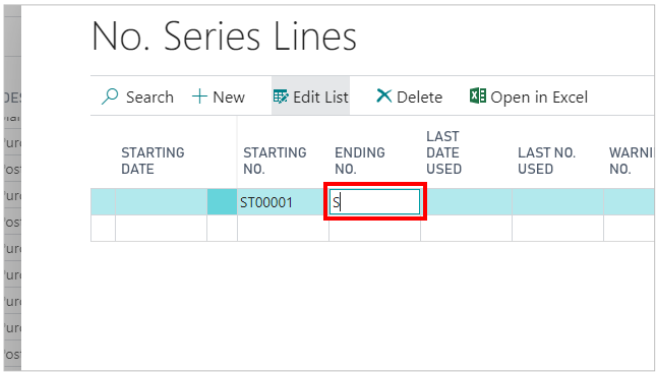
Enter the text **ST00001**.



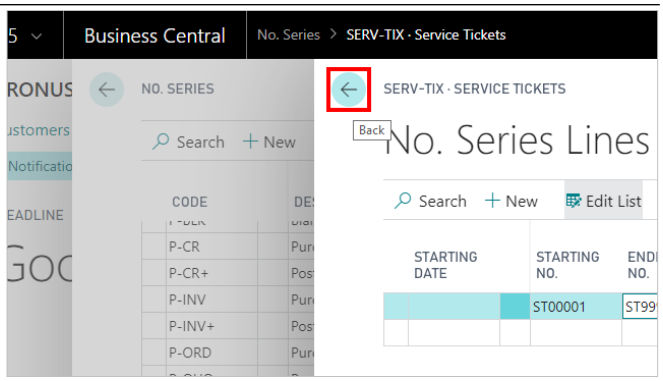
Click on the cell **Ending No.**



Enter the text **ST99999**.

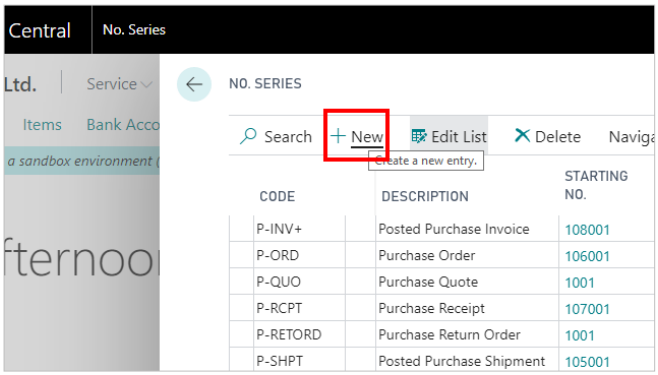


Click on the back button

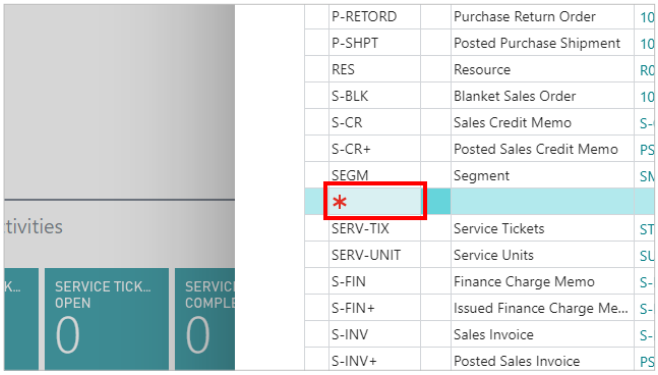


The following demonstrates the setup of the No. Series for the Planned Maintenance Ticket Nos.

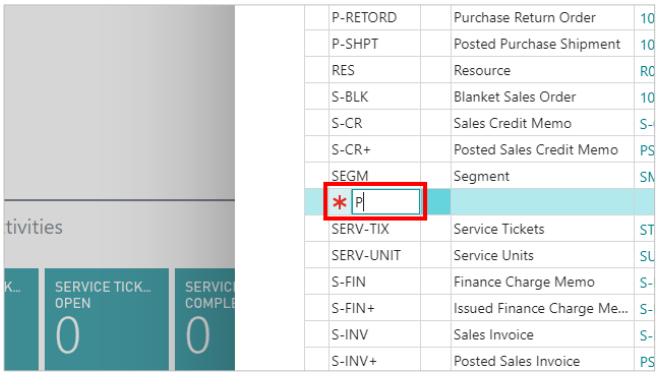
Click on the navigation menu item **New**



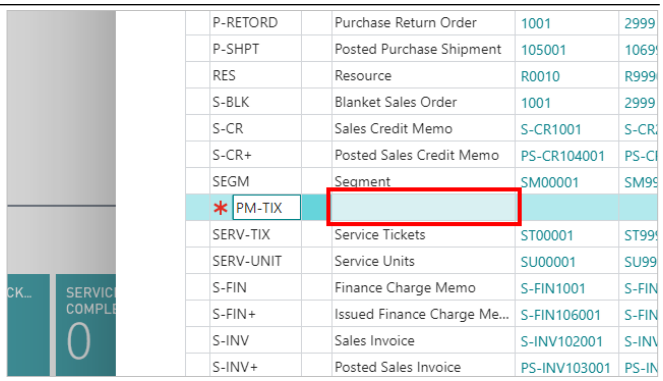
Click on the cell **Code**



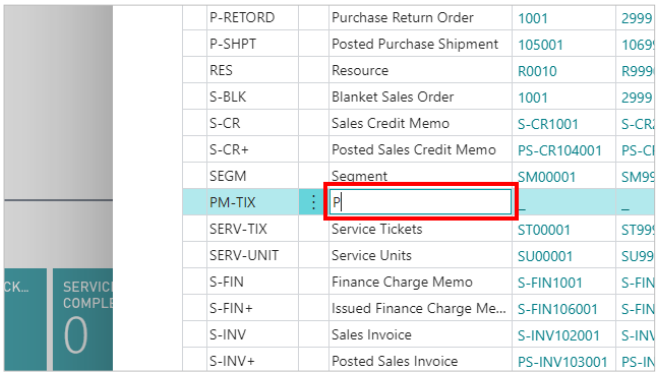
Enter the text **PM-TIX**.



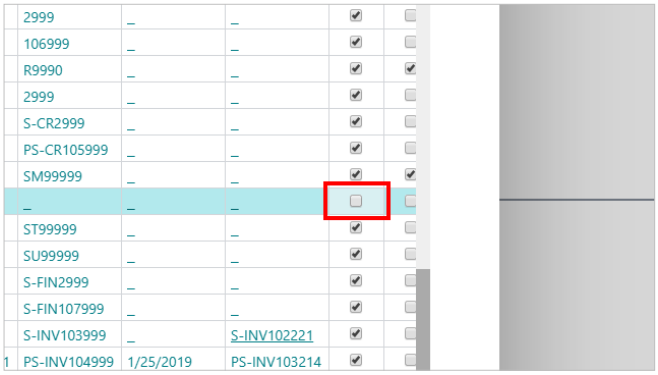
Click on the cell **Description**



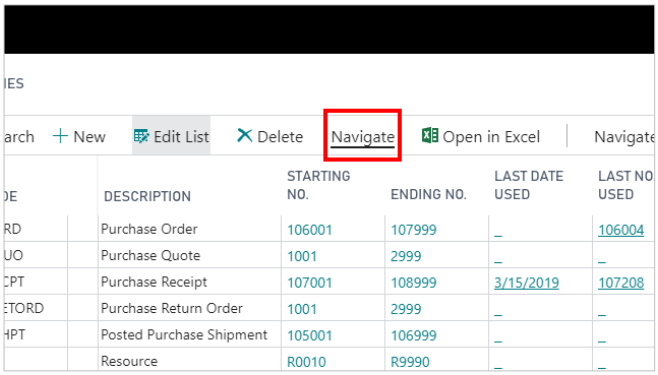
Enter the text **Planned Maintenance Tickets**.



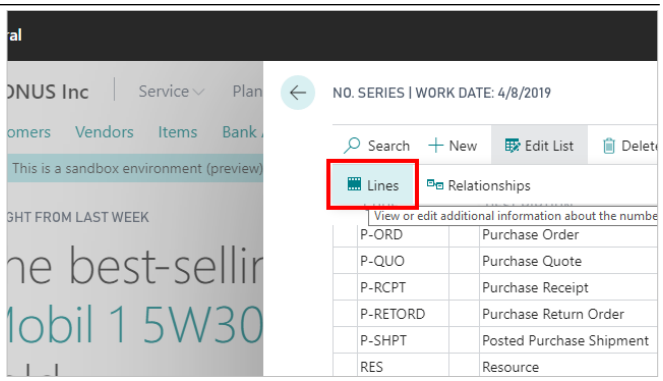
Click on **Default Nos.**



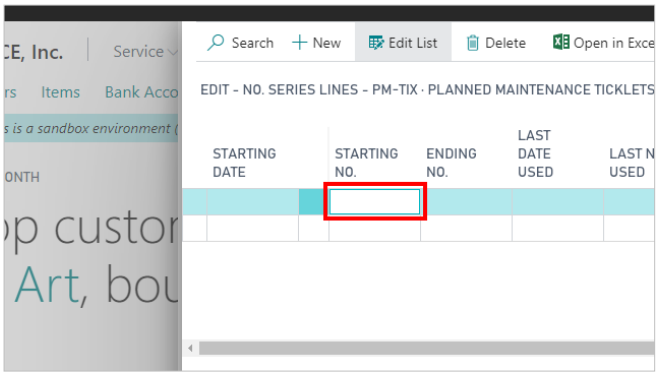
Click on the navigation menu item popup **Navigate**



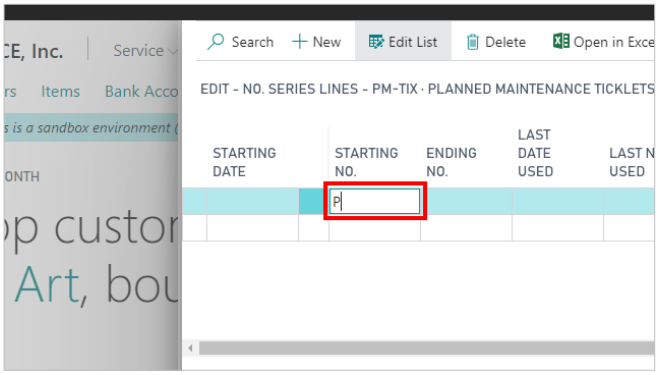
Click on the navigation menu item **Lines**



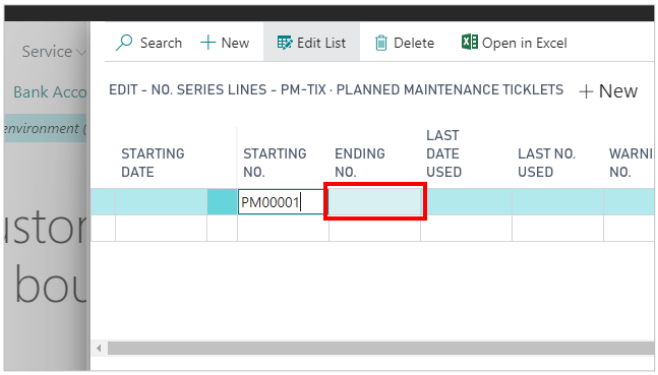
Click on the cell **Starting No.**



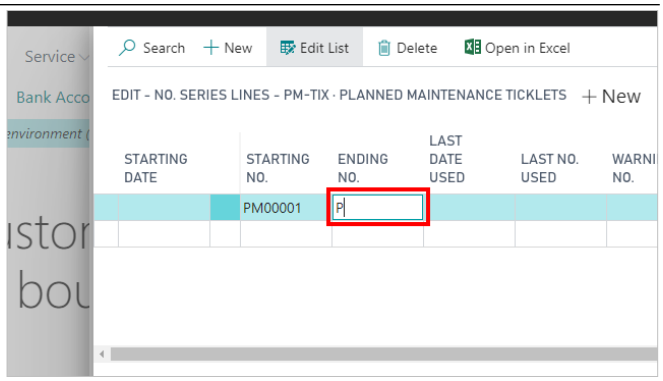
Enter the text **PM00001**.



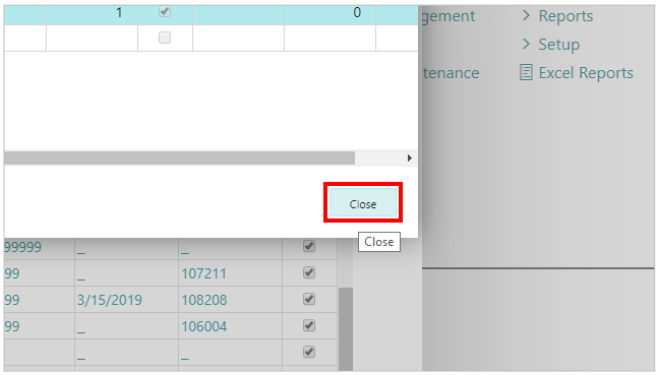
Click on the cell **Ending No.**



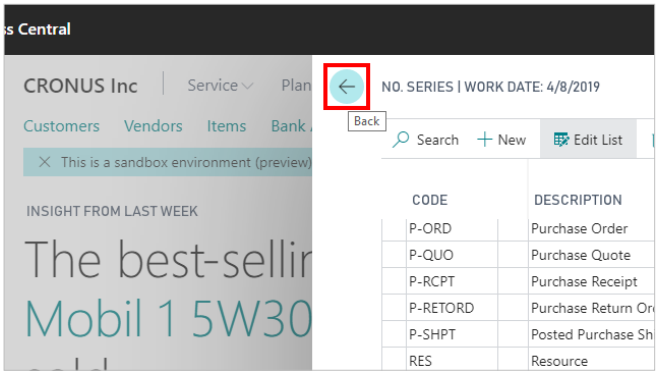
Enter the text **PM99999**.



Click on the button **Close**



Click on the back button

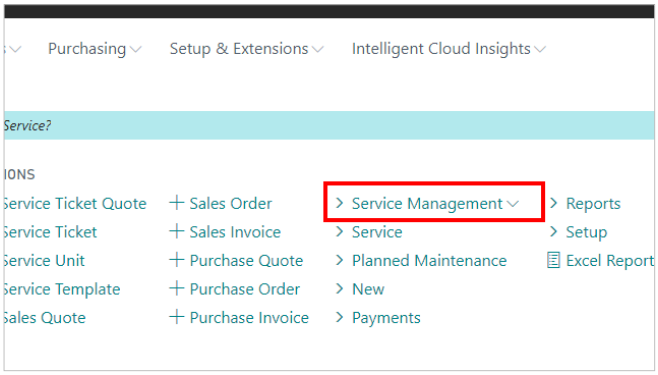


2.2.1.3. How to Set Up Service Management Setup

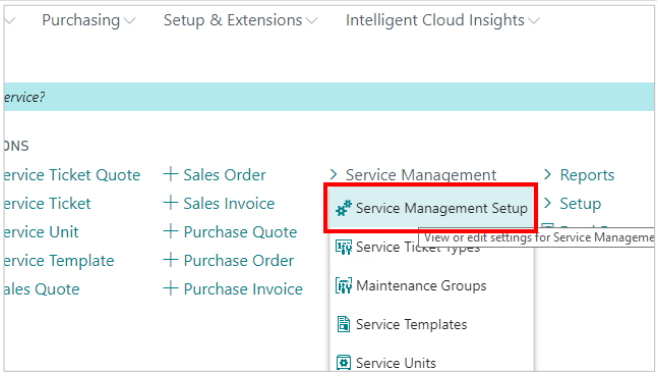
Business Manager Profile

The following steps demonstrate how to assign the No. Series for Service Units, and Service and Planned Maintenance documents, on the Serivce Management Setup.

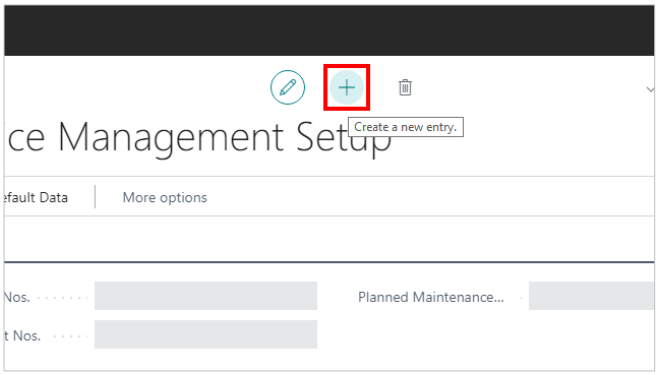
Click on the navigation menu item popup **Service Management**



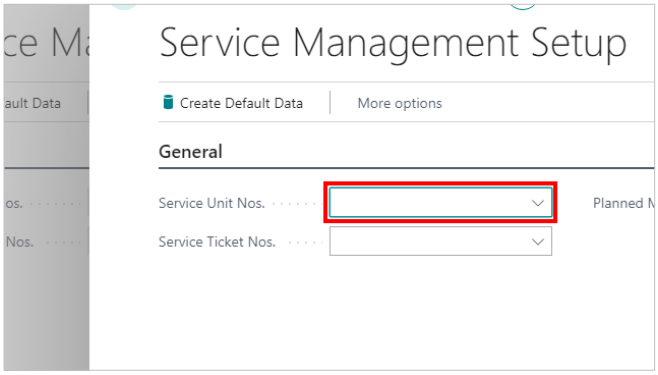
Click on the navigation menu item **Service Management Setup**



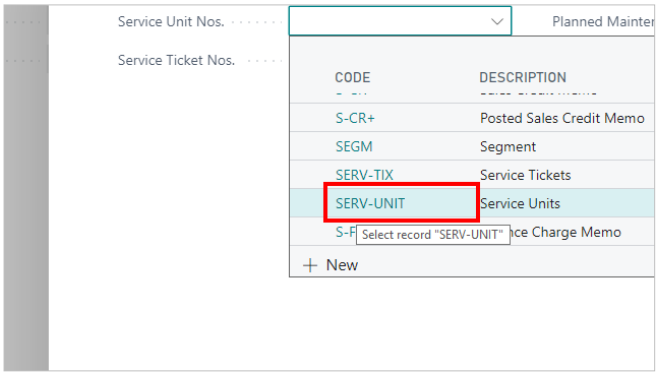
Click on the action **New**



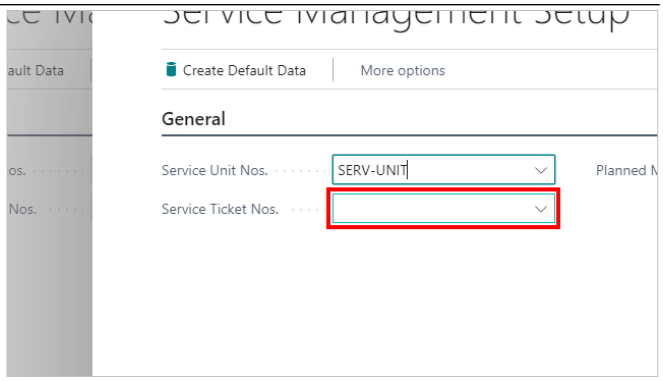
Click on the field **Service Unit Nos.**



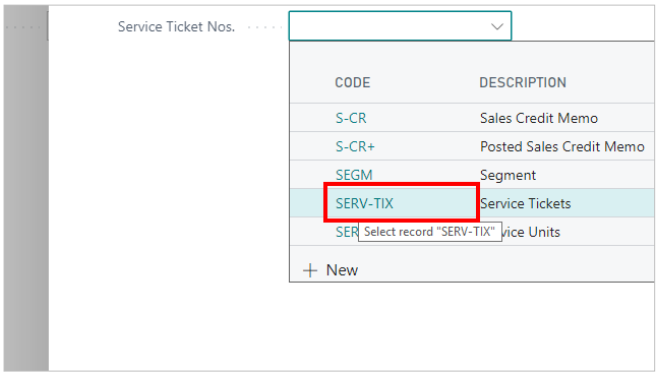
Click on the link in cell **Code** with the value **SERV-UNIT**



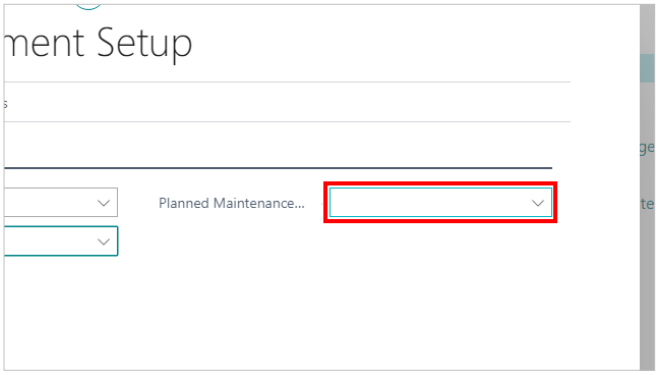
Click on the field **Service Ticket Nos.**



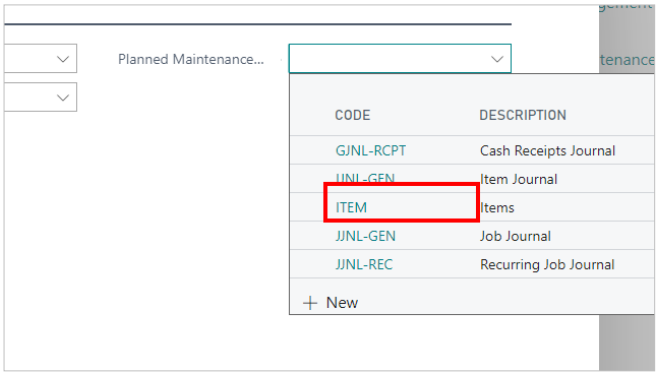
Click on the link in cell **Code** with the value **SERV-TIX**



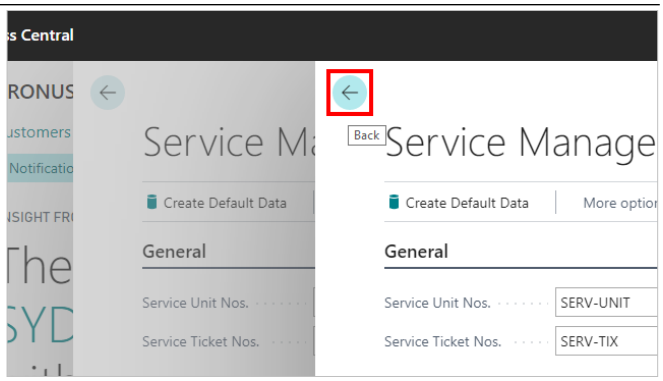
Click on the field **Planned Maintenance Ticket Nos.**



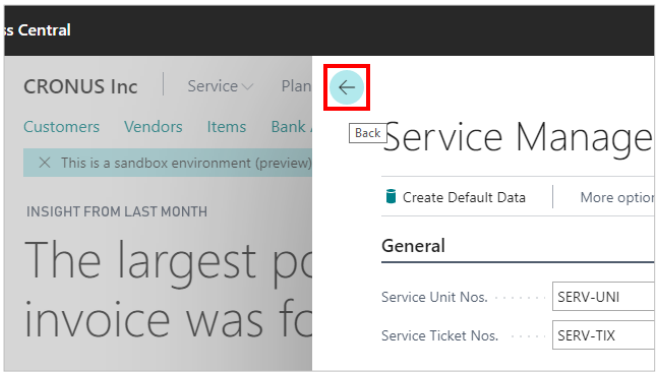
Click on the link in cell **Code** with the value **CASHFLOW**



Click on the back button



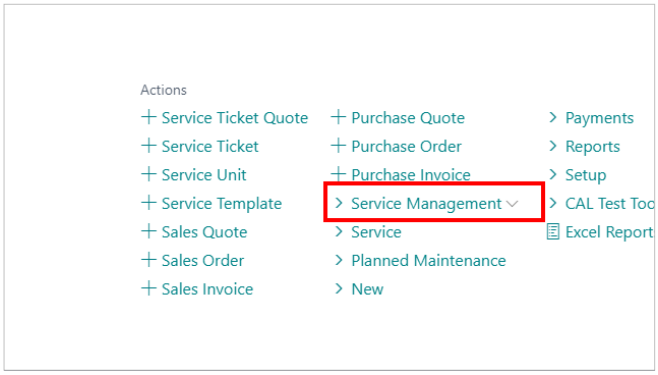
Click on the back button



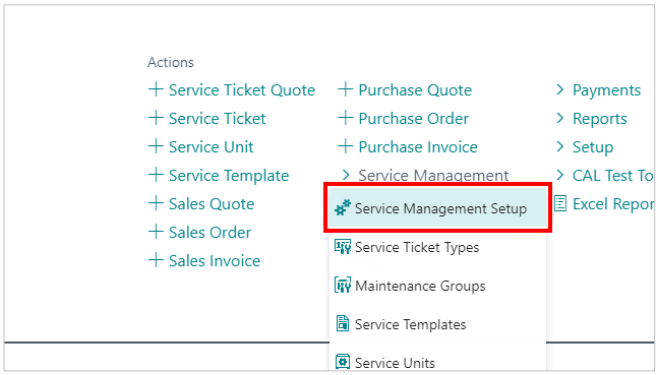
2.2.1.4. How to set up the Service Unit Filter

Service Management Setup includes an option that will filter the service units available on tickets to only those at are owned by the customer the ticket is assigned to. The following demonstrates how to enable this feature.

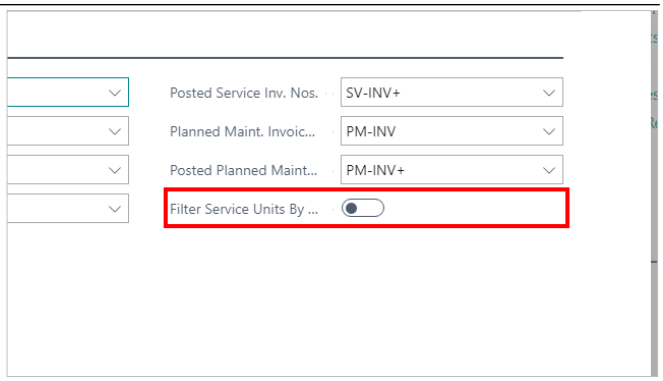
Click on the navigation menu item popup **Service Management**



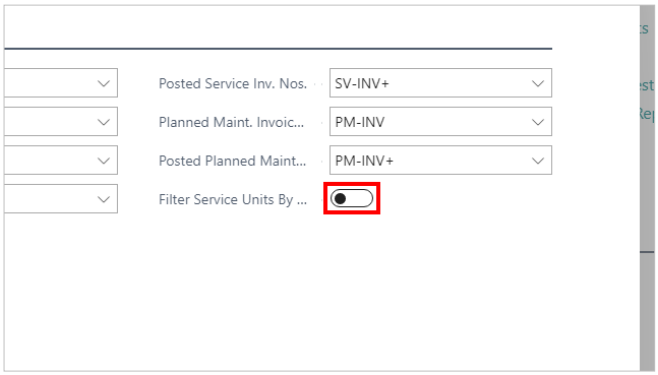
Click on the navigation menu item **Service Management Setup**



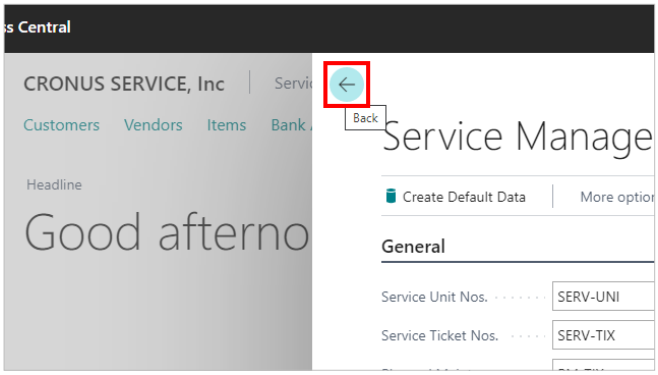
Click on **Filter Service Units By Customer No.**



Click on the toggle field **Filter Service Units By Customer No.**



Click on the back button



2.2.2. How to Setup an Internal Customer for Servicing

2.2.2.1. Overview

ODT Service includes the ability to service and track the servicing of company owned equipment.

In the Jobs module, which ODT Service enhances for servicing, a Bill-to Customer is mandatory.

Therefore, in order to automatically set the Service Ticket Detals to "Cost Tracking Only", which in turn sets the Job Planning Lines to "Budget Only", a new tab called "Service" has been added to the Customer Card.

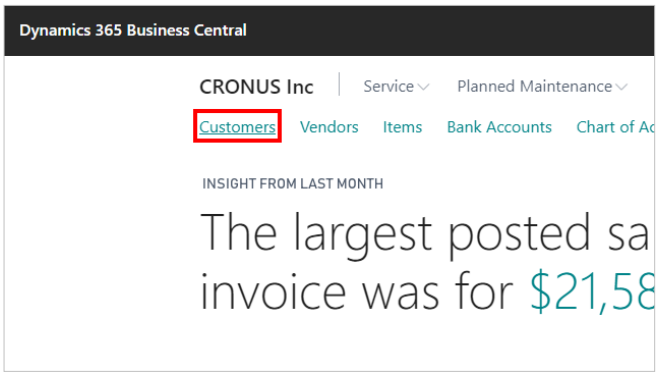
The field called Internal, must be enabled on the customer(s) to be used when servicing company owned equipmen.

2.2.2.2. How to Setup an Internal Customer

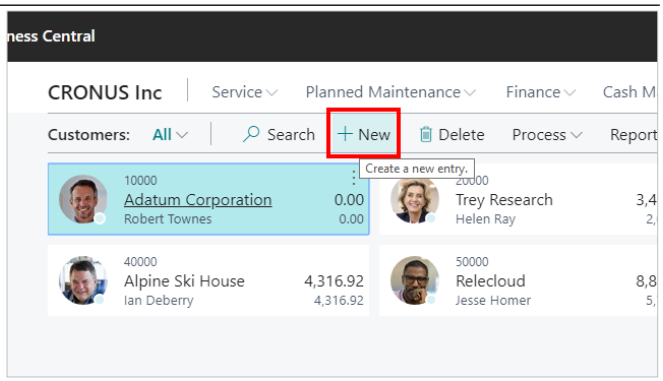
Business Manager Profile

The following demonstrates the setting up of a Customer for servicing internally owned equipment.

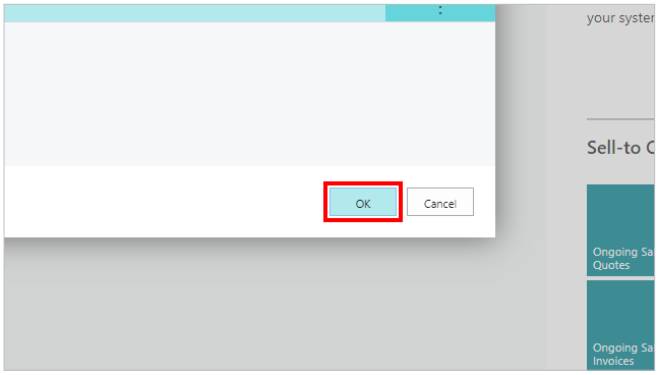
Click on the navigation menu item **Customers**



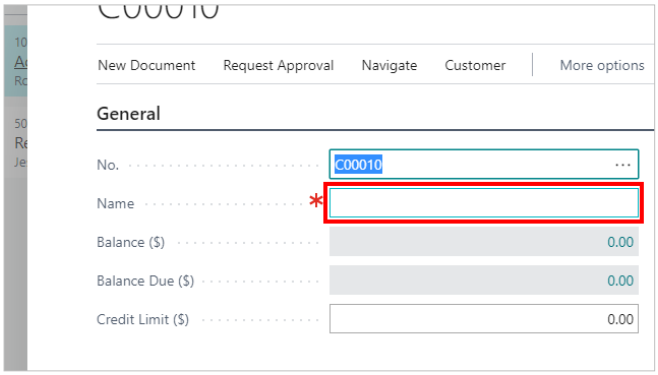
Click on the navigation menu item **New**



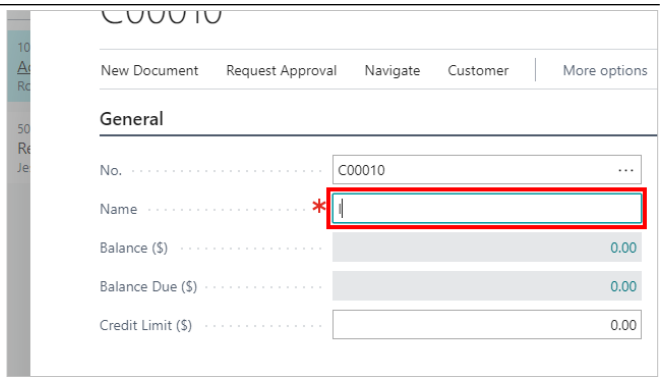
Click on the button **OK**



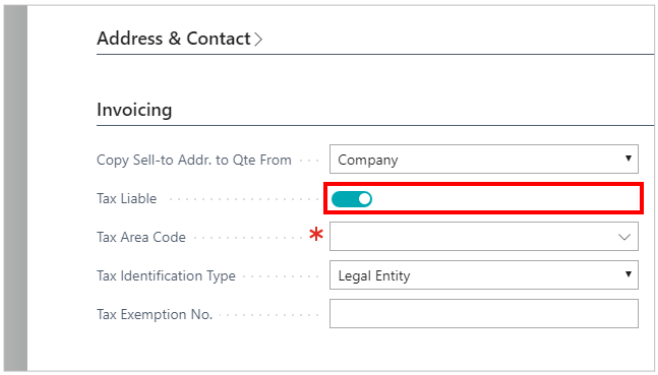
Click on the field **Name**



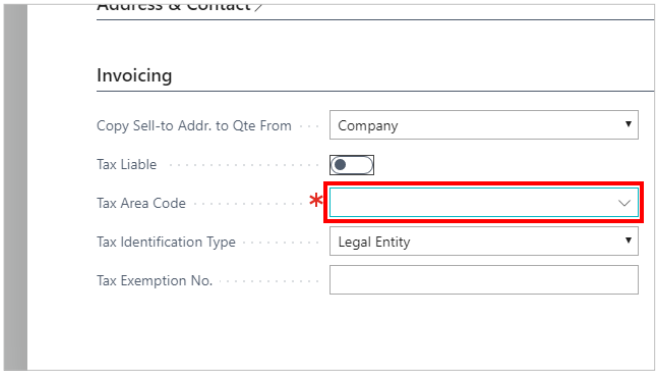
Enter the text **Internal Servicing Customer**.



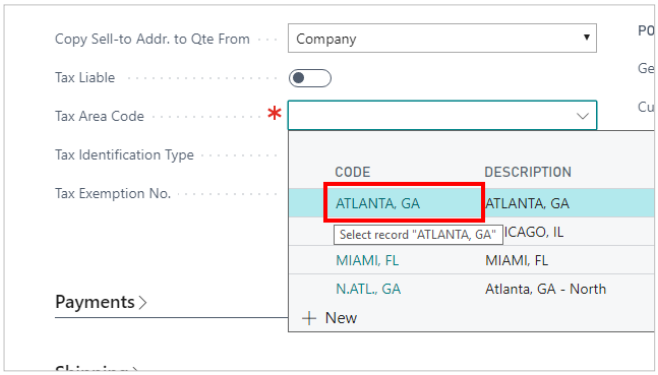
Click on **Tax Liable, Yes**



Click on the field **Tax Area Code**

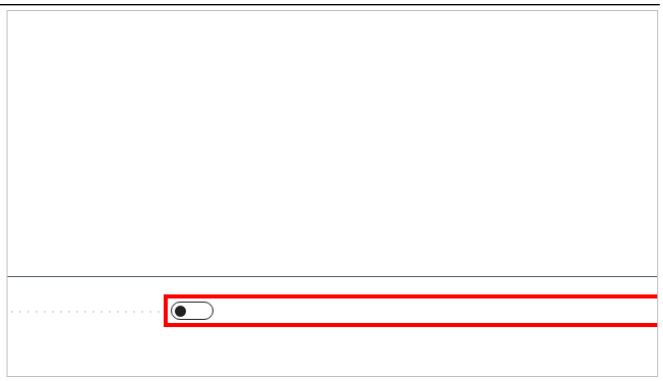


Click on the link in cell **Code** with the value **ATLANTA, GA**

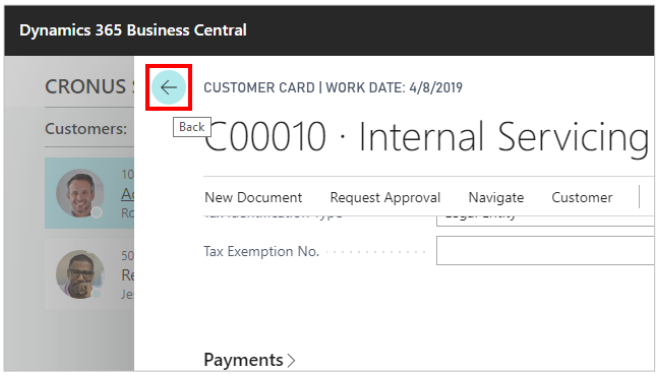


Click on **Internal Customer, No**

By default, No is the setting on this field. By clicking on the field, the setting will be changed to Yes.



Click on the back button



2.3. How to Setup Service Ticket Types

2.3.1. Overview

Service Ticket Types are used to define the types of service the organization performs. The use of service types provides additional analysis capability by segregating the types of service that an organization performs. For example, Regular Service and Walk Ins.

The setup of Service Ticket Types is optional.

NOTE:
In a future release for the ODT Service integration to the ODT Rentals App, some examples that might be used are Pre-Rental and Post Rental Return.

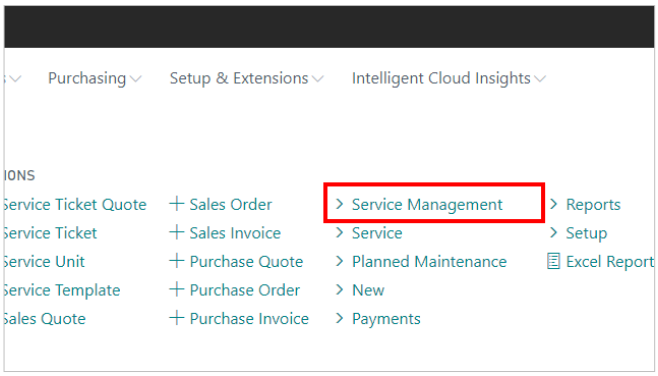
2.3.2. How to Setup Service Ticket Types

Business Manager Profile

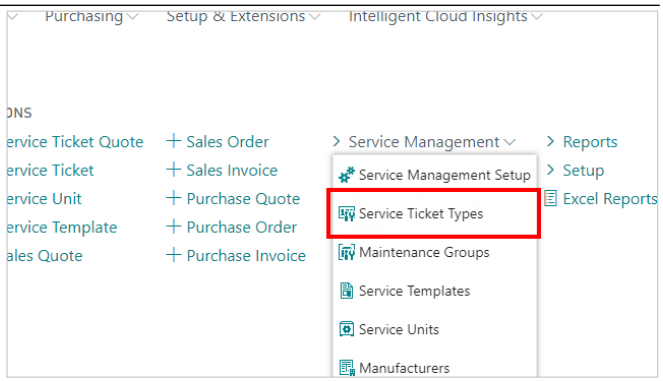
The following demonstrates how to setup a Service Ticket Type.

For information on each field, point to the caption, and a short description of the field will be provided.

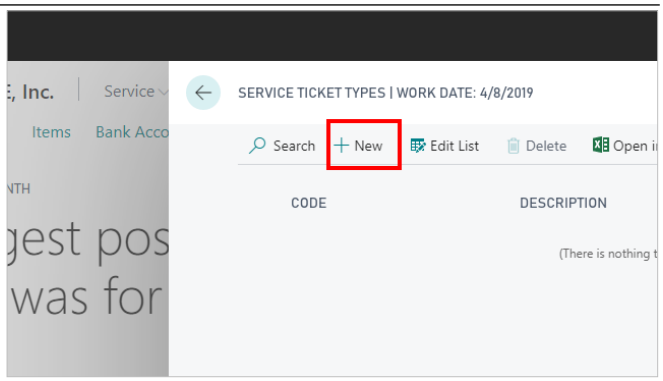
Click on the navigation menu item popup **Service Management**



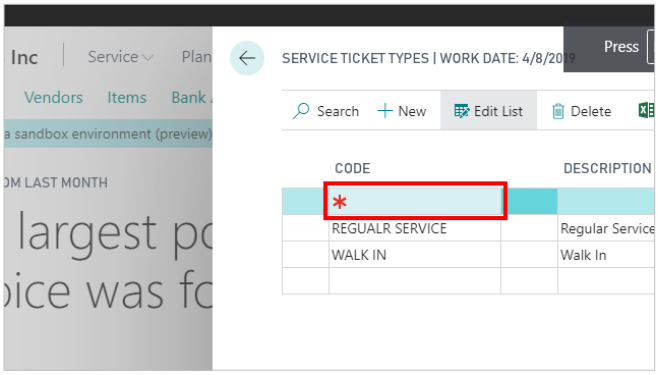
Click on the navigation menu item **Service Ticket Types**



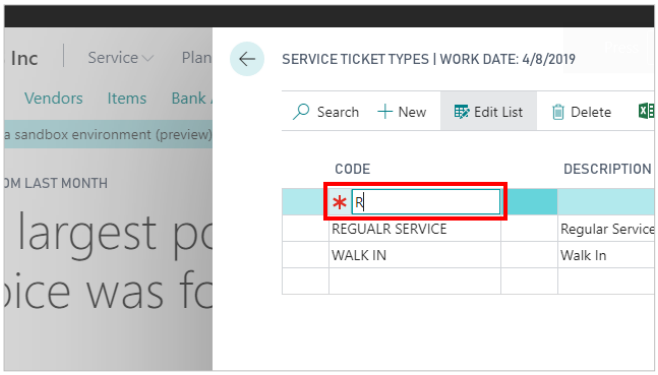
Click on the navigation menu item **New**



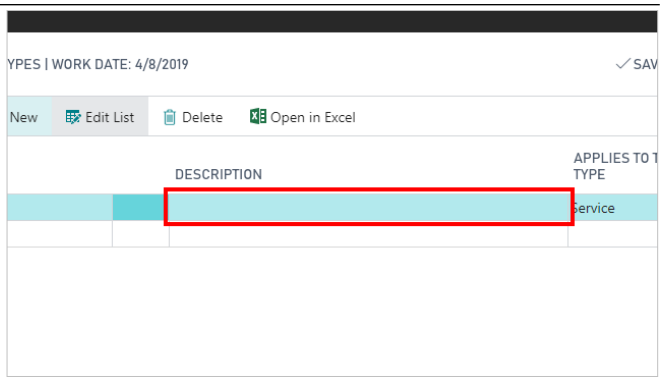
Click on the cell **Code**



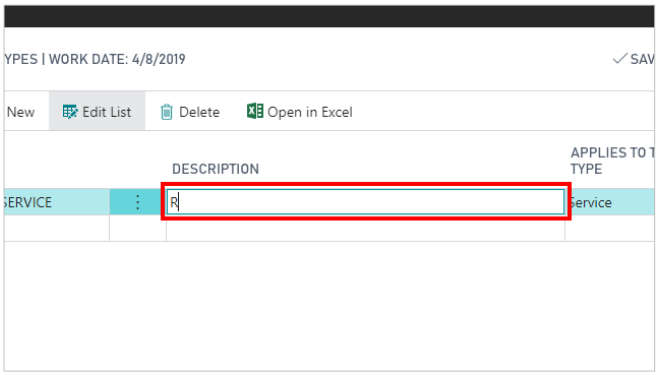
Enter the text **Regular Service**.



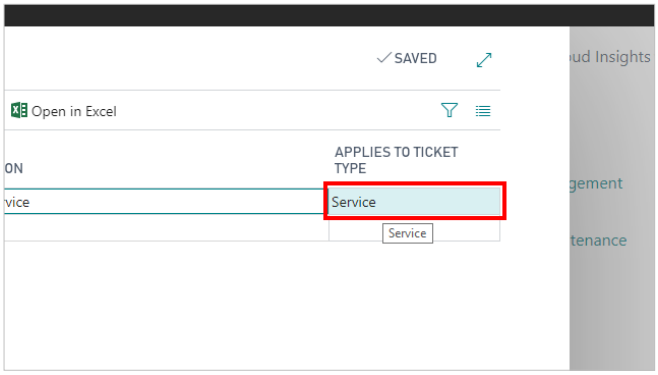
Click on the cell **Description**



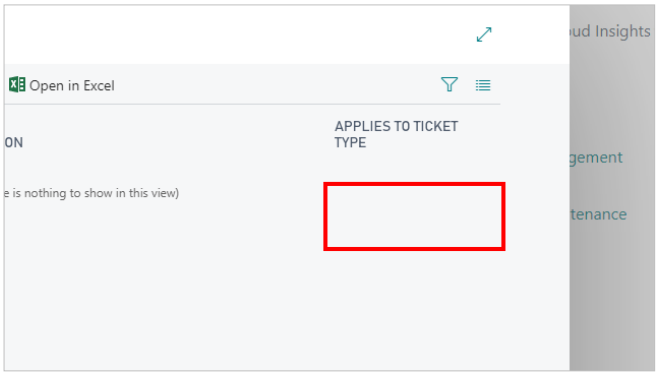
Enter the text **Regular Service**.



Click on the cell Applies to Ticket Type

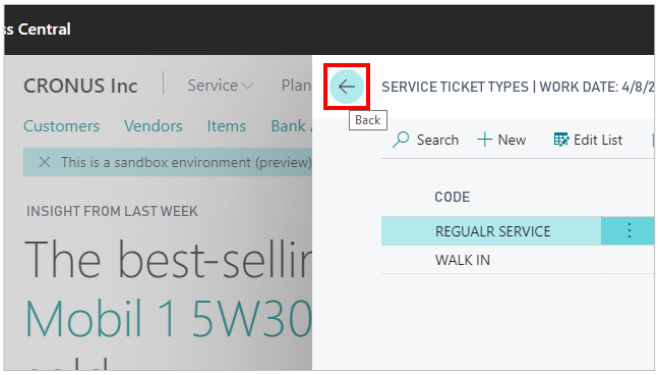


Click on Service



Repeat the steps starting at New, to create all the Ticket Types that the organization requires.

Click on the back button



2.4. How to Setup Maintenance Groups

2.4.1. Overview

Maintenance Groups, are used for grouping various service templates that would apply to Service Units, which have been assigned to a Maintenance Group.

For example, if the organization is performing service on Skid Steers, then a group would be created specifically for Skid Steers. This group would be specified on both the Service Unit(s) and the Service Templates created for the group.

The setup of Maintenance Groups is mandatory.

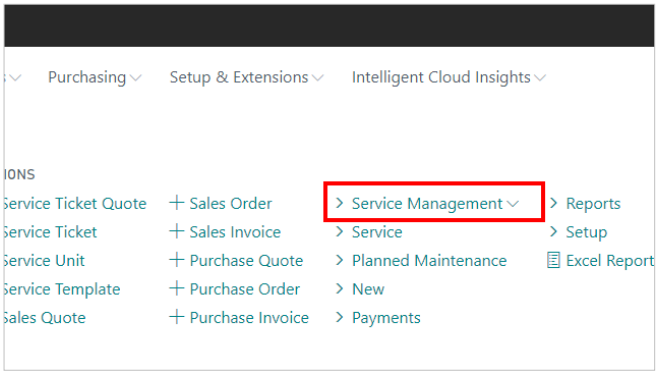
2.4.2. How to Setup Maintenance Groups

Business Manager Profile

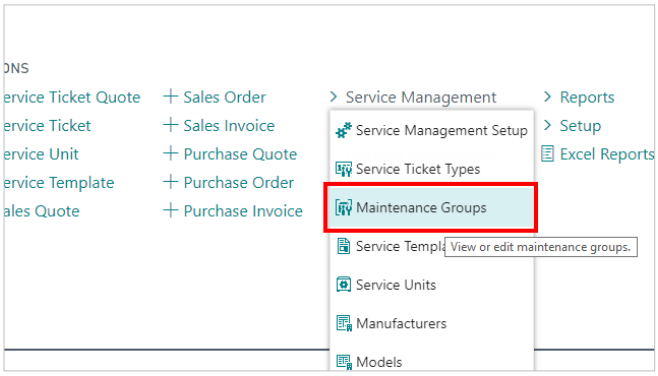
For information on each field, point to the caption, and a short description of the field will be provided.

The following demontrates the setup of a Maintenance Group.

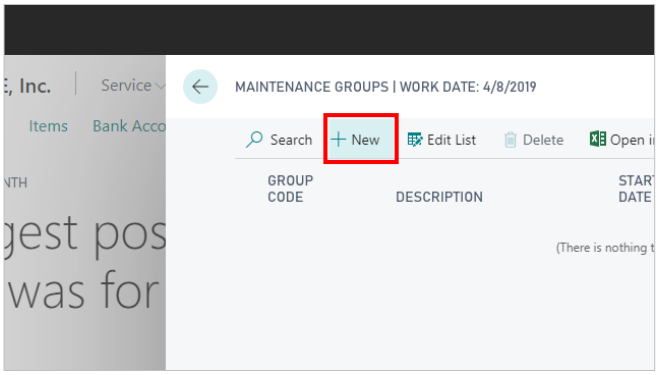
Click on the navigation menu item popup **Service Management**



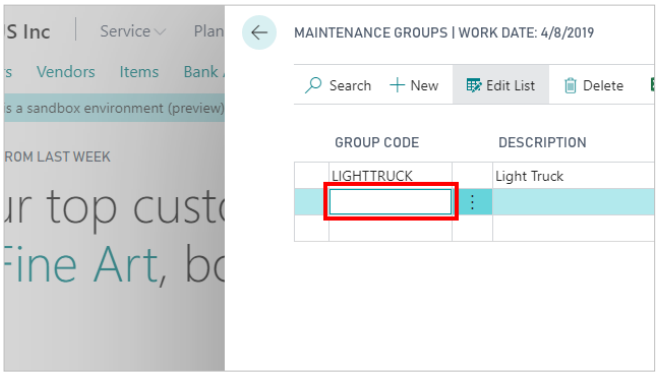
Click on the navigation menu item **Maintenance Groups**



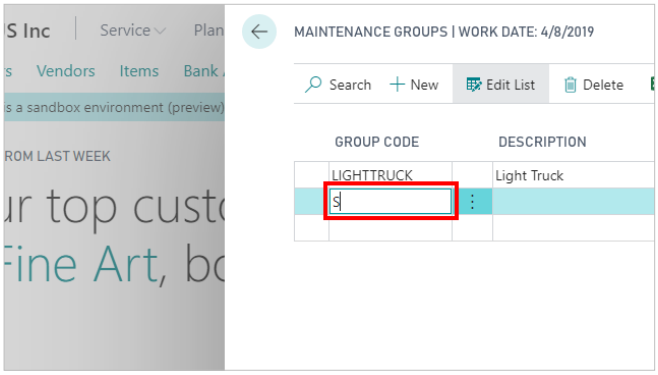
Click on the navigation menu item **New**



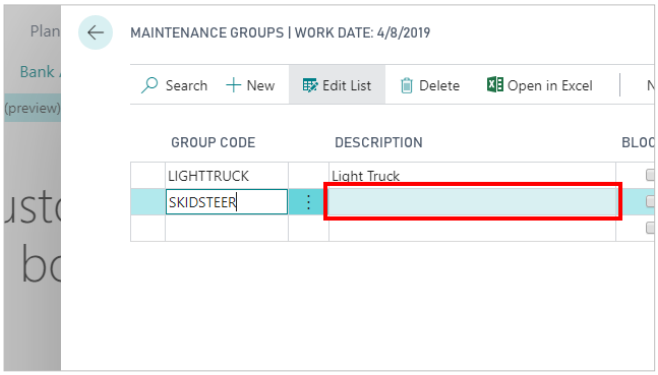
Click on the cell **Group Code**



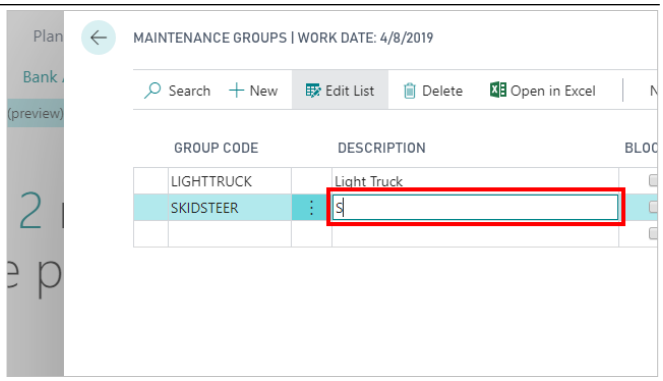
Enter the text **SKIDSTEER**.



Click on the cell **Description**

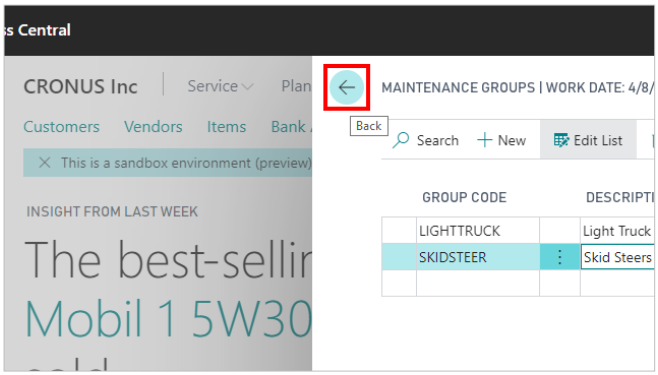


Enter the text **Skid Steers**.



Repeat the above steps to create the Maintenance Groups that the organizations requires.

Click on the back button



2.5. How to Setup Service Templates

2.5.1. Overview

Service Templates are used to setup predefined servicing activities.
Within a Service Template, service templates can be combined to create a service plan for a Maintenance Group of equipment.

Thus time is saved when creating service tickets for a piece of equipment.

For example, a service plan could consist of changing the oil, changing the air filter and a charge for shop supplies.

The oil change can be set up as a template and used stand alone. It can also be added to a template for a service plan as a nested template.
Likewise for the changing of the air filter.

The charge for the shop supplies would be an individual template line on the template for the service plan.

ODT Service also provides the ability to setup Checklists for each template, which can be printed for/by the technicians to checkoff the tasks as they are completed, and fill-in required findings, where applicable.

An example of a servicing checklist that many have encountered, is when you take your vehicle in for servicing. The technician discusses the findings with you and when paying your bill you are provided with the completed checklist.

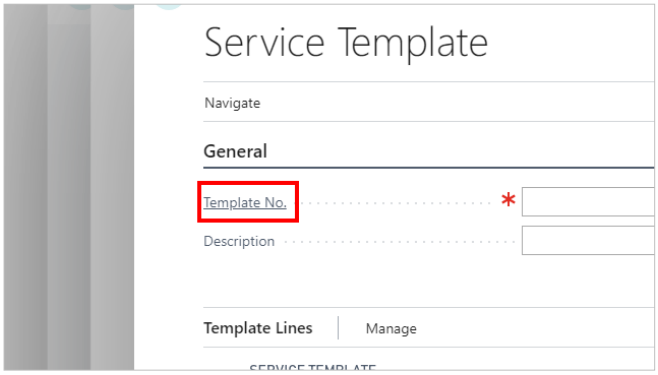
2.5.2. Service Template Field Information

The following provides a brief explanation of the fields on the General tab of a Service Template.

Click on the link **Template No.**

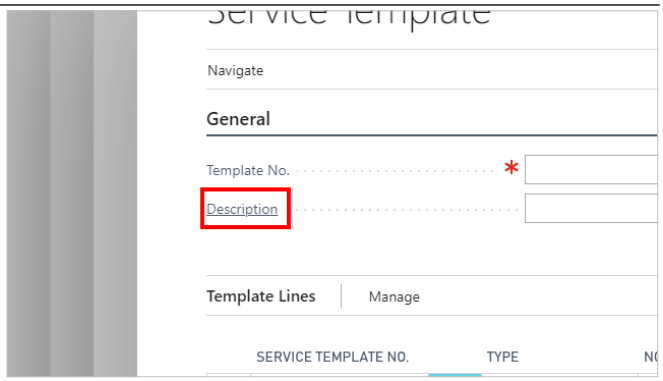
The Template No. field is used to define the template. The field allows for both alphabetic and numeric characters.

This field is mandatory.

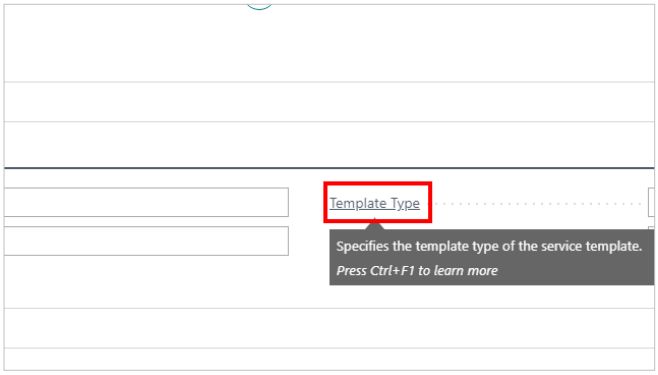


Click on the link **Description**

The description field is used to provide a longer definition of what the Service Template is for.



Click on the link **Template Type**



The Template Type field is for the specification of what type of tickets the template will be available to be used on.

There are 4 options available.

* All
Specifies the template will be available for selection for all types of tickets.

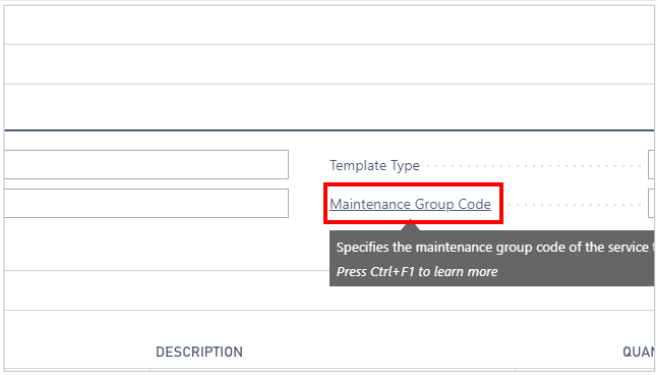
* Service
Specified the template will only be available for service tickets.

* Planned Maintenance
Specifies the template will only be available for Planned Maintenance tickets.

* Field
Specified the template will only be available for Field tickets.

NOTE:
Field functions are not in the current release.
Therefore, this option is not to be selected at this time.

Click on the link **Maintenance Group Code**



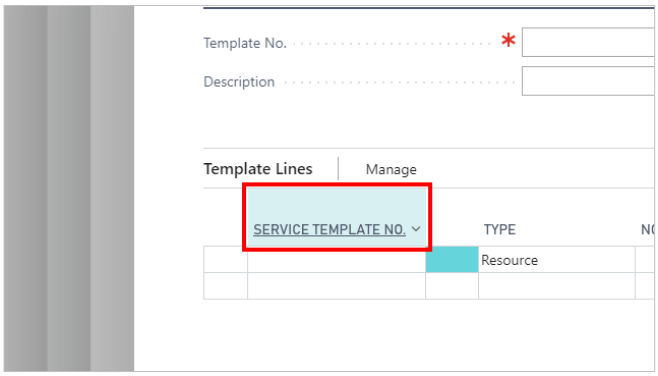
The Maintenance Group is used to specify which group the template applies to.

As the Maintenance Group is specified on the Service Unit and the Service Template, then when creating quotes or tickets and adding a template, the list of templates is filtered to show only those that are related to the Service Units' Maintenance Group Code.

Thus saving time in locating the template to be selected.

The following provides a brief description of the fields on the Template Lines.

Click on the column header **Service Template No.**



This field is used for adding/nesting a service template to a template.

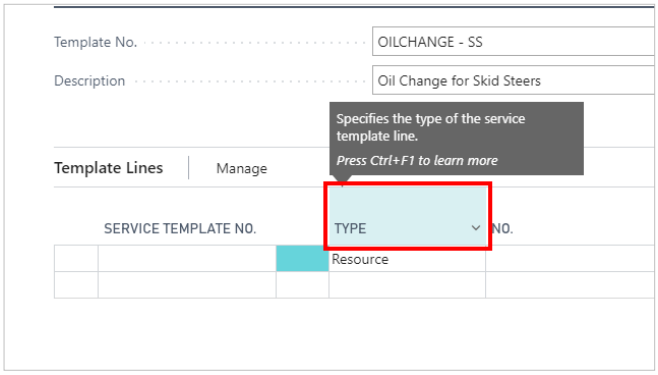
All related Template Details (job planning lines) for the nested template are included on the current template.

Click on the column header **Type**

The Type field is used when entering lines for a Resource, an Item, a G/L Account or Text.

Text can be either a description comment or a Standard Text Code.

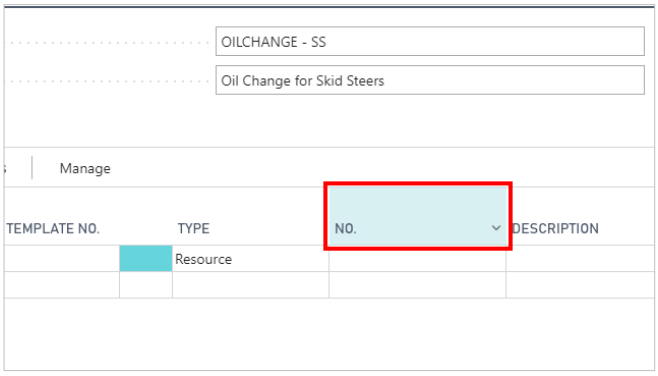
NOTE:
When the Service Template No. field is populated the Type of Resource will be displayed.
This is just a default as it is the first option in the Type field, and it has no bearing on the line when the Service Template No. field is populated.



Click on the column header **No.**

The No. field will be filtered based on the option selected in the Type field.

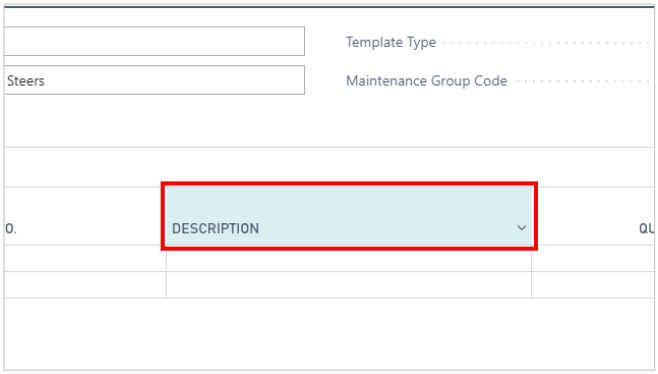
For example, if Resource is selected in the Type field, then the list in the No. field will display only Resources to select from.



Click on the column header **Description**

The description will default from the Service Template, Resource, Item, G/L Account and Standard Text Code, when selected.
The description can be overridden.

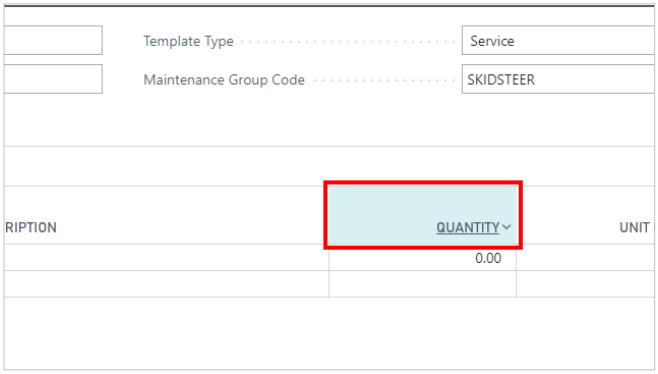
When the Type of Text is selected, then a description can be entered.



Click on the column header **Quantity**

The Quantity field is used to specify the quantity of the selected Resource, Item or G/L Account that apply to the service template/plan.

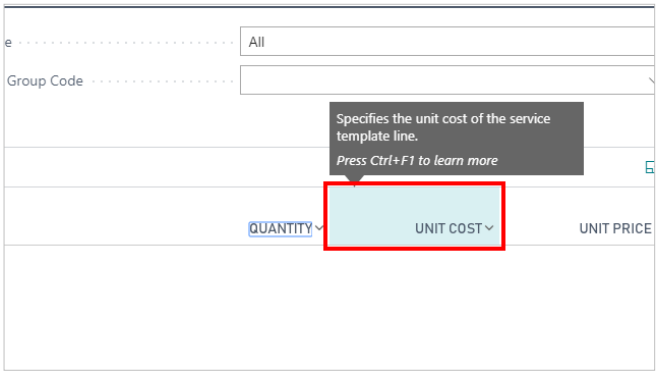
When the Service Template No. field is populated, then this field is not to be populated.



Click on the column header **Unit Cost**

The Unit Cost field will default the cost from the Resource and Item cards.
Should the type selected be G/L Account, then this field will need to be populated.

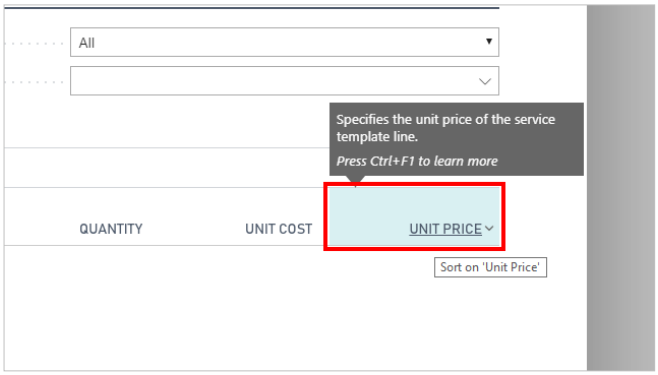
When the Service Template No. field is populated, then this field is not to be populated.



Click on the column header **Unit Price**

The Unit Price field will default the price from the Resource and Item cards.
Should the type selected be G/L Account, then this field will need to be populated.

When the Service Template No. field is populated, then this field is not to be populated.



2.5.3. How to Setup Service Templates

Business Manager Profile

For the example to be provided, setup of a resource, a G/L Account for shop supplies charge and 4 items are required before the Service Template Lines can be filled in.

These include the following:
• A Resource for Labor
• An Item for the Oil Filter
• An Item for the Oil Gasket
• An Item for the Oil
• An Item for an Air Filter for a Skid Steer
• G/L Account 40150 (for US company)

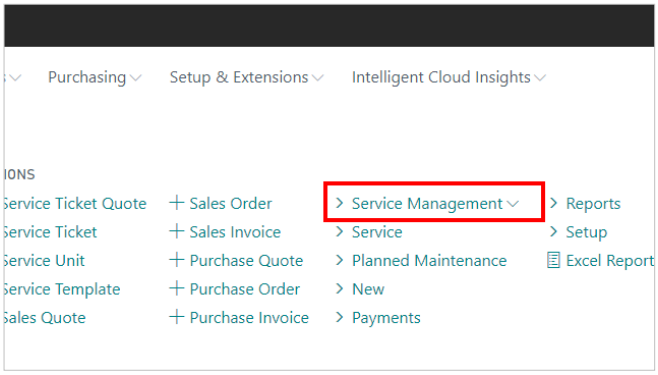
To learn how to setup Resources, G/L Accounts and Items, please refer to the Dynamics 365 Business Central Online help.

The demonstration of Service Templates includes the setup of 3 templates.
The first 2 will be separate templates.
The third template will contain the first 2 templates as nested templates.

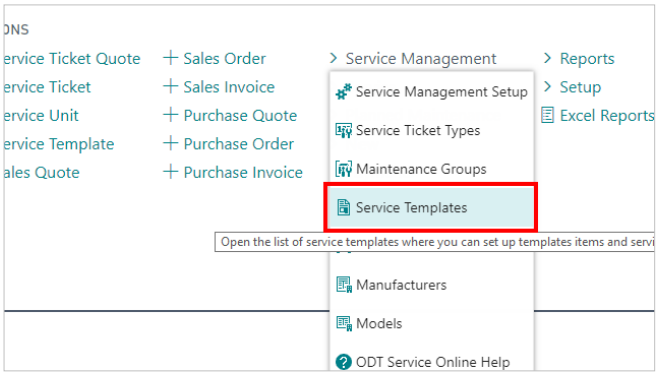
Nested templates provide a real time savings on creating the templates by reducing the time on setting up the templates.

The following demonstrates the setup of a template for an oil change for a Skid Steer.

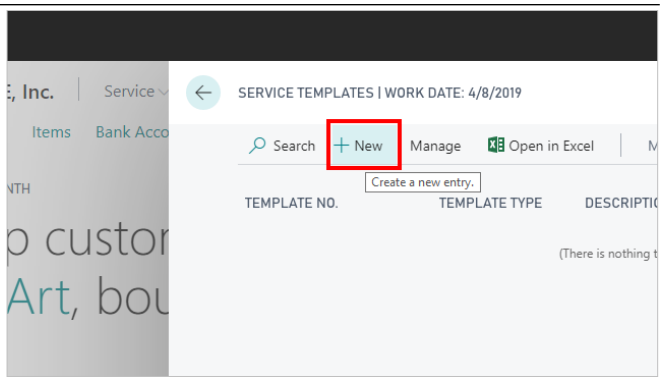
Click on the navigation menu item popup **Service Management**



Click on the navigation menu item **Service Templates**



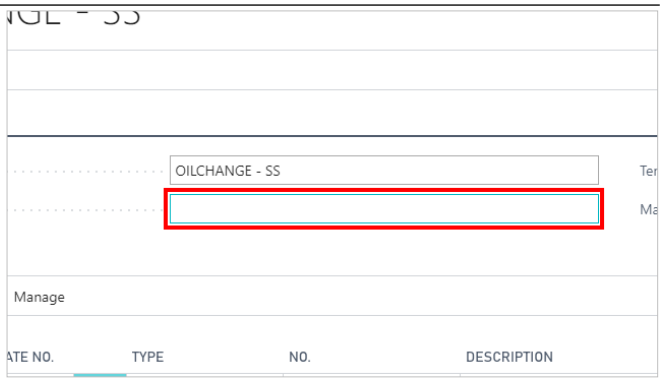
Click on the navigation menu item **New**



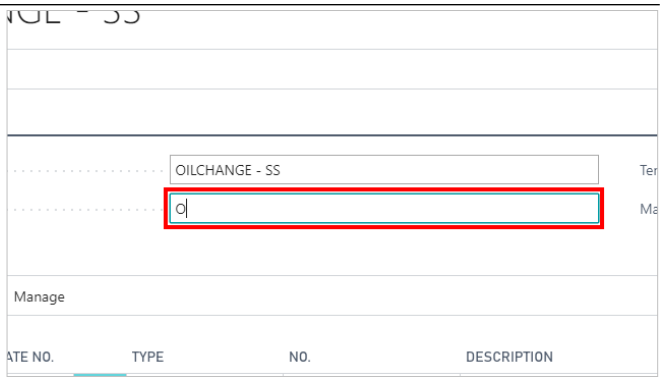
Click on the field **Template No.**

Enter the text **OilChange-SS**.

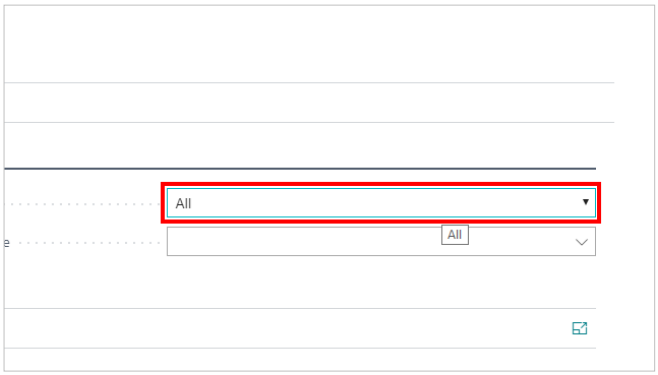
Click on the field **Description**



Enter the text **Oil Change for Skid Steers**.



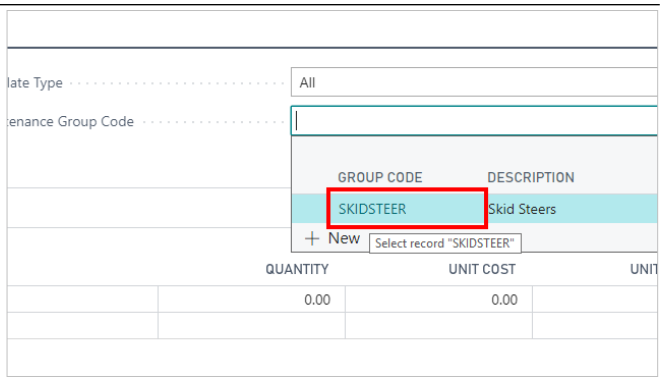
Click on the field **Template Type**



Click on the item **Service** in the list

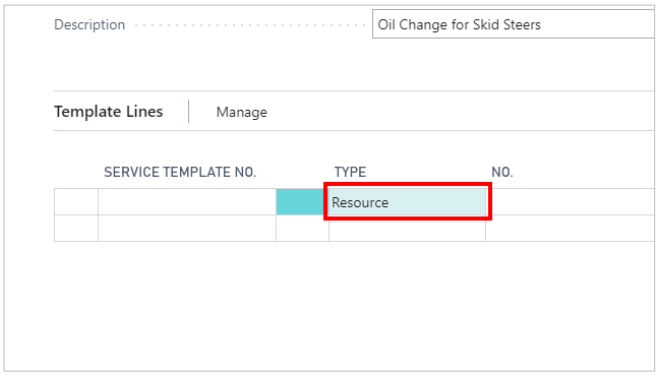
Click on the field **Maintenance Group Code**

Click on the link in cell **Group Code** with the value **SKIDSTEER**

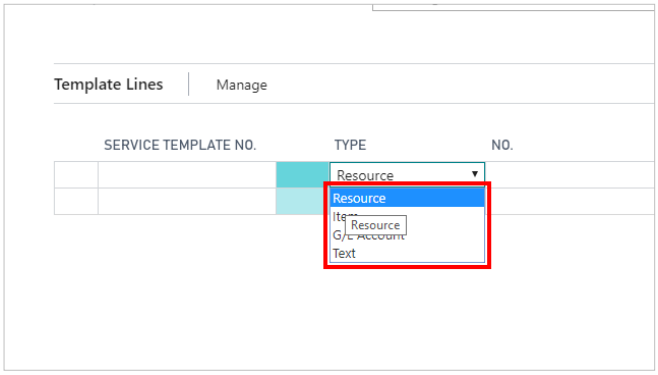


The following demonstrates the entry of the Template Lines for the oil change.

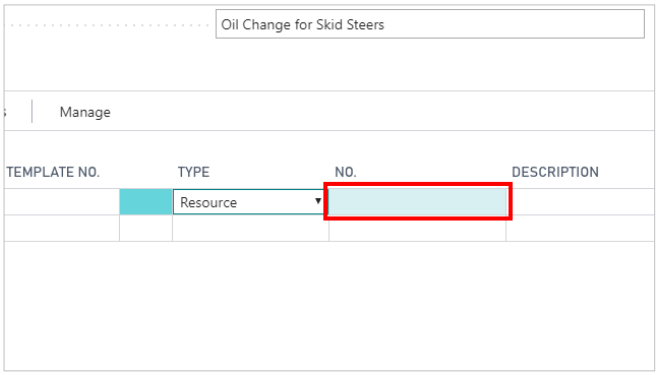
Click on the cell **Type** with the value **Resource Item G/L Account Text**



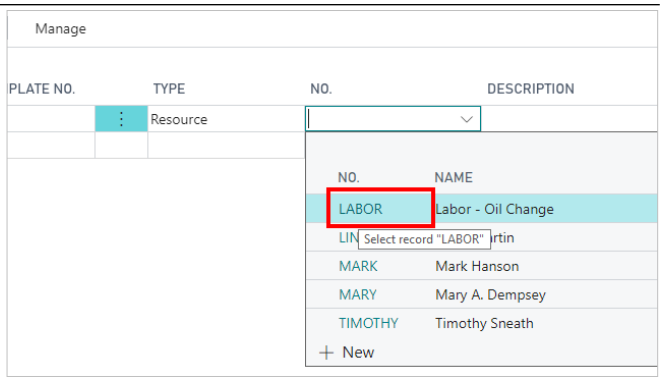
Click Resource in the options displayed.



Click on the cell **No.**

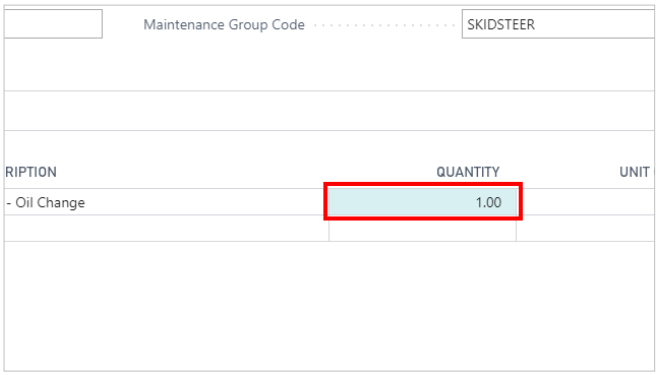


Click on the link in cell **No.** with the value **LABOR**



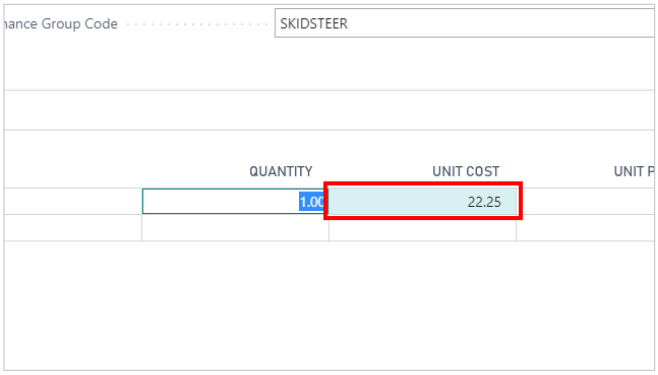
Click on the cell **Quantity** with the value **1.00**

The default quantity is 1.00. The quantity is to be overridden when it is to be a different number.



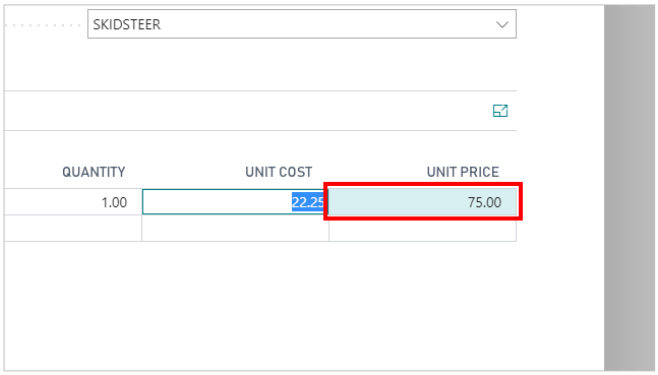
Click on the cell **Unit Cost** with the value **22.25**

The Unit Cost defaults from the Resource Card.

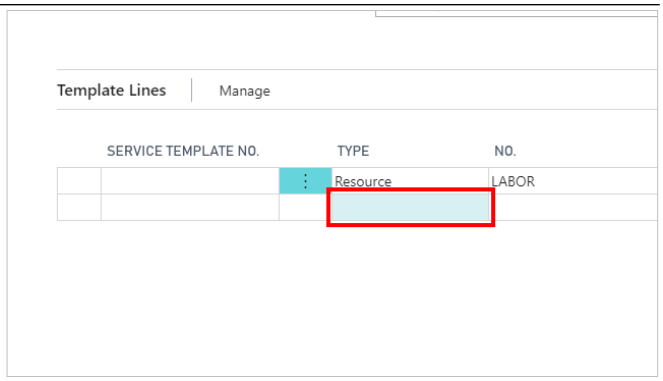


Click on the cell **Unit Price** with the value **75.00**

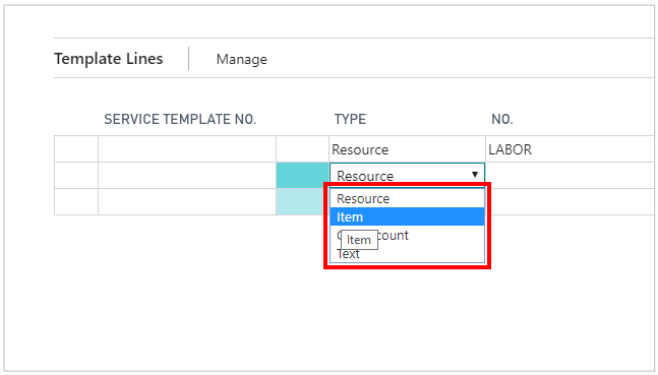
The Unit Price defaults from the Resource card.



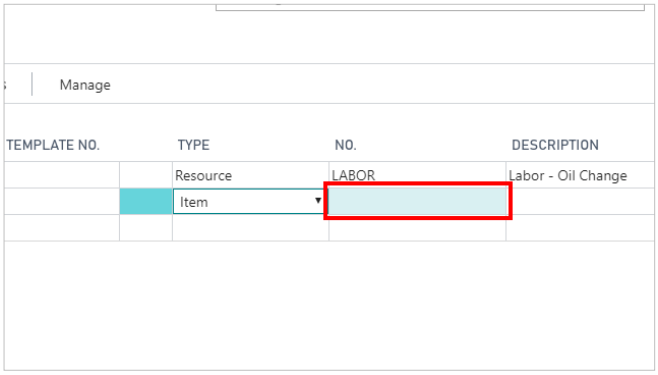
Click on the cell **Type**



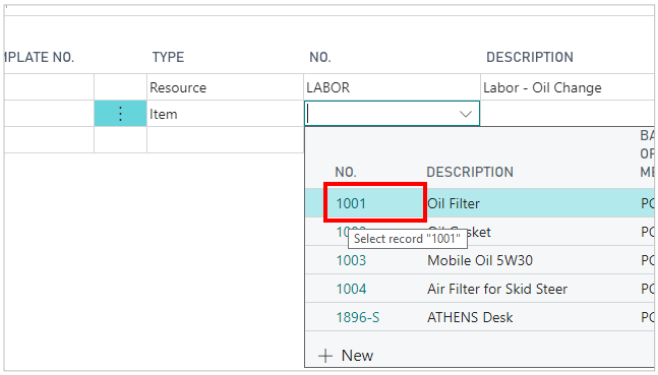
Click on the item **Item** in the list



Click on the cell **No.**

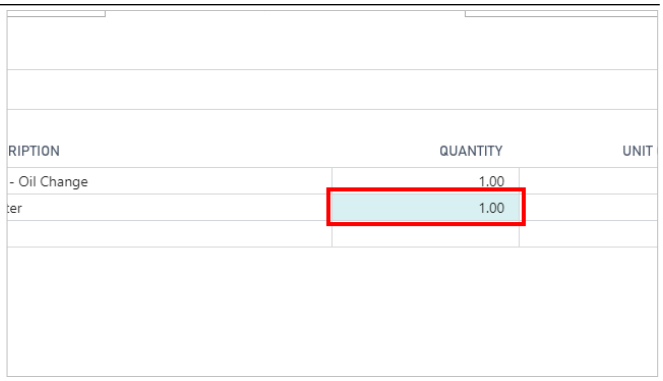


Click on the link in cell **No.** with the value **1001**



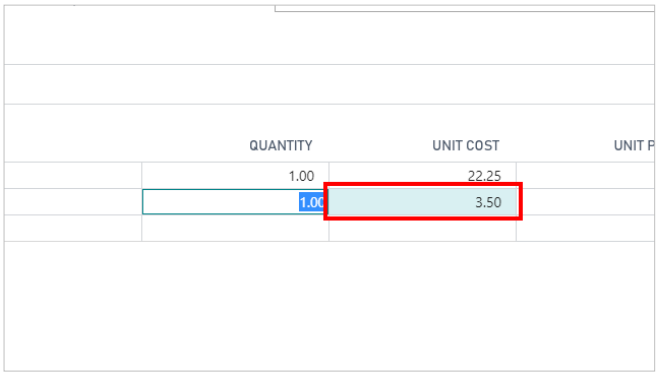
Click on the cell **Quantity** with the value **1.00**

The default quantity is 1.00. The quantity is to be overridden when it is to be a different number.



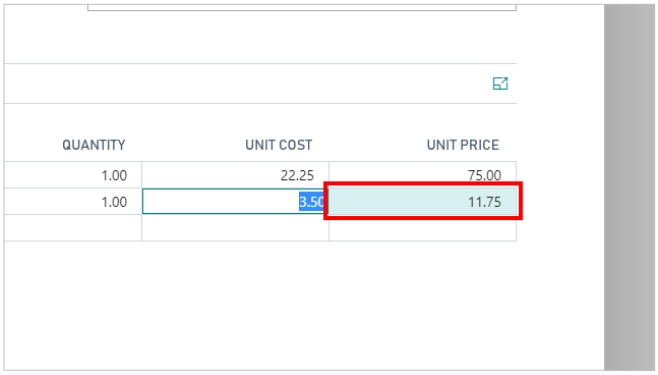
Click on the cell **Unit Cost** with the value **3.50**

The Unit Cost defaults from the Item card.

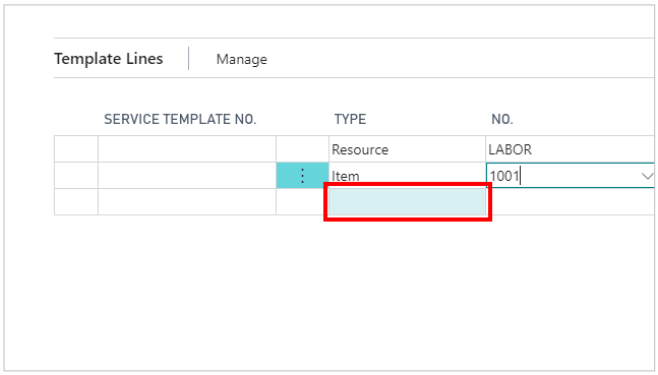


Click on the cell **Unit Price** with the value **11.75**

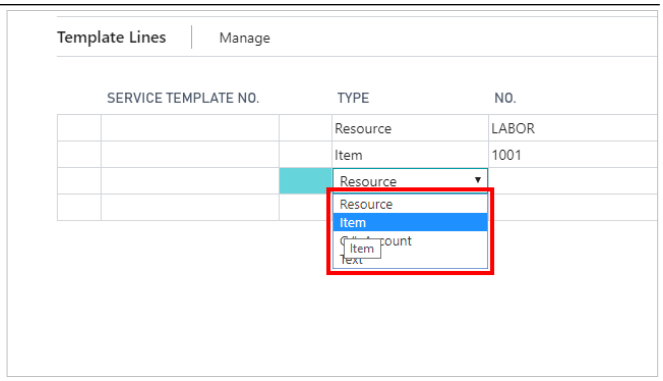
The Unit Price defaults from the Item card.



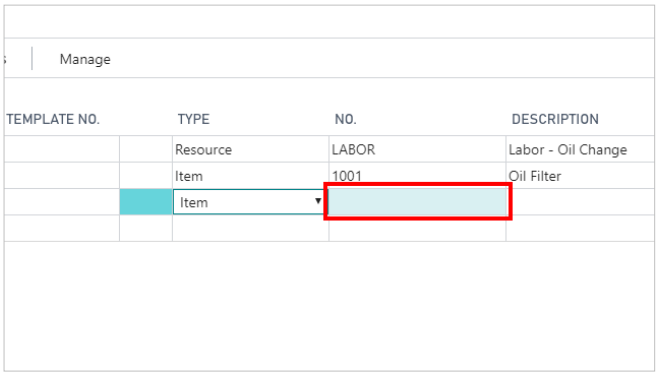
Click on the cell **Type**



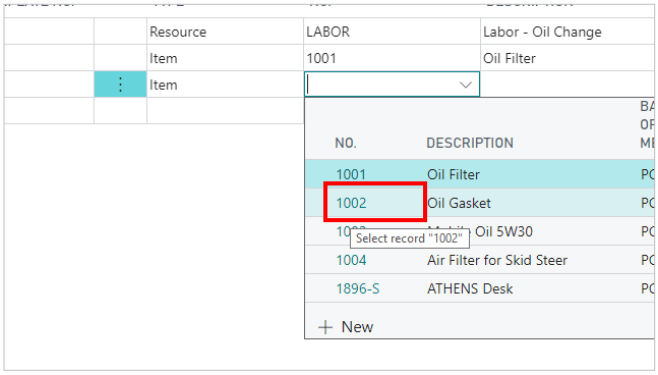
Click on the item **Item** in the list



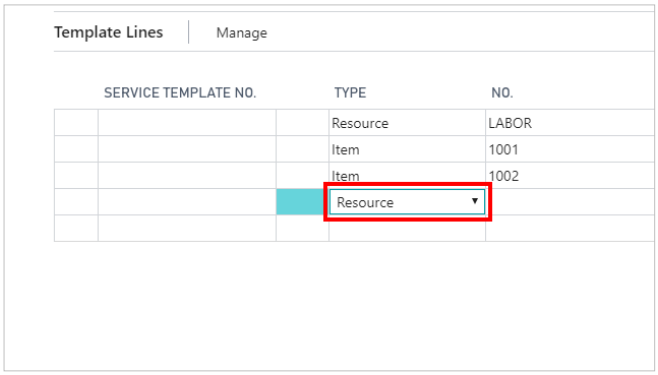
Click on the cell **No.**



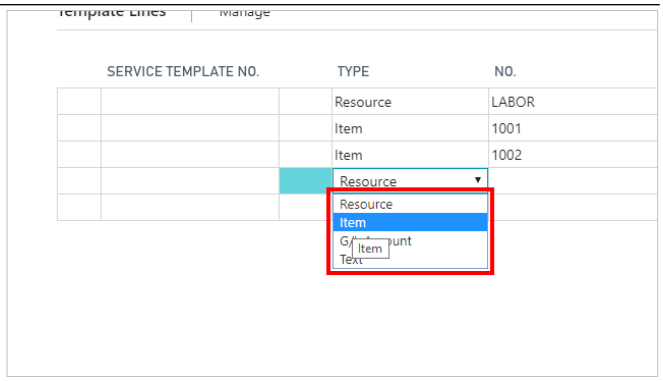
Click on the link in cell **No.** with the value **1002**



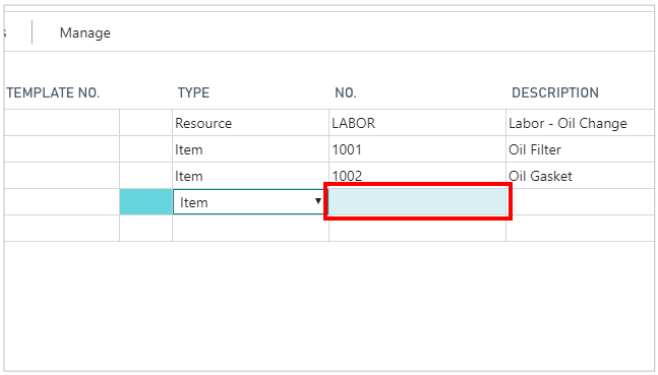
Click on the cell **Type**



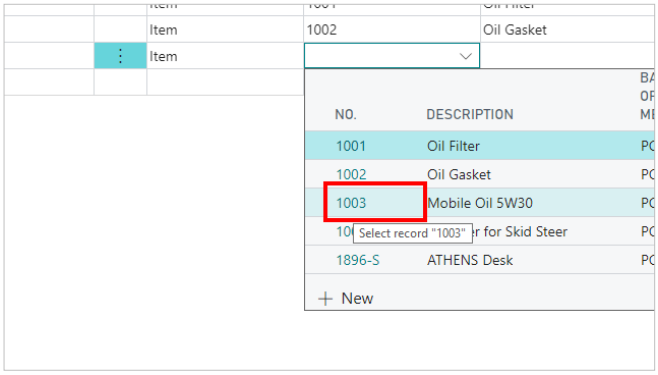
Click on the item **Item** in the list



Click on the cell **No.**

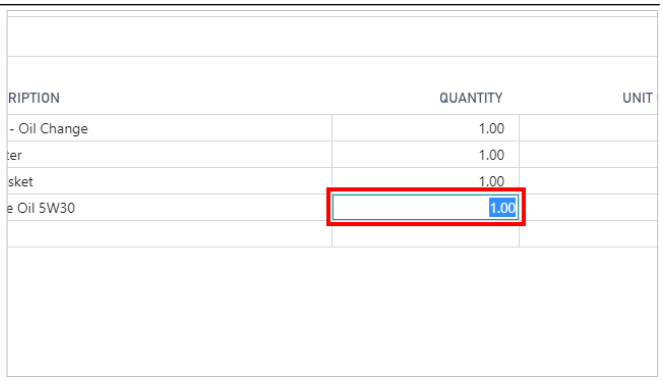


Click on the link in cell **No.** with the value **1003**

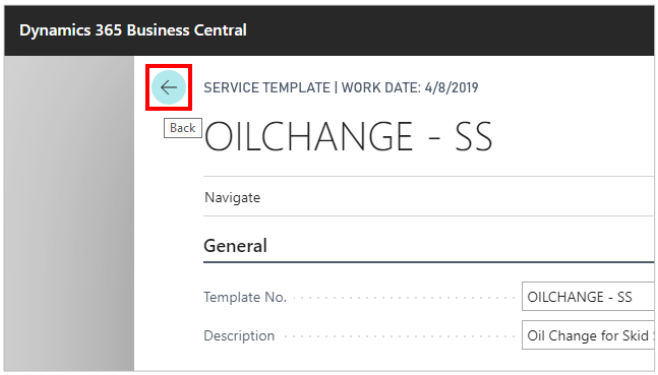


Click on the cell **Quantity** with the value **1.00**

Enter the text **5**.

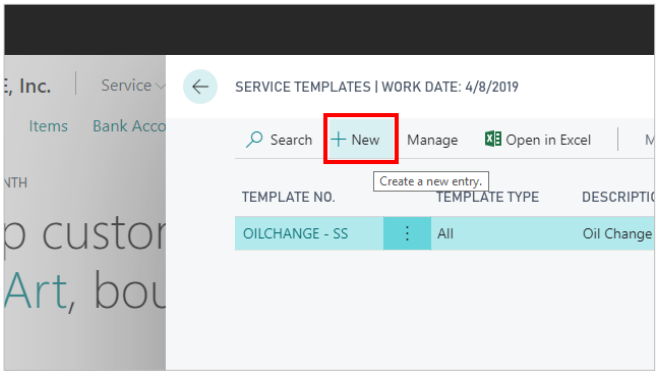


Click on the back button



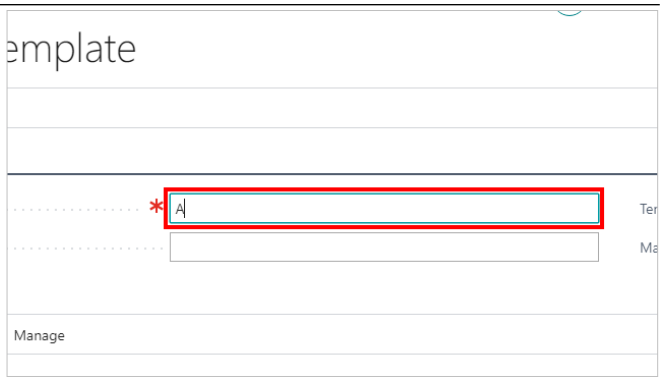
The following demonstrated the setup of a template for changing the air filter on a Skid Steer.

Click on the navigation menu item **New**



Double click on the field **Template No.**

Enter the text **AirFilter - SS**.



Click on the field **Description**

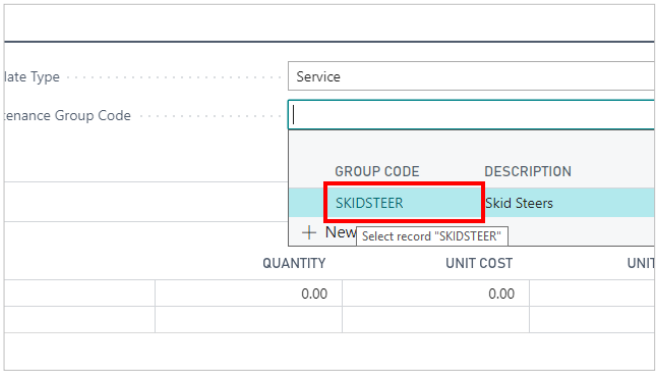
Enter the text **Changing the Air Filter on Skid Steers**.

Click on the field **Template Type**

Click on the item **Service** in the list

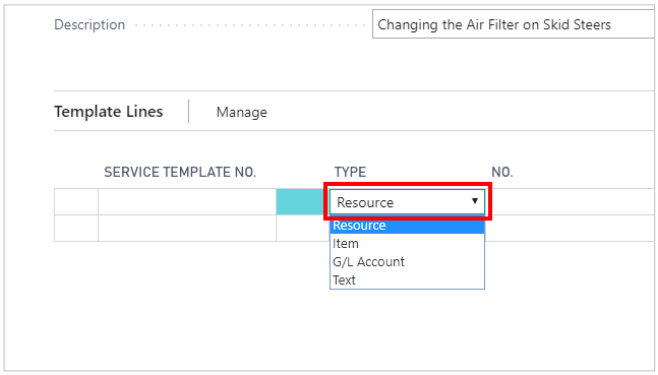
Click on the field **Maintenance Group Code**

Click on the link in cell **Group Code** with the value **SKIDSTEER**

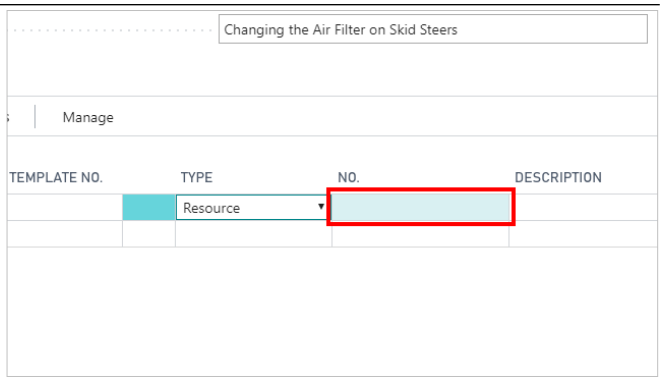


Click on the cell Type

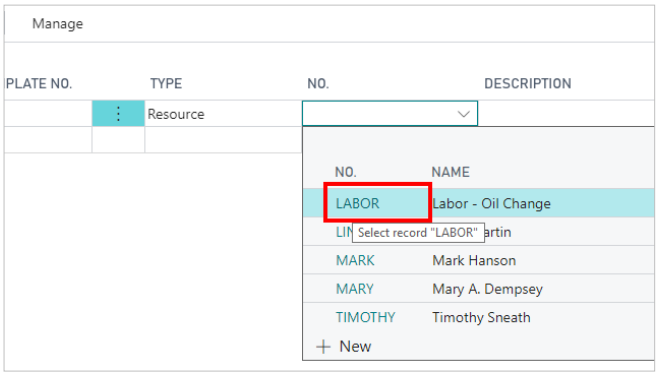
As Resource is the default Type, and this line entry is for a Resource, the Type does not need to be changed.



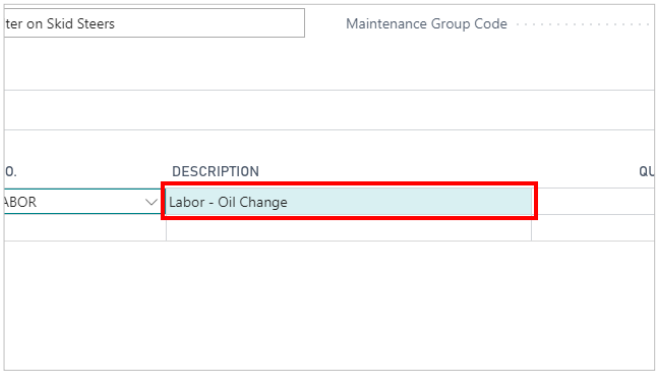
Click on the cell **No.**



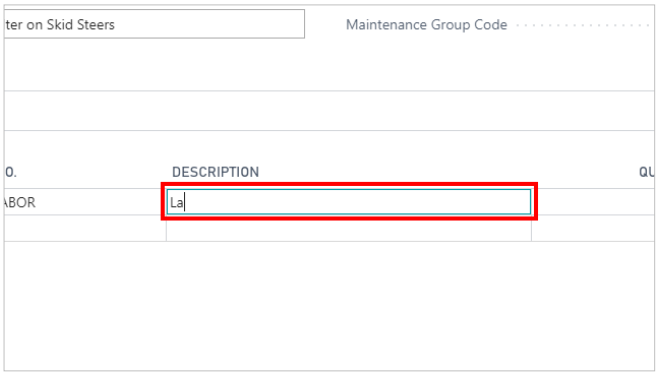
Click on the link in cell **No.** with the value **LABOR**



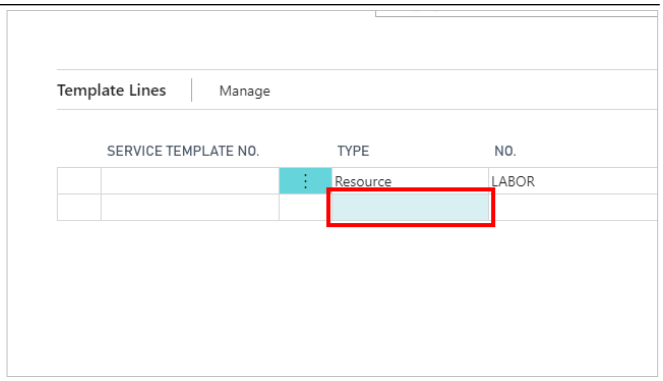
Click on the cell **Description** with the value **Labor - Oil Change**



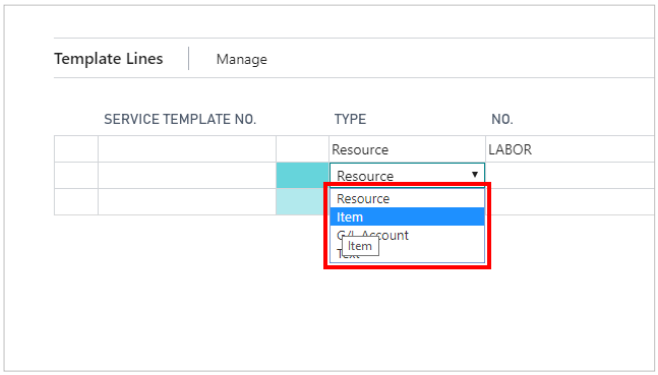
Enter the text **Labor - Replace Air Filter**.



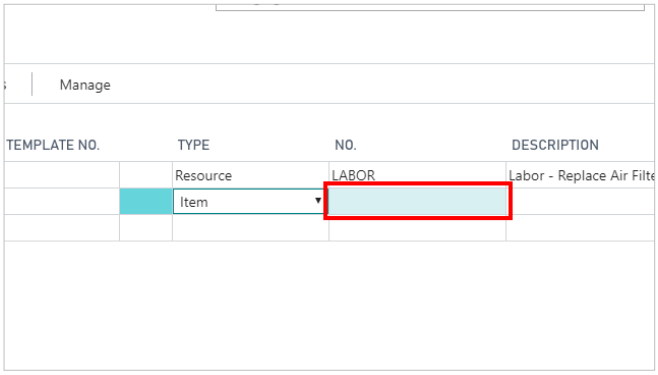
Click on the cell **Type**



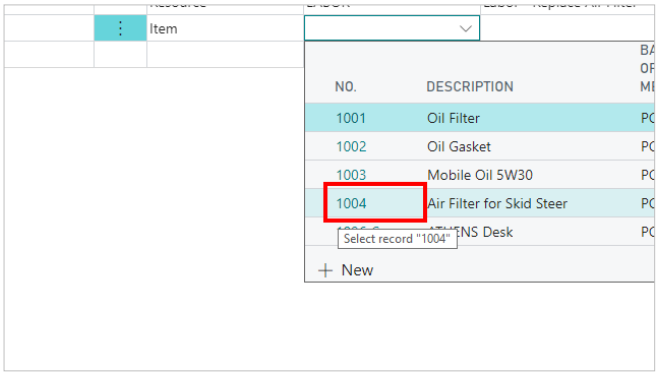
Click on the item **Item** in the list



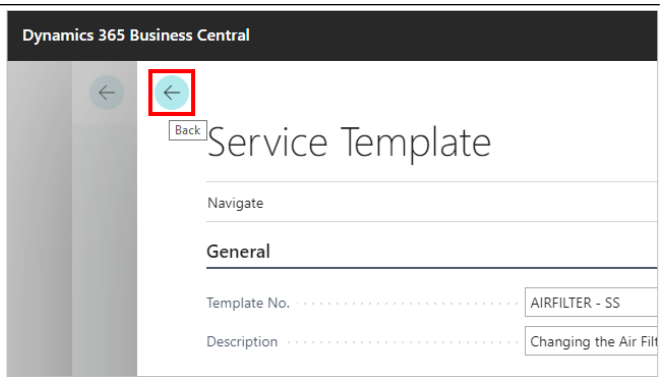
Click on the cell **No.**



Click on the link in cell **No.** with the value **1004**

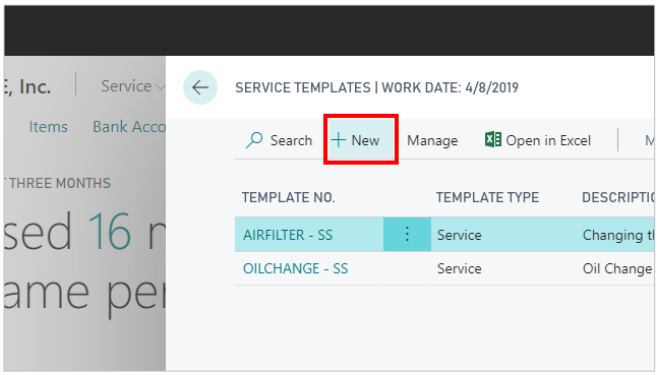


Click on the back button



The following demonstrates the creating of a service template for a service plan.

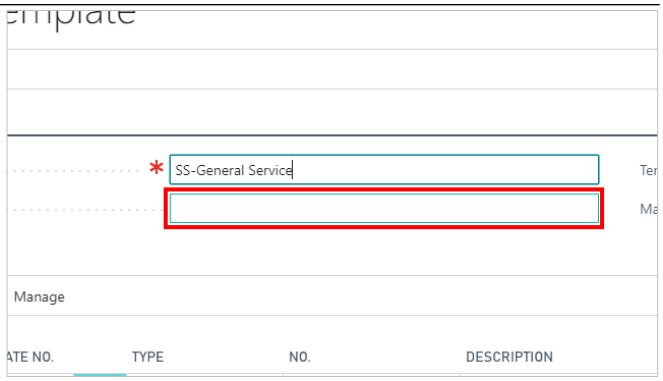
Click on the navigation menu item **New**



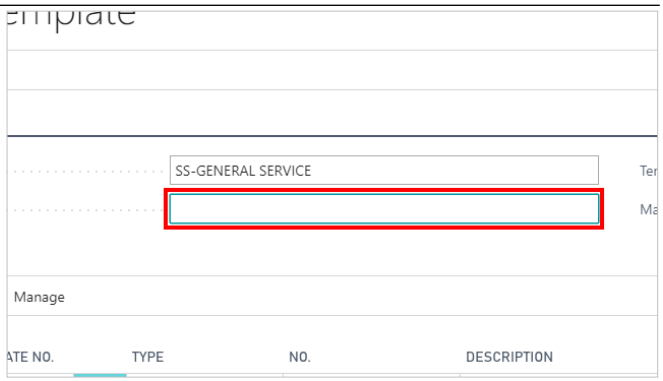
Click on the field **Template No.**

Enter the text **SS-General Service**.

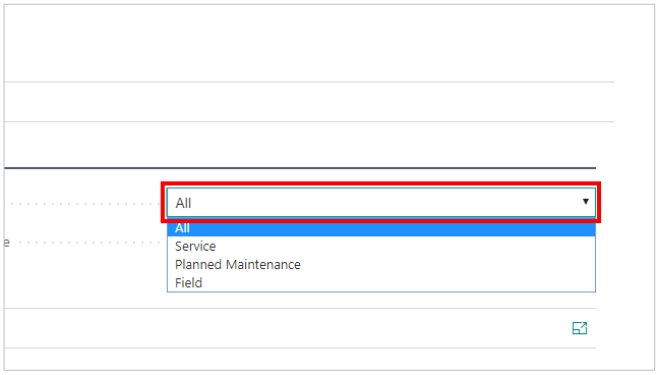
Click on the field **Description**



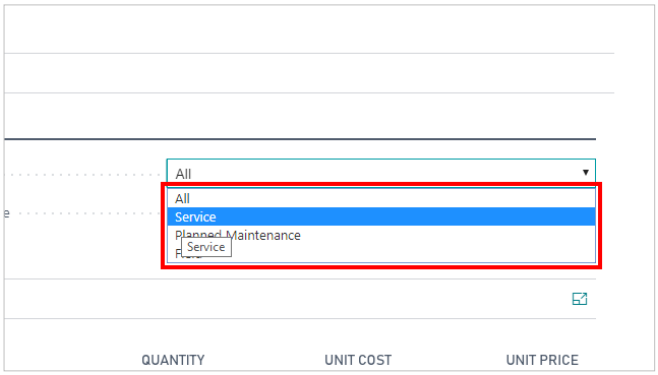
Enter the text **Skid Steer General Service**.



Click on the field **Template Type**

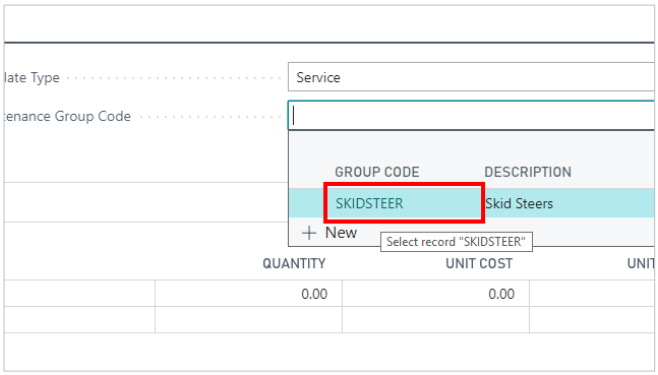


Click on the item **Service** in the list



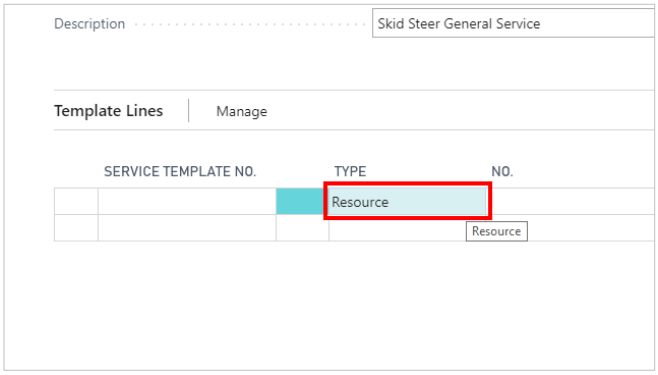
Click on the field **Maintenance Group Code**

Click on the link in cell **Group Code** with the value **SKIDSTEER**

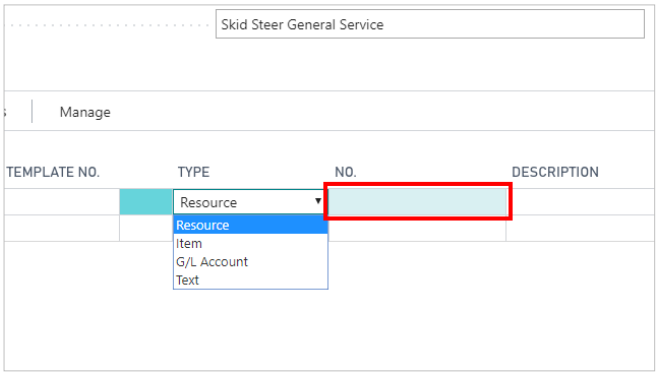


Click on the cell **Type** with the value **Resource Item G/L Account Text**

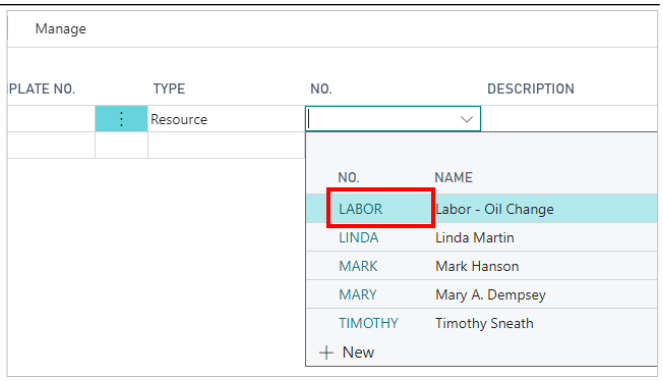
Select Resource.



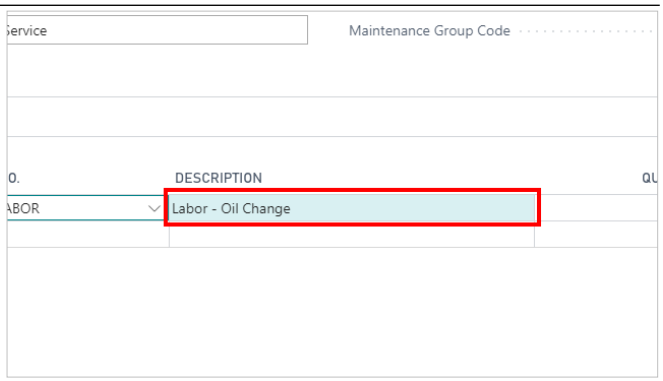
Click on the cell **No.**



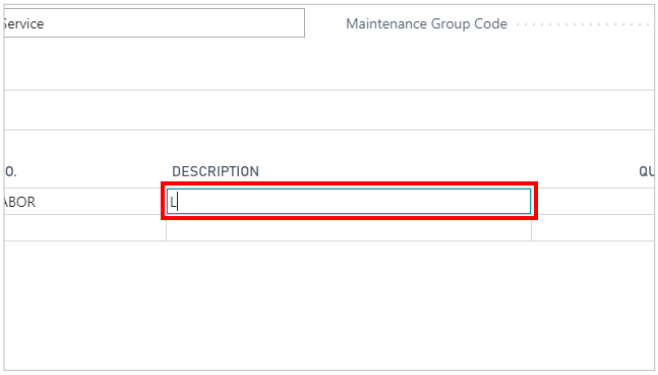
Click on the link in cell **No.** with the value **LABOR**



Click on the cell **Description** with the value **Labor - Oil Change**

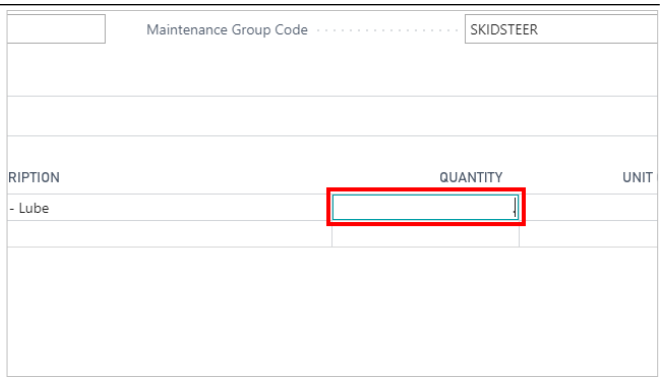


Enter the text **Labor - Lube**.

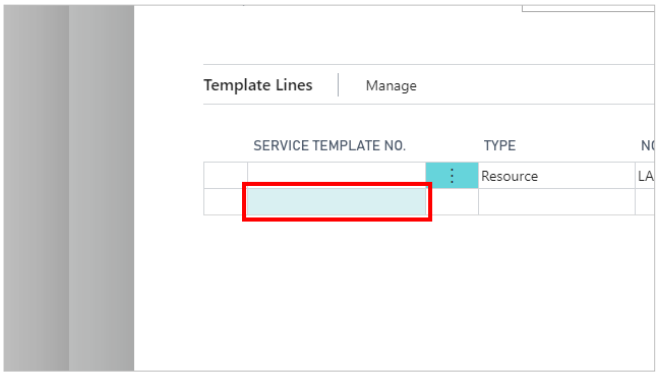


Click on the cell **Quantity** with the value **1.00**

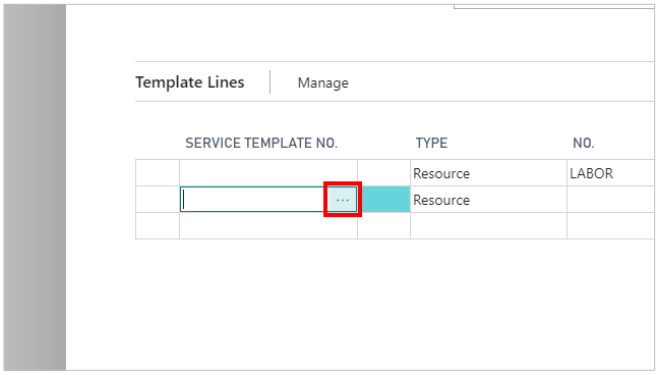
Enter the text **.5**.



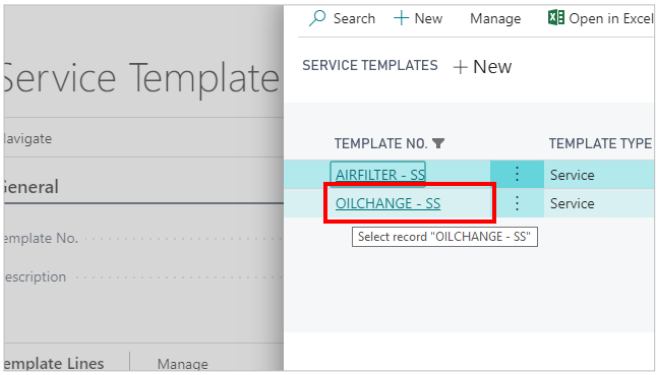
Click on the cell **Service Template No.**



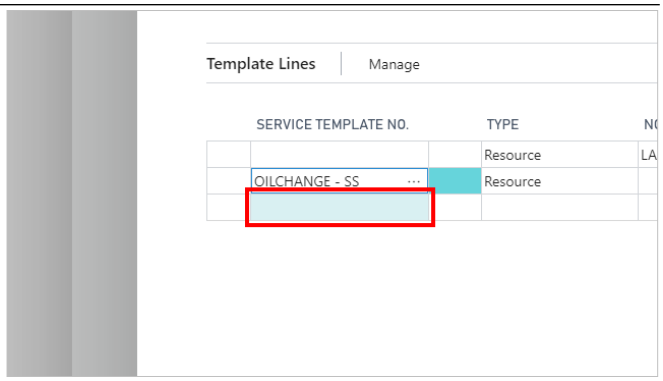
Click on the lookup button in the cell **Service Template No.**



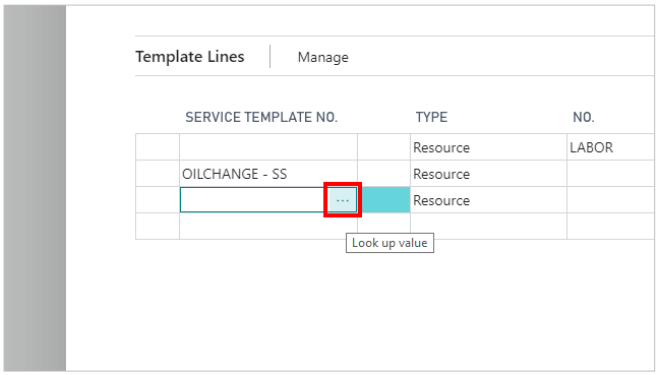
Click on the link in cell **Template No.** with the value **OILCHANGE - SS**



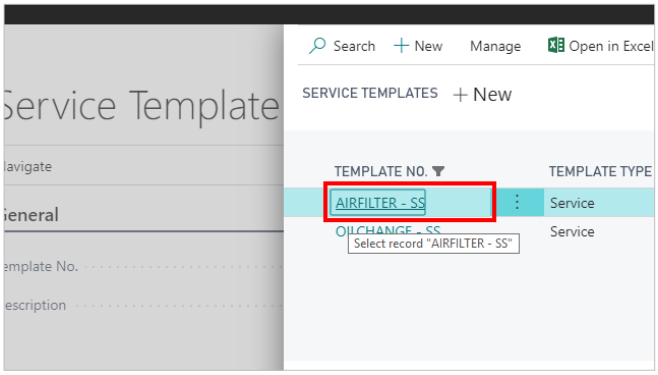
Click on the cell **Service Template No.**



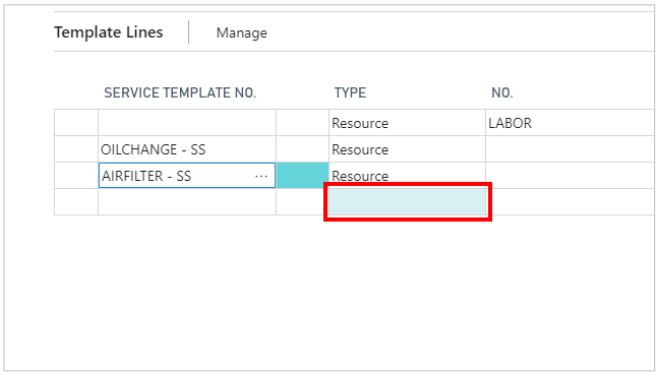
Click on the lookup button in the cell **Service Template No.**



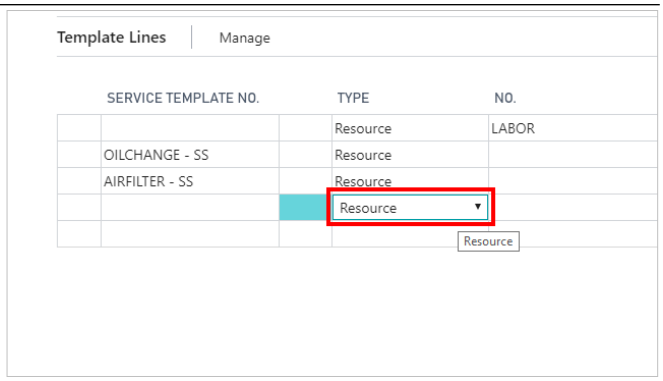
Click on the link in cell **Template No.** with the value **AIRFILTER - SS**



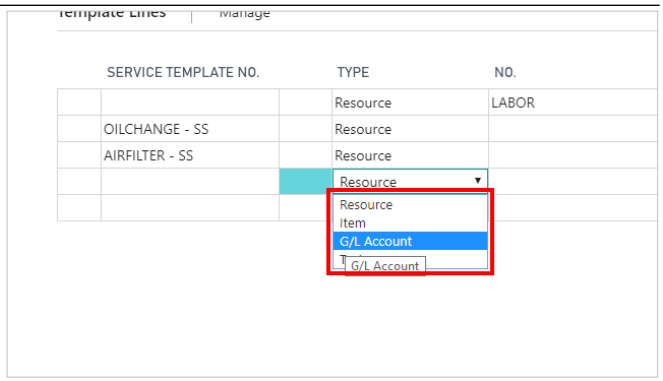
Click on the cell **Type**



Click on the cell **Type** with the value **Resource Item G/L Account Text**

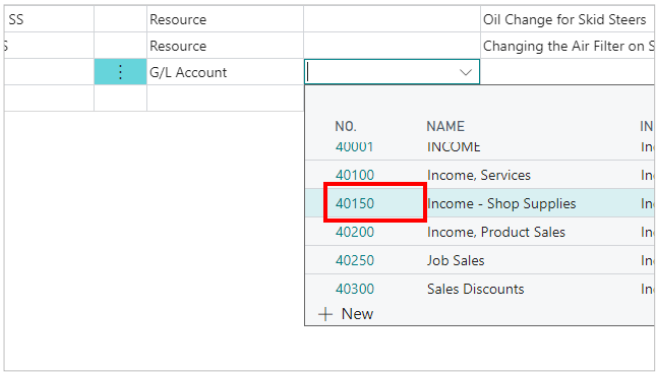


Click on the item **G/L Account** in the list



Click on the cell **No.**

Click on the link in cell **No.** with the value **40150**



Click on the cell **Unit Cost** with the value **0.00**

Enter the text **10.00**.

Click on the cell **Unit Price** with the value **0.00**

Enter the text **20.00**.

2.5.4. How to Setup a Checklist

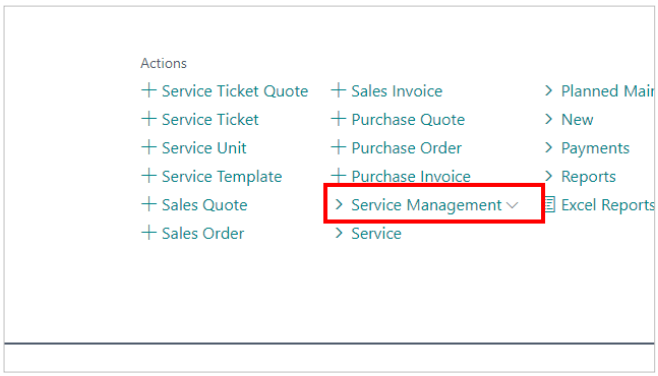
Checklists can be for the defining the details of specific tasks to be completed by the technician. The listing can be for a simple check box, recording of findings such as brake pad readings, the type oil used in an oil change, etc.

The list can be printed from the Service Ticket, where the technician can note findings and check that they have completed the task. The checklist findings can as well be entered into the checklist on the Service Ticket.

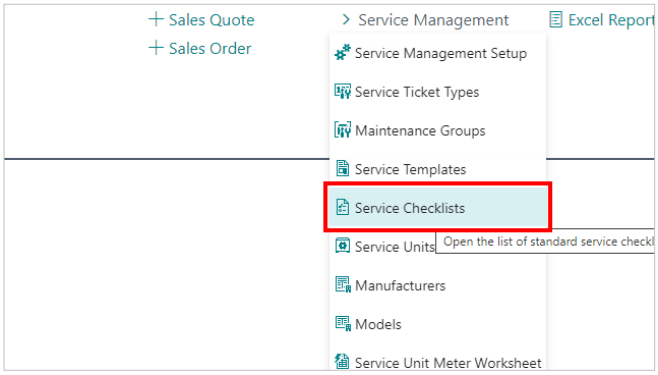
The following demonstrates the creating of a checklist for the Service Template for the Skid Steer General Service.

The following demonstrates how to set up a standard service checklist

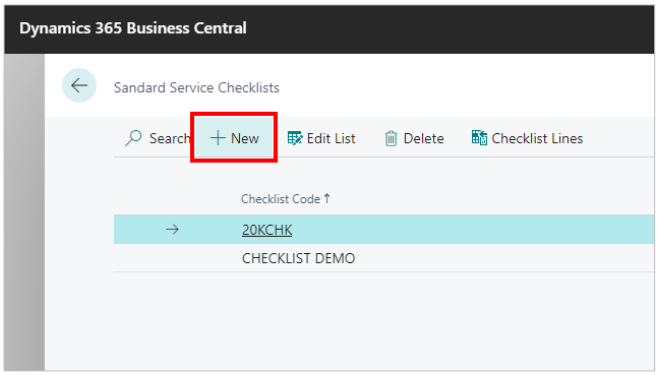
Click on the navigation menu item popup **Service Management**



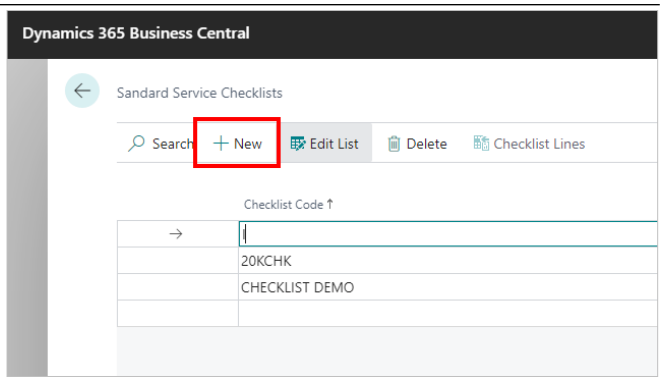
Click on the navigation menu item **Service Checklists**



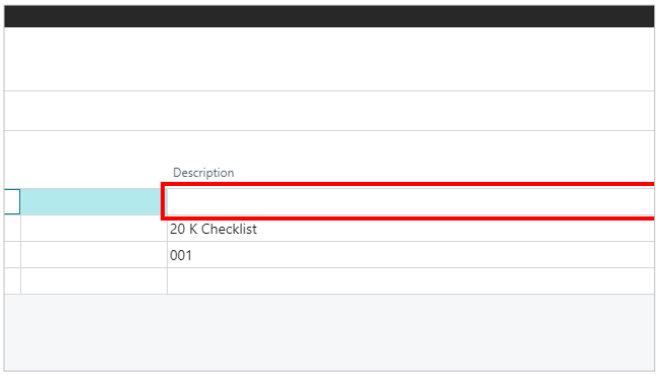
Click on the navigation menu item **New**



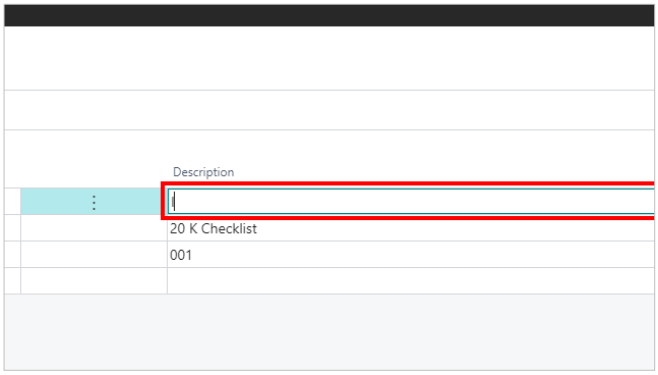
Enter the text **Inspection**.



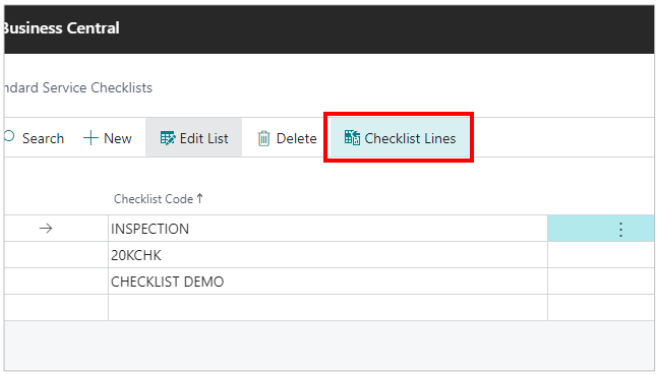
Click on **Description**



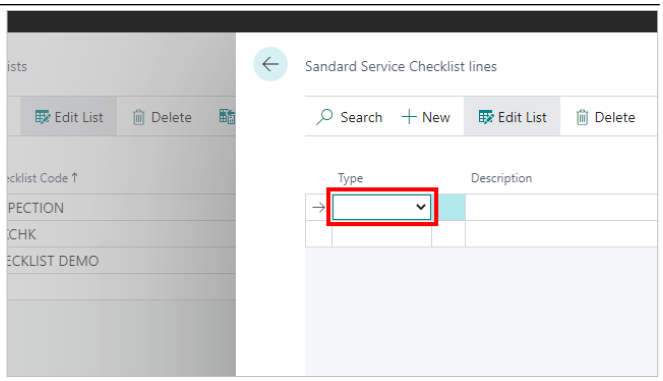
Enter the text **Inspection list**.



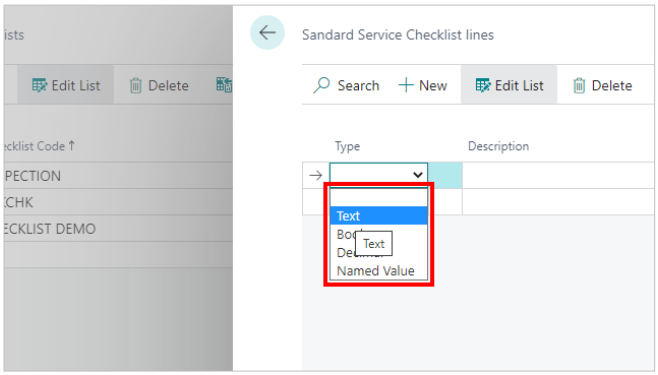
Click on the navigation menu item **Checklist Lines**



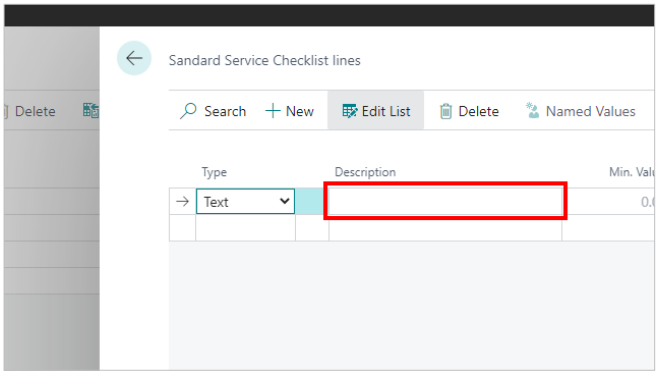
Click on the cell **Type** with the value **Text Boolean Decimal Named Value**



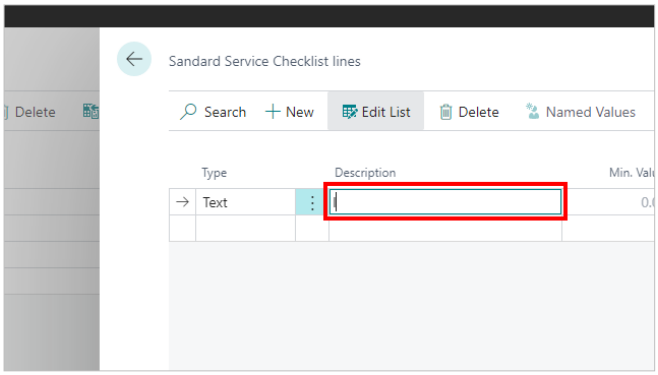
Click on the item **Text** in the list



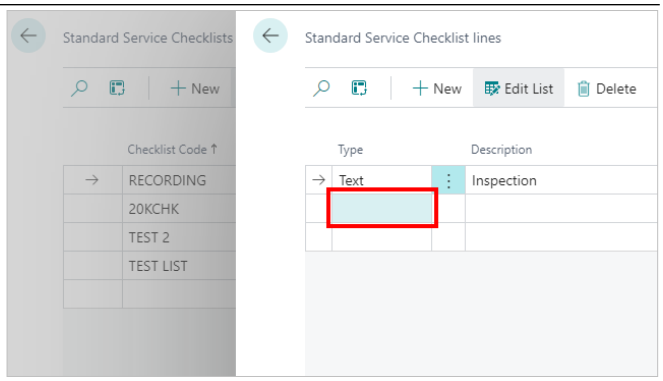
Click on the cell **Description**



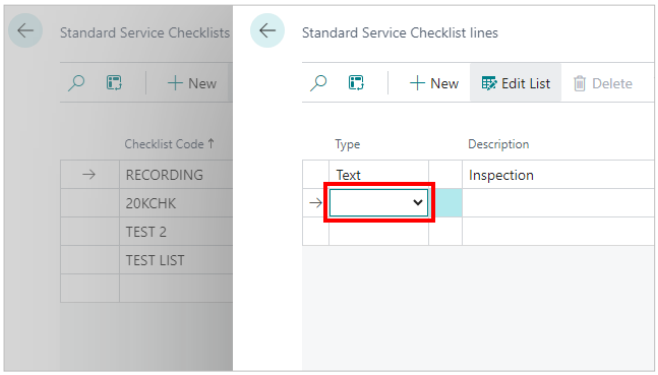
Enter the text **Inspection**.



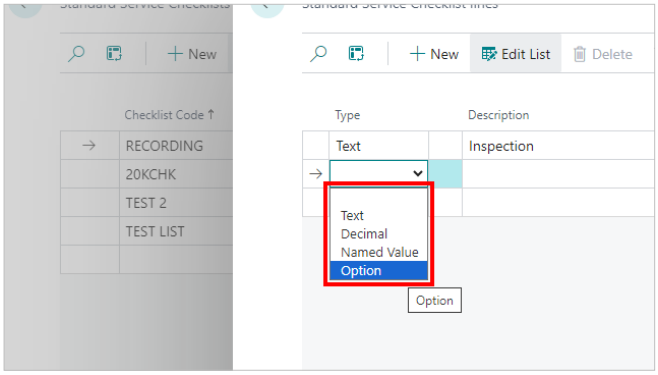
Click on the cell **Type**



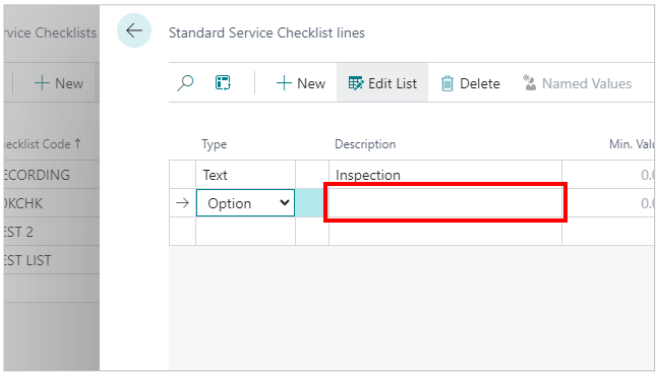
Click on the cell **Type**



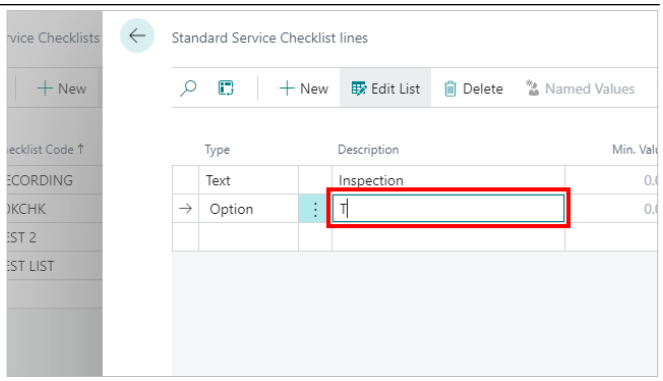
Click on the item **Option** in the list



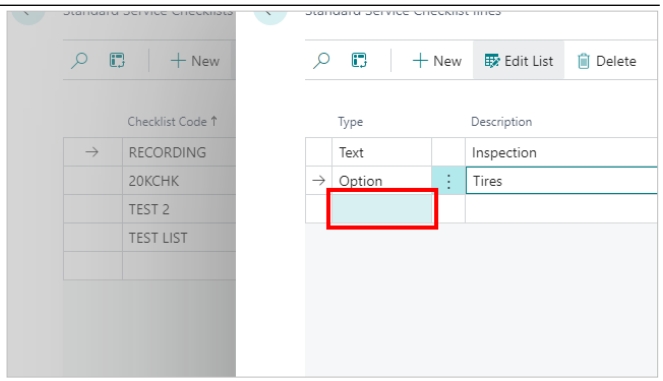
Click on the cell **Description**



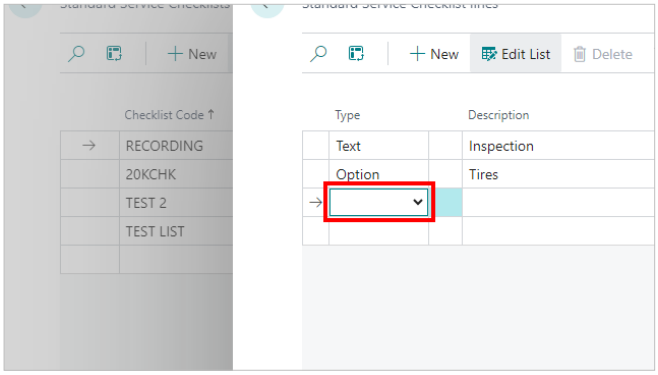
Enter the text **Tires**.



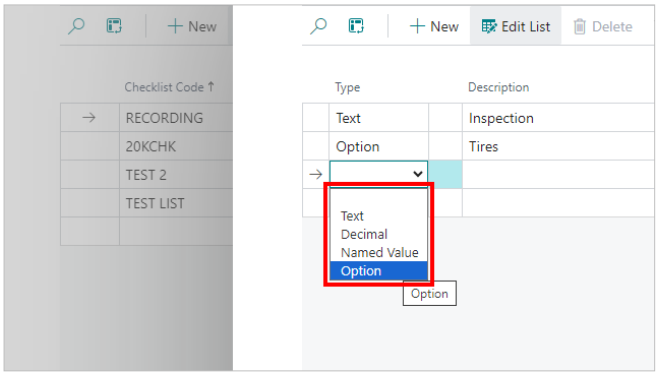
Click on the cell **Type**



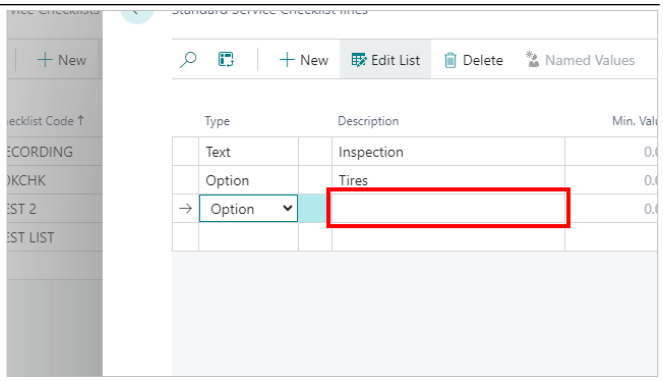
Click on the cell **Type**



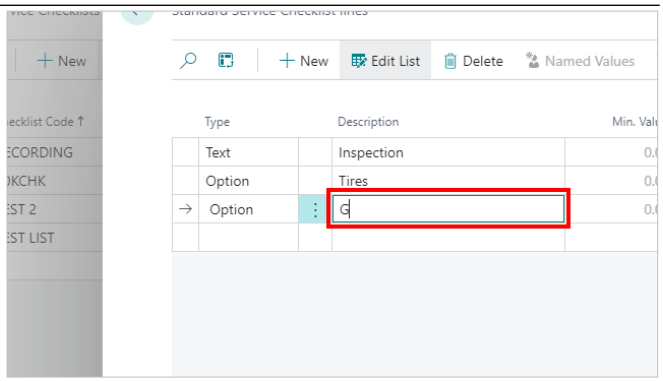
Click on the item **Option** in the list



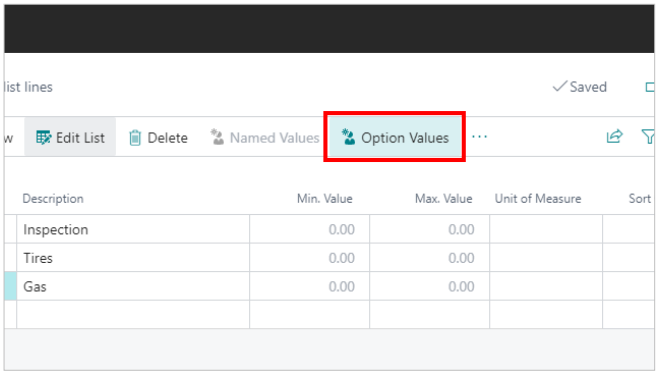
Click on the cell **Description**



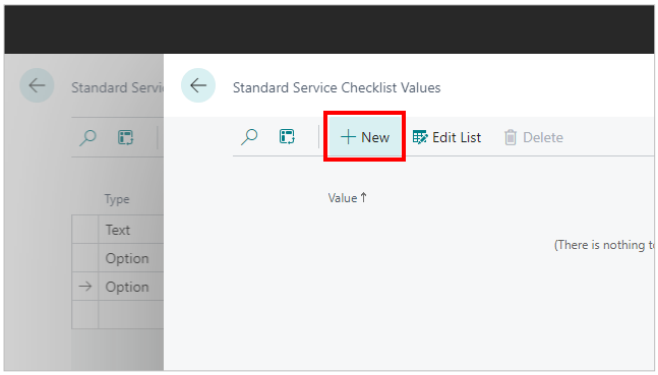
Enter the text **Gas**.



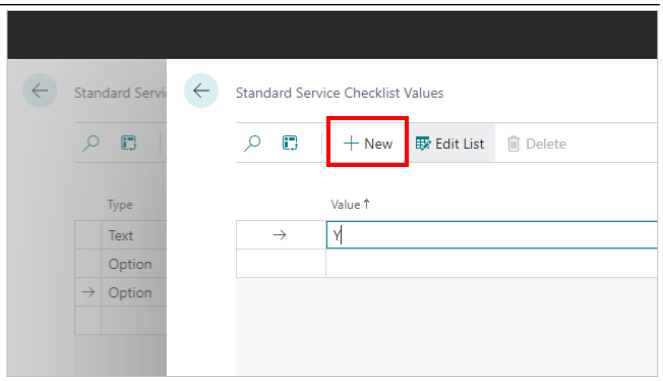
Click on the navigation menu item **Option Values**



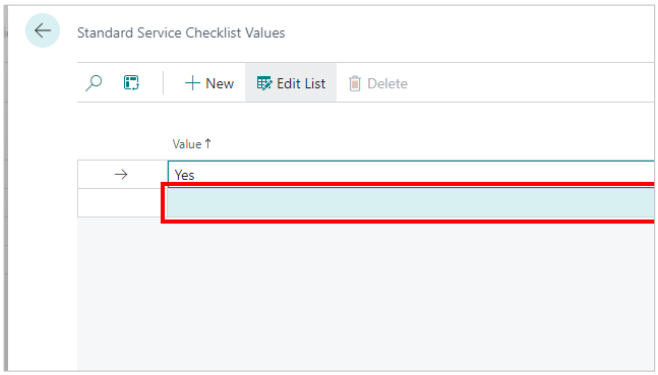
Click on the navigation menu item **New**



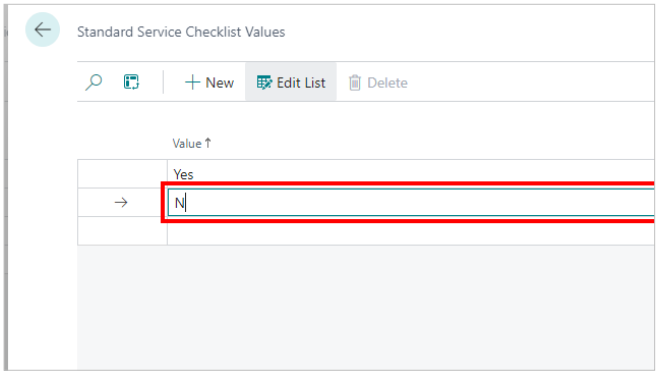
Enter the text **Yes**.



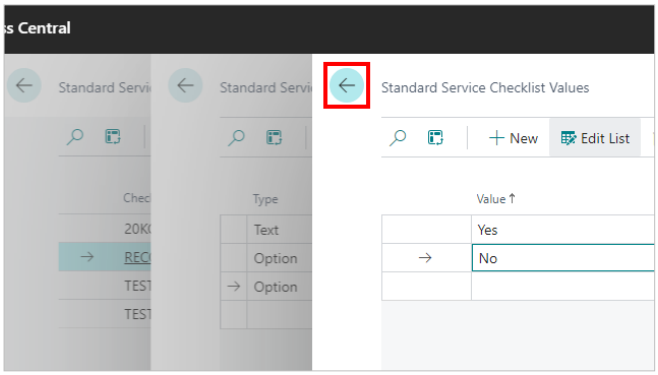
Click on the cell **Value**



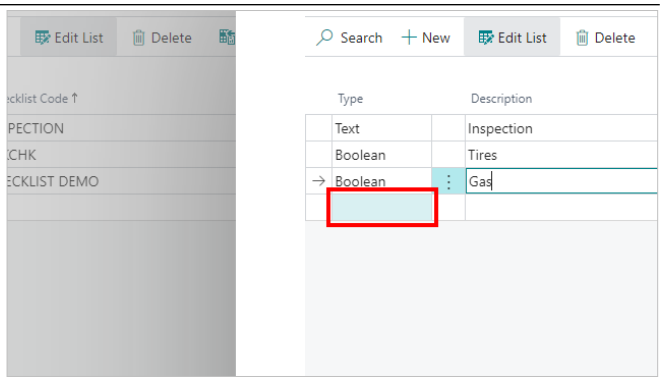
Enter the text **No**.



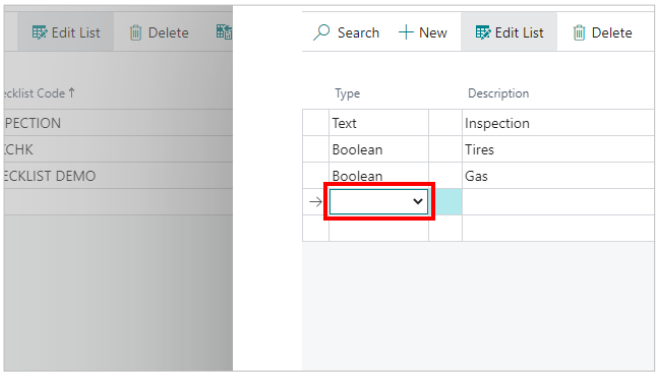
Click on the back button



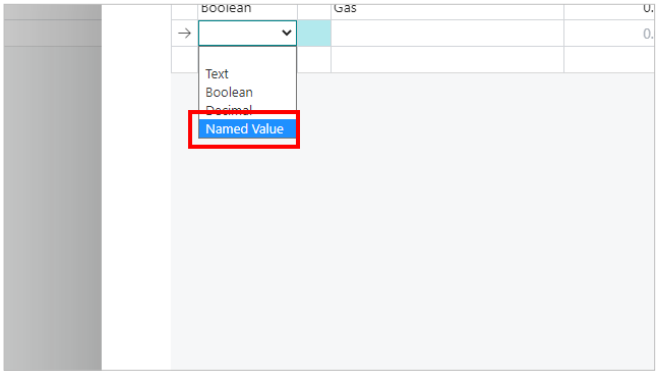
Click on **Type**



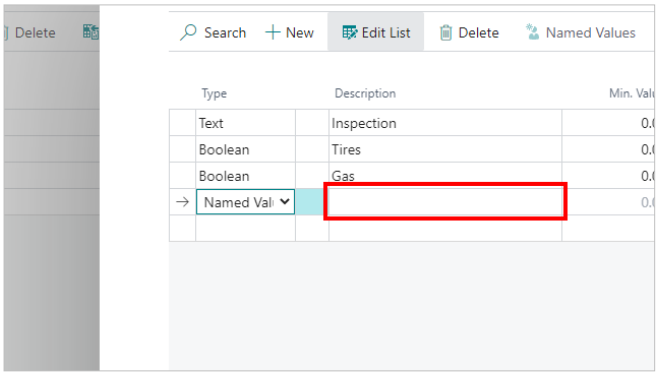
Click on the cell **Type** with the value **Text Boolean Decimal Named Value**



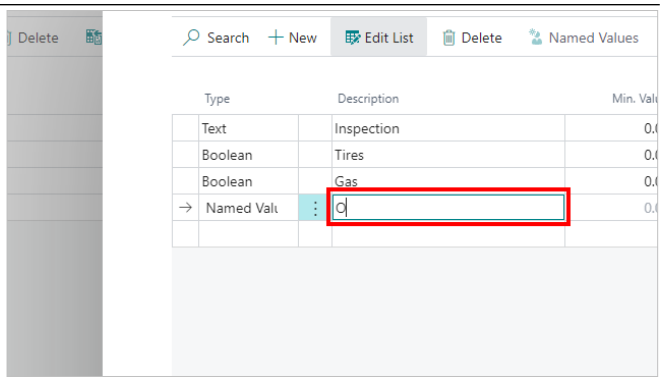
Click on the item Named Value in the list



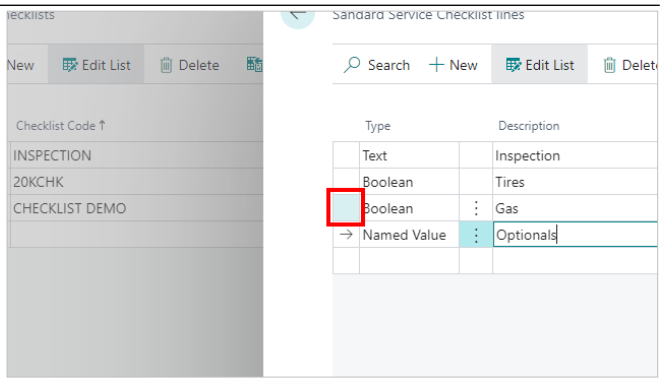
Click on the cell **Description**



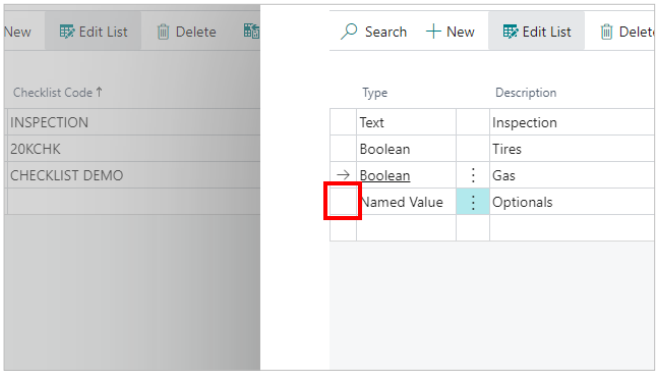
Enter the text **Optionals**.



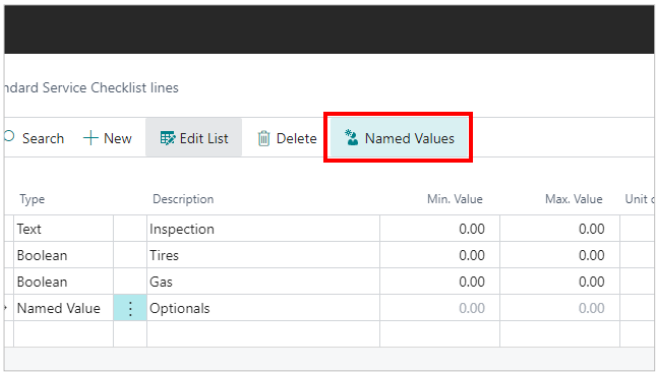
Click on **Type = 2, Description = Gas, Min. Value = 0**



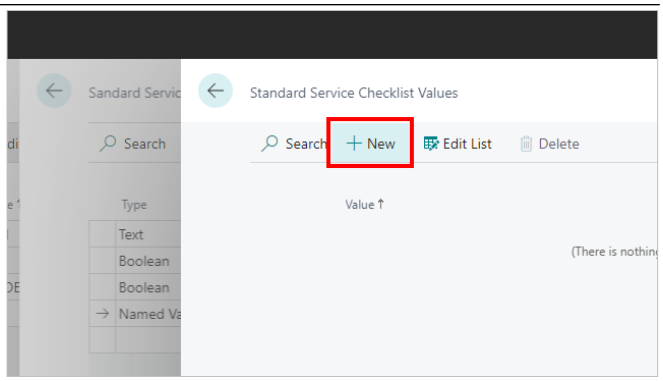
Click on **Type = 4, Description = Optionals, Min. Value = 0**



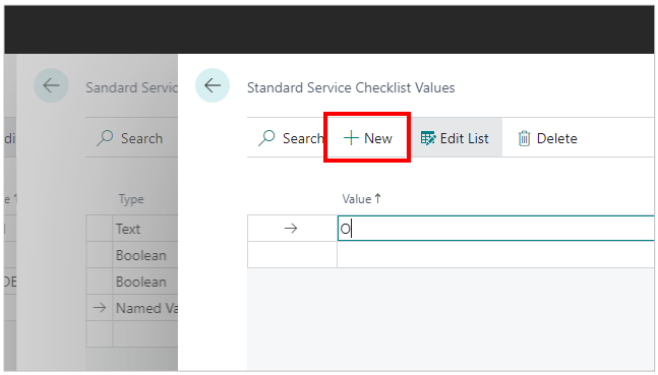
Click on the navigation menu item **Named Values**



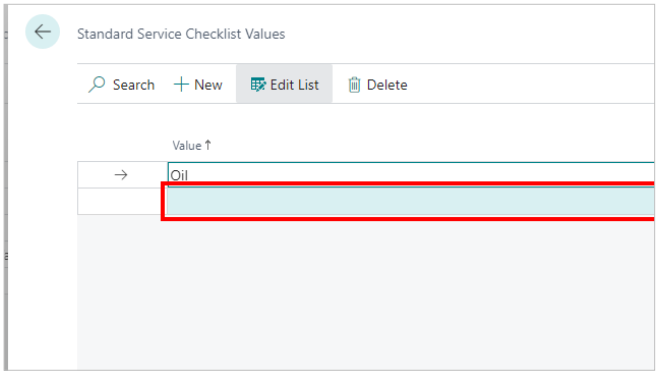
Click on the navigation menu item **New**



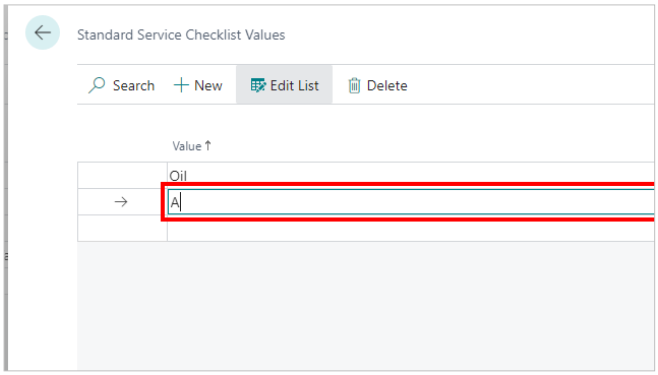
Enter the text **Oil**.



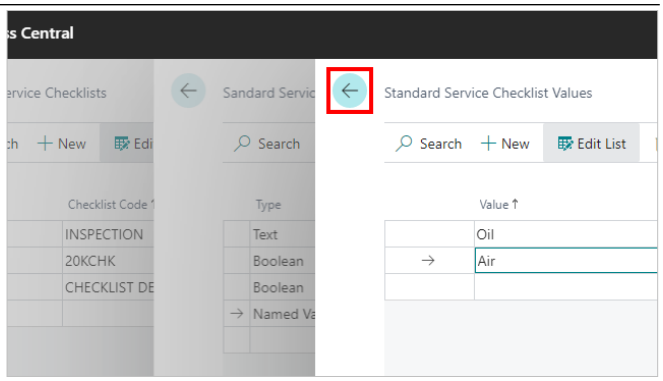
Click on **Value**



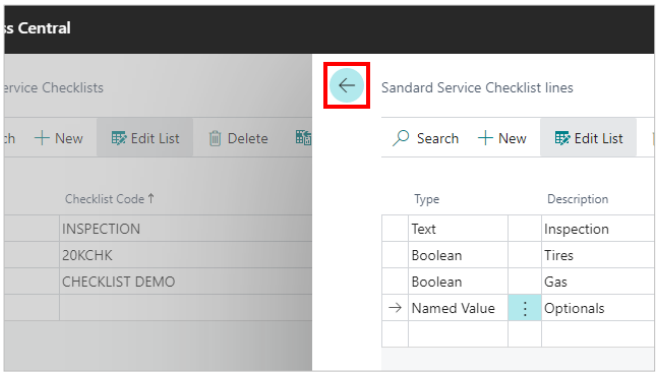
Enter the text **Air**.



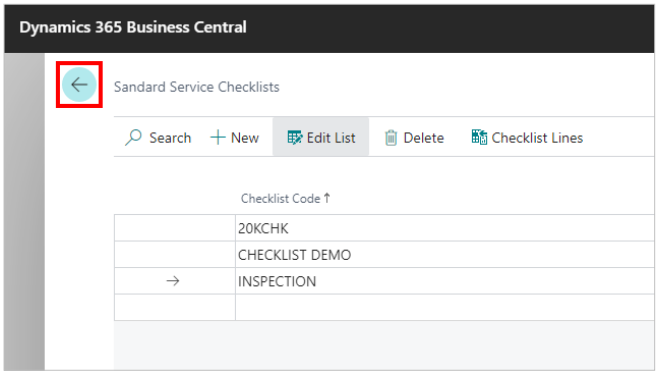
Click on the back button



Click on the back button

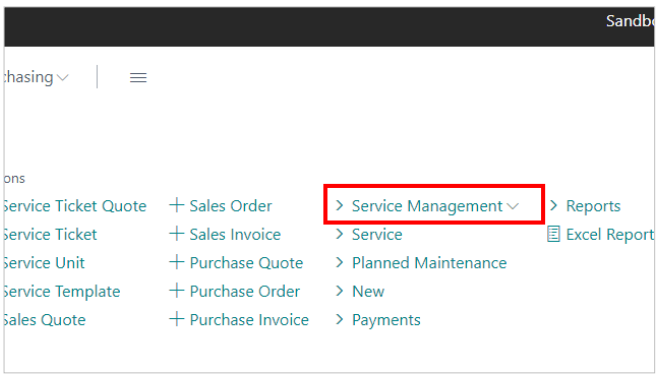


Click on the back button

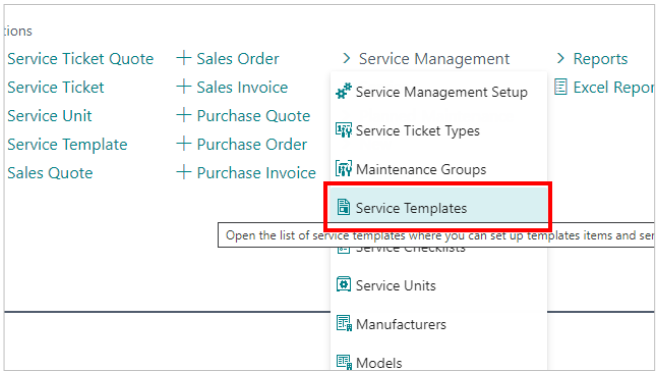


The following demonstrates how to add a checklist to a service template.

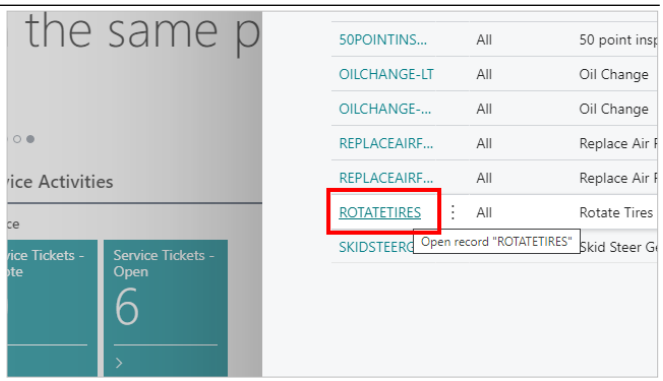
Click on the navigation menu item popup **Service Management**



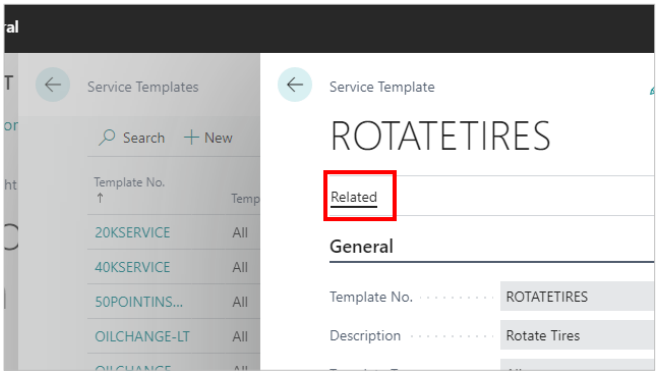
Click on the navigation menu item **Service Templates**



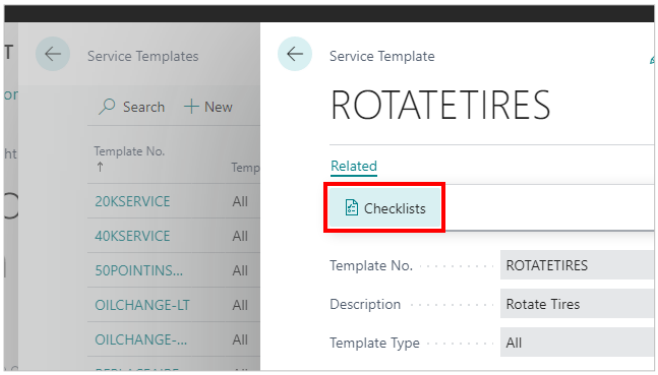
Click on the link in cell **Template No.** with the value **ROTATETIRES**



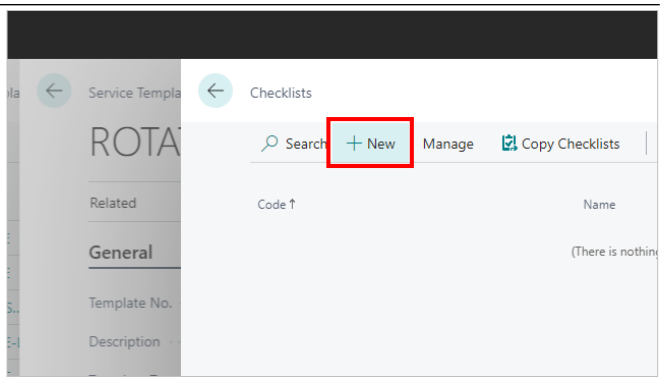
Click on the navigation menu item popup **Related**



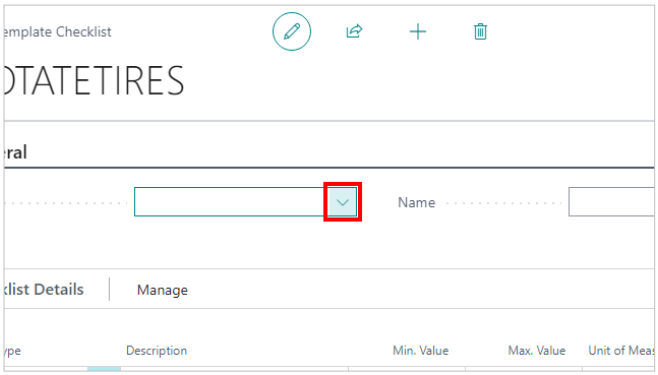
Click on the navigation menu item **Checklists**



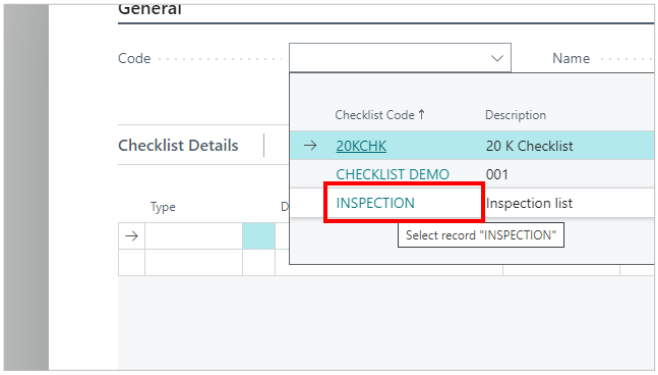
Click on the navigation menu item **New**



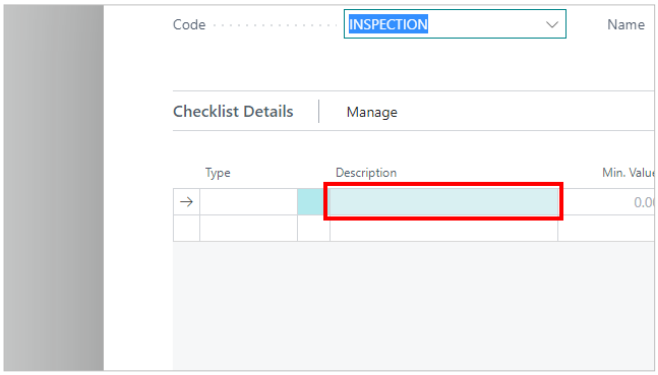
Click on the lookup button **Code**



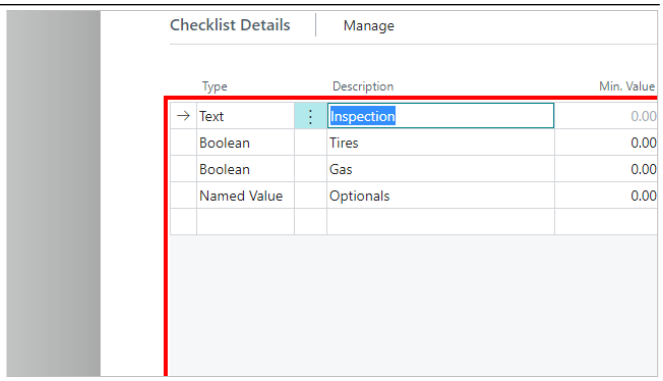
Click on the link in cell **Checklist Code** with the value **INSPECTION**



Click on the cell **Description**



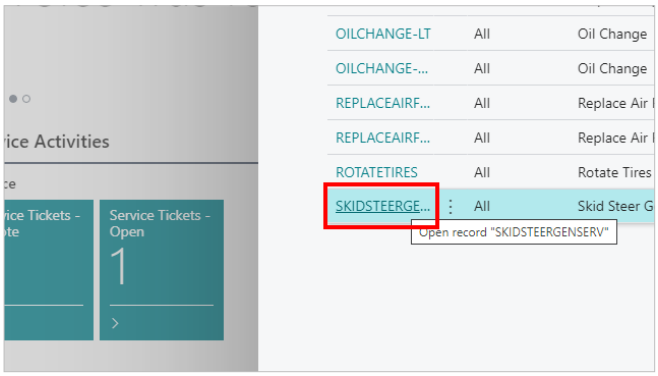
After selecting the lines, they will automatically populate with values from the selected standard service checklist.



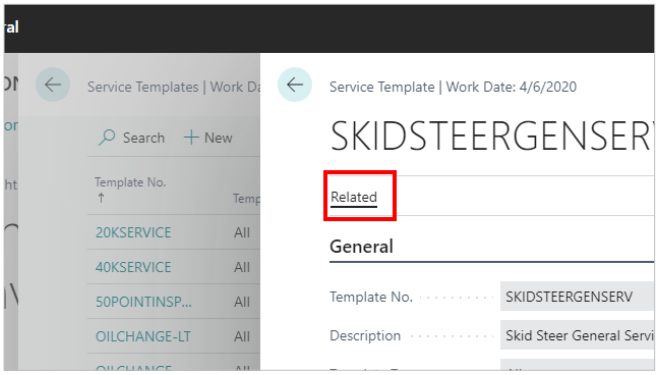
2.5.5. How to Copy an Existing Checklist

When creating checklists for service templates, you also have the option to copy existing checklists from one template to another.

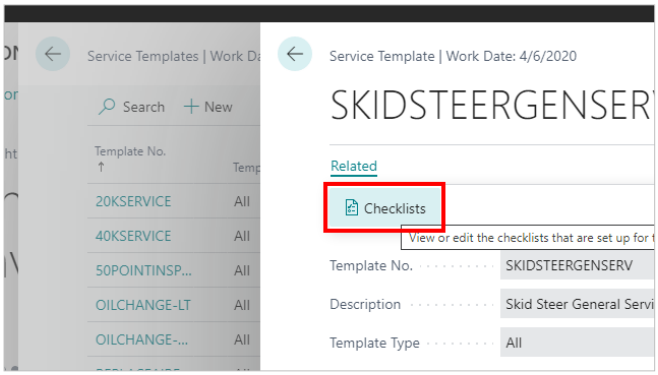
First, select the template that you will be adding a template to.
Click on the link in cell **Template No.** with the value **SKIDSTEERGENSERV**



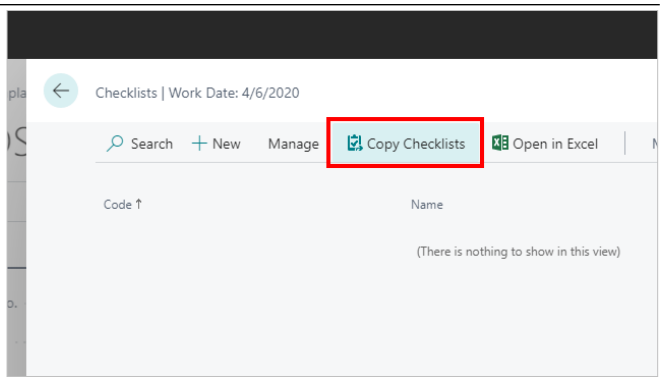
Click on the navigation menu item popup **Related**



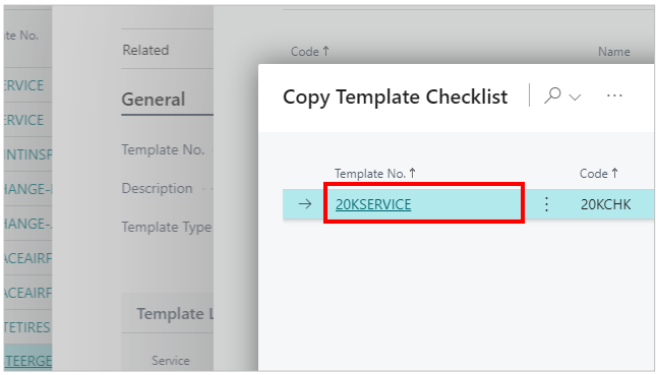
Click on the navigation menu item **Checklists**



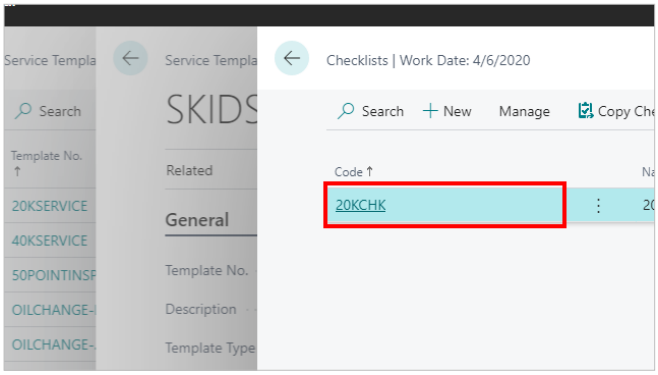
Click on the navigation menu item **Copy Checklists**



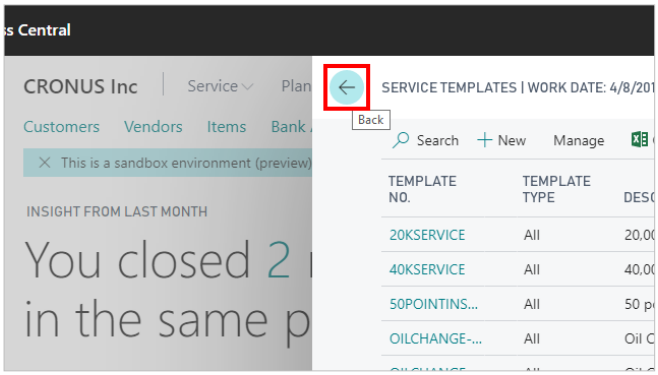
Select the tempate you want to copy
Click on the link in cell **Template No.** with the value **20KSERVICE**



Notice that the selected checklist has now been copied to the template.



Click on the back button



2.6. How to Setup Manufacturers

2.6.1. Overview

A listing of user defined Manufacturers can be setup to specify the company that manufactures the various Service Units. The Manufacturer is assigned on the Service Units.

For example, Bobcat, which manufactures Skid Steers.

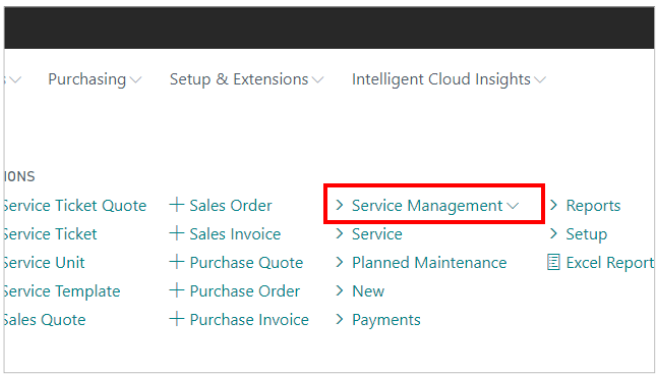
Manufacturers setup is optional.

2.6.2. How to Setup Manufacturers

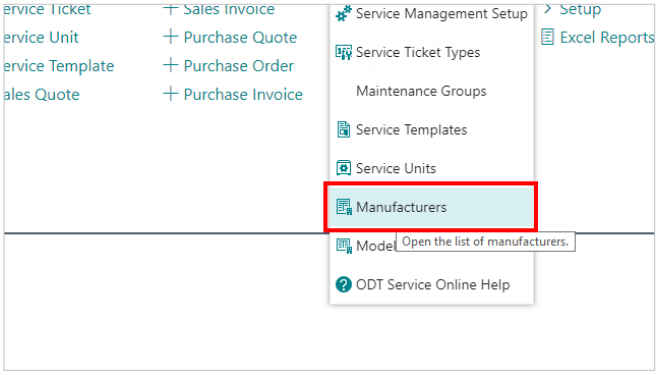
Business Manager Profile

The following example demonstrates how to setup Manufacturers.

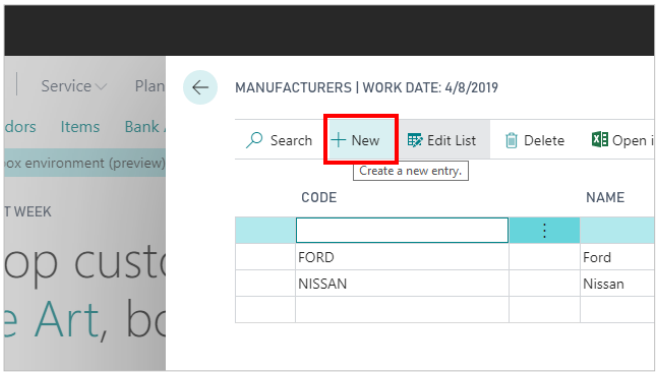
Click on the navigation menu item popup **Service Management**



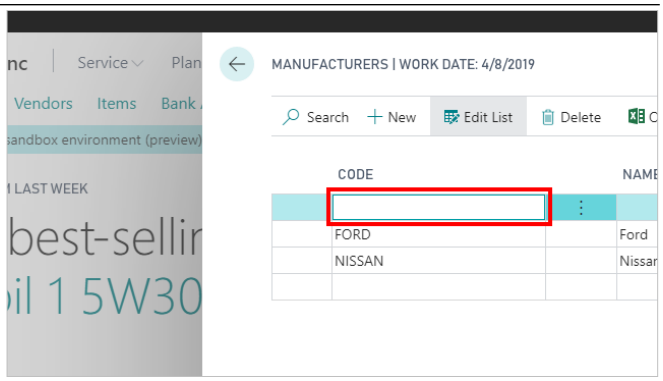
Click on the navigation menu item **Manufacturers**



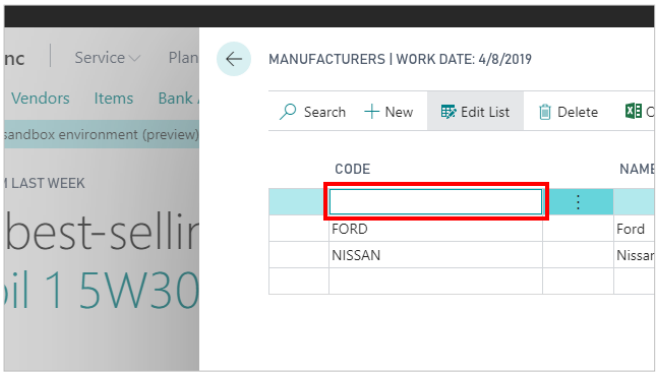
Click on the navigation menu item **New**



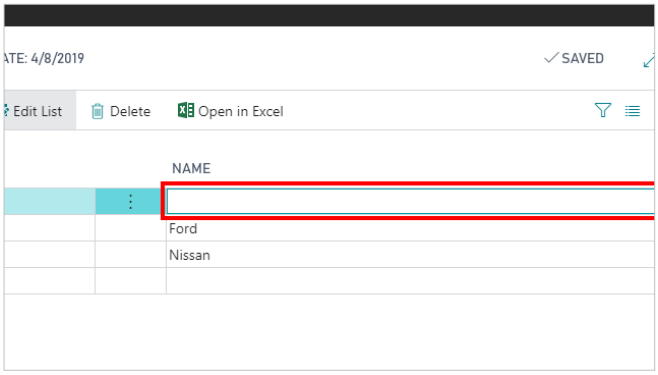
Click on the cell **Code**



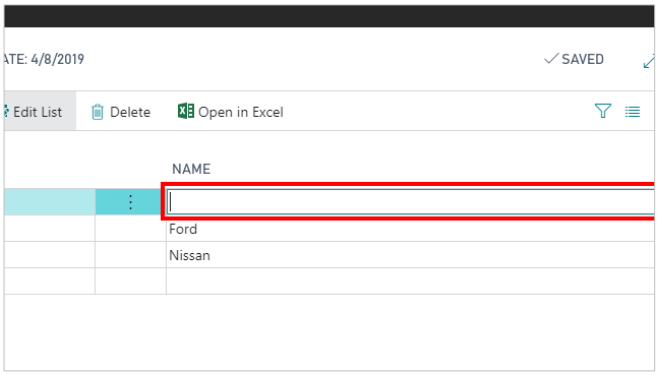
Enter the text **BOBCAT**.



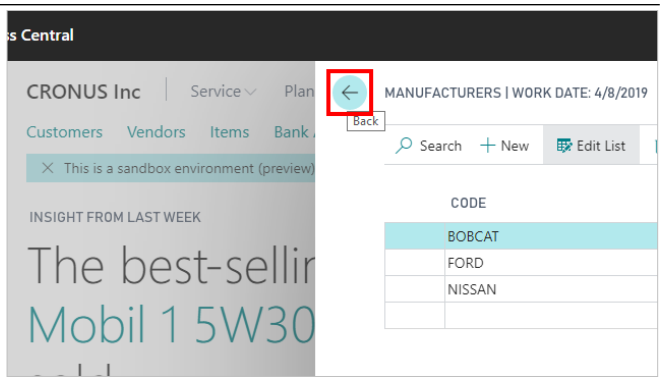
Click on the cell **Name**



Enter the text **Bobcat**.



Click on the back button



2.7. How to Setup Models

2.7.1. Overview

Models are user defined codes used to specify the Models of the product which the Manufacturers make. The Model is selected on the Service Unit from the listing. Thus providing a means for filtering the Service Units to locate a specific unit.

For example, Bobcat could have Skid Steer models of S450 and S70.

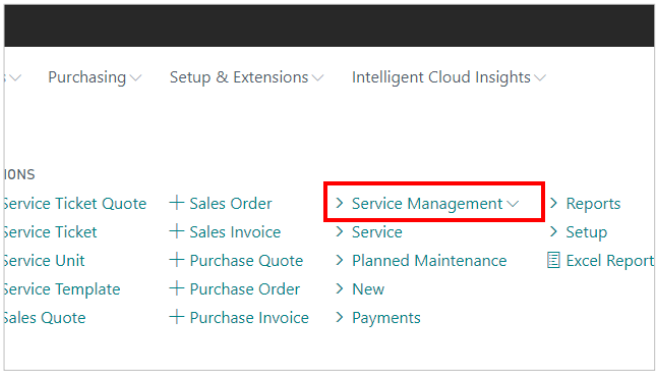
The setup of Models is optional.

2.7.2. How to Setup Models

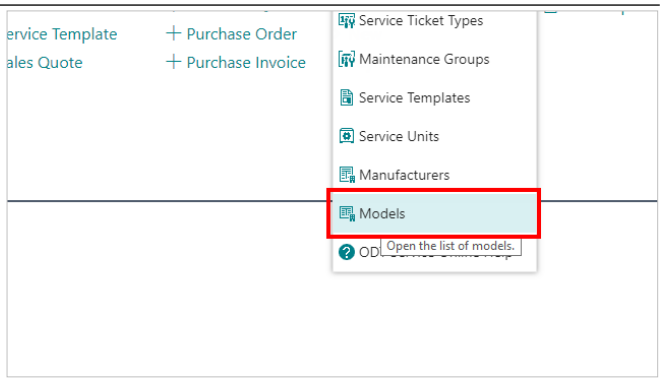
Business Manager Profile

The following demonstrates setting up the S450 Model of Skid Steers.

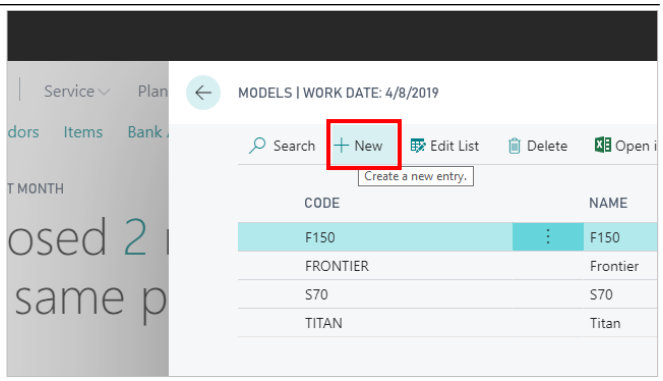
Click on the navigation menu item popup **Service Management**



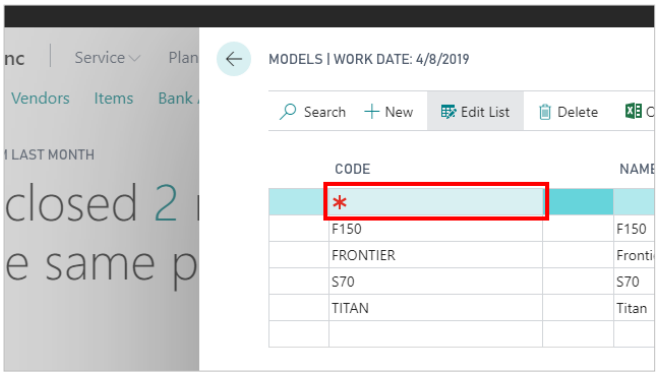
Click on the navigation menu item **Models**



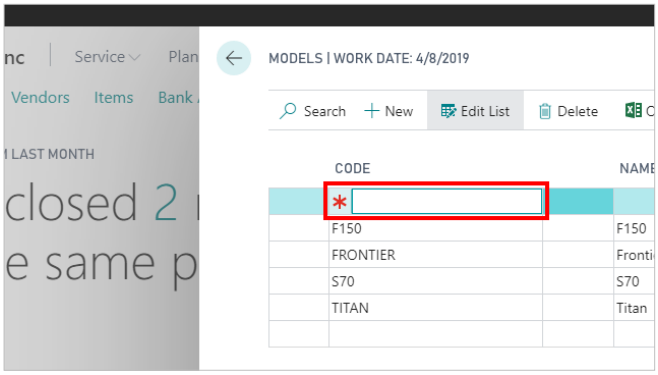
Click on the navigation menu item **New**



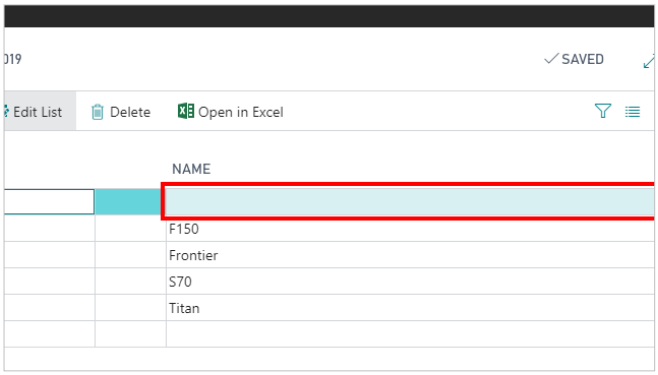
Click on the cell **Code**



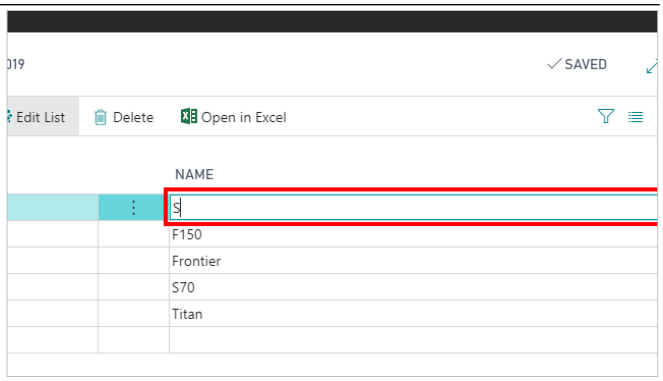
Enter the text **S450**.



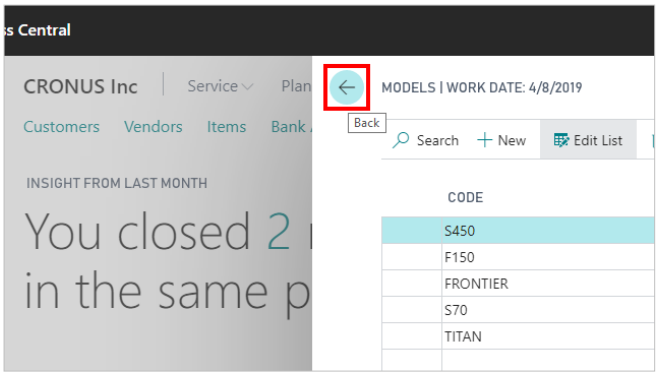
Click on the cell **Name**



Enter the text **S450**.



Click on the back button



2.8. How to Setup Service Units

2.8.1. Overview

Service Units define the product to be serviced and the setup is mandatory in order to use the ODT Service App.

Mandatory fields include the Service Unit No., Customer No. and Maintenance Group. All other fields are optional.

The customer can be an internal or a third party customer.

The Service Unit includes a number of equipment specific fields, which can be populated to enhance a users' ability to search for a unit. For example, the specification of a Manufacturer and a Model can aid in filtering the Service Unit list to locate the unit being searched by, or provide a view of the quantity of units having the same Manufacturer and Model.

The Service Unit can be linked to an Item or Fixed Asset for informational purposes, when the product is owned by the organization.

A Service Ticket can be automatically created directly from the Service Unit and can include a Service Template, if desired.

When clicking on the caption of a field, a brief description of the field is provided.

2.8.2. Service Unit Menu Options

Menu options displayed by default:

- Create Service Ticket Provides the ability to create a Service Ticket directly from the Service Unit.
- Create Service Ticket From Template Provides the ability to select a Service Template and create a Service Ticket directly from the Service Unit. Actions:
- Contains the options of Create Service Ticket and Create Service Ticket From Template.

Navigate:

- Statistics View statistical information about the Service Unit and service performed.
- Comments Provides the ability to add comments to a Service unit.
- Service History Displays a listing of Service Tickets which were completed, and provides the ability to "Navigate" to the Completed Service Ticket.
- Service Ledger Entries Displays a listing of Service ledger Entries created when processing a Service Ticket. On invoice records, the ability to view the posted invoice is provided in the Actions menu.
- Service Unit Meters Add and modify Service Meters assigned to the Service Unit. Service Meters are necessary in order to use Planned Maintenance features.

2.8.3. How to Setup a Service Unit

Business Manager Profile

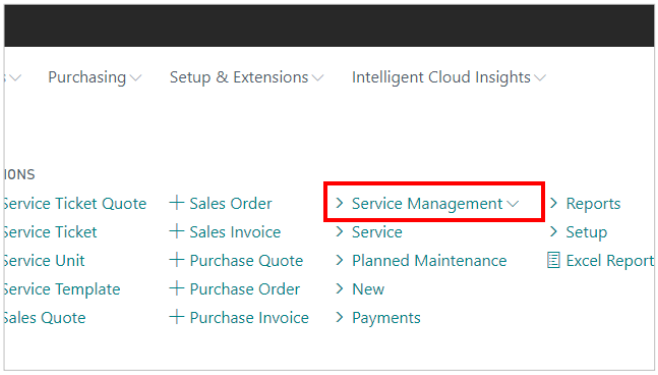
The following example demonstrates the setup of a Service Unit which is owned by an external customer.

Only those fields that are mandatory, and those which were setup for the Manufacturer and Model have been included in the example.

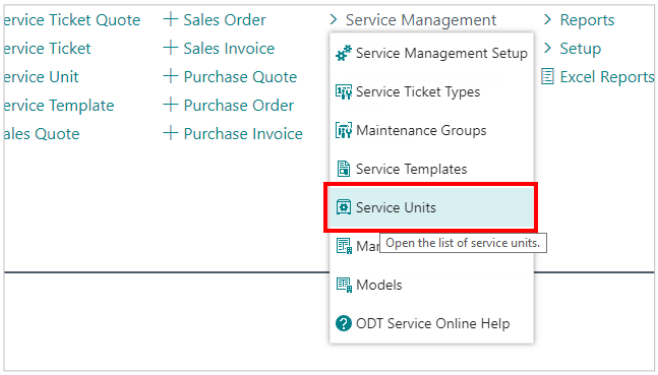
To setup a Service Unit for company owned equipment the only mandatory field difference is that the customer selected would be the Internal Customer.

To learn about "How to Setup an Internal Customer for Servicing", go to the Financials Setups for Service category in the ODT Service Online Help.

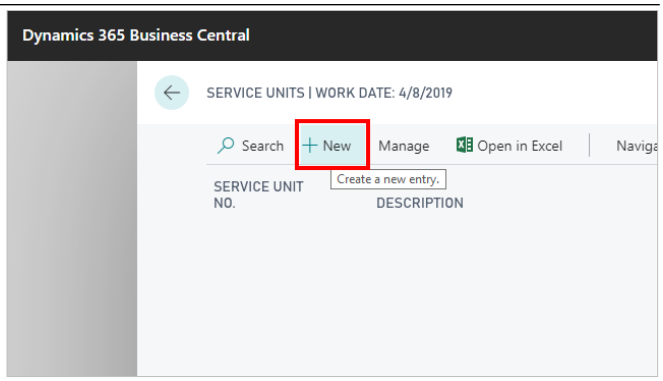
Click on the navigation menu item popup **Service Management**



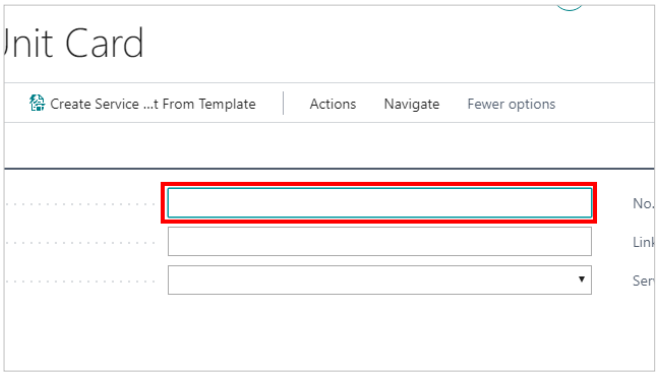
Click on the navigation menu item **Service Units**



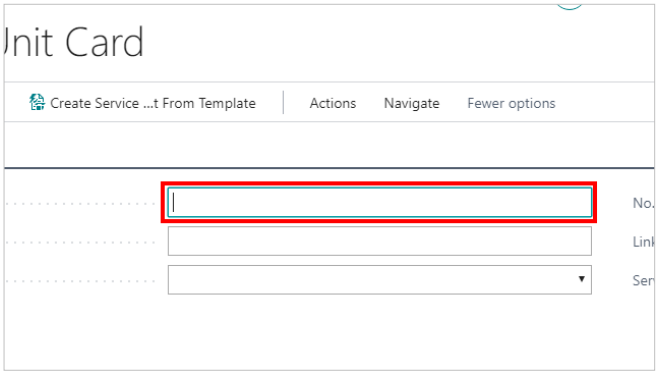
Click on the navigation menu item **New**



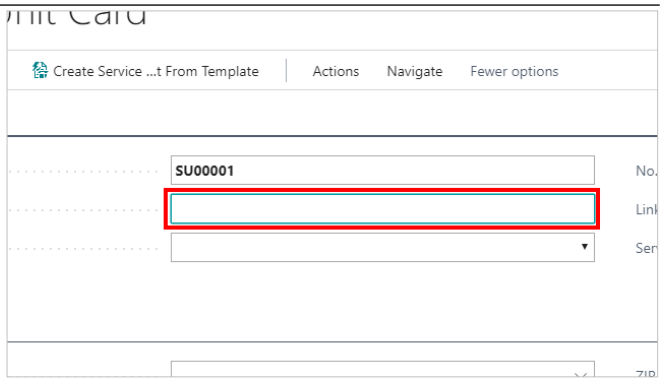
Click on the field **Service Unit No.**



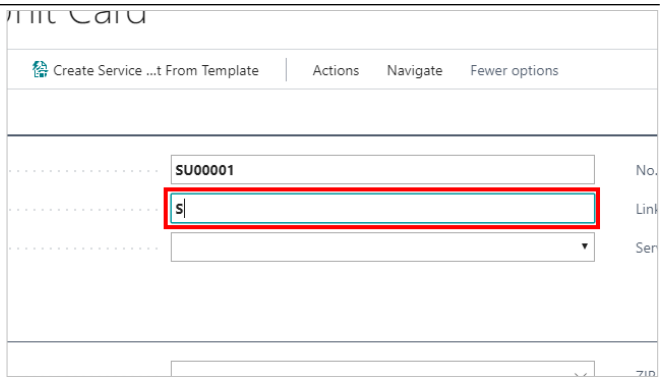
Press the **Enter** key.



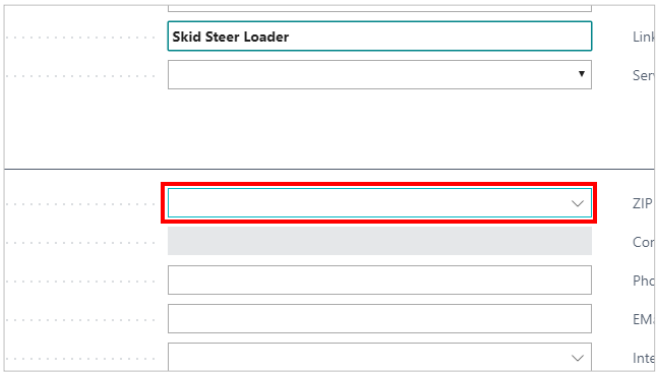
Click on the field **Description**



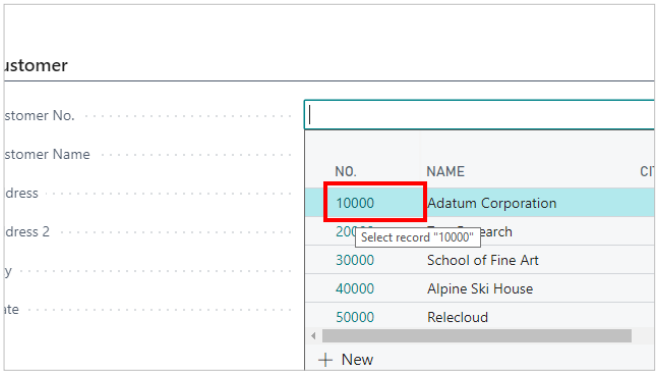
Enter the text **Skid Steer Loader**.



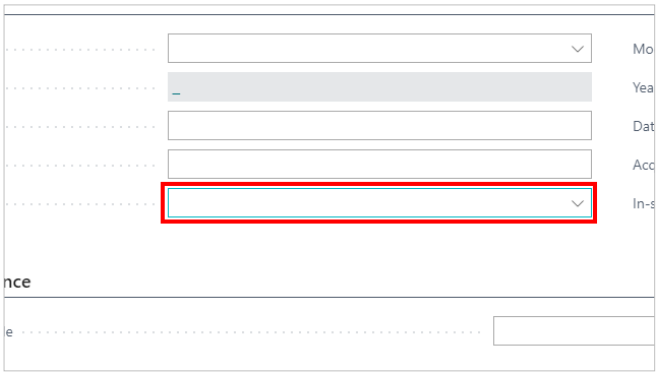
Click on the field **Customer No.**



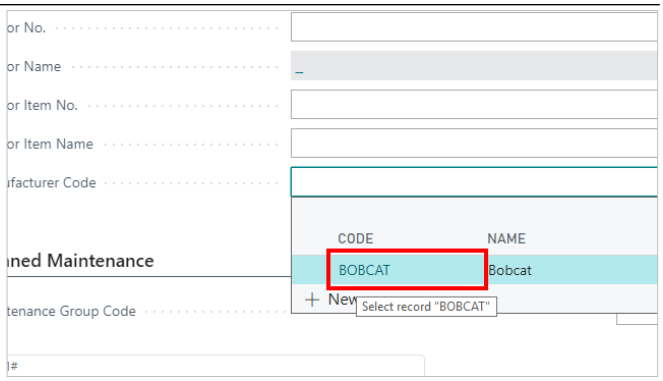
Click on the link in cell **No.** with the value **10000**



Click on the field **Manufacturer Code**

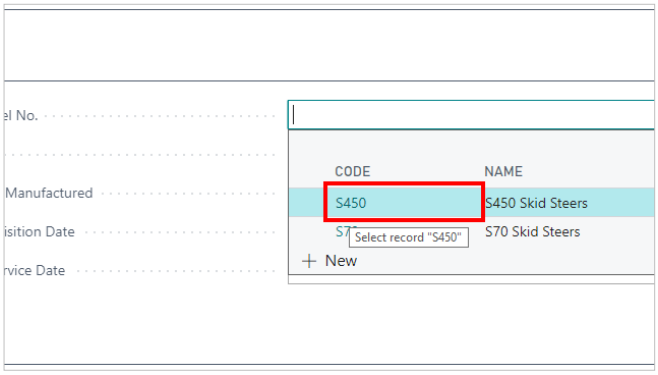


Click on the link in cell **Code** with the value **BOBCAT**



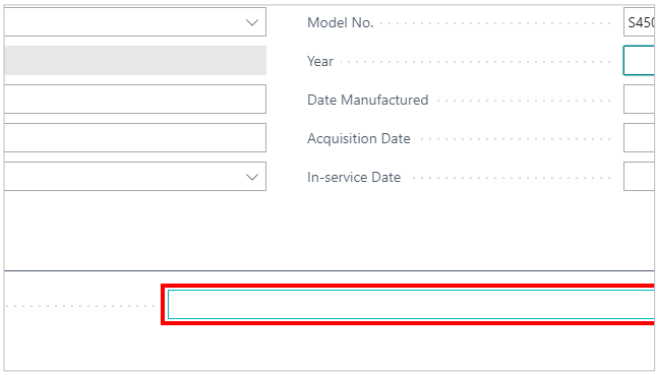
Click on the field **Model No.**

Click on the link in cell **Code** with the value **S450**

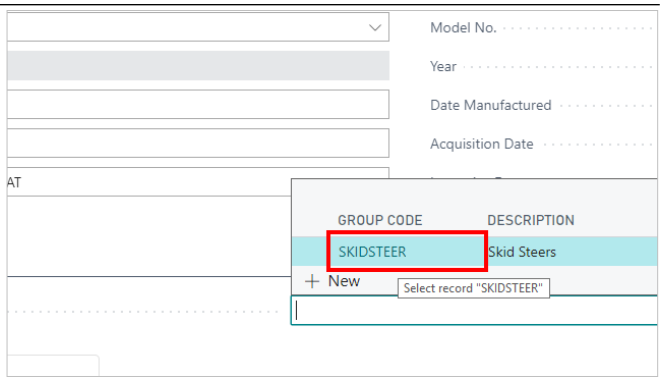


Click on the field **Maintenance Group Code**

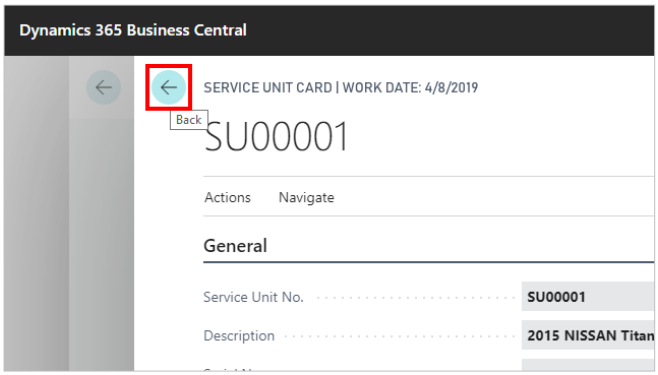
NOTE:
This field is mandatory in order to include this unit on a Service Quote or Service Ticket.



Click on the link in cell **Group Code** with the value **SKIDSTEER**



Click on the back button



2.8.4. How to Link a Service Unit to a Fixed Asset

Business Manager Profile

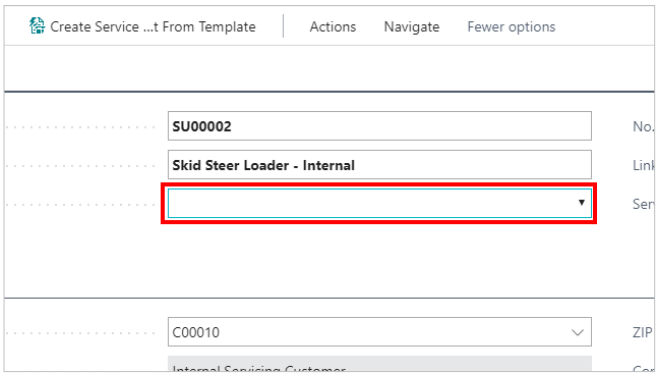
The following demonstrates how to link a Service Unit to a Fixed Asset.

The Fixed Asset and Service Unit for internal servicing were created prior to this example.

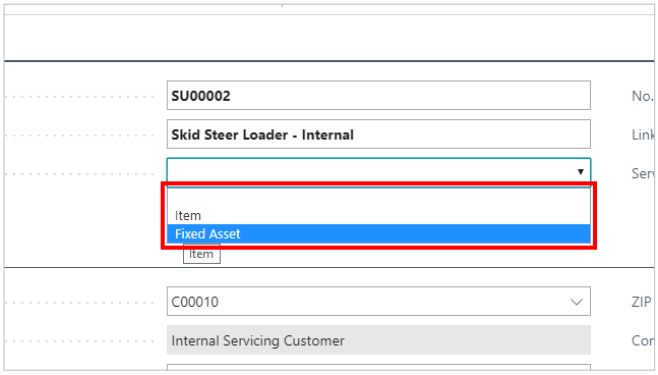
NOTE:

The same process can be used when linking to an Item by selecting the Link Type of Item.

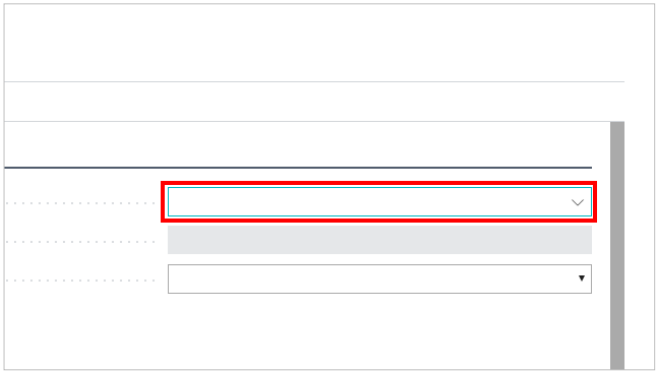
Click on the field **Link Type**



Click on the item **Fixed Asset** in the list

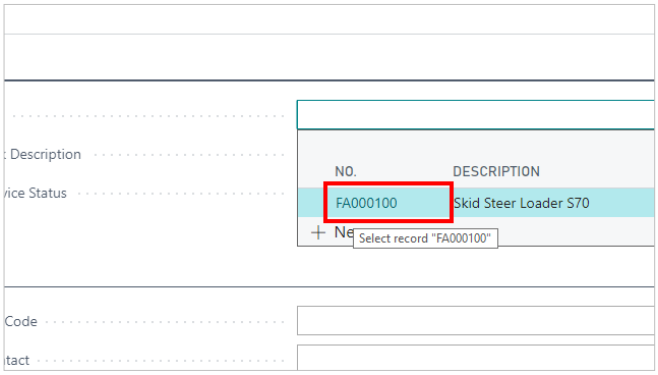


Click on the field **No.**



Click on the link in cell **No.** with the value **FA000100**

The No. field list is automatically filtered based on the Link Type selected.



The Link Description field can be refreshed by selecting F5 on your keyboard.

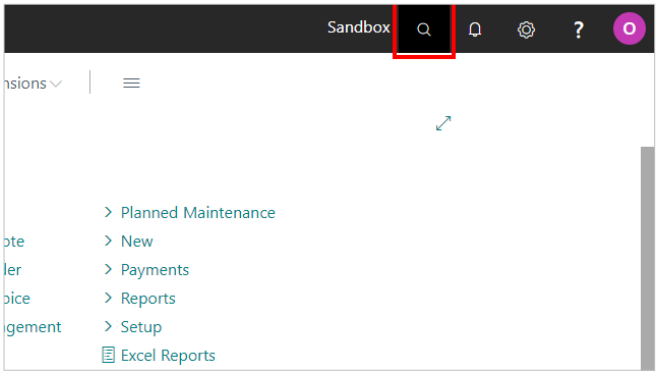
The field will be automatically updated when the unit card is closed.

2.8.5. How to Automatically Create a Service Unit from an Item

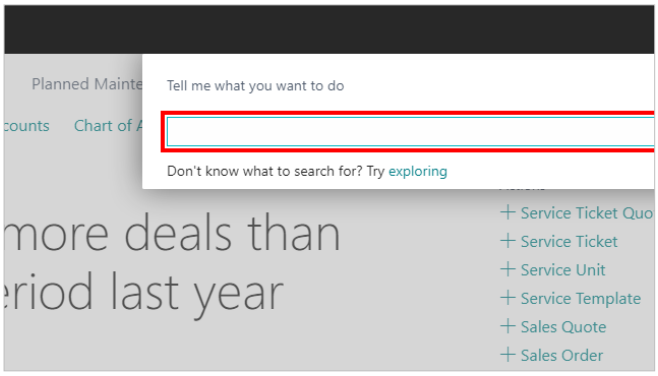
When using items that have SN tracking, It is possible for a Service Unit to be created automatically when an

item has been purchased or been sold to a customer. The item will then be used as a template to create a related Service Unit. The following demonstrates this process.

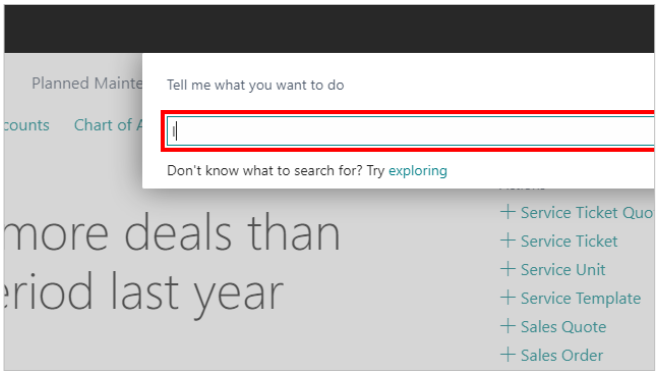
Click on the link **Tell me what you want to do. Quickly access actions, pages, reports, documentation, and apps and consulting services.**



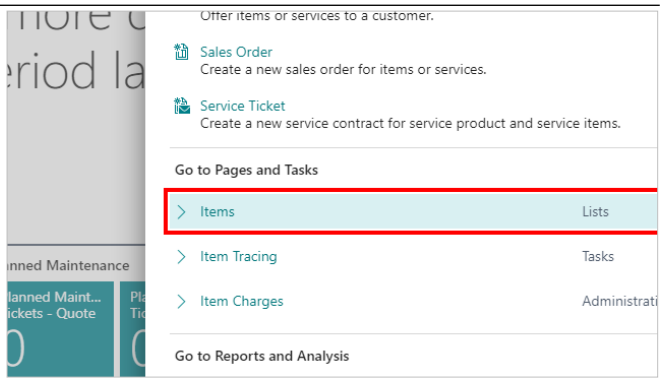
Click on the field **Type to start search:**



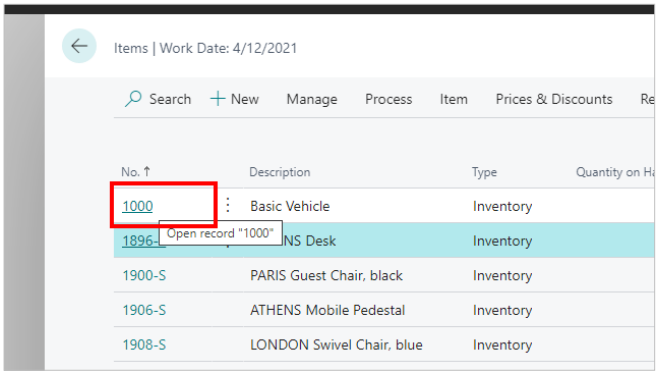
Enter the text **Item**.



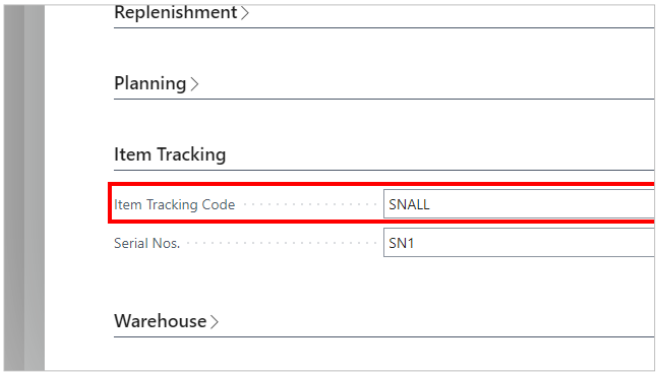
Click on **Items Lists**



Click on the link for the Item that you wish to use to create Service Units.

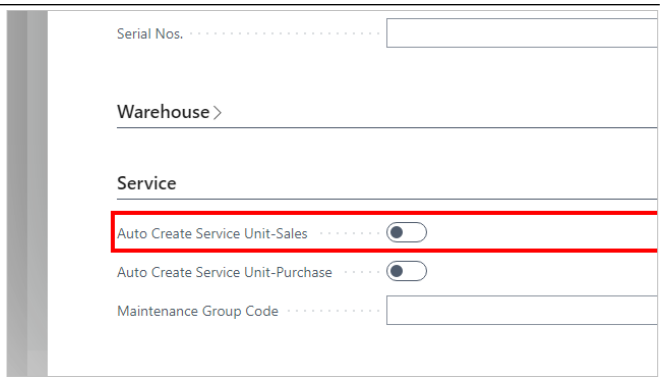


Ensure that the selected item has Serial Numbers enabled.

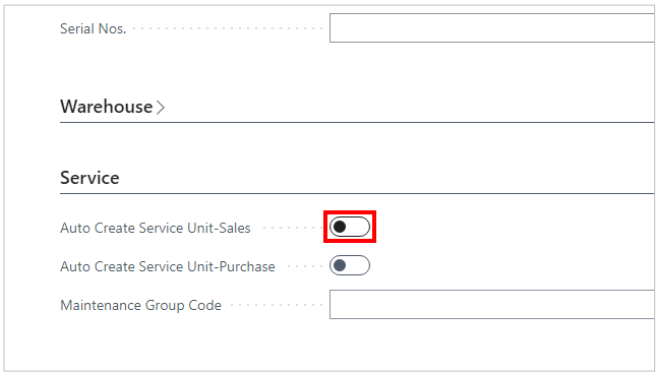


Under the Service Tab in the Item card, there are options to set up automatically creating service units when selling and when purchasing.

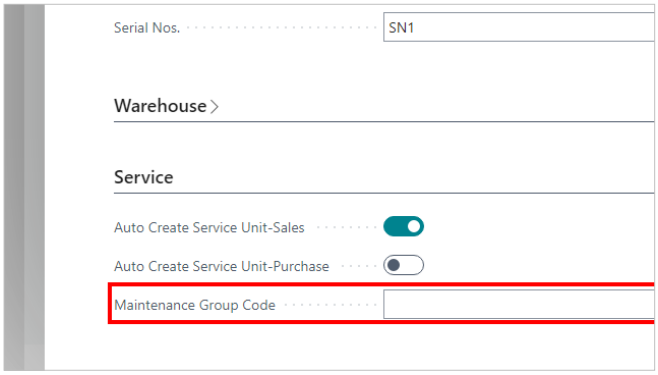
For demonstration purposes we will use Sales, however a similar process can be used to setup and process automatic creation on purchase.



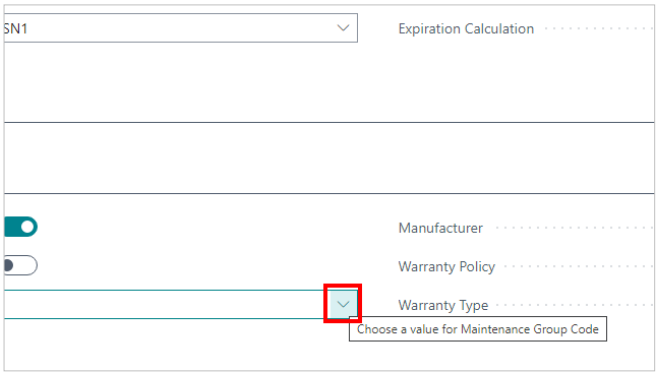
Click on the toggle field **Auto Create Service Unit-Sales**



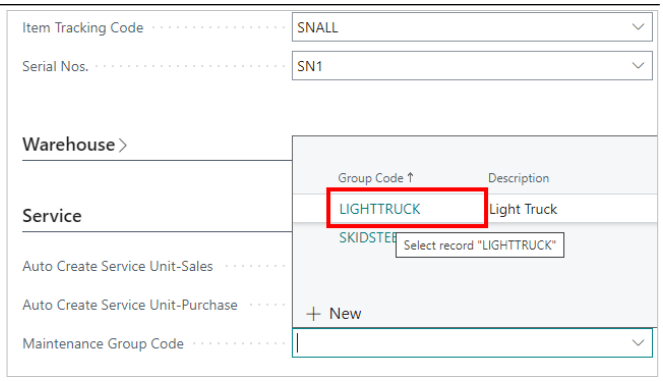
A Maintenance Group Code must also be selected. This is the Maintenance Group Code that will be used on the Service Unit created after this item is sold.



Click on the lookup button **Maintenance Group Code**

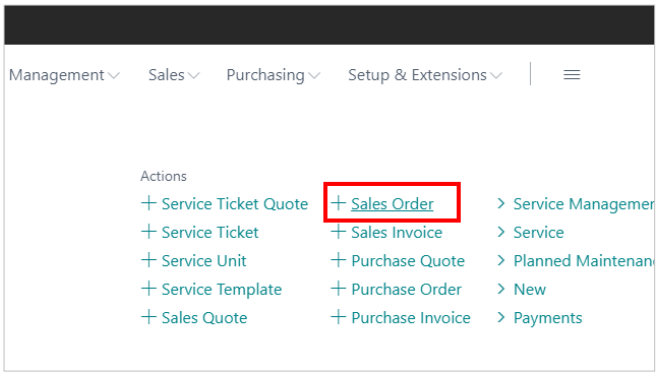


Click on the link in cell **Group Code** with the value **LIGHTTRUCK**

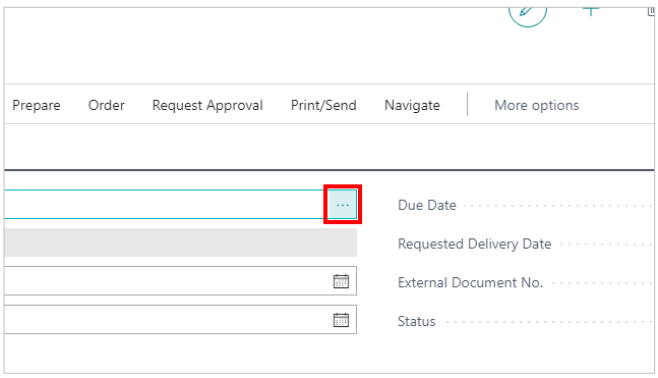


Once the item card has been set up, a Service Unit will be created any time the item is sold.

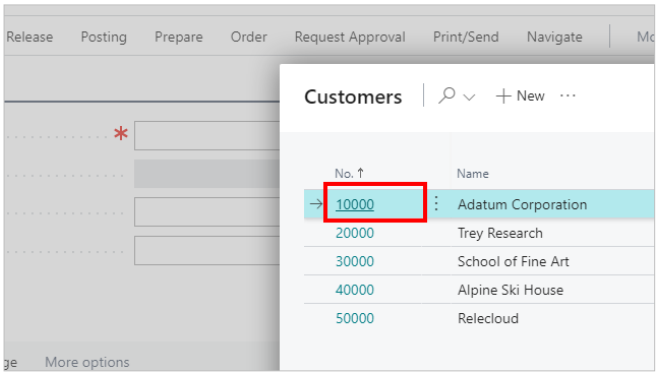
Click on the navigation menu item **Sales Order**



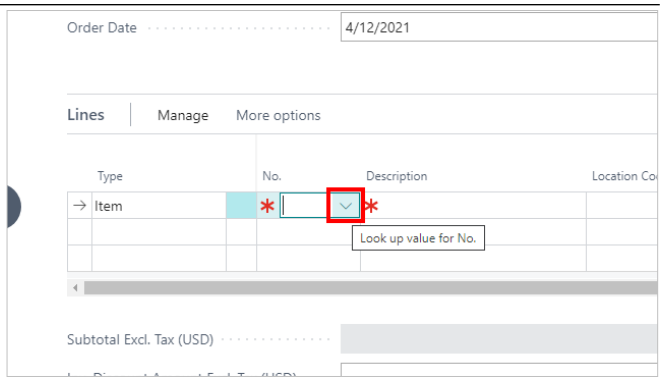
Click on the lookup button **Customer Name**



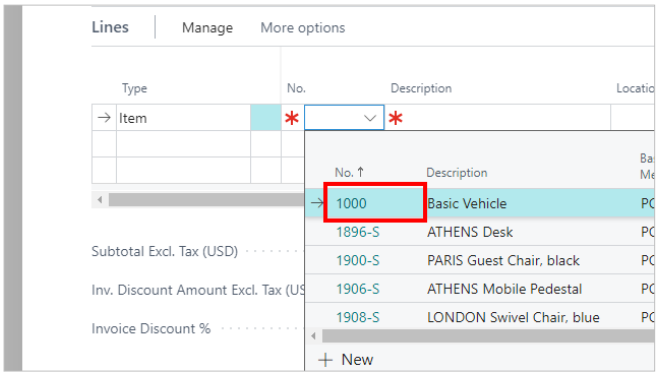
Click on the link in cell **No.** with the value **10000**



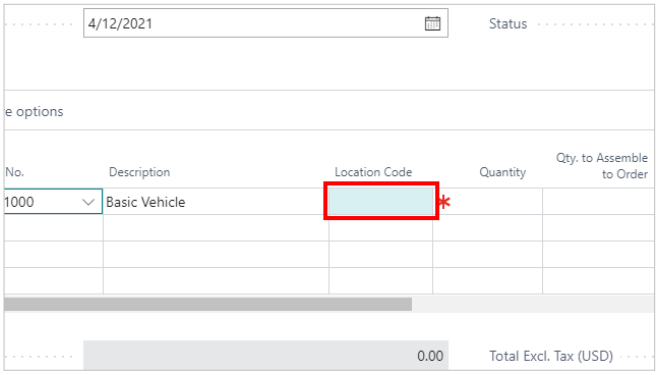
Click on the lookup button in the cell **No.**



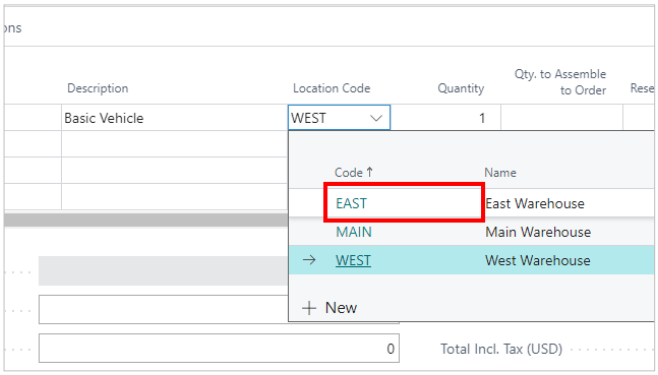
Click on the link in cell **No.** with the value **1000**
Note that the customer selected is the customer that will be assigned to the Service Unit that gets created.



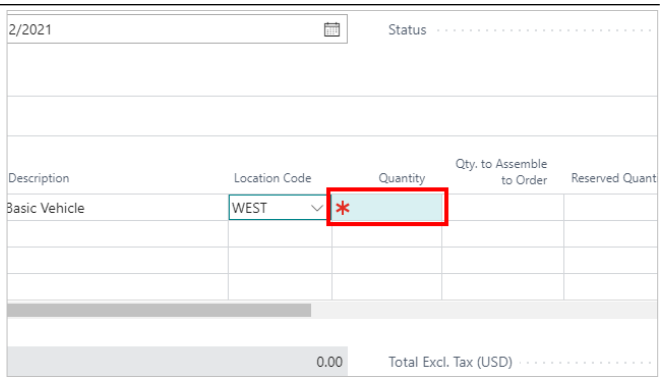
Click on the cell **Location Code**



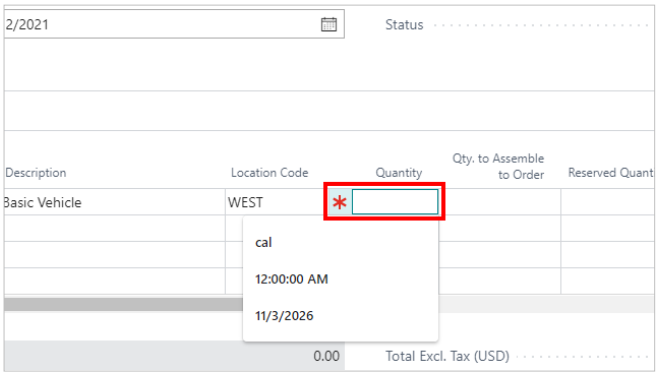
Click on the link in cell **Code** with the value **EAST**



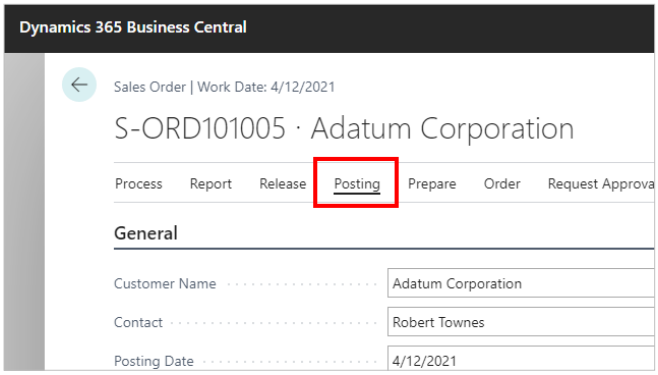
Click on the cell **Quantity**



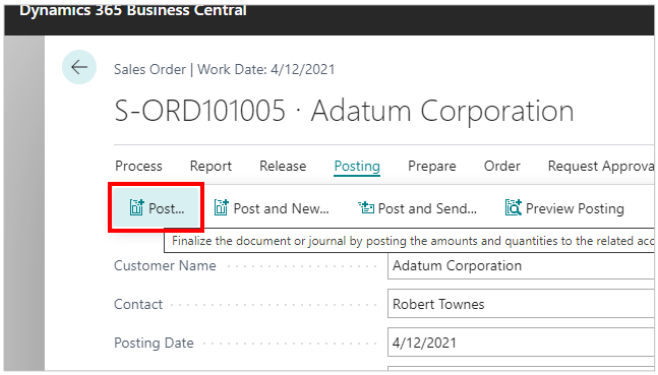
Enter the text **1**.



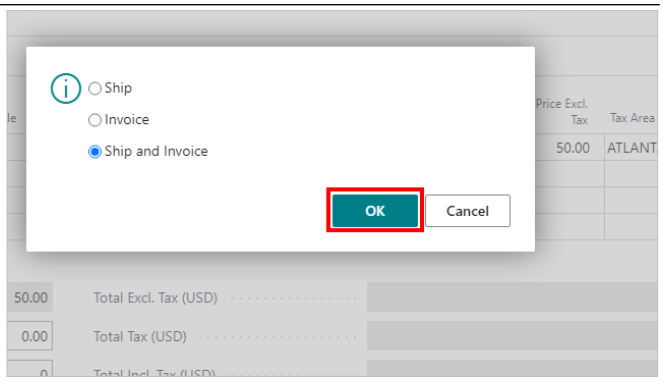
Click on the navigation menu item popup **Posting**



Click on the navigation menu item **Post...**

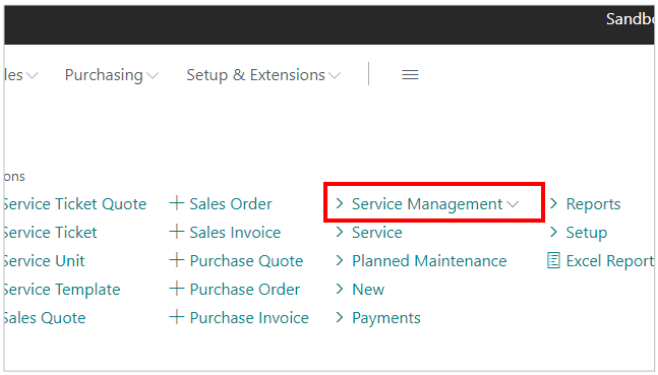


Click on the button **OK**

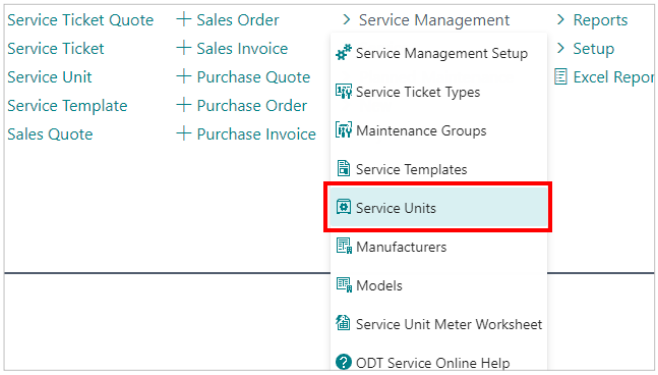


After the sale, a new Service Unit will have been created.

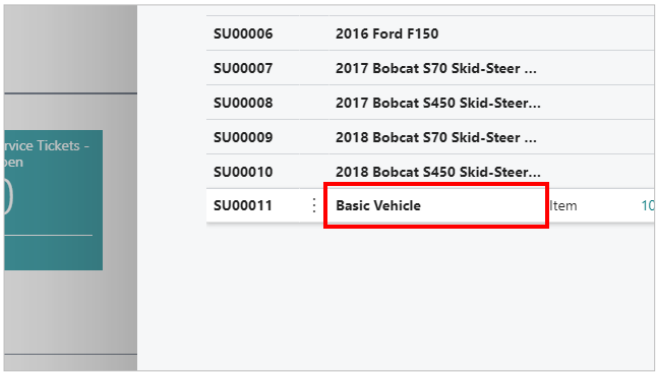
Click on the navigation menu item popup **Service Management**



Click on the navigation menu item **Service Units**



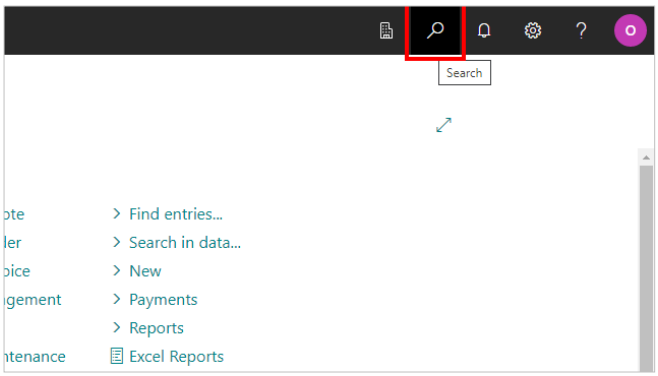
Notice that a new Service Unit has been created based on the item that was sold.



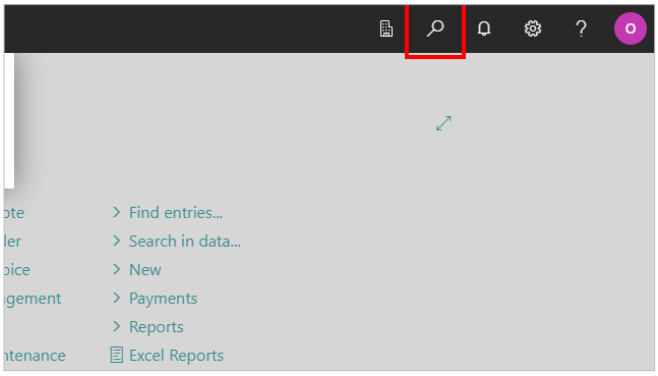
2.8.6. How to Automatically Create a Service Unit from a Fixed Asset

It is possible for a Service Unit to be created automatically when a Fixed Asset is purchased or sold. The Fixed Asset will be used as a template to create a related Service Unit. The following demonstrates this process.

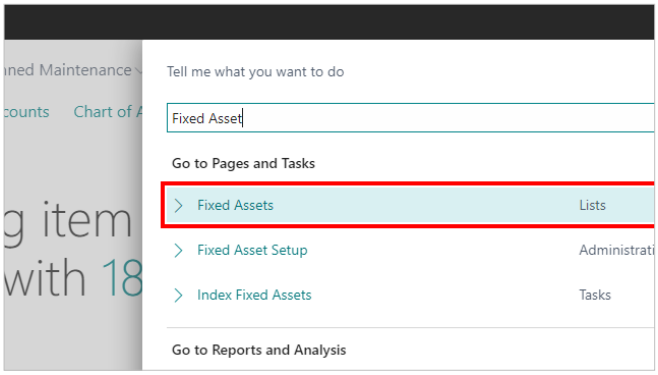
Click on the button **Search**



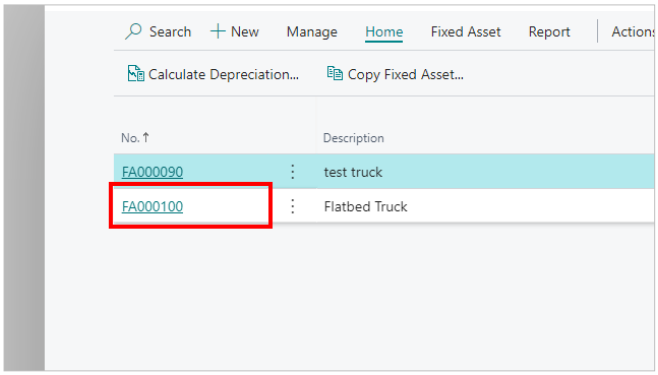
Enter the text **Fixed Asset**.



Click on **Fixed Assets Lists**

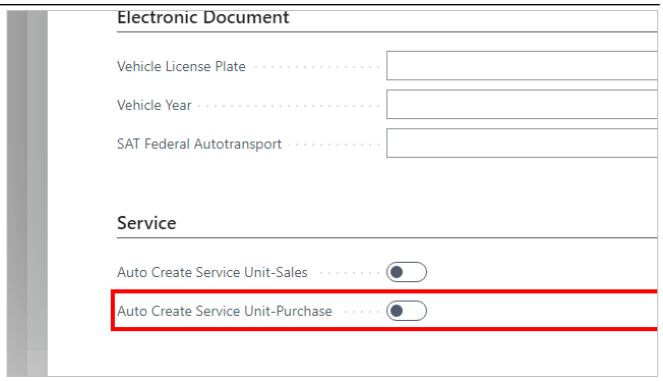


Click on the link in cell **No.** with the value **FA000100**

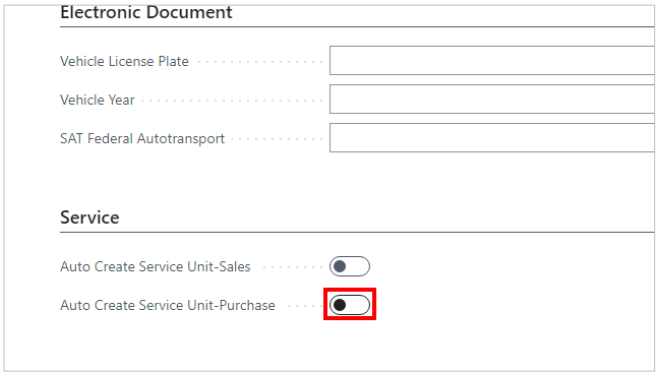


Under the Service tab of the Fixed Asset, there are options to enable Automatically Creating Service Units on sale and on purchase.

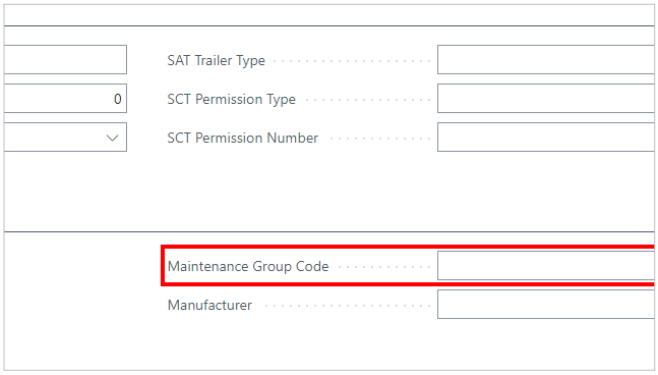
For demonstration purposes we will use Purchase, however a similar process can be used to enable and process Automatically Creating units when selling.



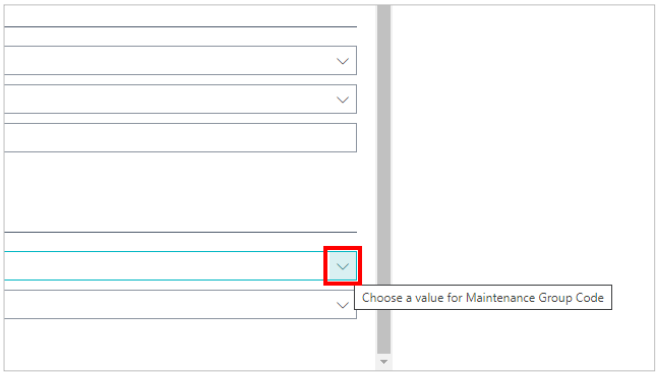
Click on the toggle field **Auto Create Service Unit-Purchase**



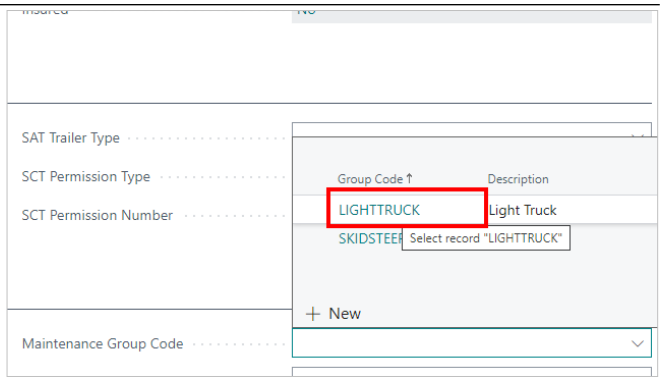
A Maintenance Group Code must also be selected. This is the Maintenance Group Code that will be used on the Service Unit created after this Fixed Asset is purchased.



Click on the lookup button **Maintenance Group Code**

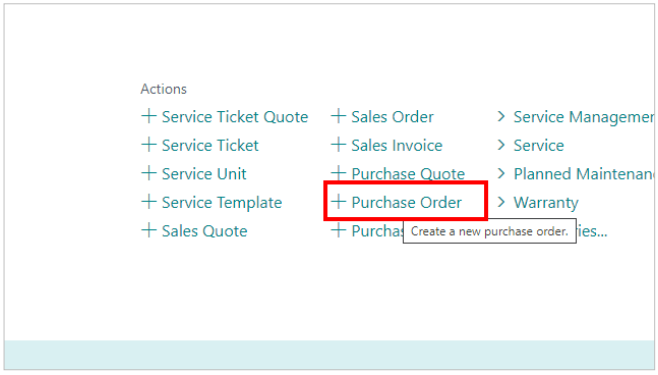


Click on the link in cell **Group Code** with the value **LIGHTTRUCK**

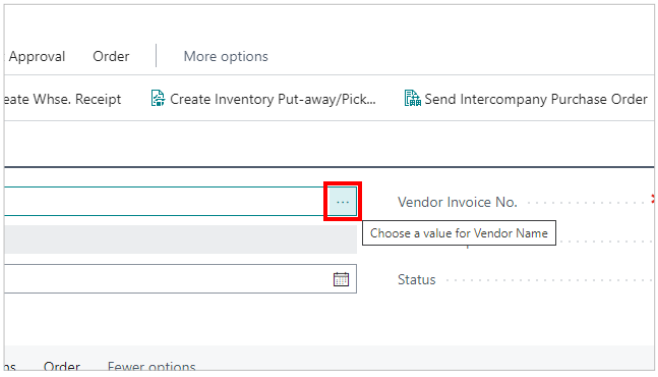


Once the Fixed Asset card has been set up, a Service Unit will be created any time the Fixed Asset is purchased.

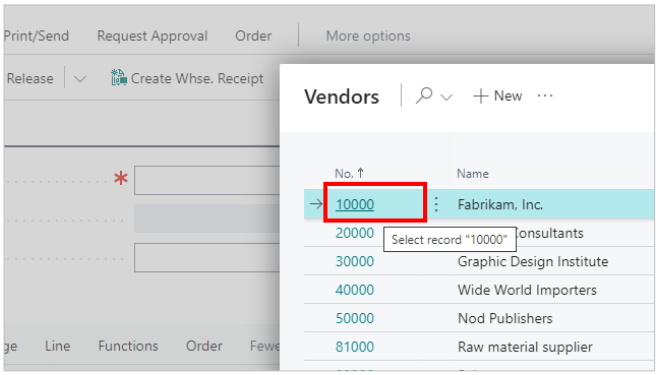
Click on the navigation menu item **Purchase Order**



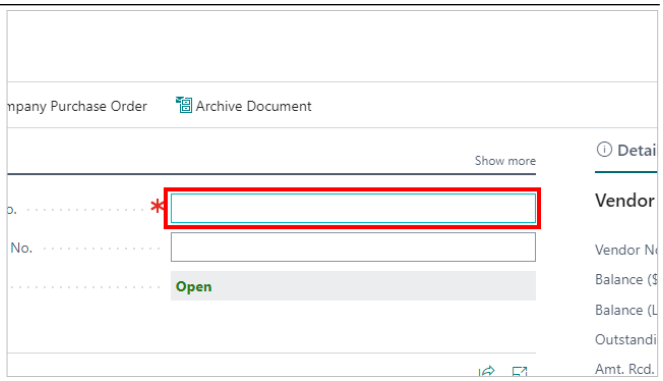
Click on the lookup button **Vendor Name**



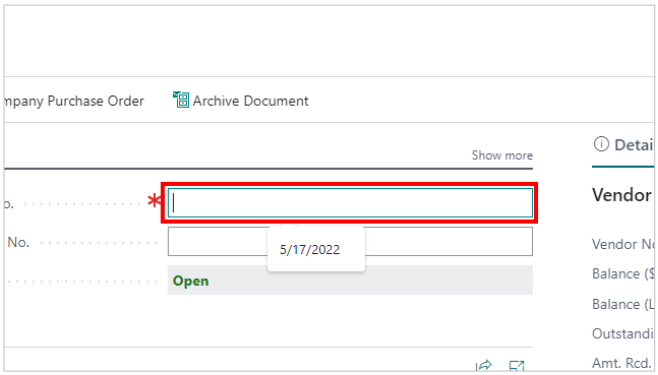
Click on the link in cell **No.** with the value **10000**



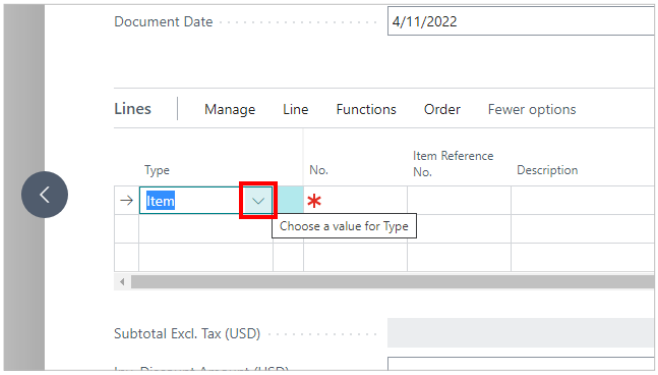
Click on the field **Vendor Invoice No.**



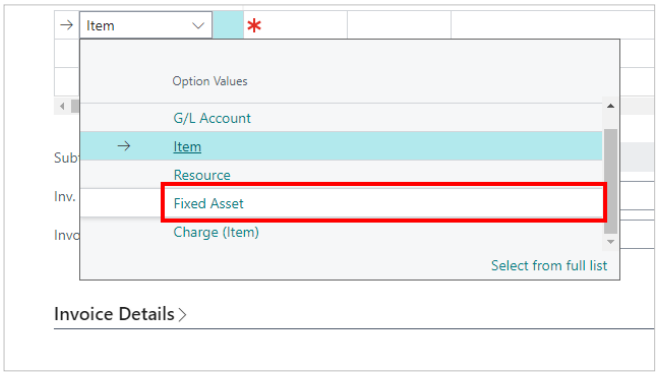
Enter the text **12345**.



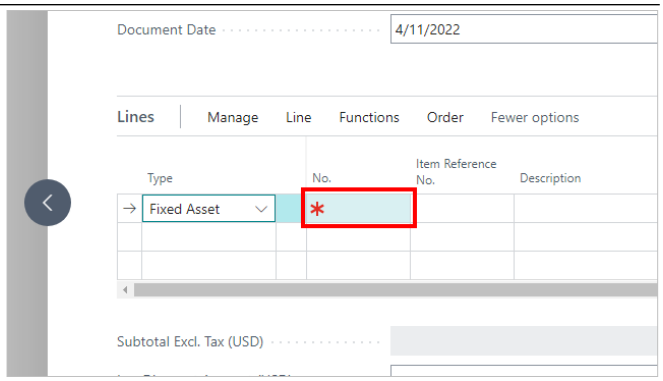
Click on the lookup button in the cell **Type**



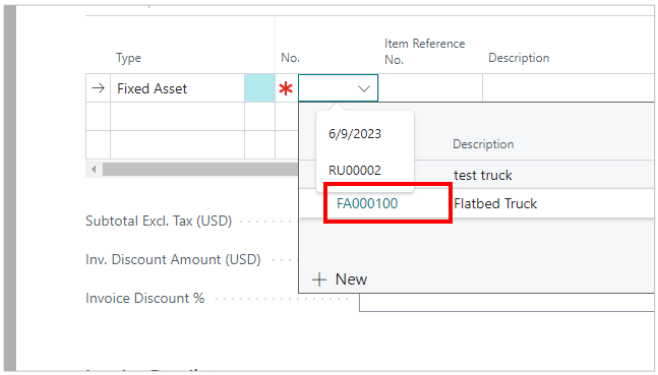
Click on the link in cell **Option Values** with the value **Fixed Asset**



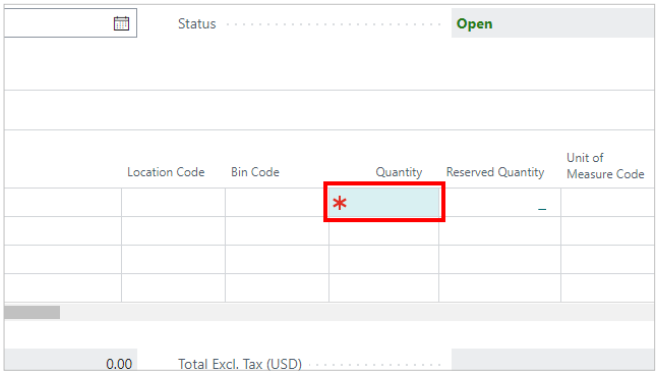
Click on the cell **No.**



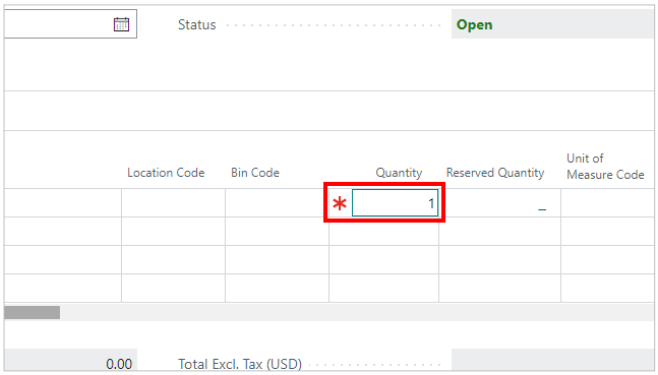
Click on the link in cell **No.** with the value **FA000100**



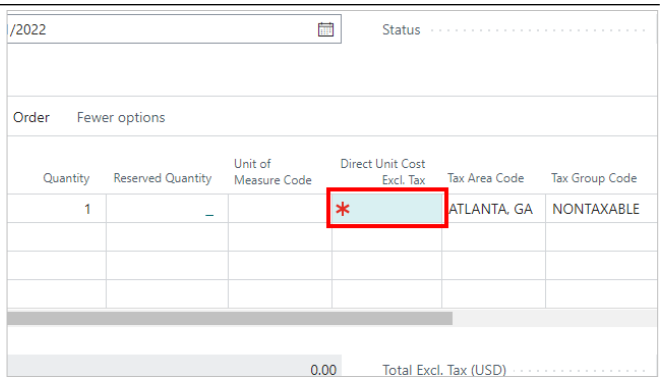
Click on the cell **Quantity**



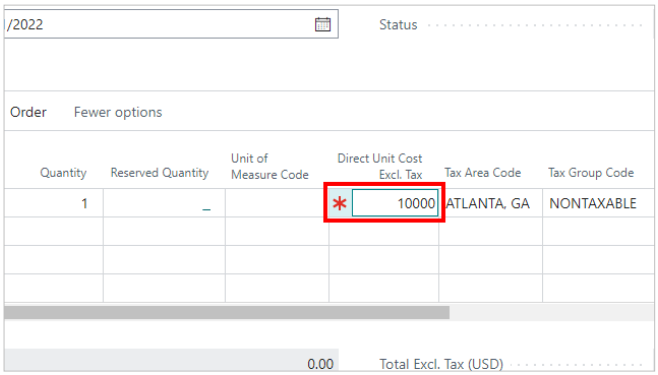
Enter the text **1**.



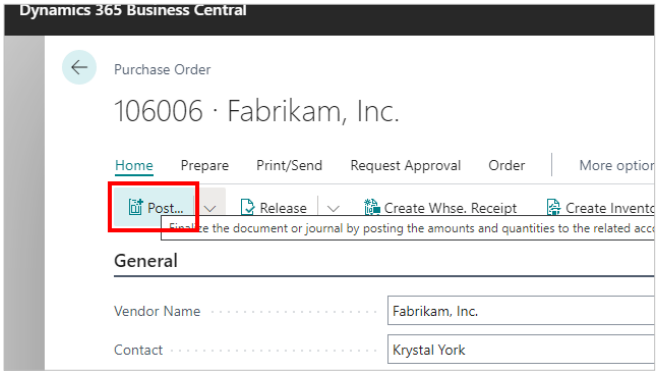
Click on the cell **Direct Unit Cost Excl. Tax**



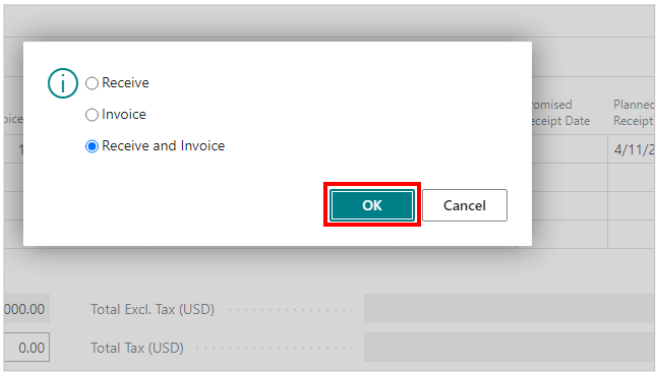
Enter the text **10000**.



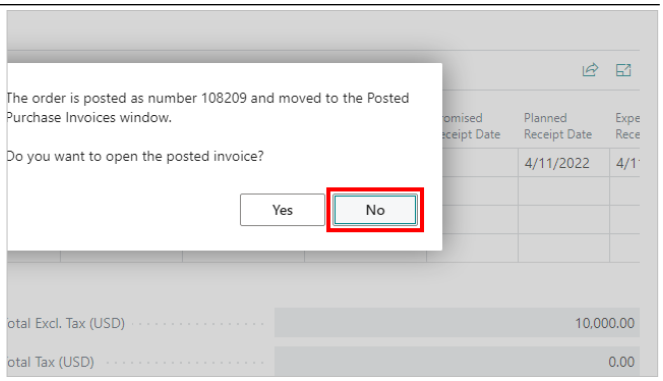
Click on the navigation menu item **Post...**



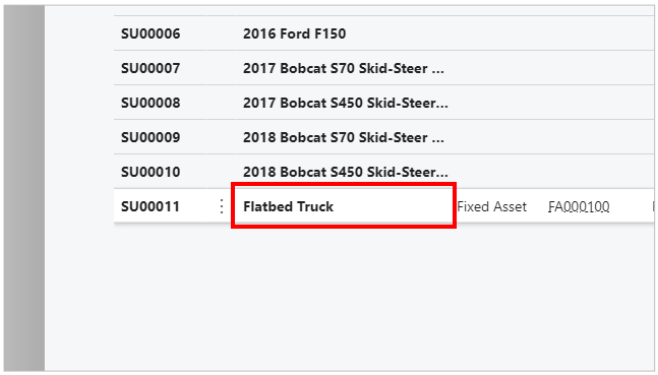
Click on the button **OK**



Click on the button **No**



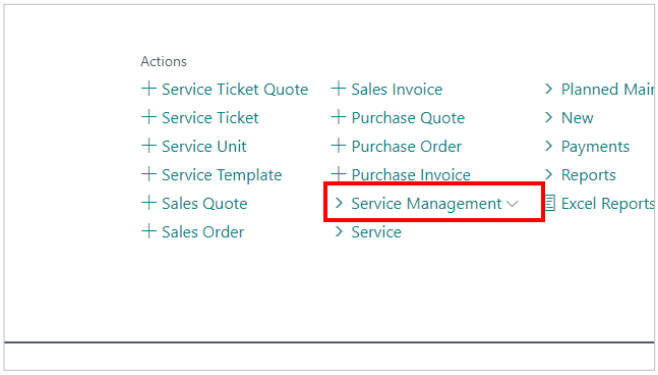
Notice that a new Service Unit has been created based on the Fixed Asset that was purchased.



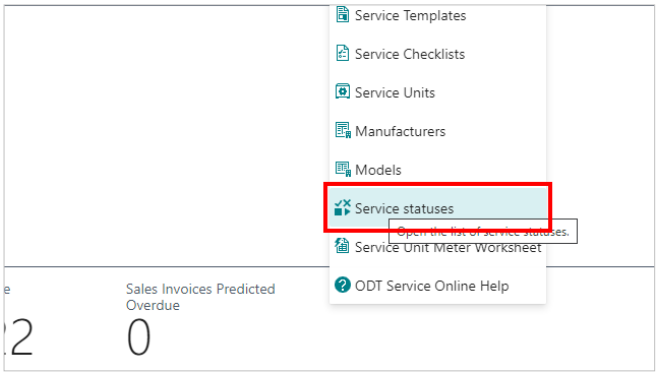
2.9. How to Setup Service Status

The following demonstrates how to set up a list of Service statuses for use with service tickets.

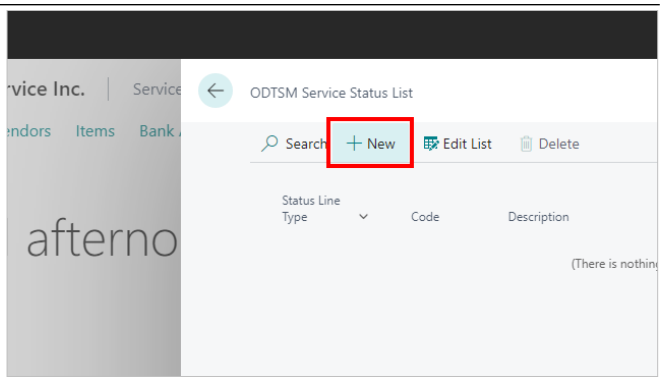
Click on the navigation menu item popup **Service Management**



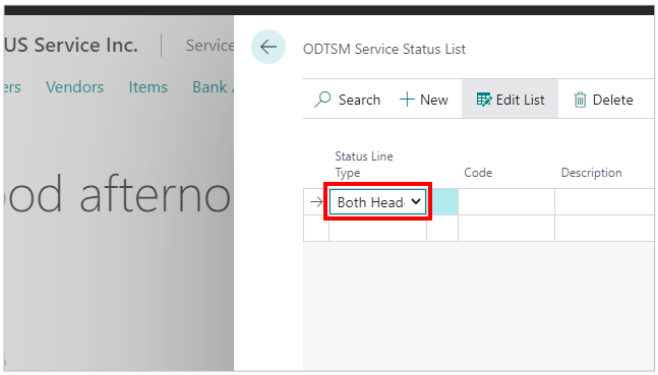
Click on the navigation menu item **Service statuses**



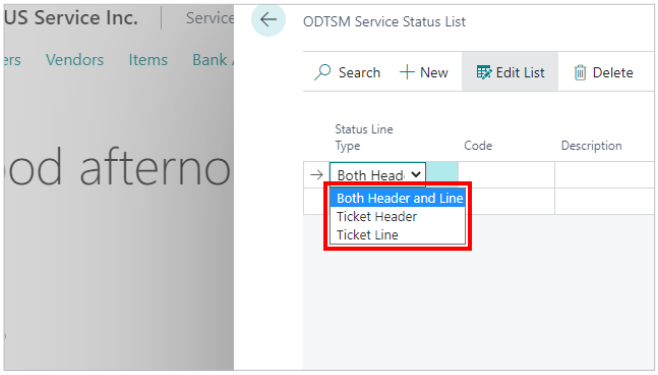
Click on the navigation menu item **New**



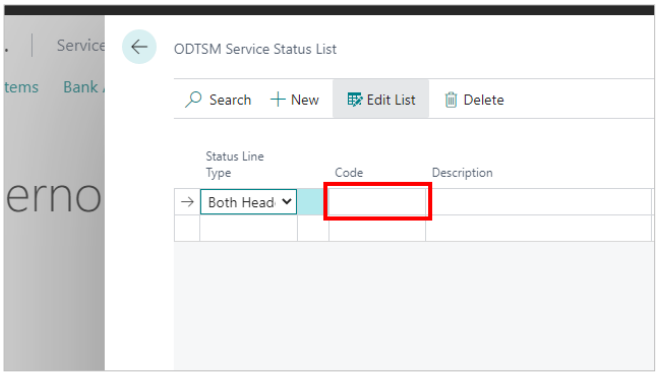
Click on the cell **Status Line Type**



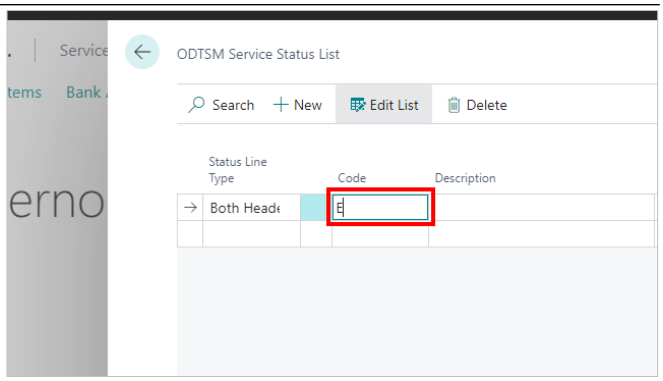
A Service Status can be set to apply to the Ticket Header, the Ticket Line, or both. This example will be set to both.
Click on the value Both Header and Line Ticket Header Ticket Line



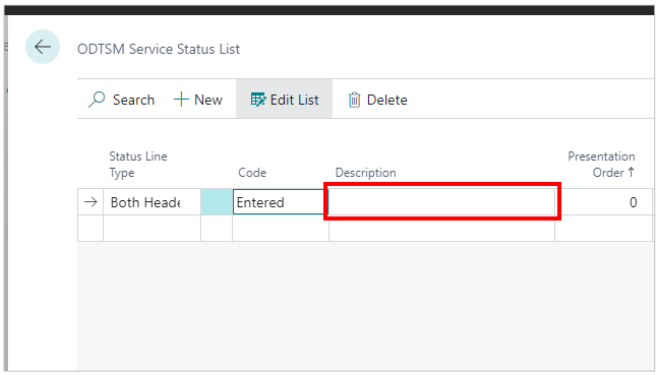
Click on the cell **Code**



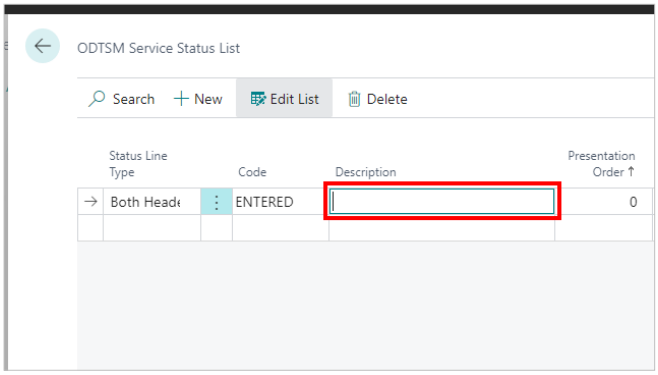
Enter the text **Entered**.



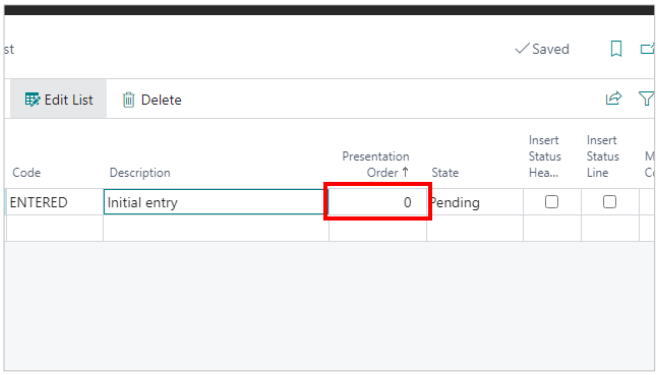
Click on the cell **Description**



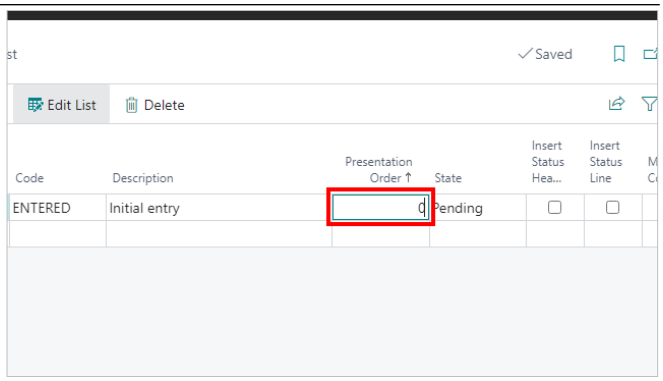
Enter the text **Initial entry**.



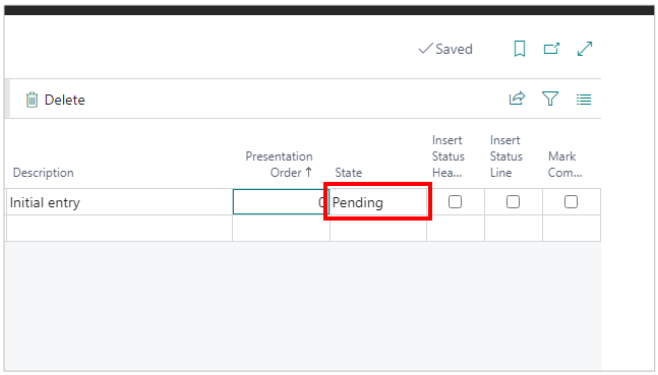
Click on the cell **Presentation Order** with the value **0**



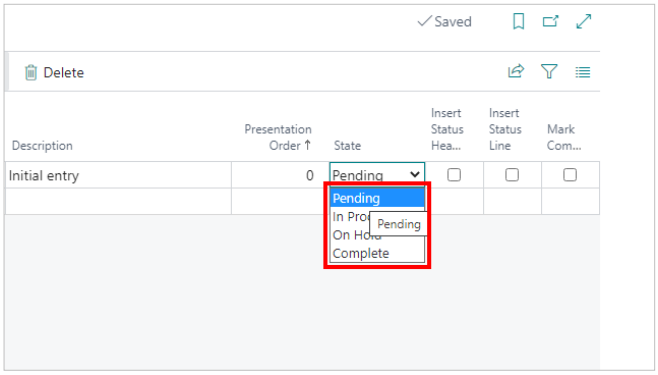
Presentation Order indicates at what position in the lookup list this status will appear. If you wish for certain statuses to appear closer to the top of the list or organized a certain way, the Presentation Order can be changed to allow this.
Enter the text **0**.



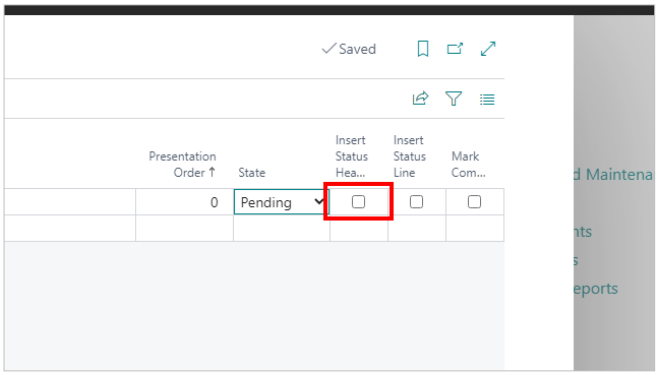
Click on the cell **State**



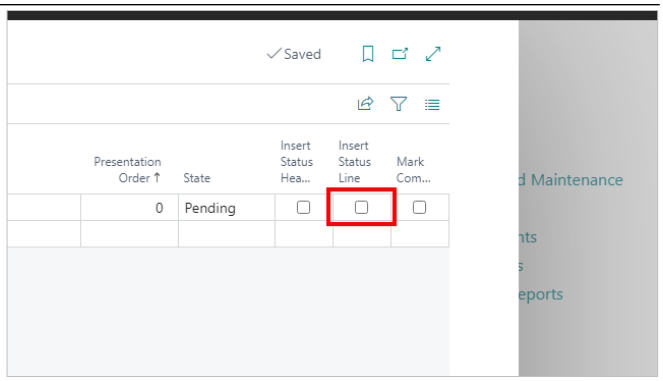
click on the option Pending



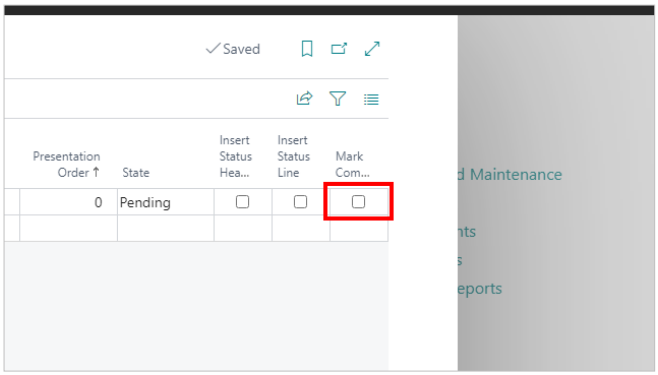
The **Insert Status Header** option will automatically assign this status to the header of a Service Ticket upon ticket creation.



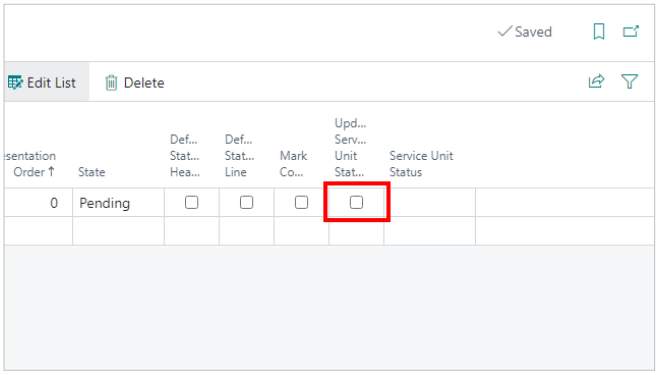
The **Insert Status Line option** will automatically assign this status to a Ticket Line when a line is added to a Service Ticket



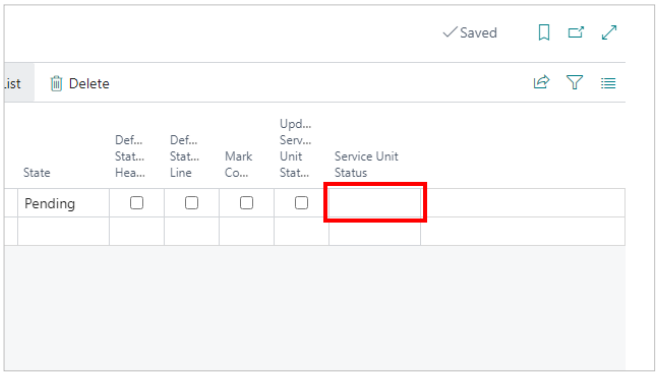
The **Mark Complete** option will automatically attempt to mark the Service Ticket as complete when this status is assigned to the Service Ticket header



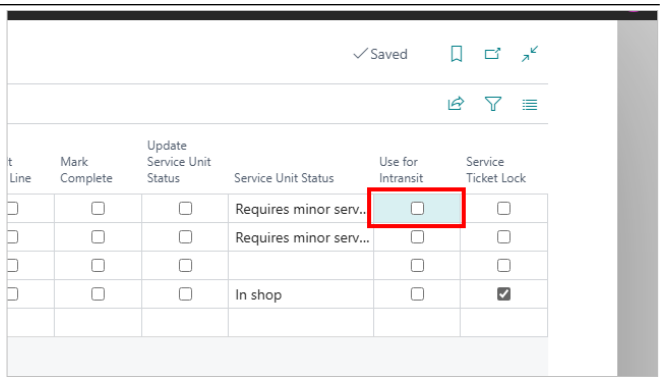
The **Update Service Unit Status** option will cause the status of the Service Unit to change when this ticket status is selected.



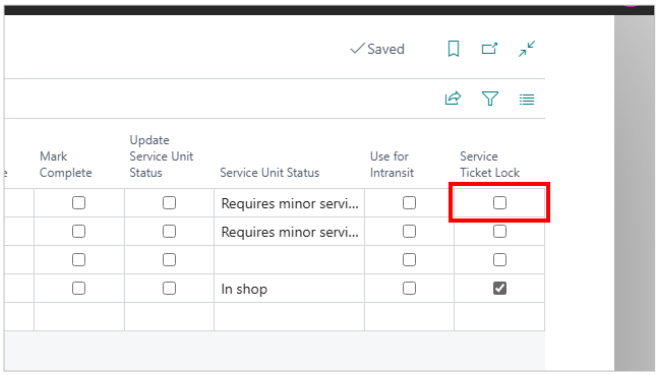
The **Service Unit Status** field specifies what status is assigned to the Service Unit when Update Service Unit Status is enabled.



The **Use for Intransit** field will toggle if this status will be used when a technician is sent to perform service.



The **Service Ticket Lock** field will determine if a service ticket is locked when the status is assigned. Locked tickets cannot be modified until the status is changed, but they can still be invoiced and have the actuals confirmed.



2.10.Service Planned Maintenance Setup

2.10.1. How to Setup Service Unit Meters

2.10.1.1. Overview

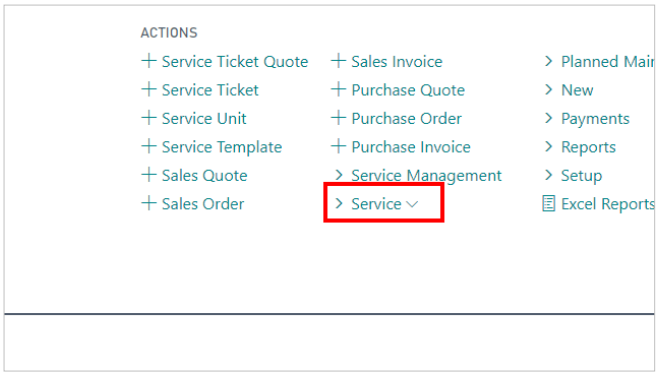
Service Unit Meters provide a way to keep track of usage information such as mileage and hours of service.

Assigning a Service Unit Meter is required in order to use Planned Maintenance functions.

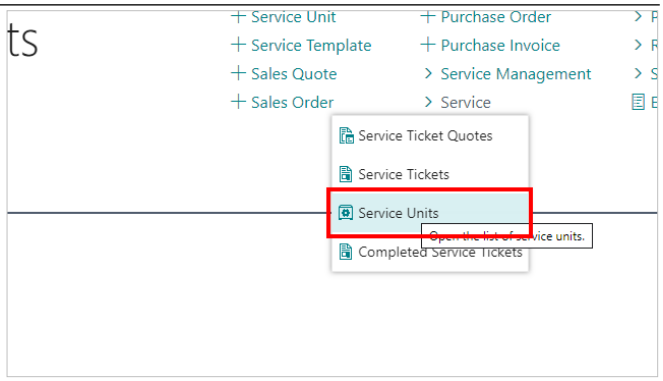
2.10.1.2. How to Setup a Service Unit Meter

Business Manager Profile

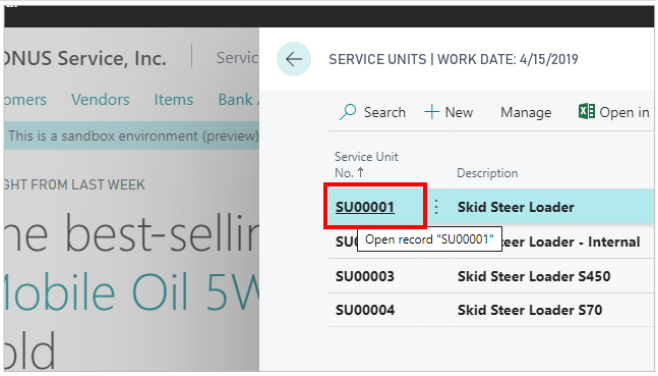
Click on the navigation menu item popup **Service**



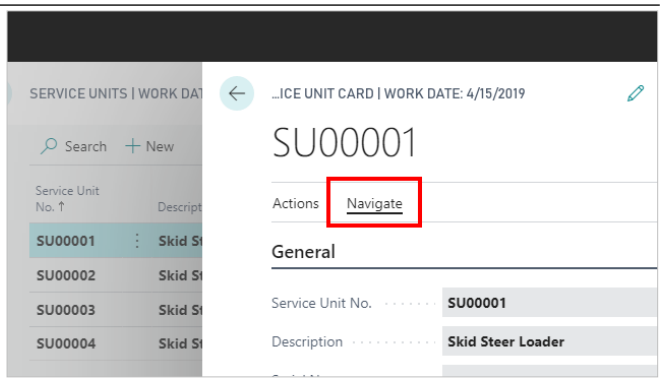
Click on the navigation menu item **Service Units**



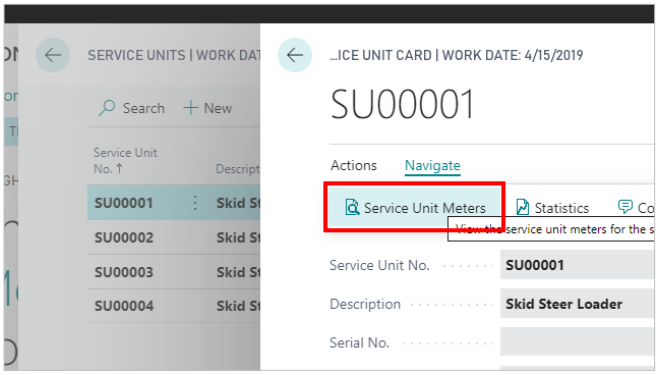
Click on the link in cell **Service Unit No.** with the value **SU00001**



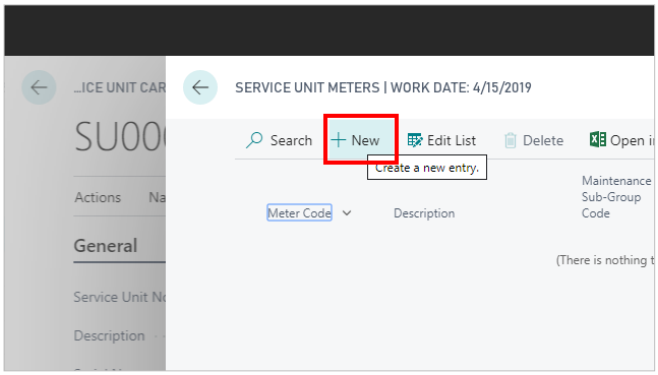
Click on the navigation menu item popup **Navigate**



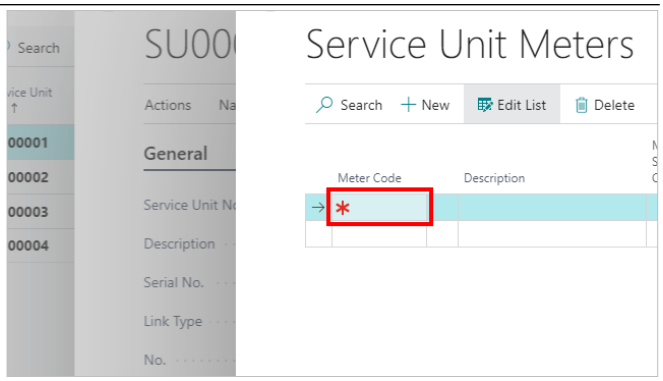
Click on the navigation menu item **Service Unit Meters**



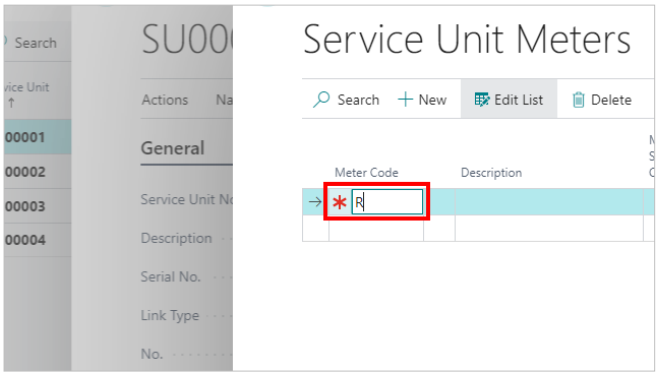
Click on the navigation menu item **New**



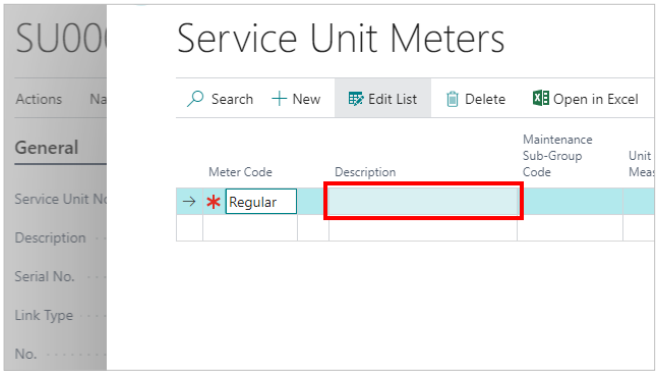
Click on the cell **Meter Code**



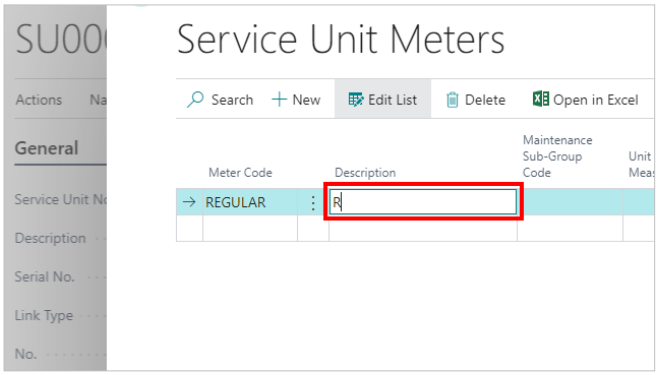
Enter the text **Regular**.



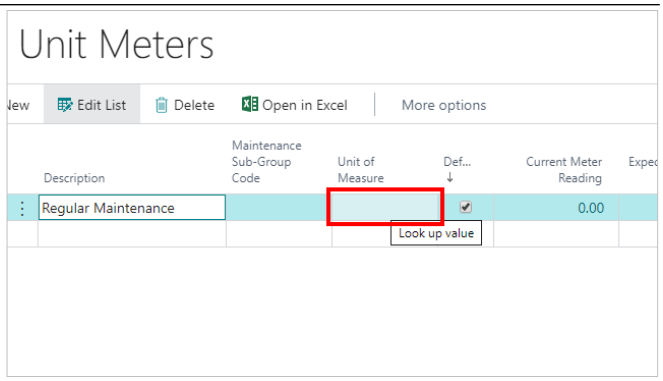
Click on the cell **Description**



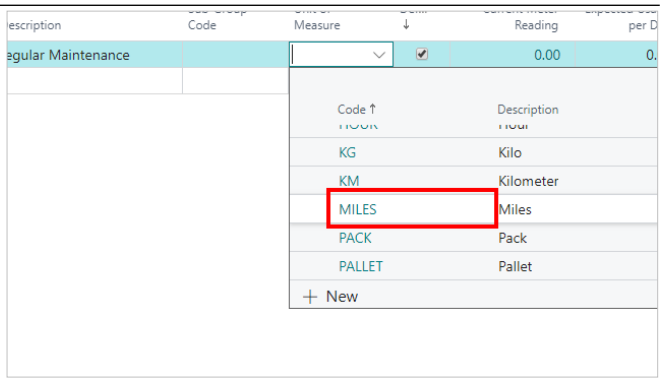
Enter the text **Regular Maintenance**.



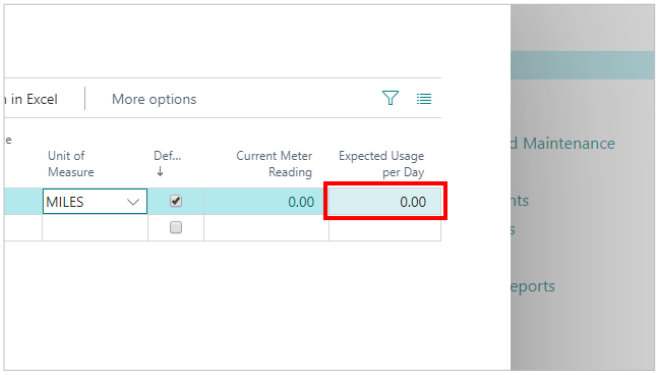
Click on the cell **Unit of Measure**



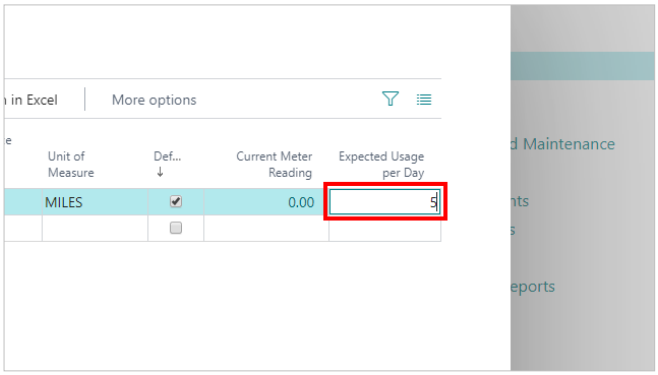
Click on the link in cell **Code** with the value **MILES**



Click on the cell **Expected Usage per Day** with the value **0.00**



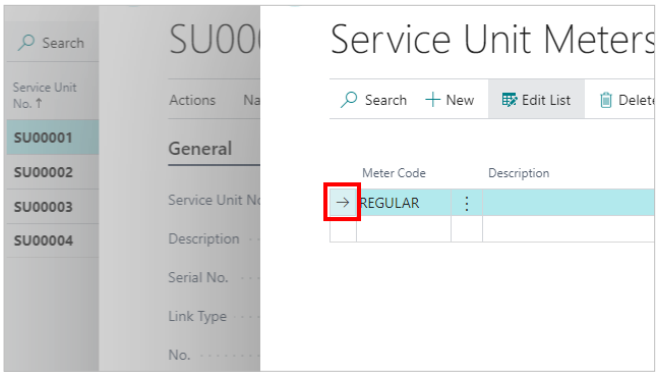
Enter the text **50**.



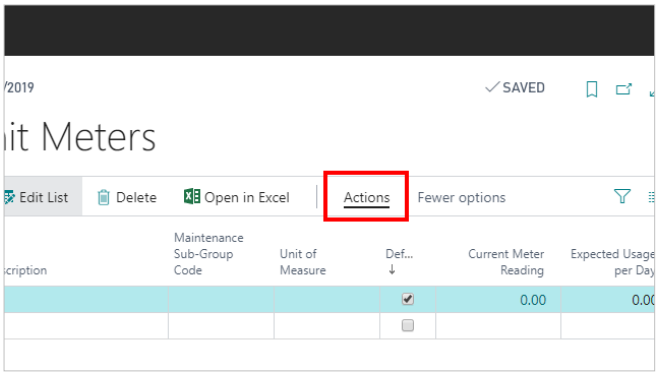
2.10.1.3. How to Update a Service Unit Meter

Business Manager Profile

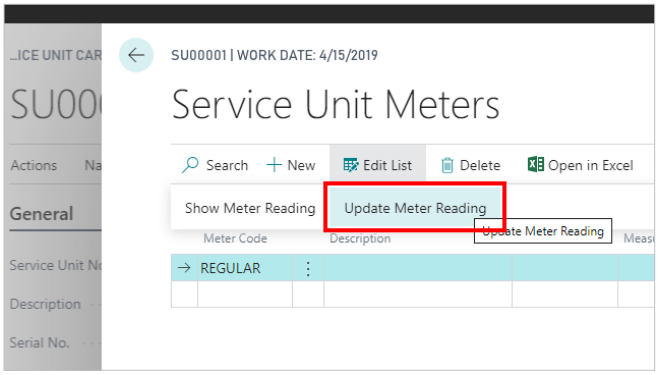
Click on the Service Meter.



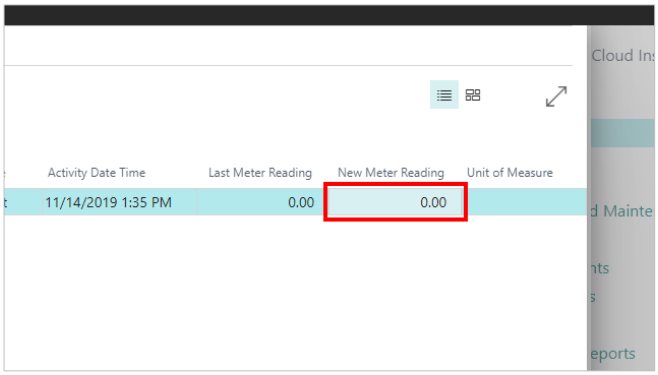
Click on the navigation menu item popup **Actions**



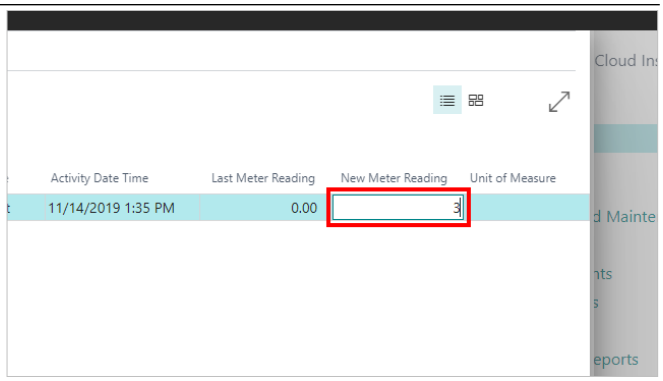
Click on the navigation menu item **Update Meter Reading**



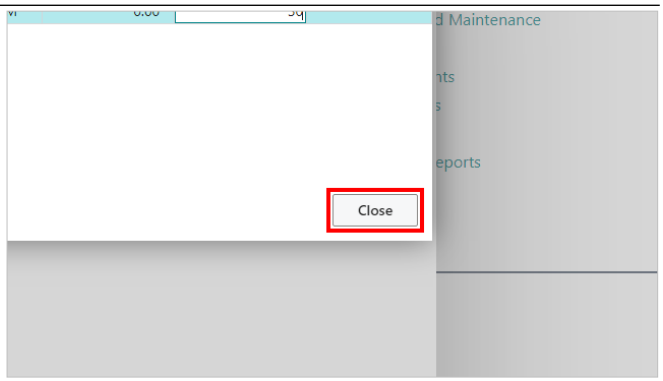
Click on the cell **New Meter Reading** with the value **0.00**



Enter the text **30**.



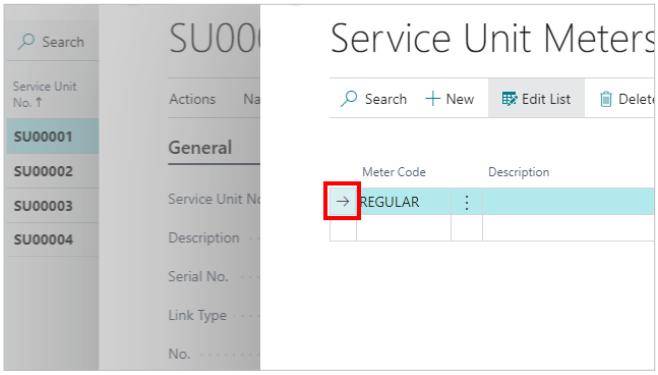
Click on the button **Close**



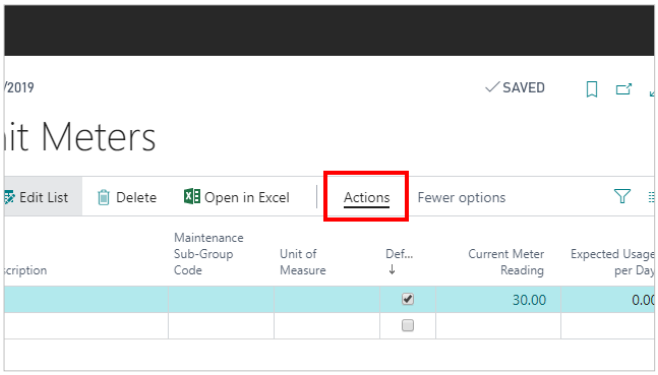
2.10.1.4. How to View Service Meter Usage History

Business Manager Profile

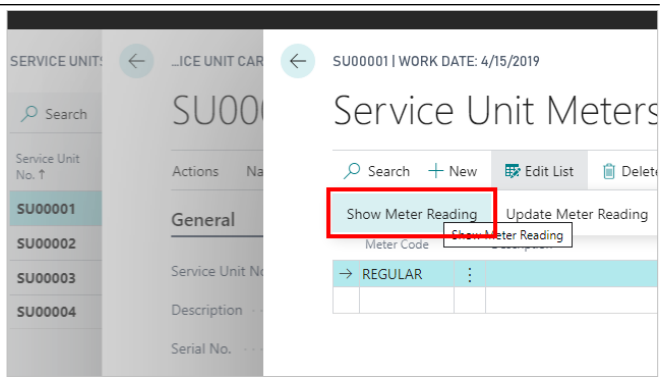
Click on the Service Meter.



Click on the navigation menu item popup **Actions**



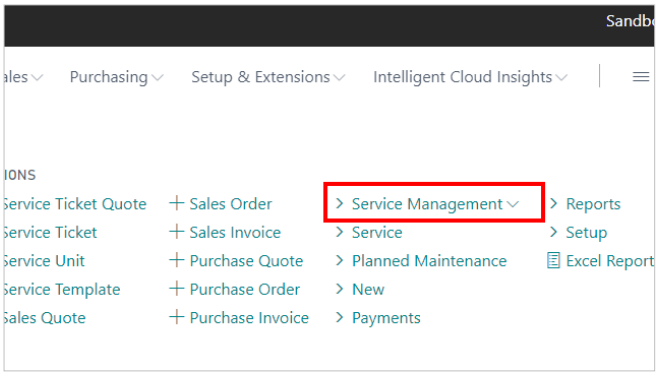
Click on the navigation menu item **Show Meter Reading**



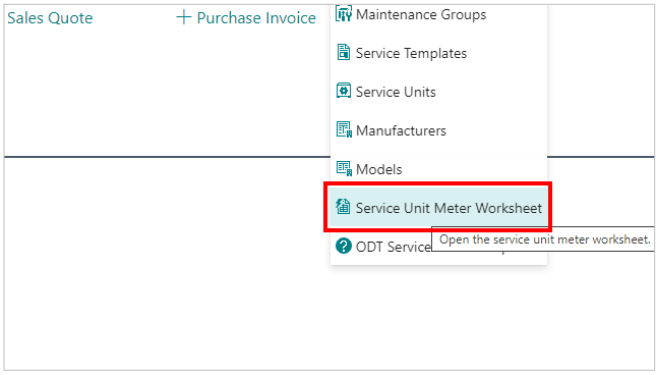
2.10.1.5. How to Bulk Update Service Meters

ODT Service provides a worksheet that can be used to update multiple service meters at the same time.

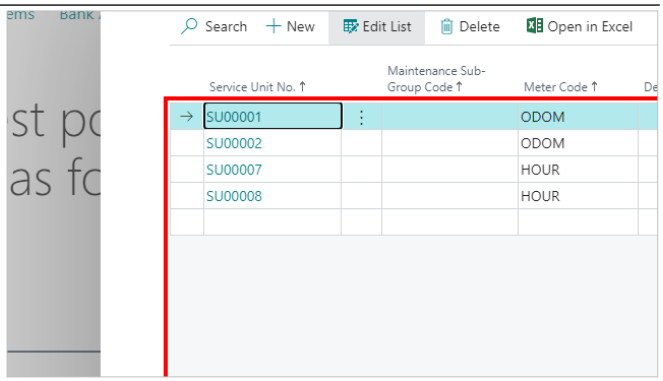
Click on the navigation menu item popup **Service Management**



Click on the navigation menu item **Service Unit Meter Worksheet**

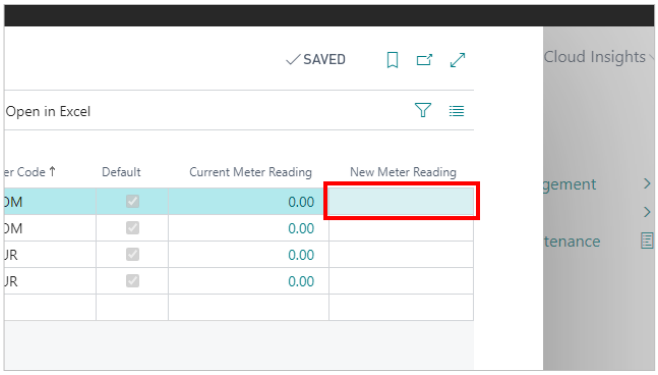


The worksheet will display a list of all currently available service meters, along with their current meter readings.

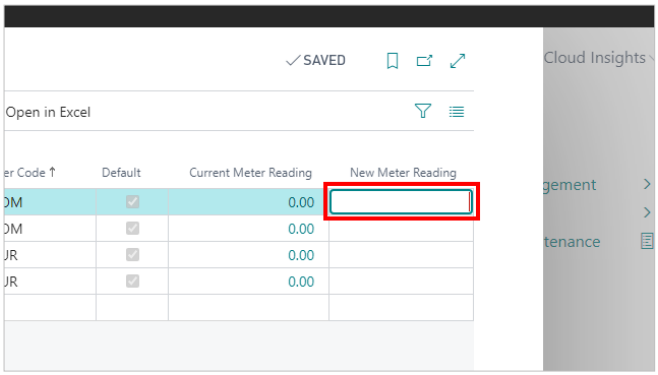


Fill in the new meter readings for all service meters you wish to update.

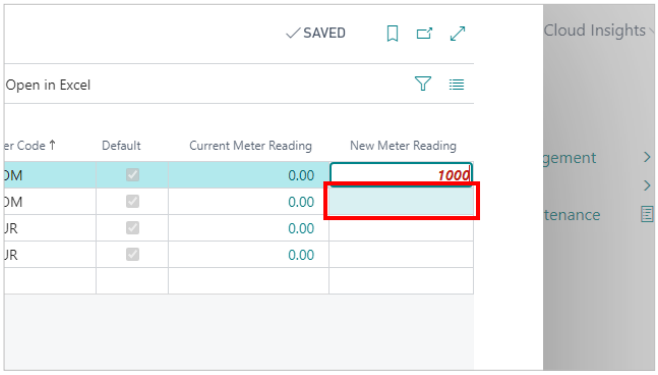
Click on the cell **New Meter Reading**



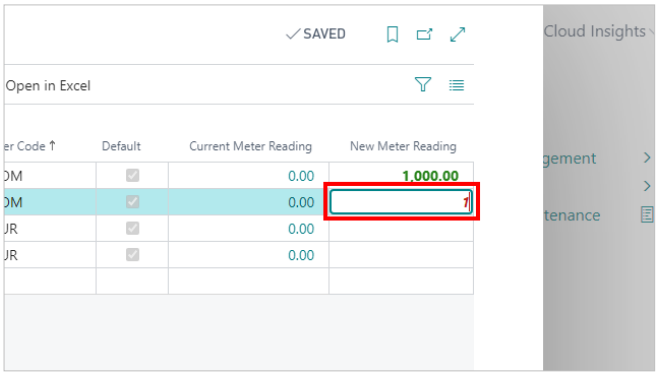
Enter the text **1000**.



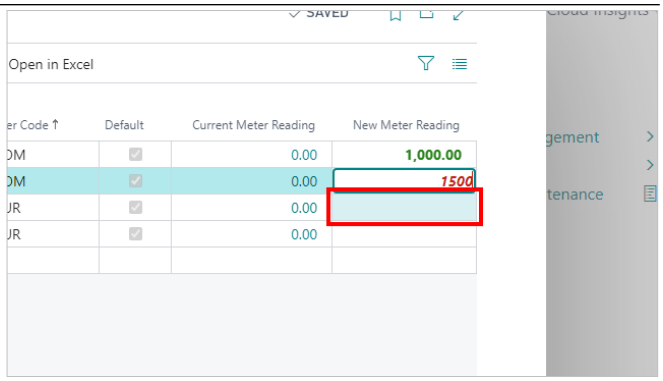
Click on the cell **New Meter Reading**



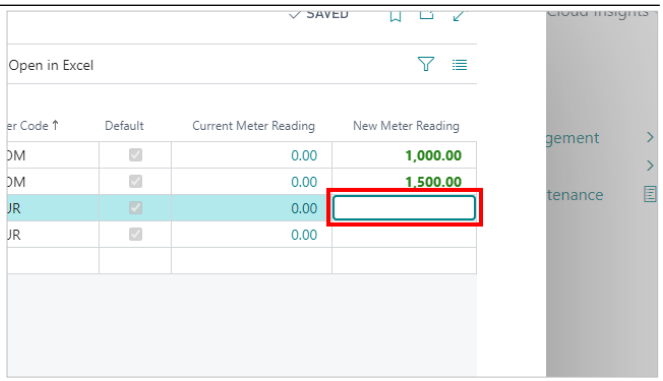
Enter the text **1500**.



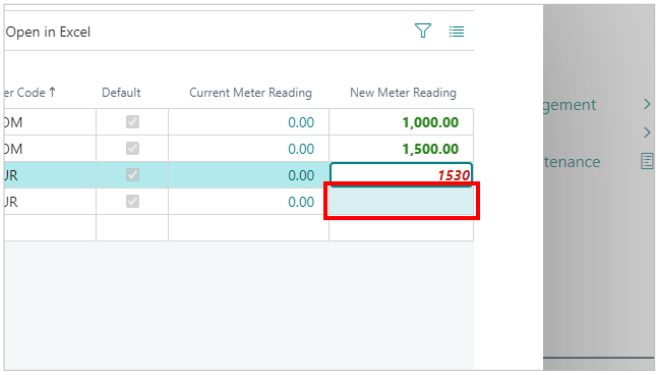
Click on the cell **New Meter Reading**



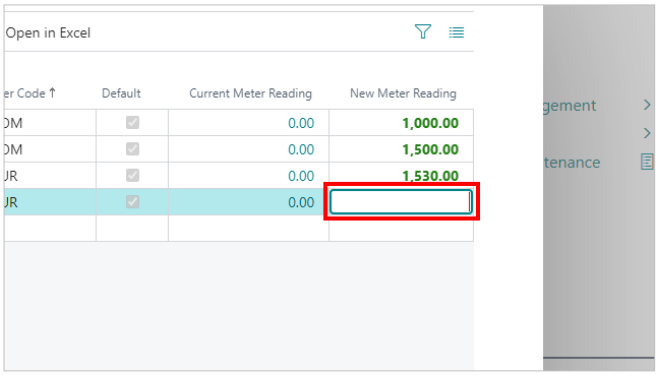
Enter the text **1530**.



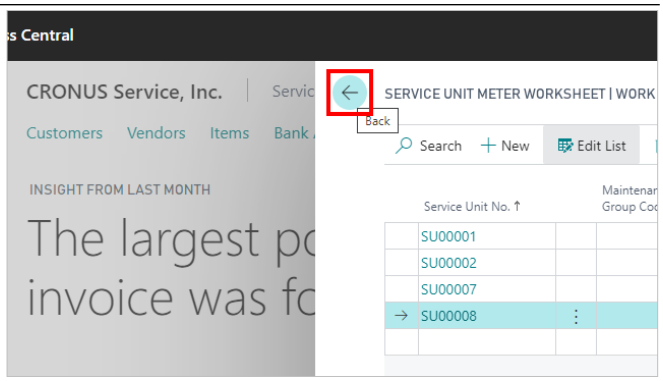
Click on the cell **New Meter Reading**



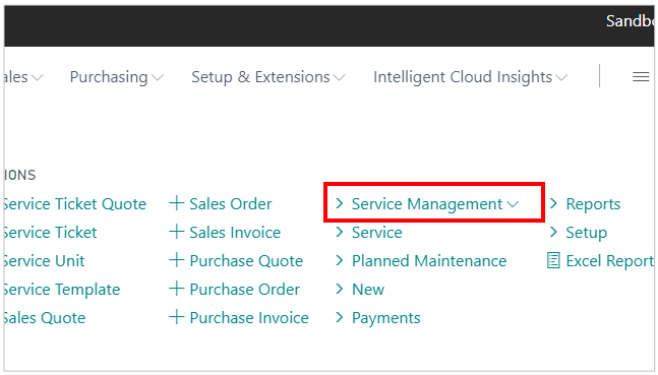
Enter the text **2400**.



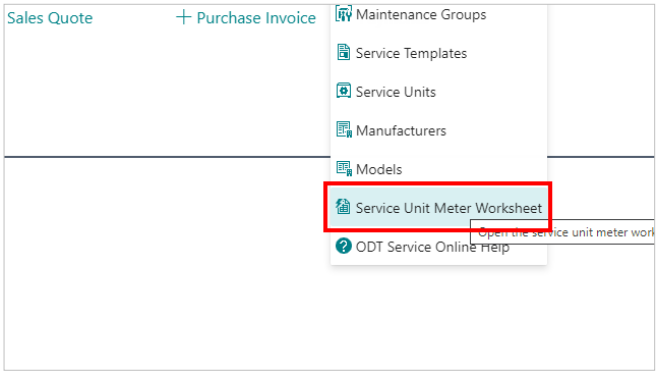
When you are finished filling in the new service meter readings, close the page and the new readings will be saved.
Click on the back button



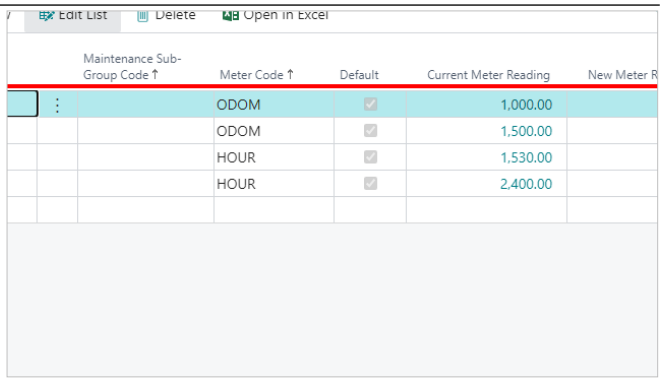
Click on the navigation menu item popup **Service Management**



Click on the navigation menu item **Service Unit Meter Worksheet**



Notice that the current meter readings have now been updated with the new readings entered previously.



2.10.2. How to Setup Planned Maintenance Schedules

2.10.2.1. Overview

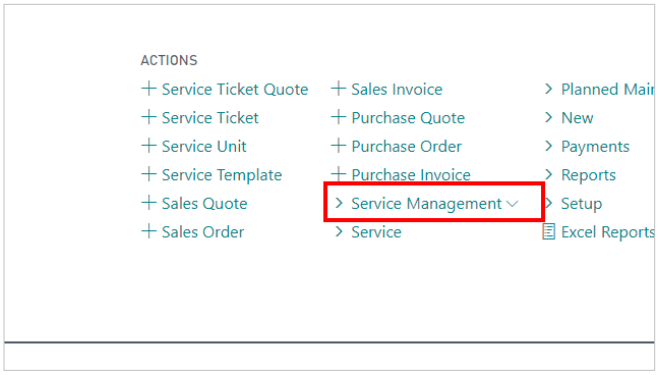
Planned Maintenance Schedules are used to identify what types of service should be used for Planned Maintenance, and under what conditions they should occur.

Planned Maintenance Schedules are required in order to use Planned Maintenance functions.

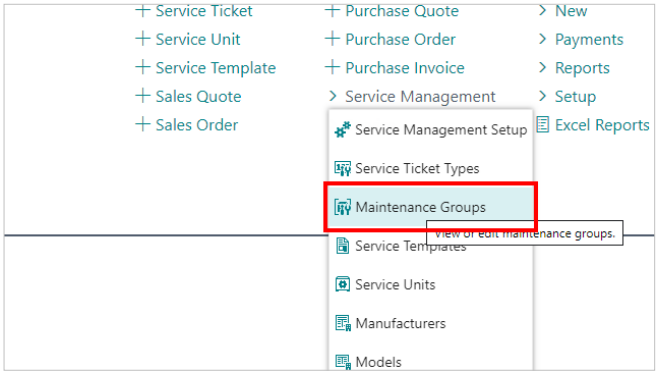
2.10.2.2. How to Setup a Planned Maintenance Schedule

Business Manager Profile

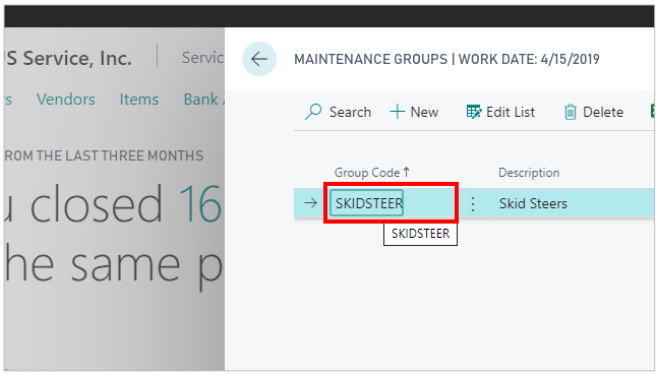
Click on the navigation menu item popup **Service Management**



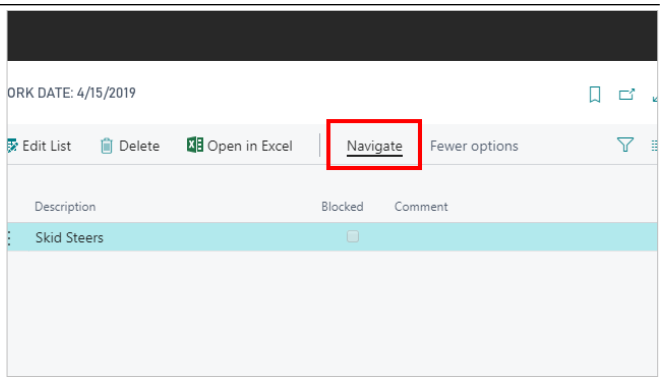
Click on the navigation menu item **Maintenance Groups**



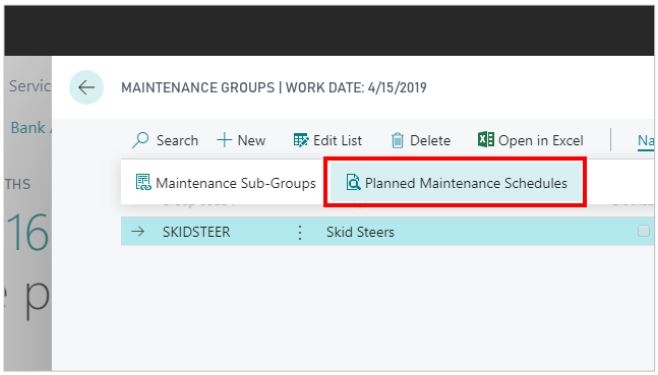
Click on the cell **Group Code** with the value **SKIDSTEER**



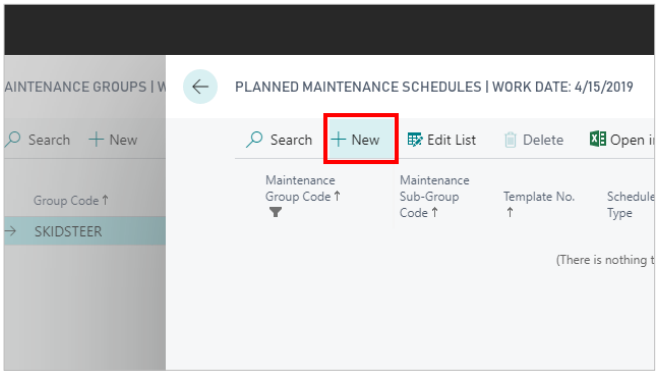
Click on the navigation menu item popup **Navigate**



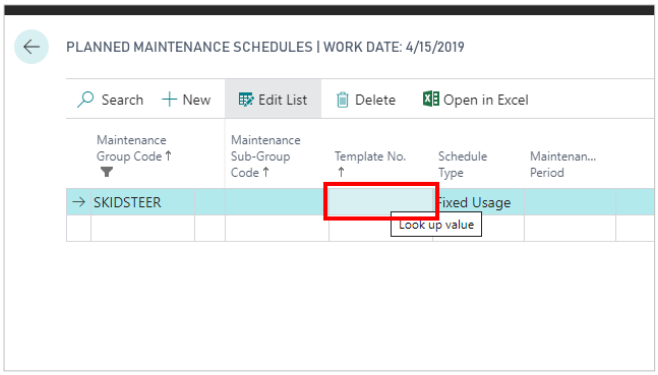
Click on the link **Planned Maintenance Schedules**



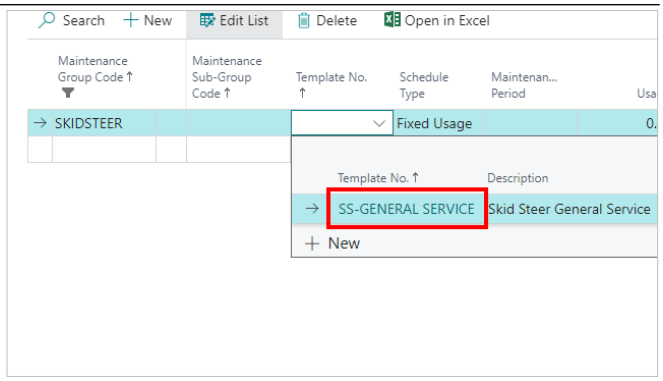
Click on the navigation menu item **New**



Click on the cell **Template No.**

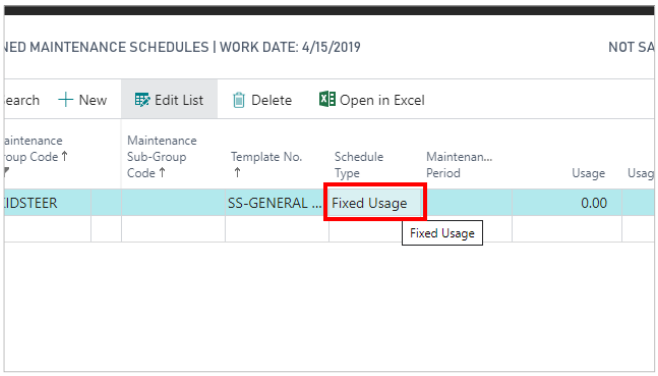


Only templates with a type of Planned Maintenance or All will be displayed.
Click on the link in cell **Template No.** with the value **SS-GENERAL SERVICE**

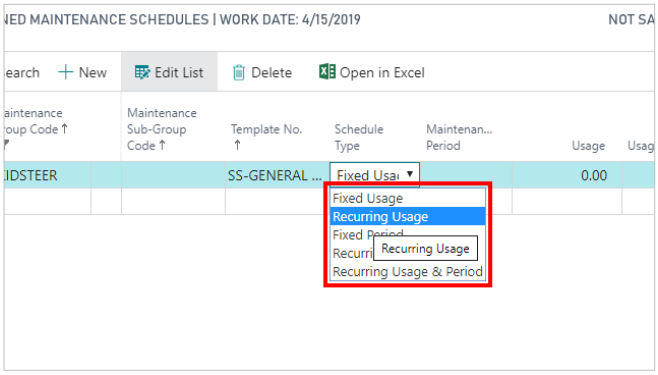


Templates can either be of type Usage (a metric such as mileage) or Period (a period of time), and can be either fixed or recurring. The following example uses a type of Recurring Usage.

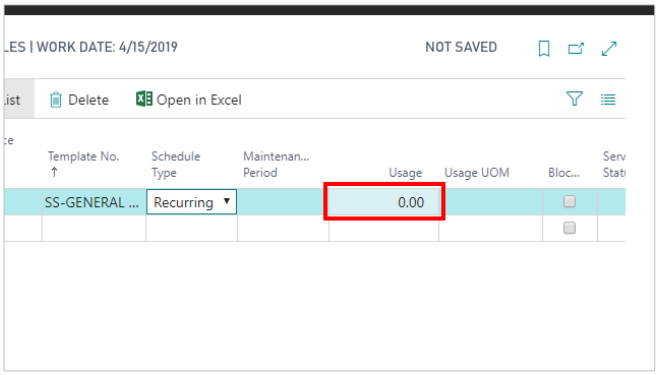
Click on the cell Schedule Type



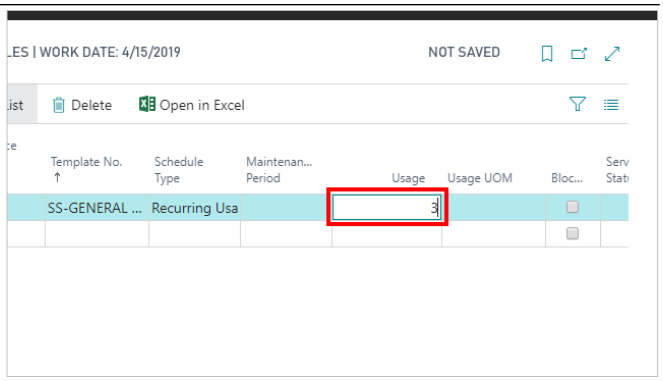
Click on the item **Recurring Usage** in the list



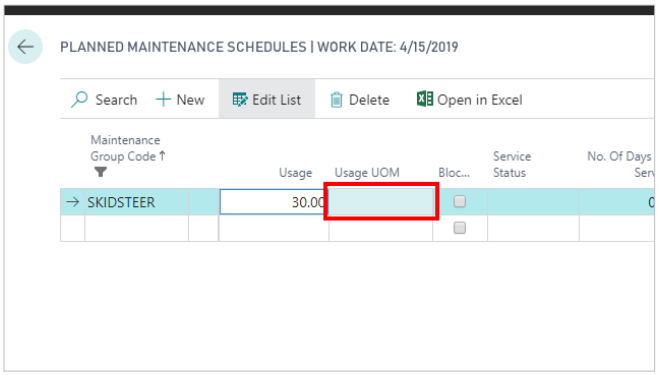
Click on the cell **Usage** with the value **0.00**



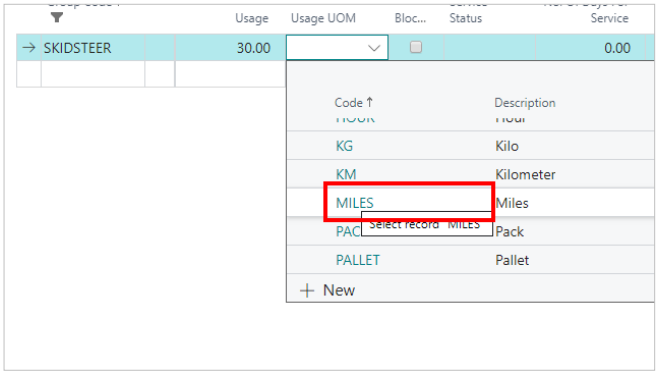
Enter the text **30**.



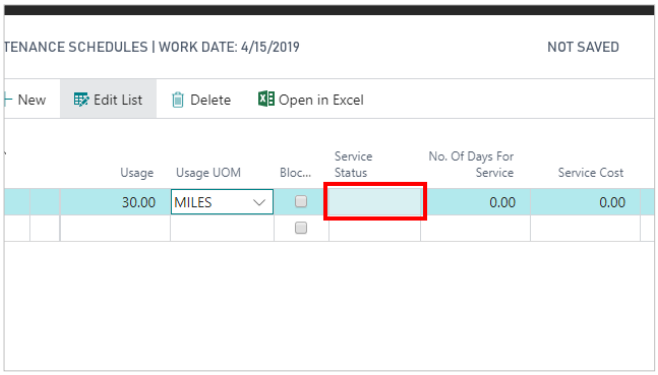
Click on the cell **Usage UOM**



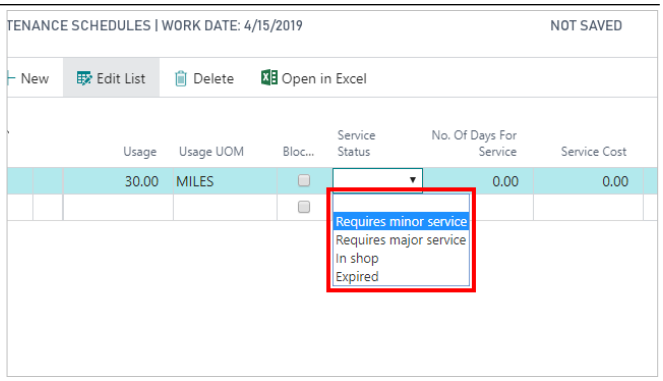
Click on the link in cell **Code** with the value **MILES**



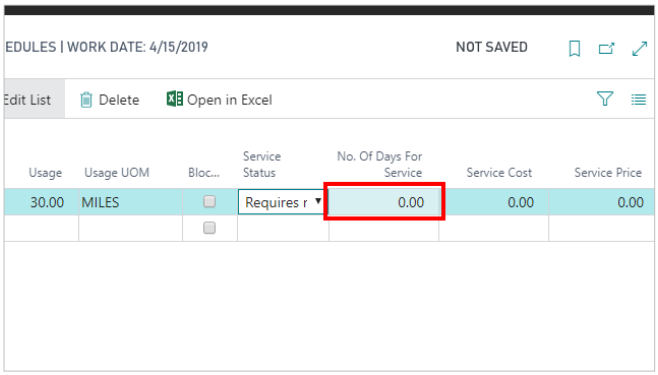
Click on the cell Service Status



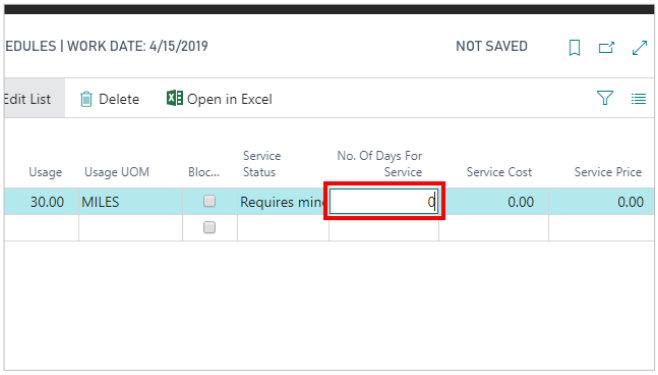
Click on the item **Requires minor service** in the list



Click on the cell **No. Of Days For Service** with the value **0.00**



Enter the text **0.5**. Press the **Enter** key.



3. Processing Service

3.1. Service Processing Overview

3.1.1. Processing Overview

You can create a service quote or service ticket to record your agreement with a customer to service the equipment or record the service to be completed on your own company equipment.

A Job is created automatically when a service quote or ticket is created using the quote or ticket no. as the Job No.

When servicing external customer equipment, you can negotiate with the customer by first creating a service quote. You can then print the quote to send to the customer. After the customer confirms they agree with the quote, you can convert the quote to a Service Ticket.

When not using Service Quotes, then from the Service Ticket, you can send a service ticket confirmation to record your obligation to service the products as agreed.

The following describes the sequence of tasks for processing using ODT Service:

• Create a service quote, where you offer services on negotiable terms before converting the quote to a service ticket. This use of service quotes is optional.
• Create a service ticket to record your agreement with a customer to service product(s) on certain payment terms or to record the tasks to be performed on servicing company owned product(s).
• Perform the service as recorded on the service ticket.
• Record and confirm the usage of resources, items and if applicable, G/L Account charges
• Invoice the customer, should the ticket be for an external customer.
• Mark the service ticket as complete.

ODT Service enhances the Jobs module by creating the Service Quotes and Service Tickets, which provide a work order type interface on top of the Jobs.

When either a quote or ticket is created, a Job is automatically created using the quote or ticket no. as the Job No. in the Jobs list.

In addition to creating a Service Ticket from the Actions – Service Ticket option, or from the Service Ticket – Open Cue, a Service Ticket can be created automatically from a Service Unit card.

On the Service Quote and Service Ticket, the Ticket Units/Line section are essentially Job Task lines.

The Service Quote and Service, the Ticket Details are essentially the related Job Planning Lines.

The Ticket Details, Line Type field of, Time and Materials, equates to the Jobs, Line Type, Both Budget and Billable.

The Ticket Details, Line Type field of, Cost Tracking Only, equates to the Jobs, Line Type, Budget.

When adding a service template to a ticket, the Ticket Units/Lines and Ticket Details records are automatically created.

IMPORTANT
By default, the Line Type field is set to Time and Materials.
It is only when the Customer card has the Internal Customer field, on the Service tab enabled, the Line Type will be set to Cost Tracking only.

From the service ticket, when you create and post the actual usage, the related job ledger entry, G/L entry, item ledger and value entries and resource ledger entries records are created.

Posting the sales invoice will create the related job ledger, general ledger, tax ledger, customer ledger and resource ledger entries in your system.

Marking the service ticket as complete will set the Job status to “Completed”.

3.2. Service Ticket Overview

3.2.1. Service Ticket Overview

ODT Service enhances the Jobs module by creating the Service Quotes and Service Tickets, which provide a work order type interface on top of the Jobs.

When either a quote or ticket is created, a Job is automatically created using the quote or ticket no. as the Job No. in the Jobs list.

In addition to creating a Service Ticket from the Actions – Service Ticket option, or from the Service Ticket – Open Cue, a Service Ticket can be created automatically from a Service Unit card.

On the Service Quote and Service Ticket, the Ticket Units/Line section are essentially Job Task lines.

On the Service Quote and Service, the Service Ticket Details, accessed from the Ticket Units/Lines, are essentially the related Job Planning Lines.

On the Service Ticket Details, the Line Type field of, Time and Materials, equates to the Jobs, Line Type, Both Budget and Billable.

On the Service Ticket Details, the Line Type field of, Cost Tracking Only, equates to the Jobs, Line Type, Budget.

When adding a service template to a ticket, the Ticket Units/Lines and Ticket Details records are automatically created.

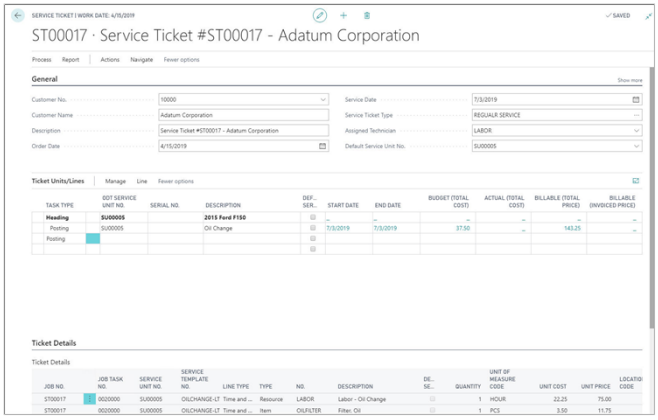
IMPORTANT
By default, the Line Type field is set to Time and Materials.
It is only when the Customer card has the Internal Customer field, on the Service tab enabled, the Line Type will be set to Cost Tracking only.

From the service ticket, when you create and post the actual usage, the related job ledger entry, G/L entry, item ledger and value entries and resource ledger entries records are created.

Posting the sales invoice will create the related job ledger, general ledger, tax ledger, customer ledger and resource ledger entries in your system.

Marking the service ticket as complete will set the Job status to “Completed”.

The following picture displays a Service Ticket.



3.2.2. Service Ticket Menu Options

Service Ticket main menu options:

The following provides a brief overview of these options.

Process:

• Add Service Template
This option is used to add a service template to the Ticket Units/Lines for the service unit that is specified on the General tab of the ticket.

• Confirm Actuals
This option is used to automatically create a Job Journal for the actuals usage for resources, items, etc. and open the journal.

When a user runs this menu option the first time a Job Journal Batch will be automatically created for the user based on their Microsoft Dynamics 365 Business Central User ID.

• View Job Journal
This option will open the Job Journal Batch related to the user and contain any records which have not been posted as yet that were created when the Confirm Actuals was ran. The records displayed will contain multiple ticket records should the journals not be posted after running the Confirm Actuals.

• Create Service Sales Invoice
This option is used to create the Service Sales Invoice, which is used when servicing an external customers' equipment. A pop-up will occur asking if the user would like to open the invoice, where the Service invoice can be printed and then posted.

NOTE
On the invoice, there is a menu option to print a Service Sales Invoice in a format similar to the Service Ticket document.

• Mark Complete
This option is to be used only when the servicing has been completed, usage has been posted, and if applicable a service invoice created and posted. This option will set the status on the Job card for the ticket to "Completed".

Report:

• Print
Provides the ability to print the service ticket.

Actions – contains the same options as noted in Process

Navigate:

• Dimensions
Provides the ability to view and/or add Dimensions to the ticket.

• Sales Invoices/Credit Memos
Displays a listing of both open and posted Sales Invoices/Credit Memos for the ticket. A menu option is available to open the document on the listing.

NOTE:
Currently Credit Memos cannot be created directly from a Service Ticket

• Checklist
When a service template that is added to the Ticket units/Lines contains a Checklist(s), then this option will open a listing of the Checklist(s). On the listing a user can open and print the checklist and/or fill in the checklist findings.

3.2.3. General Tab

The General tab is used to specify the customer, order date, service date, which are mandatory.

The following fields are not mandatory and will be explained in detail in the help on Service for Internal Equipment and Service for External Customers.

• Service Ticket Type
• Assigned Technician
• Default Service Unit

There are two additional fields available when “Show more” is selected on the General tab. Information is provided on these fields in the notes below on Date fields.

• Starting Date
• Ending Date

General Tab – Date fields:

• Order Date:
The date defaults from the users’ work date and can be overridden.

• Service Date:
The date defaults from the users’ work date and can be overridden.
When there are no records in the Ticket Units/Lines tab, then when the lines are created the Service Date will be used as both Start Date and End Date on the lines.
Should there be records in the Ticket Units/Lines tab and the Service Date is overridden, then a pop-up confirmation will occur. When Yes is selected, then the Starting Date and Ending Date on the General tab will be populated. In addition, the Start Date and End Date on the lines will be updated.

• Starting Date:
When the Service Date is left as the default date, then this field is blank. This field can be overridden.
When overridden, if start date is later than any lines, it will prompt you to update lines.
When new lines are added then on the Ticket Details, the Planning Date will be set to Starting Date specified.

• Ending Date:
When the Service Date is left as the default date, then this field is blank. This field can be overridden.
When overridden if the date is earlier than the current date, and there are records in the Ticket Units/Lines tab, then a pop-up confirmation will occur. When Yes is selected, then the End Date on the lines will be updated.

3.2.4. Ticket Units/Lines

On the Service Quote and Service Ticket, the Ticket Units/Line section are essentially Job Task lines.

The majority of the fields are the same as on Job Task Lines. ODT Service has added the ODT Service Unit No. field to the lines. The Job Task Nos. on the Job created, are automatically populated for the users and thus are not displayed on the Service Ticket.

The view a brief description of the field on the Tickets Units/Lines a tool tip is available and can be viewed by pointing to the column name.

NOTE:
The Defer Service field is not functional in this release, however, is planned for a future release.

When a Default Service Unit is specified on the General tab, a Heading Type line is automatically created on the Ticket units/Lines. From here records can be added to the lines in two ways.

• By adding a Service Template for the unit using the menu option of Add Service Template.
• By manually entering a Posting Type line beneath the Heading line and then going to the Ticket Details for that line and entering the Ticket Detail records (planning lines).

When the Default Service Unit field on the General Tab is blank, manually entry of the Ticket Units/Lines can be done.
The first record must be a Heading Type line with the Service Unit specified, followed by related Posting Type lines.

If a Default Service Unit on the General tab is not entered, then when add a Heading Type line and select a unit, the Default Service Unit No. field on the General tab is automatically populated.

Should another Heading type line be added for a different unit, then the General tab field is automatically cleared.

Menu options on the Ticket Units/Lines.

Manage:

• New Line
• Delete Line
• Add Service Template
This menu option is only available when the cursor is on a Heading Type line with a Service Unit specified.

• View Service Ticket Details

This menu option is only available when the cursor is on a Posting Type line.

Should a Posting Type line exist from adding a Service Template to the ticket, then the details related to that line will open. Only from this selection can the Ticket Details be modified.

Should the Posting Type line be manually entered, then the Service Ticket Details list will open. In the Service Ticket Details users can enter the detailed records for comments, resources, items, and G/L Accounts which are related to the line.

Line:

• Dimensions, which provides the standard options, for viewing and/or editing the Dimensions for the line.

• Create Service Sales Invoice, which provides the ability to invoice on per line basis.

Ticket Details Tab

The Ticket Details tab is a view only of the Service Ticket Details for easy reference for users.

3.2.5. Service Ticket Details

The Service Ticket Details, accessed from the Ticket Units/Lines, are essentially the related Job Planning Lines.

When adding a service template to a ticket, the Ticket Units/Lines and Service Ticket Details records are automatically created.

The quantity, unit cost and unit price can be modified on the Service Ticket Detail records.
Additional lines can as well be manually added.

When the Service Ticket Details opens, it is filtered to the Ticket Units/Lines that was selected. This Job Task No. filter can be cleared to view all detail lines for the ticket.

For information on the fields, point to cursor to the column name.

3.3. Service for Internal Equipment

3.3.1. Overview of Internal Equipment Servicing

3.3.1.1. Overview

ODT Service is essentially an enhancement to the Jobs module. Servicing of internal equipment can be easily accomplished. There are two specific setups required for the servicing of internally owned equipment. The Jobs module requires a Customer be specified on a job. Therefore, when servicing internally owned equipment, a Customer will be required, which must have the field, Internal Customer, enabled on the Service tab.
To learn how to setup an internal customer for servicing internal equipment, please see the ODT Service Online Help, ODT Service Setups, Financial Setups for Service - How to Setup an Internal Customer for Servicing.

For internal servicing, the internal customer must be assigned to the company owned equipment on the Service Unit cards.

To learn about setting up Service Units, see ODT Service Online Help, ODT Service Setups, Service Units Setup.

A review of the ODT Service Online Help, Service Processing Overview and Service Ticket Overview, located within the category, Processing Service, is highly recommended, prior to using Service Tickets.

3.3.2. How to Enter and Process an Internal Service Ticket

3.3.2.1. Overview

A Service Ticket for internally owned equipment can be created by:

• From the main menu option, Service, by selecting Service Tickets, which opens the Service Ticket list where New can be selected.
• From the Actions part of the profile by selecting, +Service Ticket.
• From the Actions part of the profile by selecting, Service, then Service Tickets.
• From the Activities Cue, Service Tickets Open and then selecting New.
• From the Service Unit, which is to be serviced.

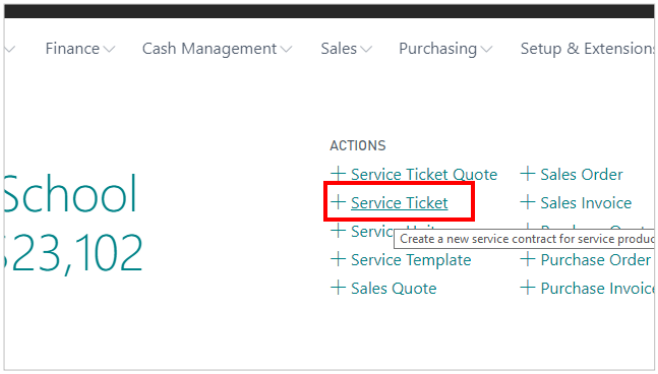
3.3.2.2. How to Create an Internal Service Ticket from Actions

Sales Order Process Profile

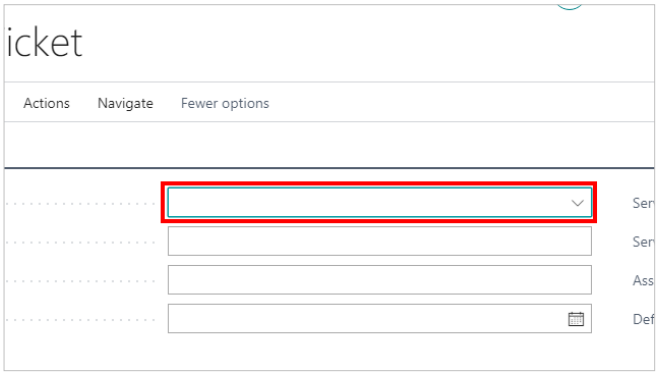
The same steps can be used when a user has the Business Manager Profile.

The following demonstrates the creation of a Service Ticket from the Actions, +Service Ticket option.

Click on the navigation menu item **Service Ticket**

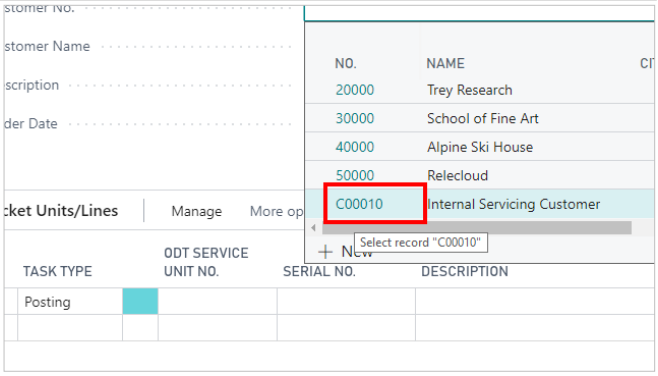


Click on the field **Customer No.**

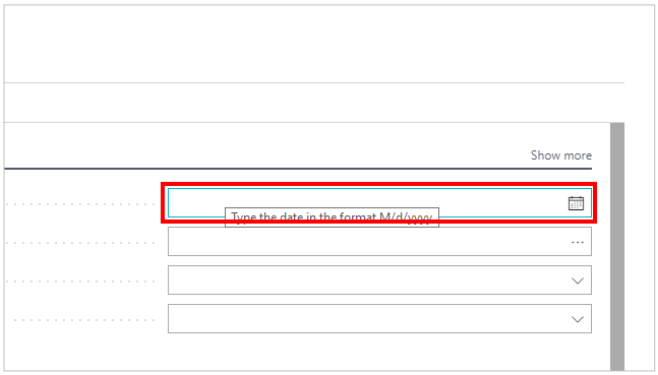


Click on the link in cell **No.** with the value **C00010**

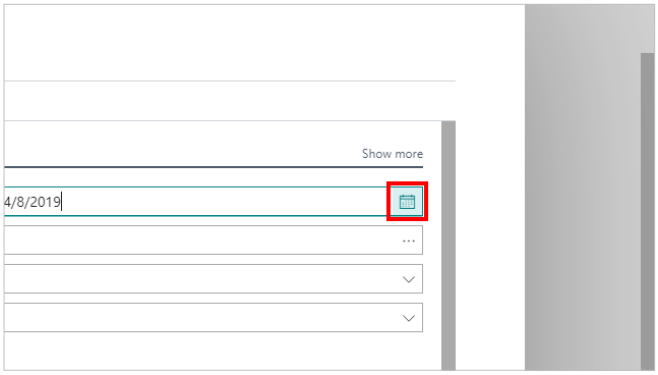
For servicing of company owned equipment, a Customer with the field, Internal Customer, enabled must be selected.



Click on the field **Service Date**

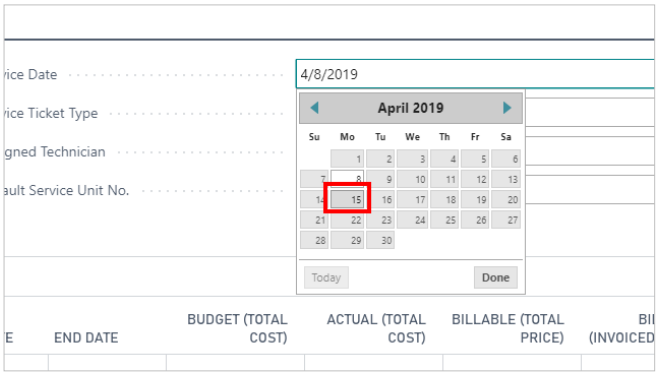


Click on the link **Open the date picker**

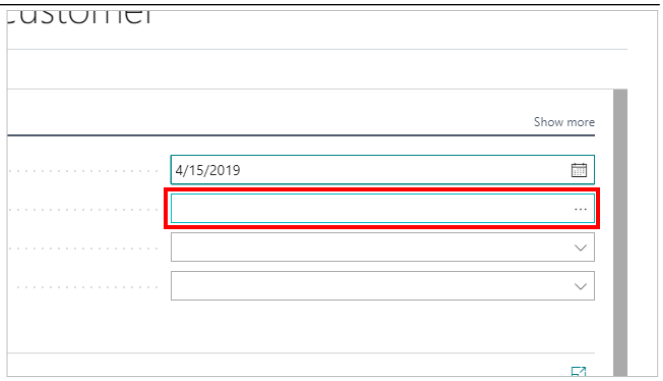


Click on a date in the calendar

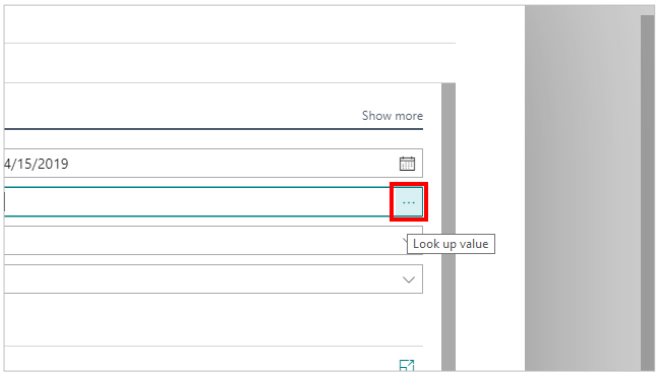
Select the date on which the service to be performed, if different from the defaulted date, from the Users' Work Date.



Click on the field **Service Ticket Type**



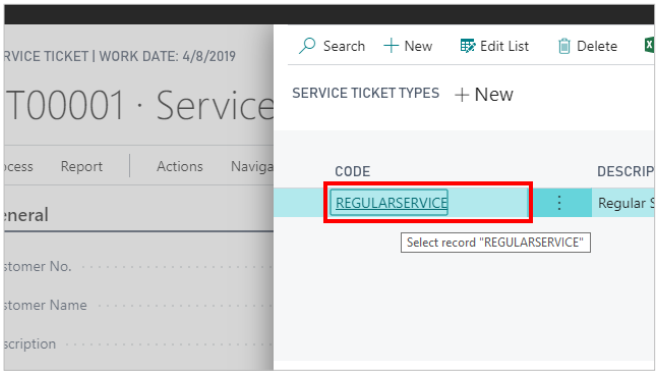
Click on the lookup button **Service Ticket Type**



Click on the link in cell **Code** with the value **REGULARSERVICE**

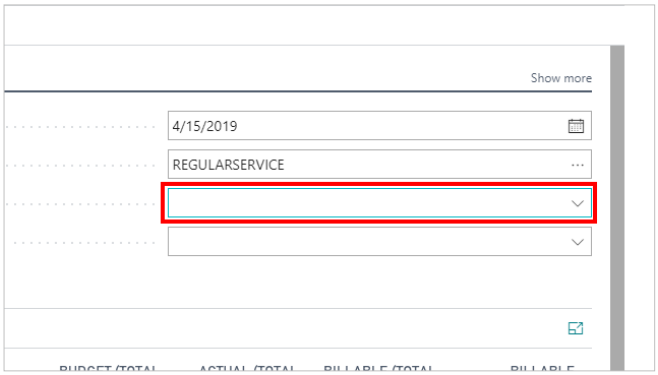
The specification of a Ticket Type is optional.

The use of the Ticket Type to specify differing types of servicing can be beneficial for analysis of past servicing.



Click on the field **Assigned Technician**

The technician/resource who is to perform the service can be assigned on the header of the ticket.
This is optional.

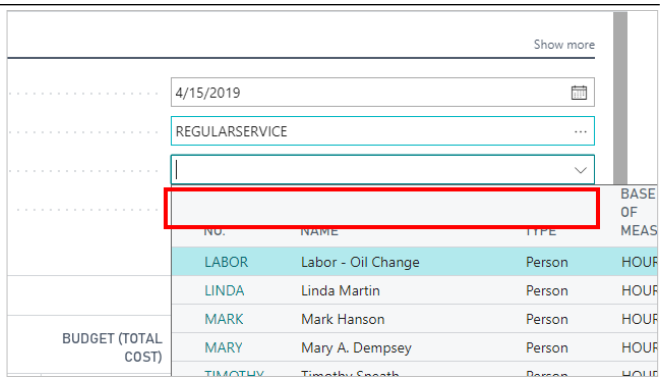


Click on the field **Default Service Unit No.**

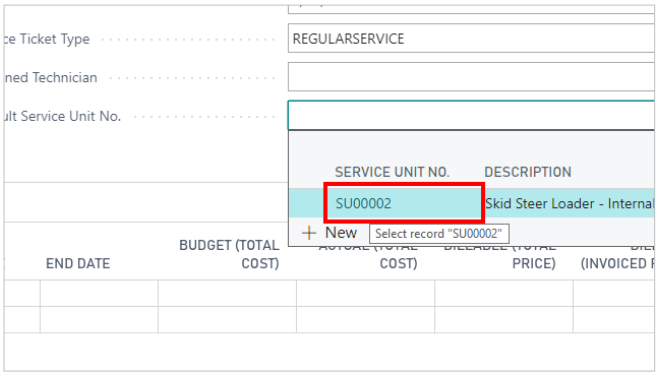
When a service ticket is for a single product, then when this field is populated, a Heading type Ticket Unit/Line, will automatically be created.

If the selected Service Unit is already on another open ticket, a message will be displayed to indicate this and confirm if you want to proceed.

This selection of a Default Service Unit is optional.



Click on the link in cell **Service Unit No.** with the value **SU00002**



3.3.2.3. How to Add a Service Template to a Ticket

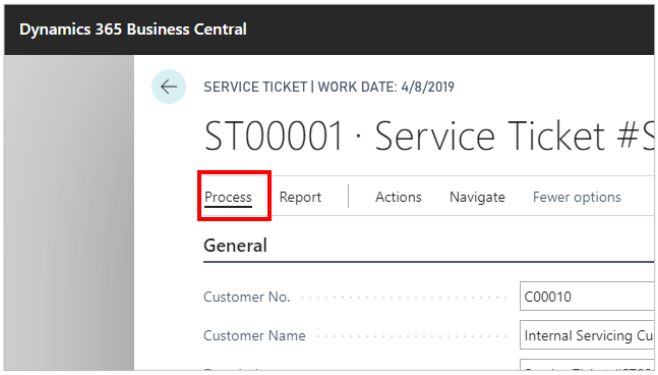
The listing of the Service Templates available is filtered to display only those templates, which have the same Maintenance Group as on the Service Unit.

When adding a Service Template from the Ticket main menu, Process, Add Service Template, then the Default Service Unit, Maintenance Group is used in the filtering of the available Service Templates.

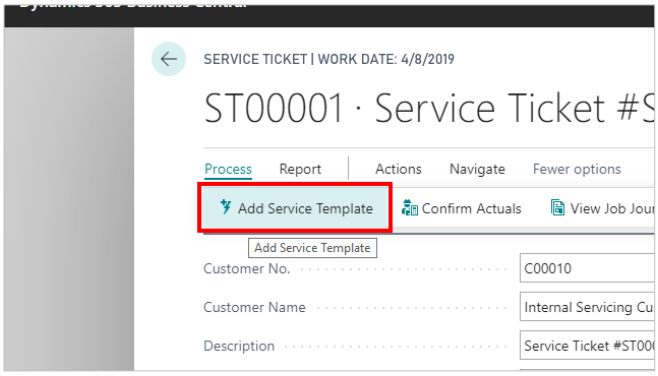
When adding a Service Template from the Ticket Units/Lines tab via Manage - Add Service Template, the available templates is filtered by the Maintenance Group of the Service Unit on the selected line with a Task Type of Heading.

The following demonstrates the adding of a service template from the Ticket main menu.

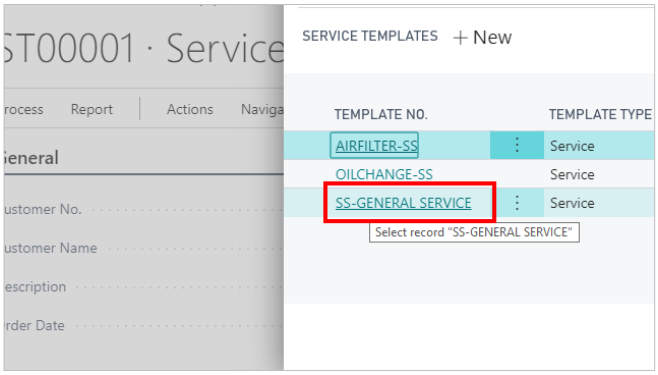
Click on the navigation menu item popup **Process**



Click on the navigation menu item **Add Service Template**



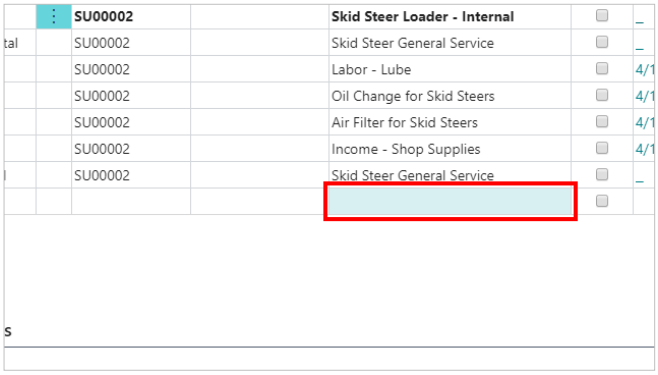
Click on the link in cell **Template No.** with the value **SS-GENERAL SERVICE**



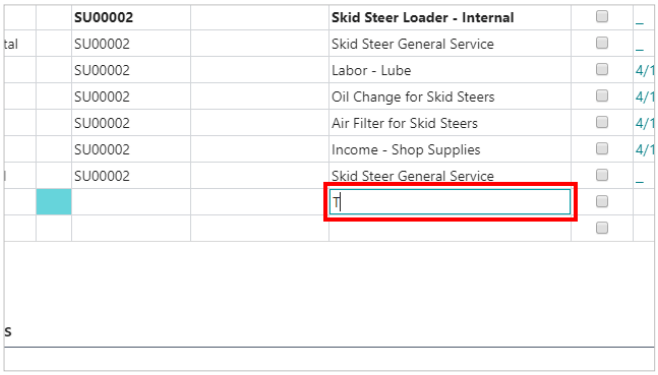
3.3.2.4. How to Enter Manual Lines on a Service Ticket

The following demonstrates the entry and configuration of a manually entered line in the Ticket Units/Lines tab for the same Service Unit as used when adding the Service Template.

Click on the cell **Description**

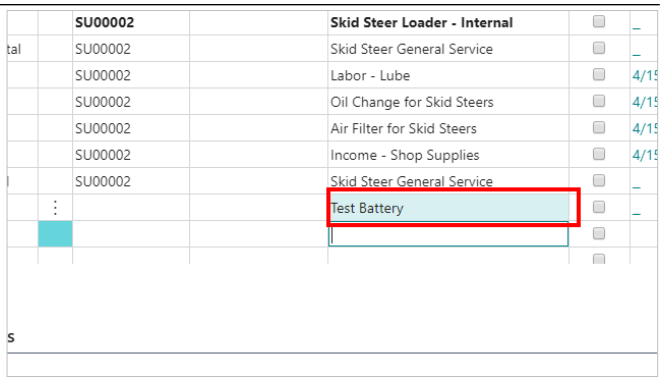


Enter the text **test Battery**. Press the **Arrow down** key.

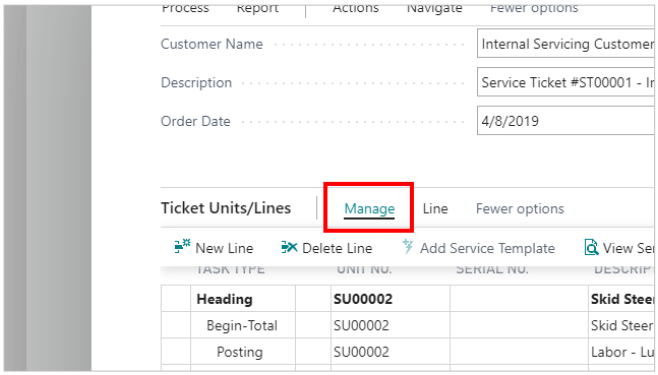


Press the **Arrow up** key.

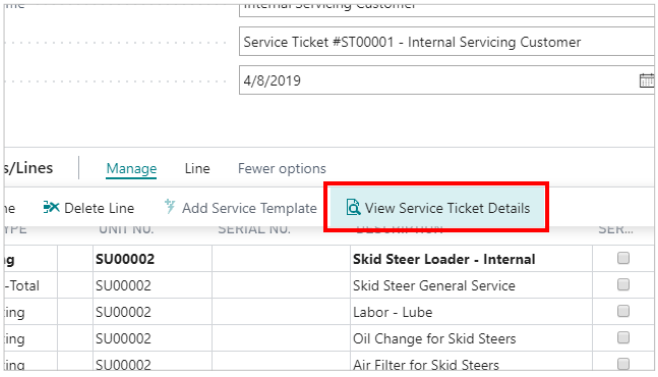
The ODT Service Unit No. field will automatically be populated with the same Service Unit No., when moving off and back to the line as the Task Type is left as the default of Posting.



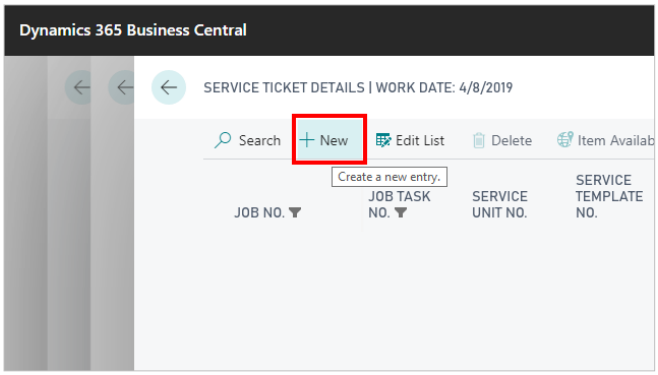
Click on the navigation menu item popup **Manage**



Click on the link **View Service Ticket Details**



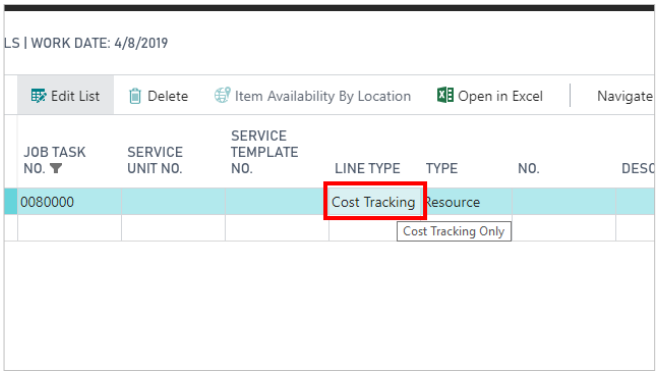
Click on the navigation menu item **New**



The Task No. Field is automatically populated on the line.

Click on the cell **Line Type** with the value **Cost Tracking Only Fixed Price Billing Time and Materials**

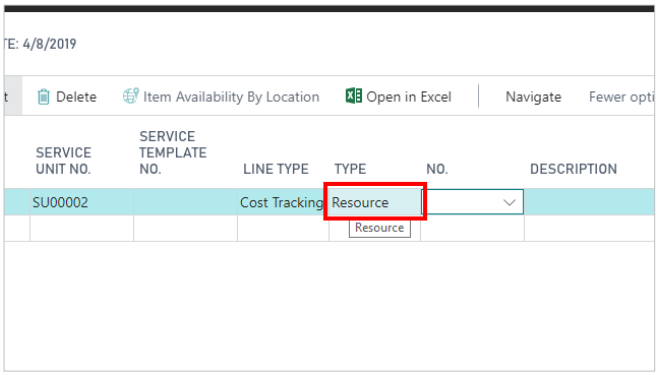
Note that the Line Type is automatically set to Cost Tracking Only.
This occurs as the Customer card has the field, Internal customer, enabled.



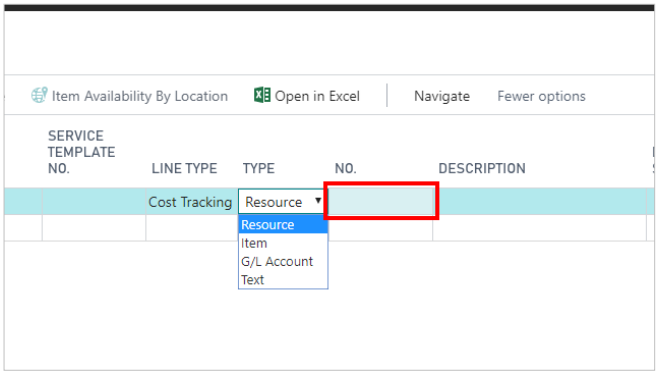
Click on the cell **Type** with the value **Resource Item G/L Account Text**

Select the applicable type to be used for the line.

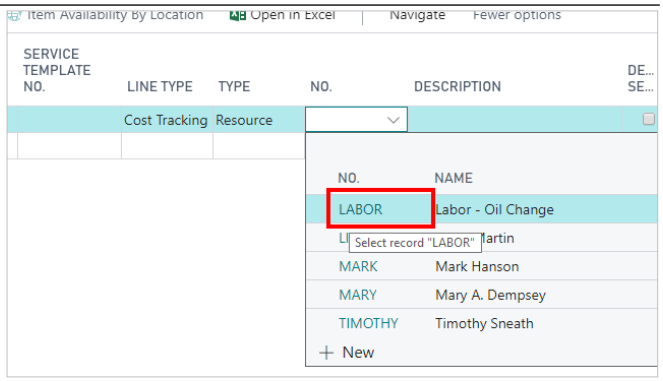
In this example the line is for a technician to perform a task, therefore, Resource is used.



Click on the cell **No.**

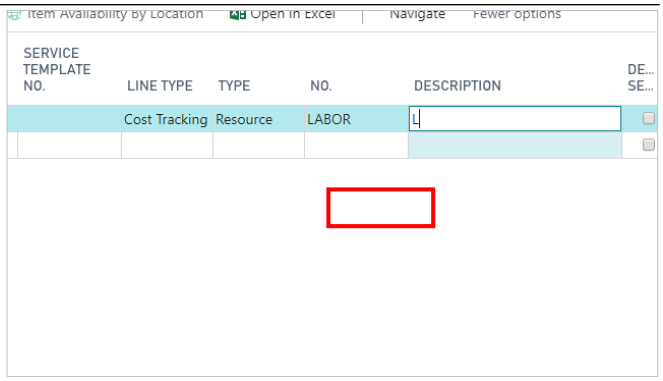


Click on the link in cell **No.** with the value **LABOR**

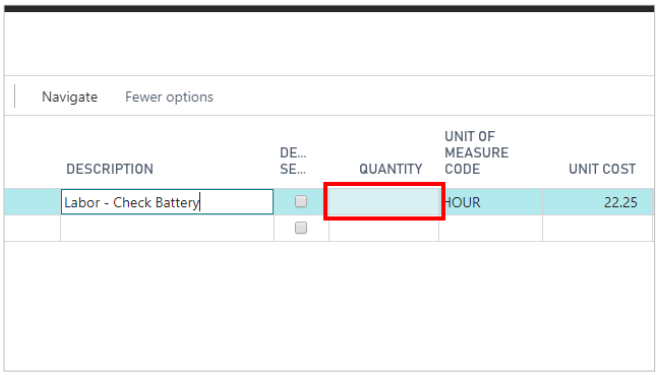


Enter the text **Labor - Check Battery**.

The description will default from Resource card selected and can be overridden to be indicative of the task to be performed.

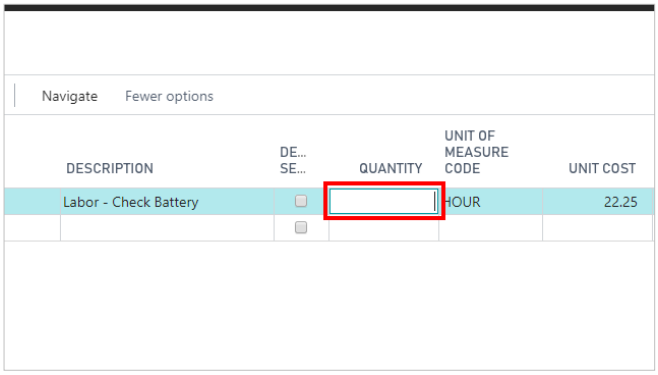


Click on the cell **Quantity**



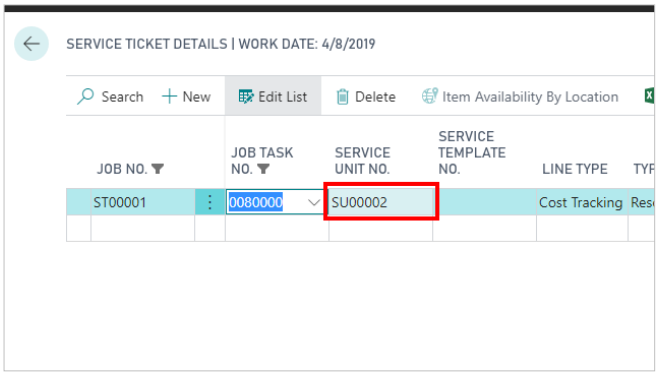
Enter the text **.25**.

Enter the budgeted quantity for performing the task.

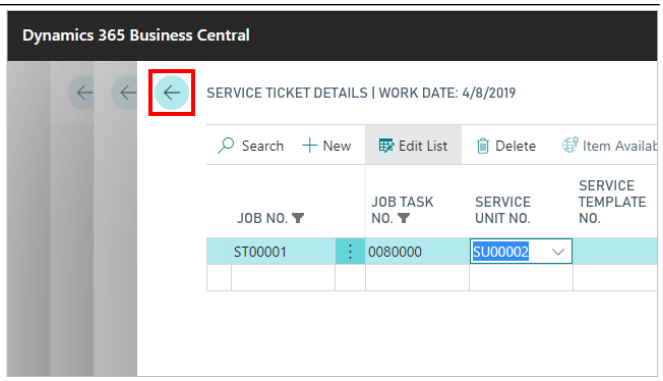


Click on the cell **Service Unit No.** with the value **SU00002**

Note that the Service Unit No. is automatically populated.

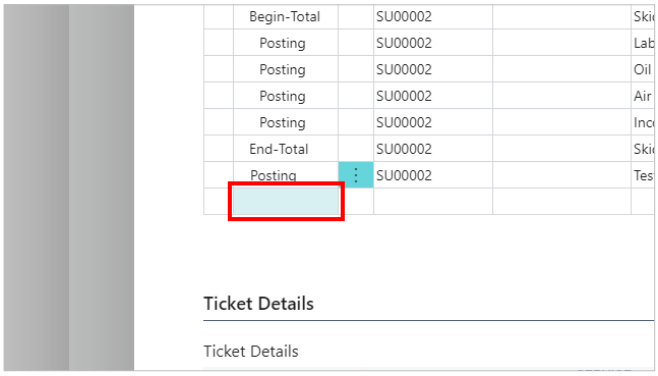


Click on the back button

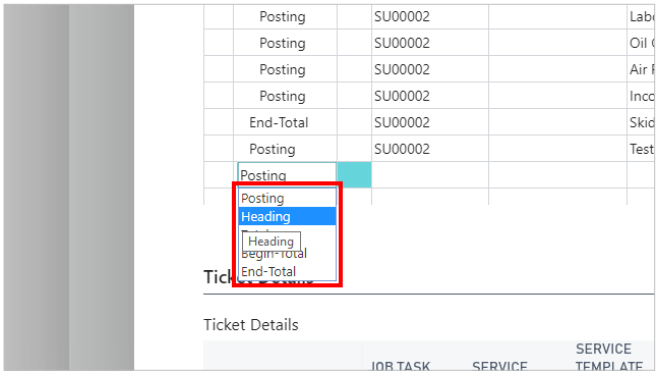


The following demonstrates the manual entry of lines for a different Service Unit on the Ticket Units/Lines tab and the configuration of the Service Ticket Detail lines.

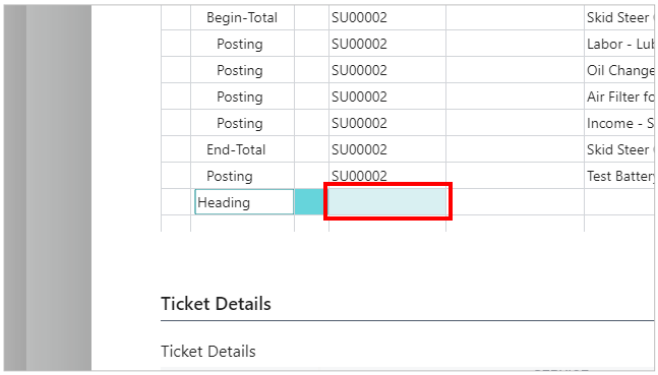
Click on the cell **Task Type**



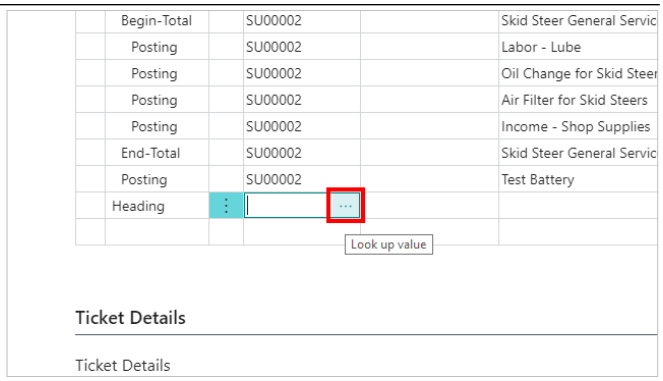
Click on the item **Heading** in the list



Click on the cell **ODT Service Unit No.**



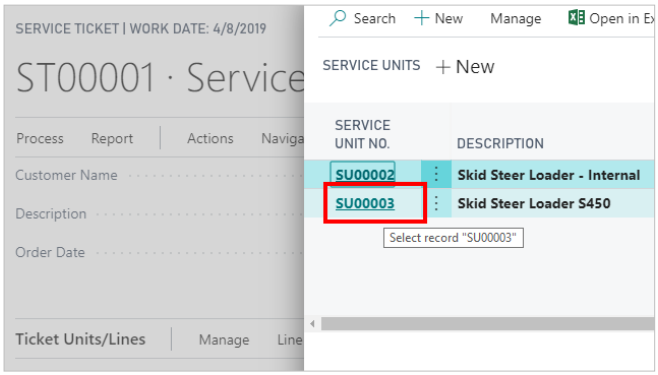
Click on the lookup button in the cell **ODT Service Unit No.**



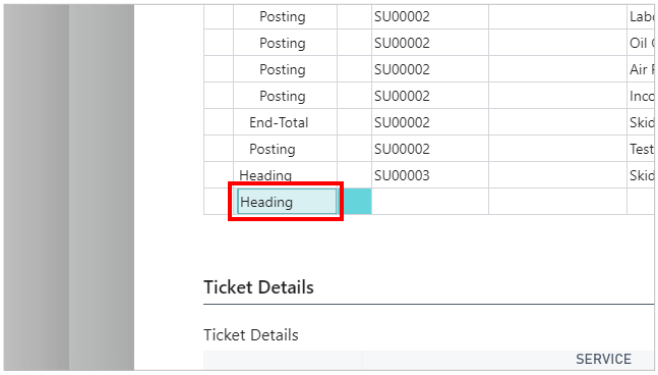
Click on the link in cell **Service Unit No.** with the value **SU00003**

Select the Service Unit to be added to the ticket.

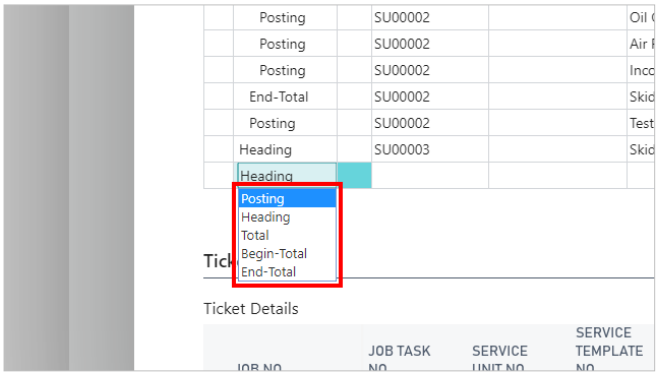
NOTE:
The Default Service Unit field on the General tab will automatically be cleared, as ticket is now for multiple units.



Click on the cell **Task Type**

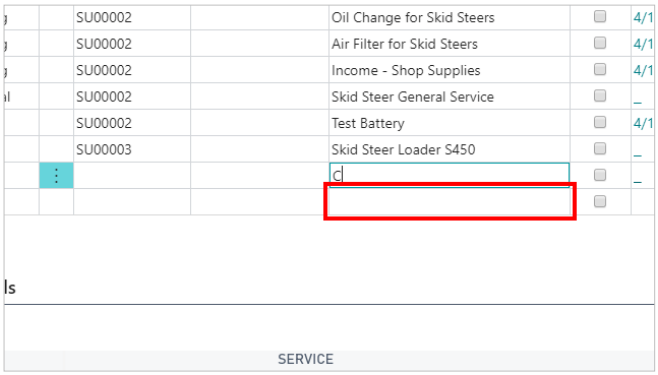


Click on the item **Posting** in the list

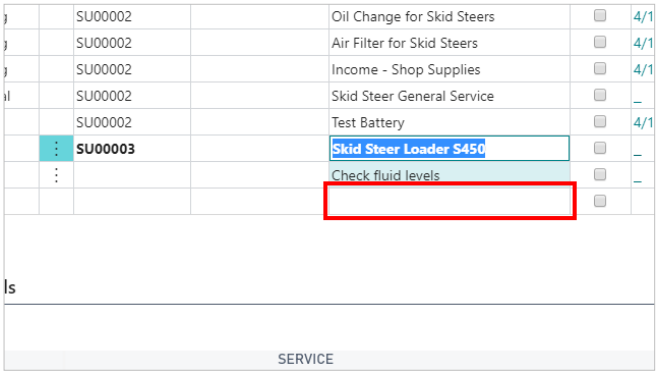


Click on the cell **Description**

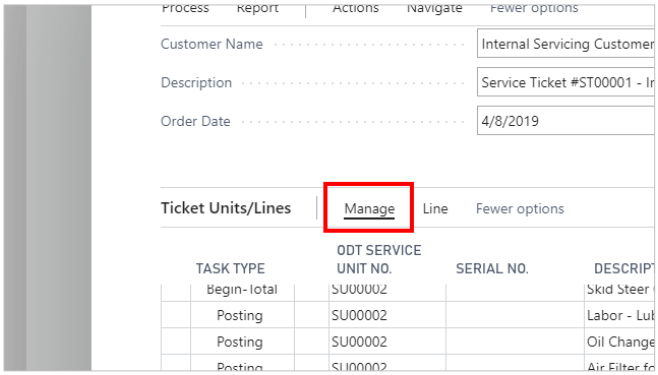
Enter the text **Check fluid levels**. Press the **Arrow up** key.



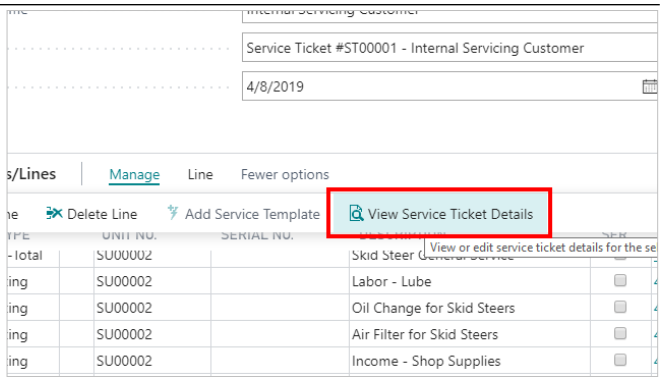
Press the **Arrow down** key.



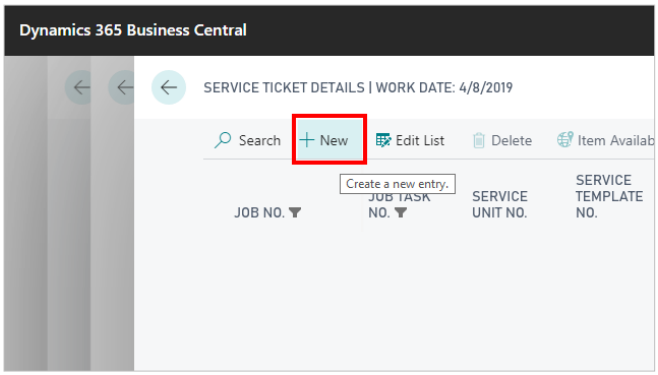
Click on the navigation menu item popup **Manage**



Click on the navigation menu item **View Service Ticket Details**

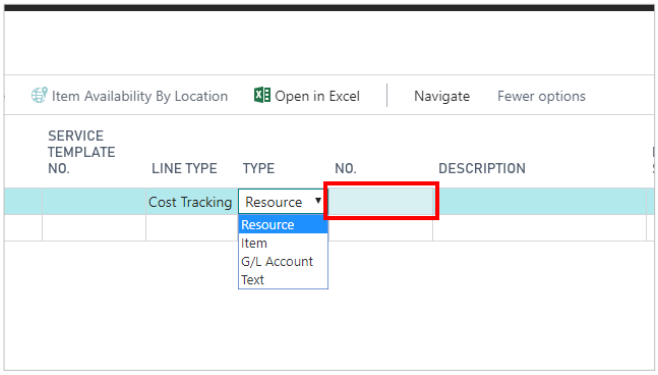


Click on the navigation menu item **New**

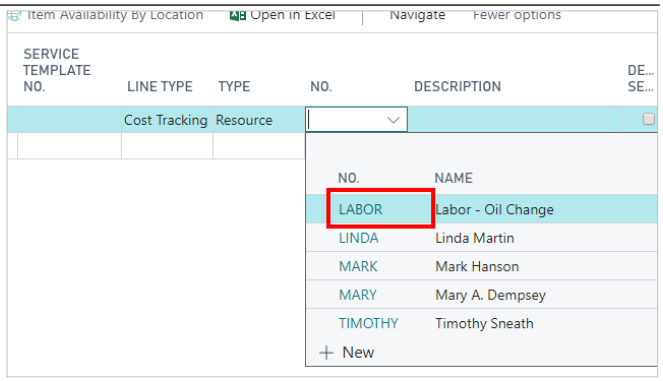


As the line is to be for a technician default type of Resource will be used.

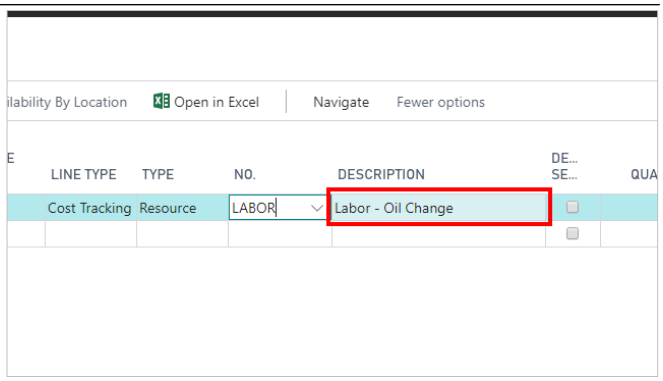
Click on the cell **No.**



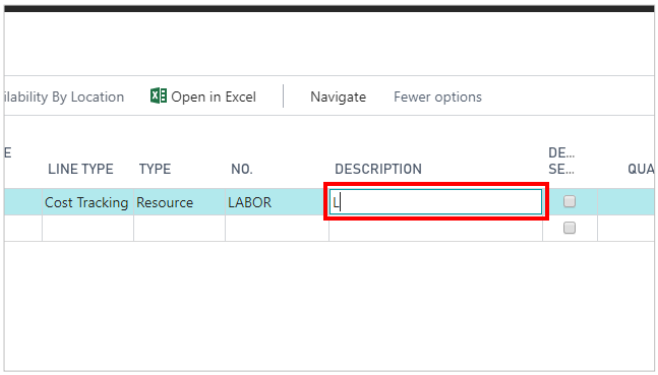
Click on the link in cell **No.** with the value **LABOR**



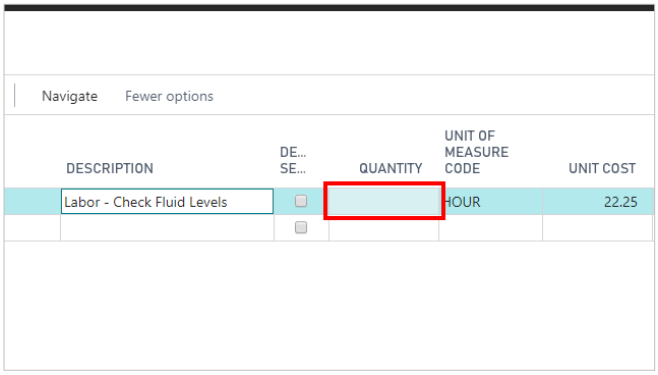
Click on the cell **Description** with the value **Labor - Oil Change**



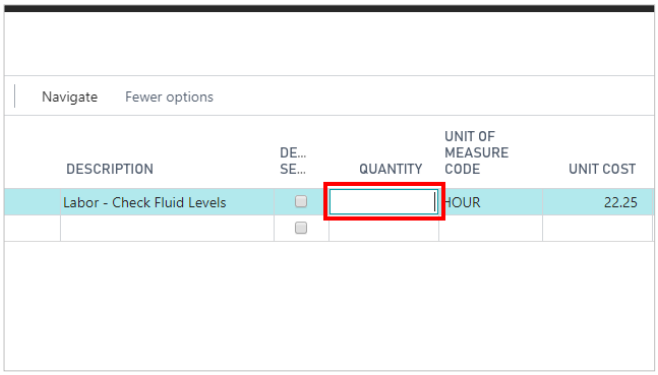
Enter the text **Labor - Check Fluid Levels**.



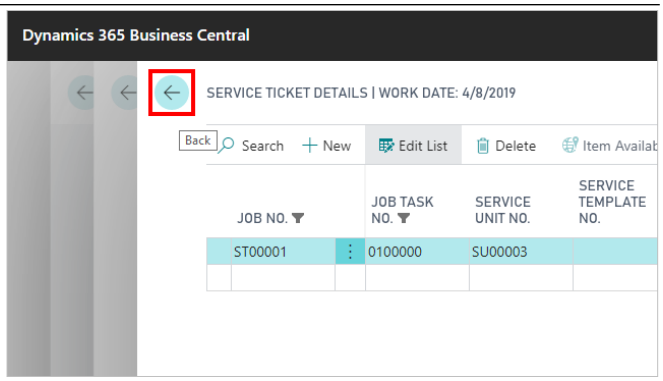
Click on the cell **Quantity**



Enter the text **.25**.

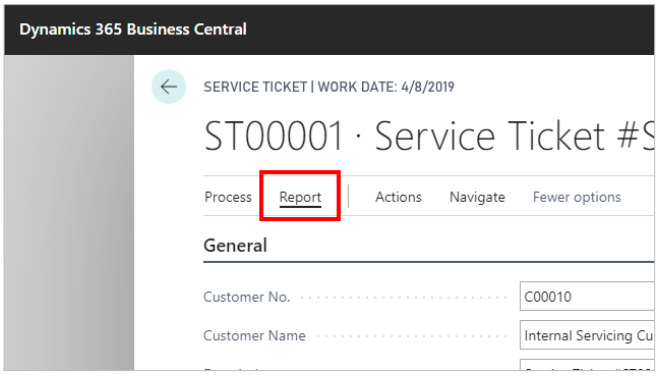


Click on the back button

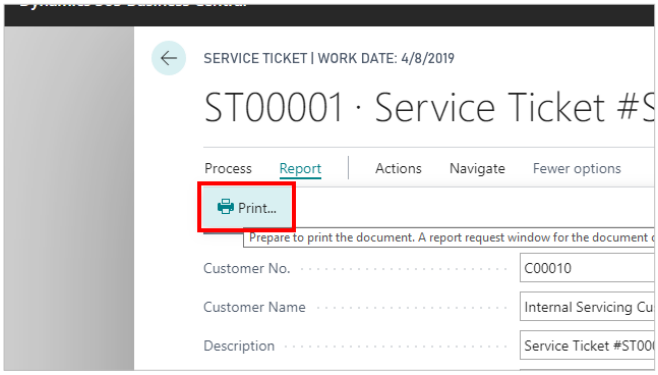


3.3.2.5. How to Print the Service Ticket

Click on the navigation menu item popup **Report**

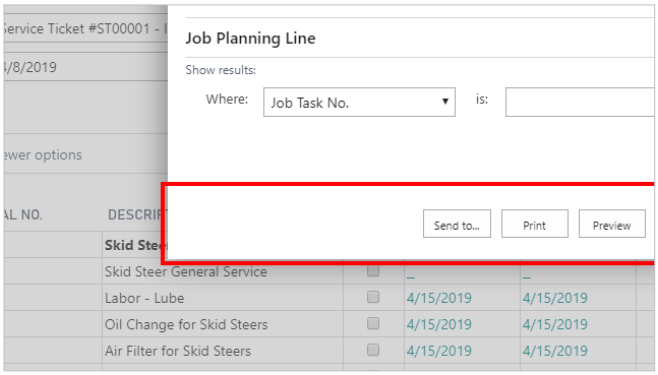


Click on the navigation menu item **Print...**

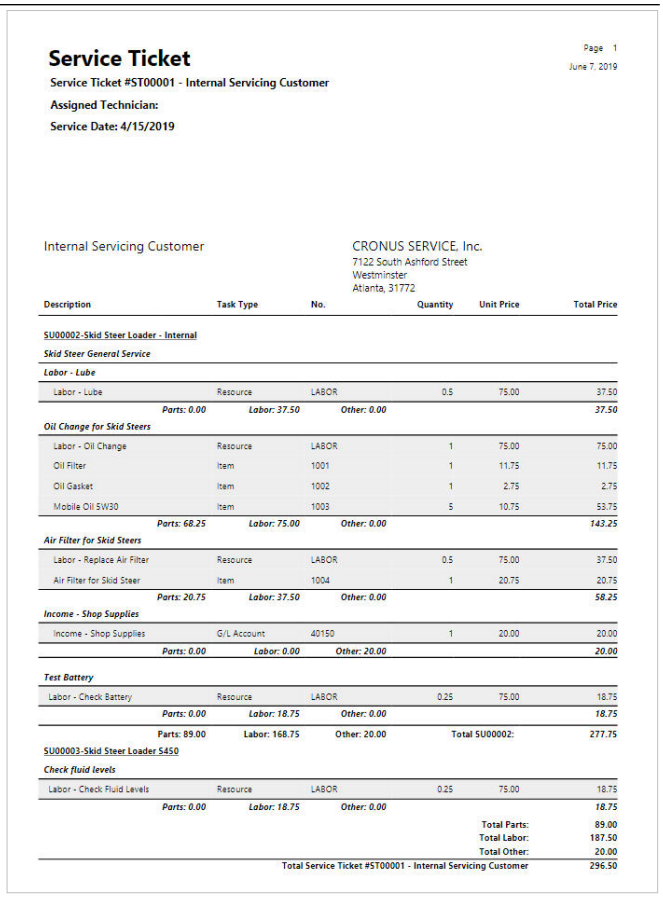


Click on **Send to... Print Preview Cancel**

The standard Microsoft Dynamics 365 Business Central, printing options are available to select from.



The following picture displays the Service Ticket document.



Service Ticket

Page 1
June 7, 2019

Service Ticket #ST00001 - Internal Servicing Customer
Assigned Technician:
Service Date: 4/15/2019

Internal Servicing Customer

CRONUS SERVICE, Inc.
7122 South Ashford Street
Westminster
Atlanta, 31772

Description	Task Type	No.	Quantity	Unit Price	Total Price
SU00002-Skid Steer Loader - Internal					
Skid Steer General Service					
Labor - Lube					
Labor - Lube	Resource	LABOR	0.5	75.00	37.50
Parts: 0.00 *Labor: 37.50* *Other: 0.00*					*37.50*
Oil Change for Skid Steers					
Labor - Oil Change	Resource	LABOR	1	75.00	75.00
Oil Filter	Item	1001	1	11.75	11.75
Oil Gasket	Item	1002	1	2.75	2.75
Mobile Oil 5W30	Item	1003	5	10.75	53.75
Parts: 68.25 *Labor: 75.00* *Other: 0.00*					*143.25*
Air Filter for Skid Steers					
Labor - Replace Air Filter	Resource	LABOR	0.5	75.00	37.50
Air Filter for Skid Steer	Item	1004	1	20.75	20.75
Parts: 20.75 *Labor: 37.50* *Other: 0.00*					*58.25*
Income - Shop Supplies					
Income - Shop Supplies	G/L Account	40150	1	20.00	20.00
Parts: 0.00 *Labor: 0.00* *Other: 20.00*					*20.00*
Test Battery					
Labor - Check Battery	Resource	LABOR	0.25	75.00	18.75
Parts: 0.00 *Labor: 18.75* *Other: 0.00*					*18.75*
Parts: 89.00	Labor: 168.75	Other: 20.00	Total SU00002:		277.75
SU00003-Skid Steer Loader S450					
Check fluid levels					
Labor - Check Fluid Levels	Resource	LABOR	0.25	75.00	18.75
Parts: 0.00 *Labor: 18.75* *Other: 0.00*					*18.75*
				Total Parts:	89.00
				Total Labor:	187.50
				Total Other:	20.00
			Total Service Ticket #ST00001 - Internal Servicing Customer		296.50

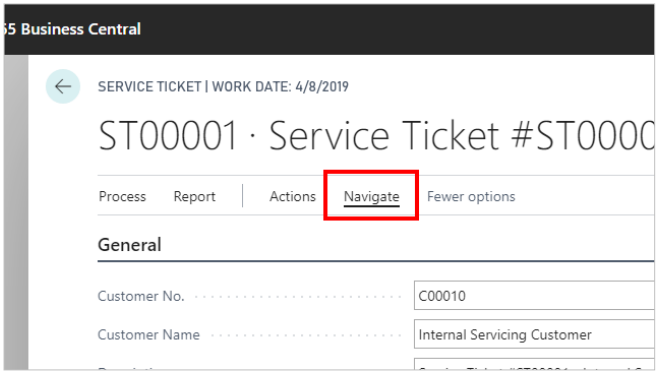
3.3.2.6. Service Template Checklists

Should the Service Template(s) added to a Service Ticket contain a Checklist(s), then the checklist(s) can be printed for or by the technician for reference and the recording of their findings.

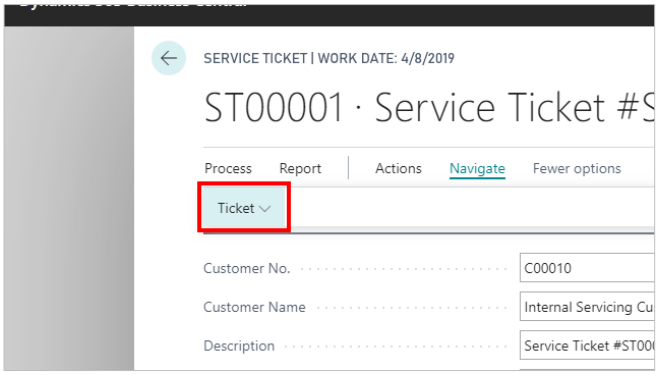
Additionally the technicians' findings can be entered onto the Service Ticket Checklist.

The following demonstrates the printing of a Service Template Checklist.

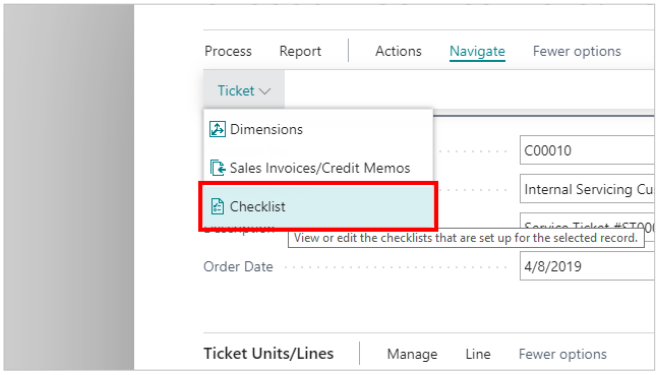
Click on the navigation menu item popup **Navigate**



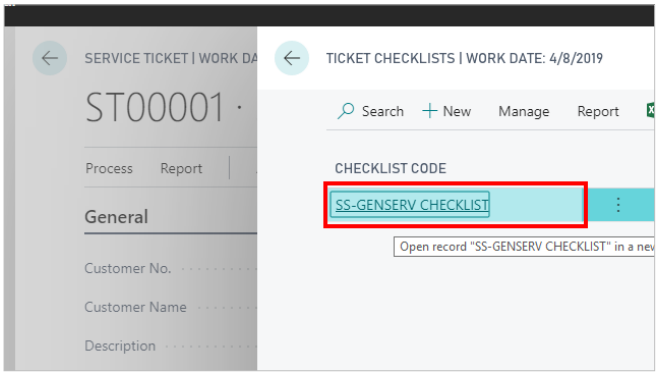
Click on the navigation menu item popup **Ticket**



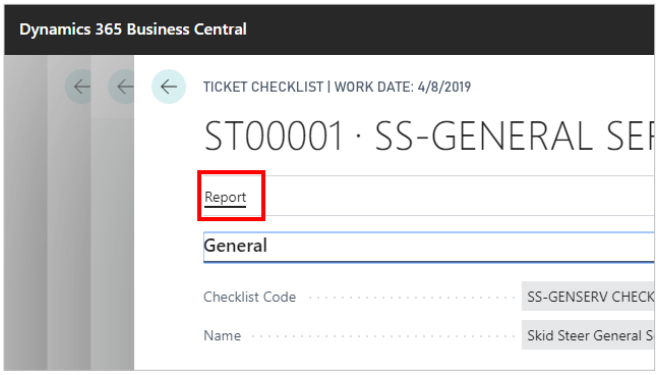
Click on the link **View or edit the checklists that are set up for the selected record.**



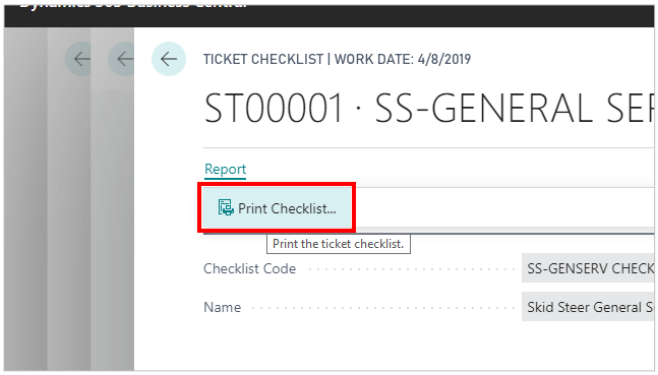
Click on the link in cell **Checklist Code** with the value **SS-GENSERV CHECKLIST**



Click on the navigation menu item popup **Report**

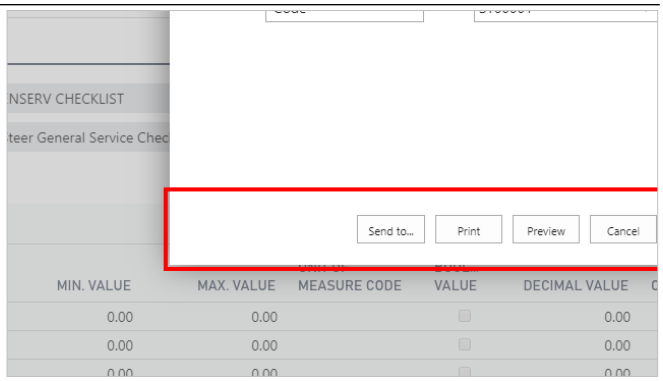


Click on the navigation menu item **Print Checklist...**

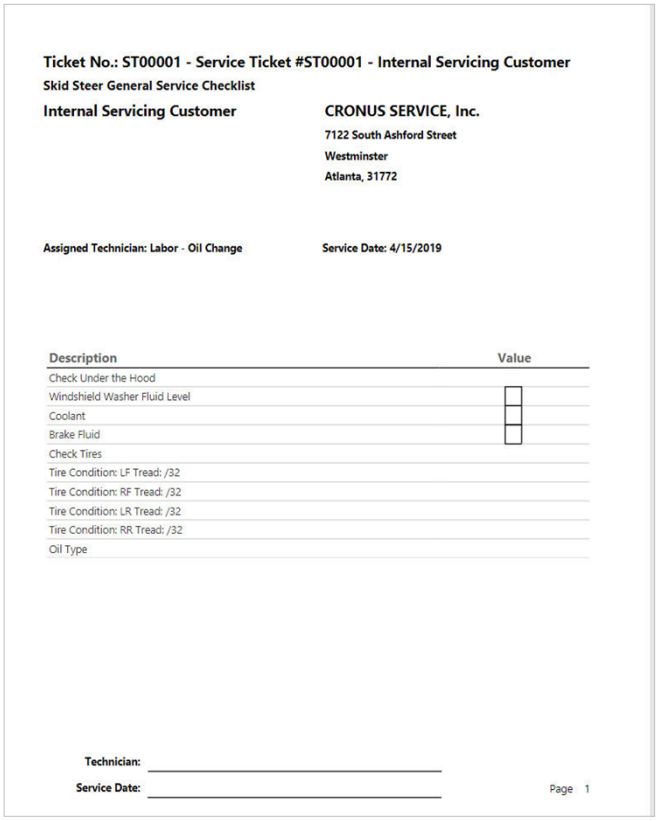


Click on **Send to... Print Preview Cancel**

The standard Microsoft Dynamics 365 Business Central, printing options are available to select from.



The following picture displays the Checklist document which is for the template, SS-General Service.



Ticket No.: ST00001 - Service Ticket #ST00001 - Internal Servicing Customer
Skid Steer General Service Checklist
Internal Servicing Customer
CRONUS SERVICE, Inc.
7122 South Ashford Street
Westminster
Atlanta, 31772
Assigned Technician: Labor - Oil Change
Service Date: 4/15/2019

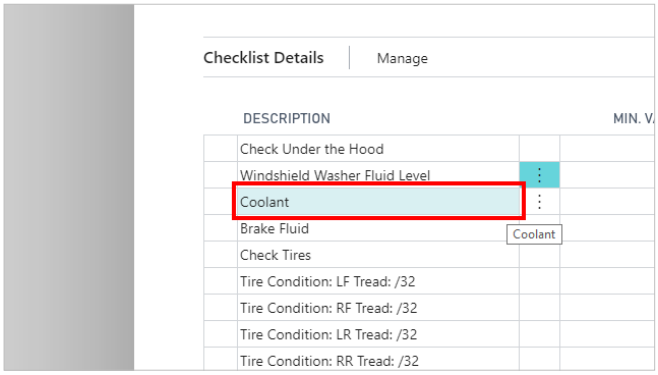
Description	Value
Check Under the Hood	
Windshield Washer Fluid Level	☐
Coolant	☐
Brake Fluid	☐
Check Tires	
Tire Condition: LF Tread: /32	
Tire Condition: RF Tread: /32	
Tire Condition: LR Tread: /32	
Tire Condition: RR Tread: /32	
Oil Type	

Technician: _____
Service Date: _____
Page 1

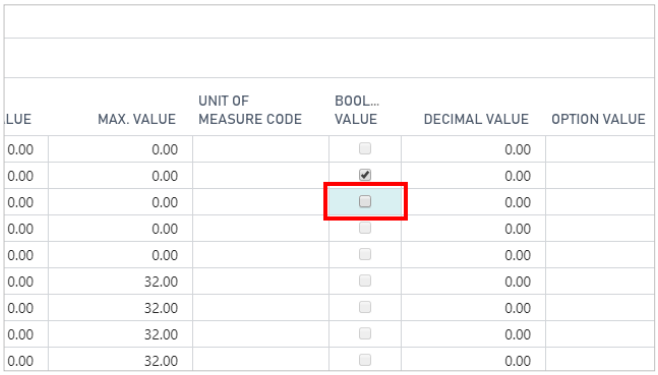
The following demonstrates the entering of the technicians' results from completing the checklist tasks.

The entry is optional.

Click on the cell **Description** with the value **Coolant**

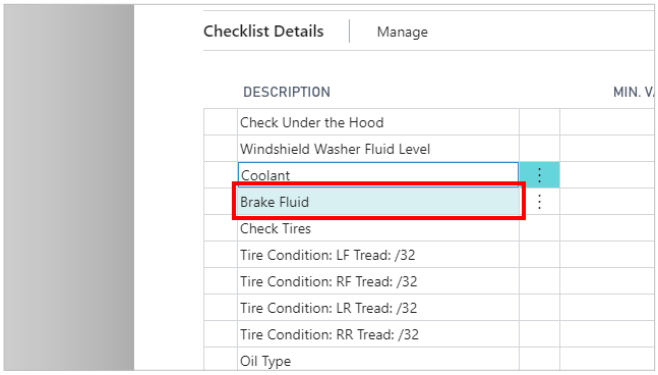


Click on **Boolean Value**

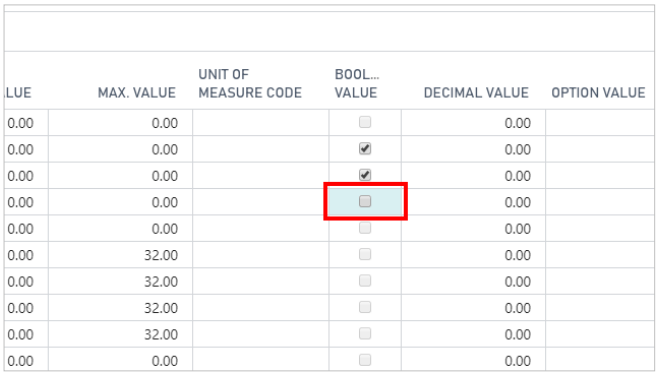


LUE	MAX. VALUE	UNIT OF MEASURE CODE	BOOL... VALUE	DECIMAL VALUE	OPTION VALUE
0.00	0.00		☐	0.00	
0.00	0.00		☑	0.00	
0.00	0.00		☐	0.00	
0.00	0.00		☐	0.00	
0.00	0.00		☐	0.00	
0.00	32.00		☐	0.00	
0.00	32.00		☐	0.00	
0.00	32.00		☐	0.00	
0.00	32.00		☐	0.00	

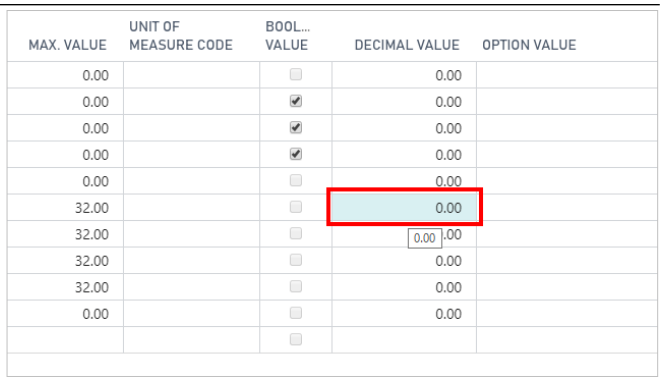
Click on the cell **Description** with the value **Brake Fluid**



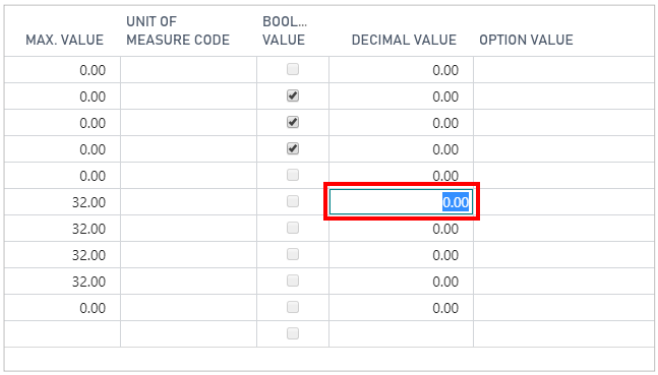
Click on **Boolean Value**



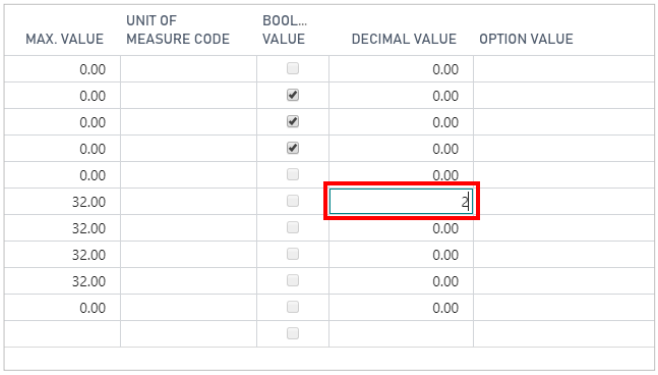
Click on the cell **Decimal Value** with the value **0.00**



Click on the cell **Decimal Value** with the value **0.00**



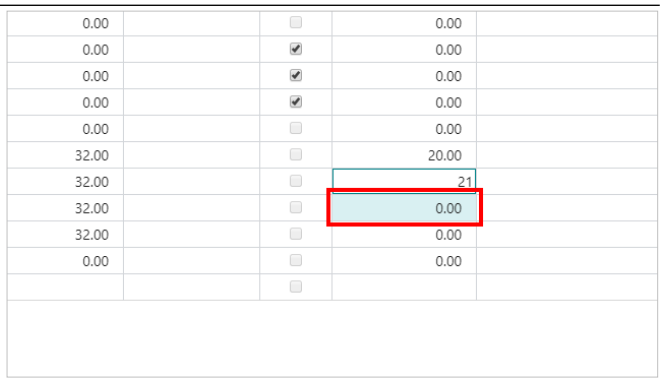
Enter the text **20**.



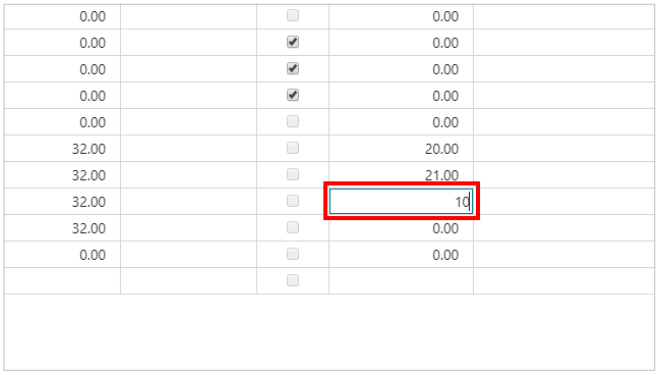
Click on the cell **Decimal Value** with the value **0.00**

Enter the text **21**.

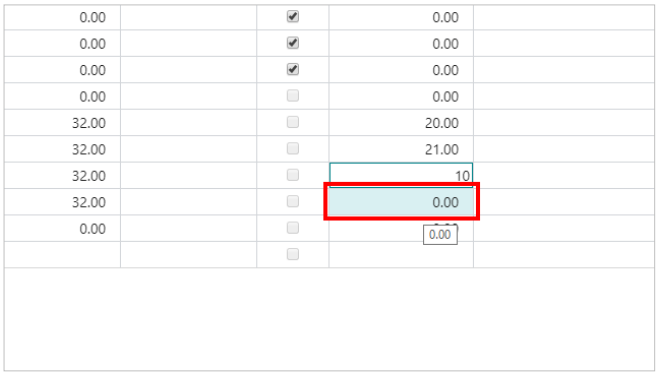
Click on the cell **Decimal Value** with the value **0.00**



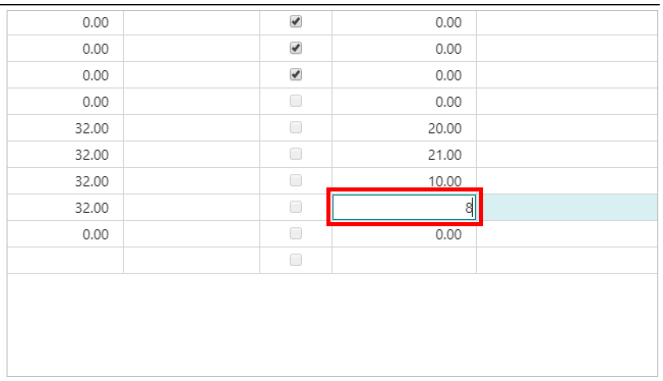
Enter the text **10**.



Click on the cell **Decimal Value** with the value **0.00**

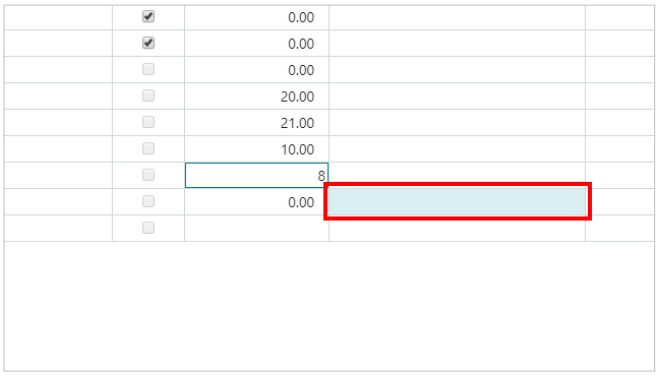


Enter the text **8**.

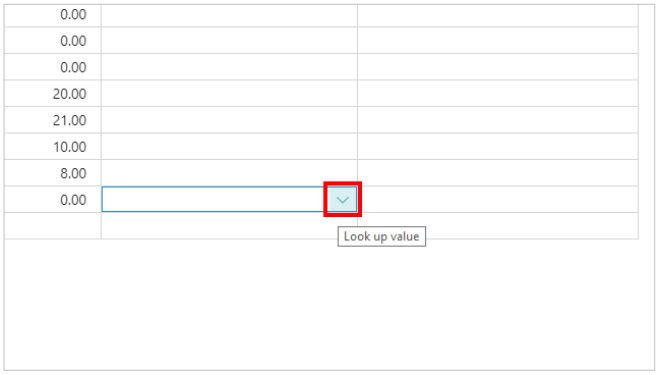


For records where there are various options to select from, the following demonstrates this for the Oil Type line.

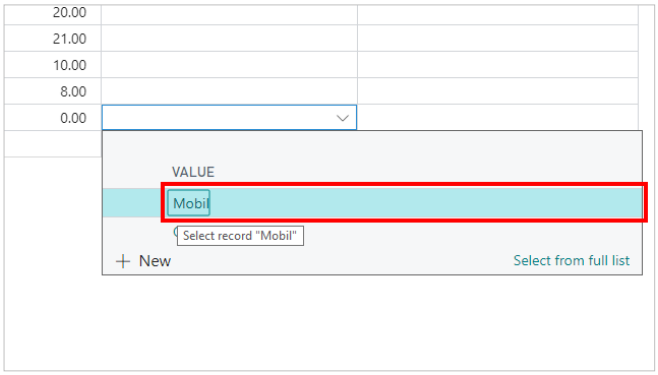
Click on the cell **Option Value**



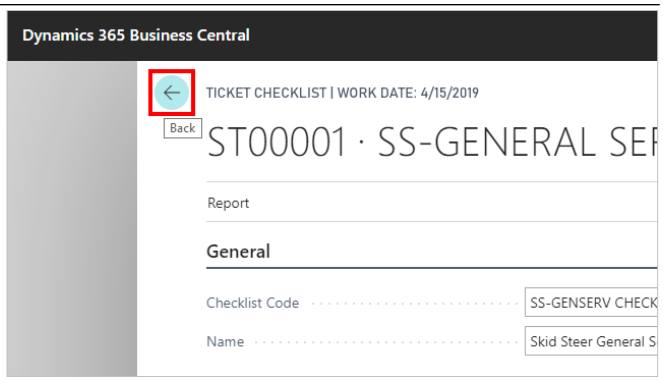
Click on the lookup button in the cell **Option Value**



Click on the link in cell **Value** with the value **Mobil**



Click on the back button



3.3.2.7. How to Process the Usage Actuals for the Ticket

The following demonstrates the confirmation of actual quantities for all the Service Ticket Detail lines when the actuals are the same as the budgeted quantities.

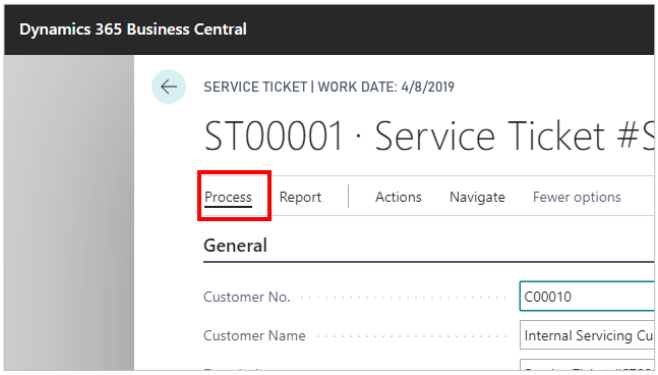
Should the actuals be different from the budgeted quantities, then on the Ticket Detail Lines, the quantity should be revised to reflect the actual quantities prior to running the Confirm Actuals.

Alternatively, the quantity can be revised on the Job Journal records prior to posting the journal when only a portion of the usage is to be posted at the specified posting date.

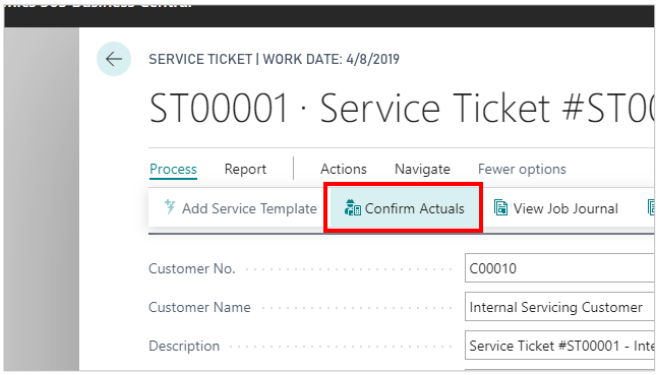
This process automatically creates records in a Job Journal, which automatically opens and must be posted to record the usage on the ticket and job.

NOTE:
The first time a user completes the following steps a Job Journal Batch will automatically be created for the user.

Click on the navigation menu item popup **Process**

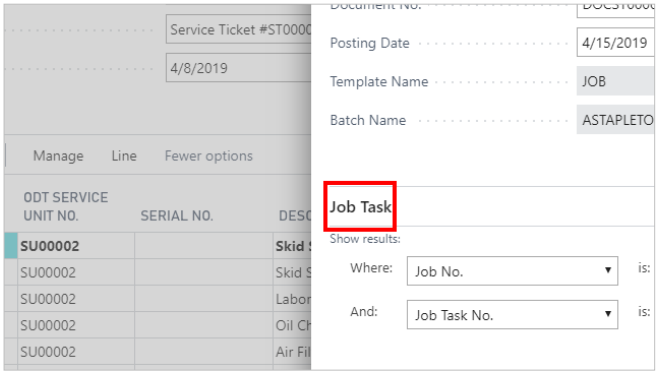


Click on the link **Confirm Actuals**

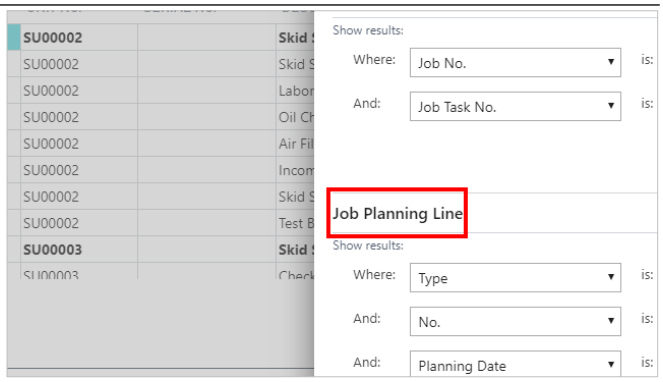


Should only some of the Ticket Detail records to be have the usage calculated, then filters can be set on the following tabs of Job Task and Job Planning Lines on the Confirm Actuals request page.

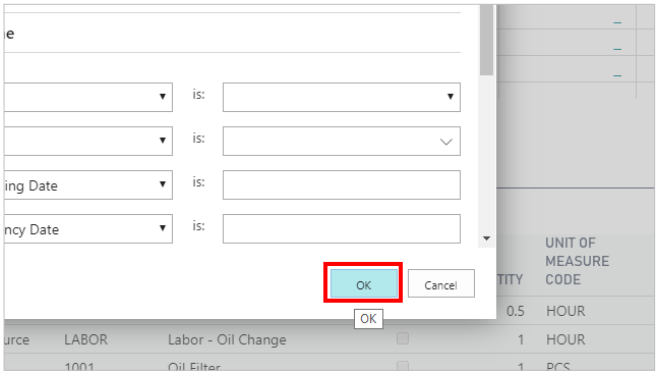
Click on **Job Task**



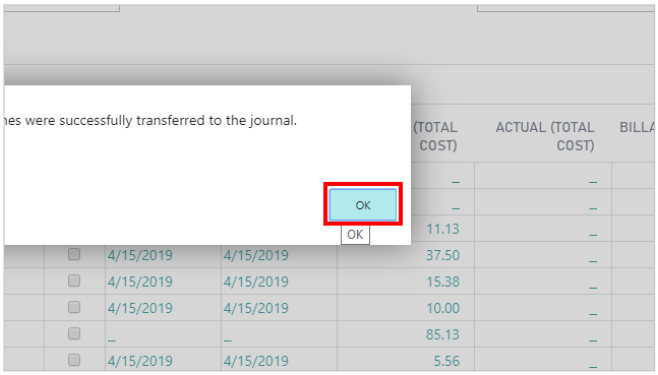
Click on **Job Planning Line**



Click on the button **OK**



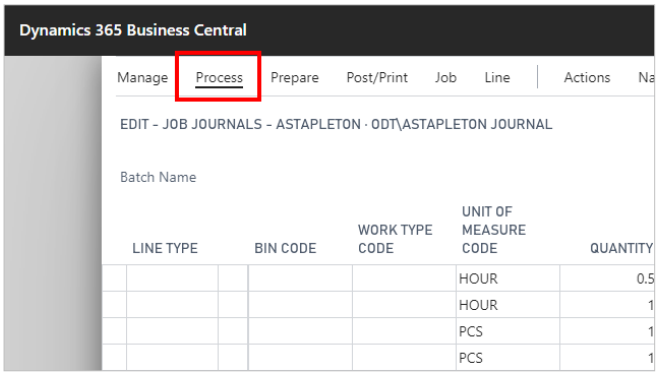
Click on the button **OK**



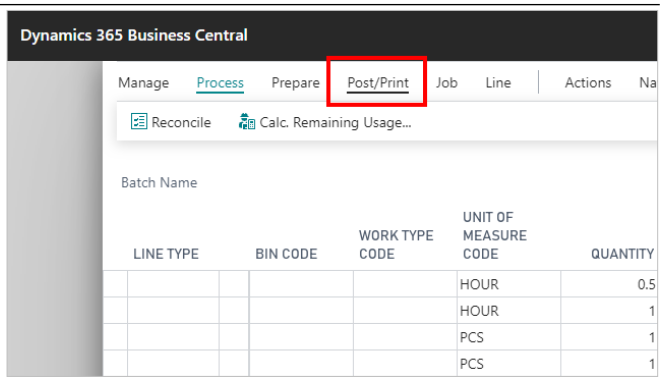
The Job Journal will automatically open for review and modification, if needed.

NOTE: Should you wish to change the Line Type field, you must first clear the Job Planning Line No. field.

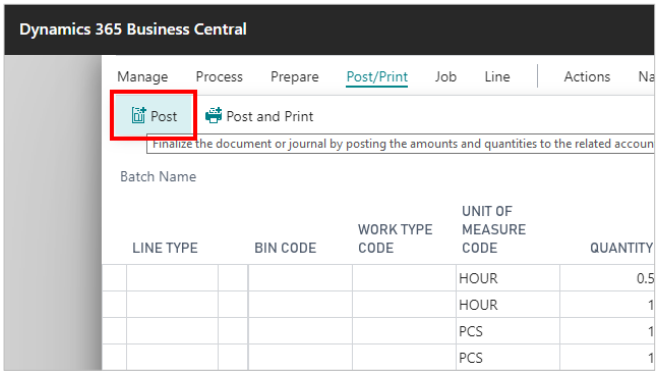
Click on the navigation menu item popup **Process**



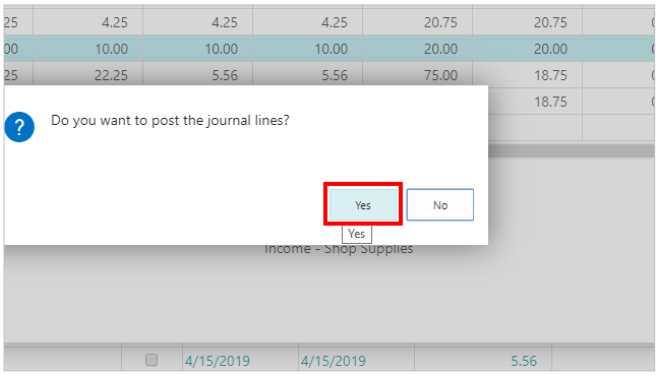
Click on the navigation menu item popup **Post/Print**



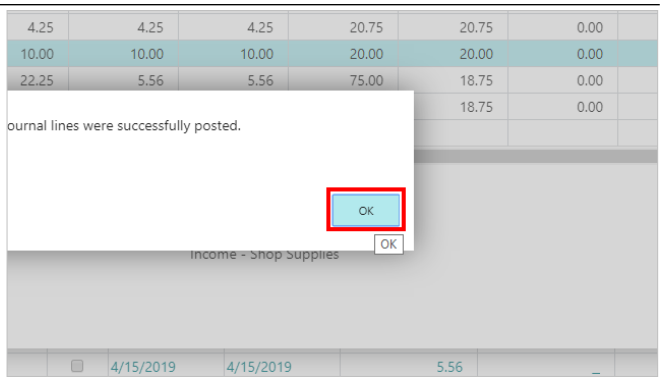
Click on the navigation menu item **Post**



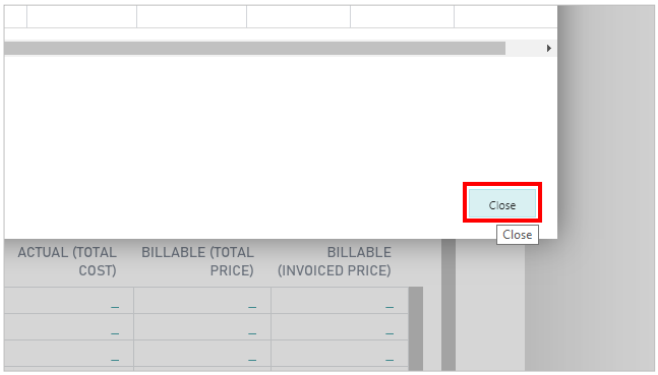
Click on the button **Yes**



Click on the button **OK**



Click on the button **Close**



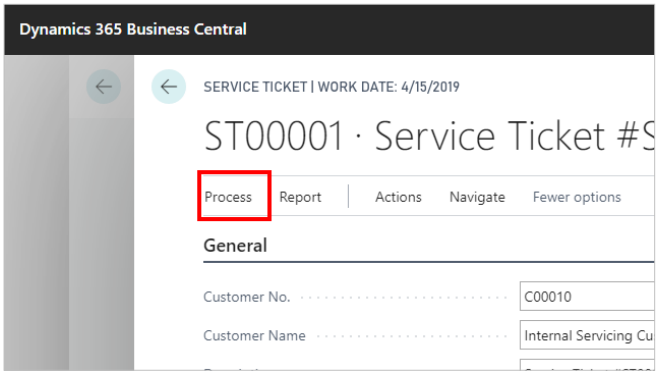
3.3.2.8. How to Close the Ticket

As this Service Ticket is for servicing internally owned equipment, no invoicing of the ticket is to occur.

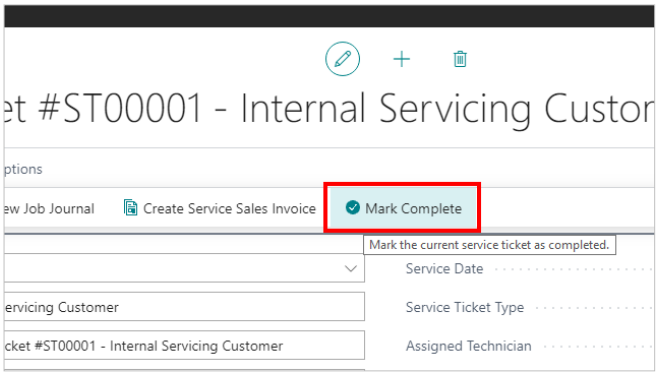
The final step is to mark the ticket as completed once all usage has been posted.
This will set the Status on the Job card to Completed.

The following demonstrates this process.

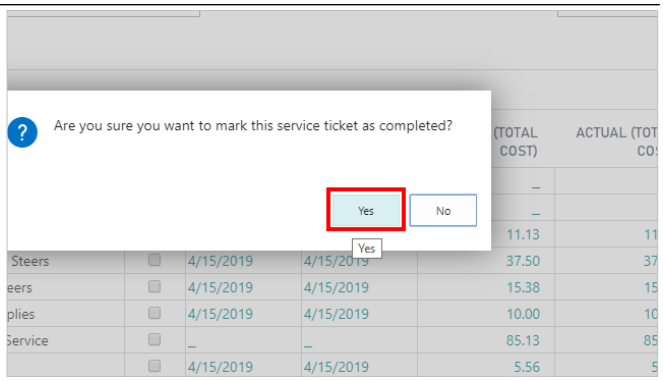
Click on the navigation menu item popup **Process**



Click on the navigation menu item **Mark Complete**



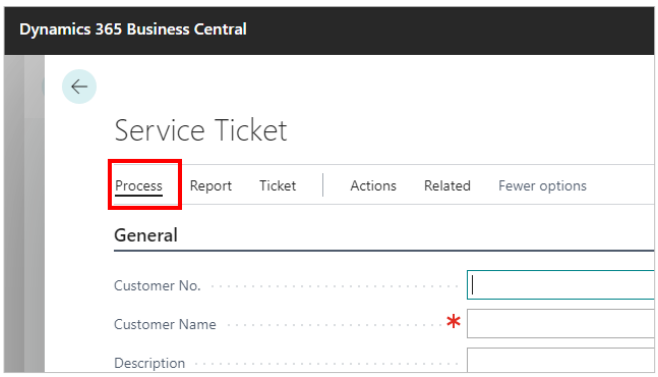
Click on the button **Yes**



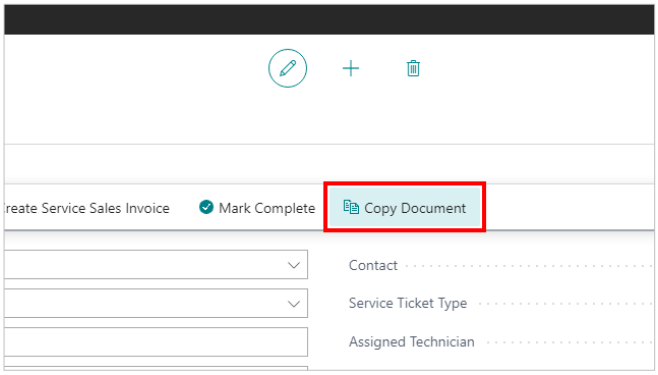
3.3.2.9. How to use the Copy Document Feature

The following demonstrates how to use the Copy Document Feature.
Please note that the Service Ticket that will be used for this example was created in advance.

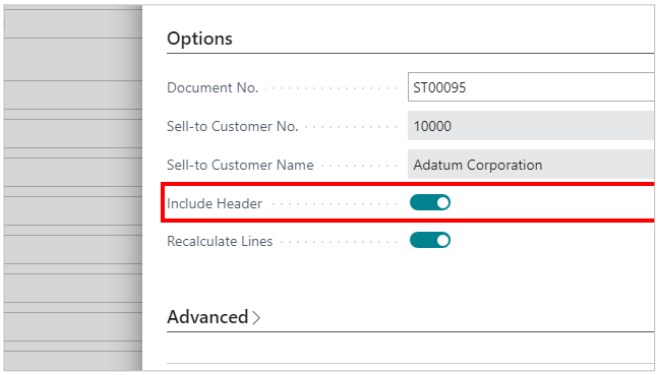
Click on the navigation menu item popup **Process**



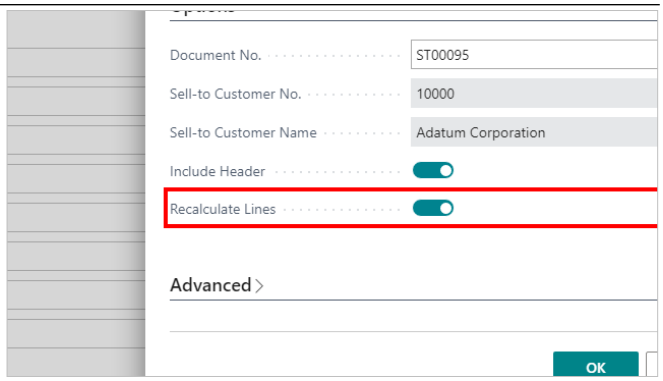
Click on the navigation menu item **Copy Document**



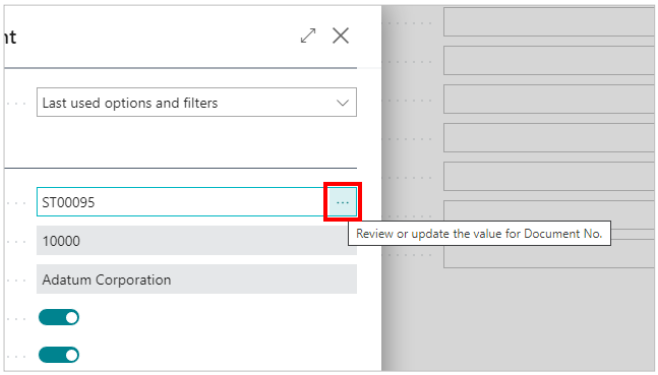
The Include Header toggle can be used to toggle if information from the header of the selected ticket is copied. It is enabled by default if a customer has not been selected before copying, and is disabled by default if a customer has been selected before copying.



The Recalculate Lines toggle can be used to toggle if service lines that get copied should have their prices recalculated after being copied.

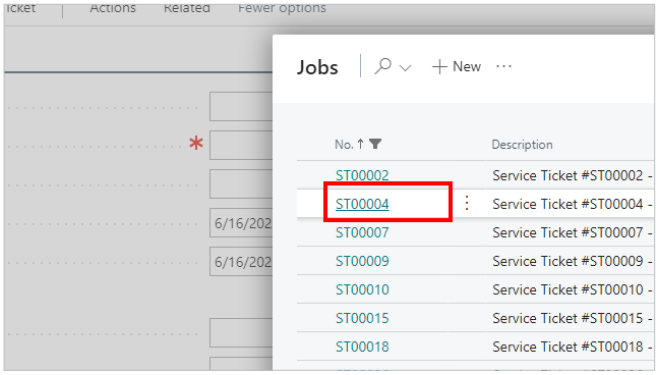


Click on the lookup button **Document No.**

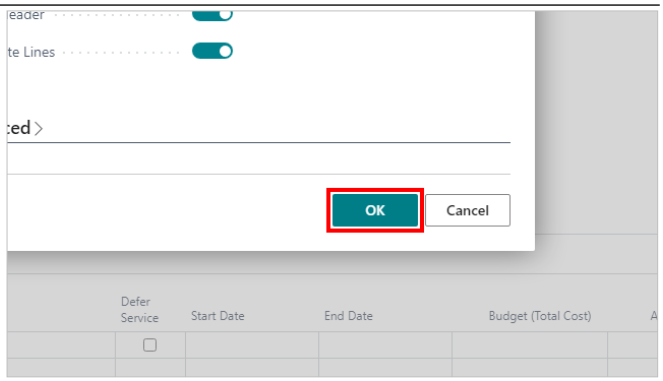


Select the service ticket that you want to copy.

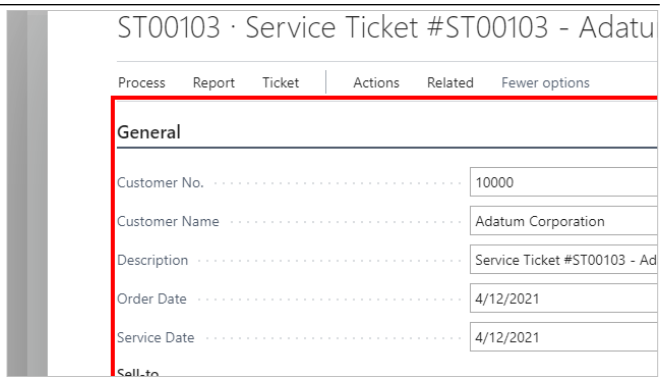
Click on the link in cell **No.** with the value **ST00004**



Click on the button **OK**



Notice that information from the selected ticket has now been copied to the current service ticket.



3.4. Service for External Equipment

3.4.1. Overview of External Customer Equipment Servicing

3.4.1.1. Overview

ODT Service is essencially an enhancement to the Jobs module, servicing of internal equipment can be easily accomplished.

There are two specific setups required for the servicing of external Customer owned equipment.

The Jobs module requires a Customer be specified on a job.

Therefore, when servicing Customer owned equipment, a Customer will be required.

Service Quotes are available, should your organization provide quotes, prior to converting the quote to a Service Ticket. Service Quotes are optional.

The Service Quote and Service Ticket can be entered, printed and processed from the Business Manager or Sale Order Processor Profiles.

A review of the ODT Service Online Help, Service Processing Overview and Service Ticket Overview, located within the category, Processing Service, is highly recommended, prior to using Service Quotes or Service Tickets.

3.4.2. How to Process External Customer Service Quotes

3.4.2.1. Overview

A Service Quote can be created:

- From the main menu option, Service, by selecting Service Ticket Quotes, which opens the Service Ticket Quote list where New can be selected.
- From the Actions part of the profile by selecting, +Service Ticket Quote.
- From the Actions part of the profile by selecting, Service, then Service Ticket Quote.
- From the Activities Cue, Service Ticket Quote and then selecting New.

The Service Ticket Quote is to be converted to a Service Ticket upon approval from the Customer.

Should the Customer decide they do not want to go forward with the servicing, then the Service Ticket Quote can be canceled by selecting Process, then Cancel Ticket.

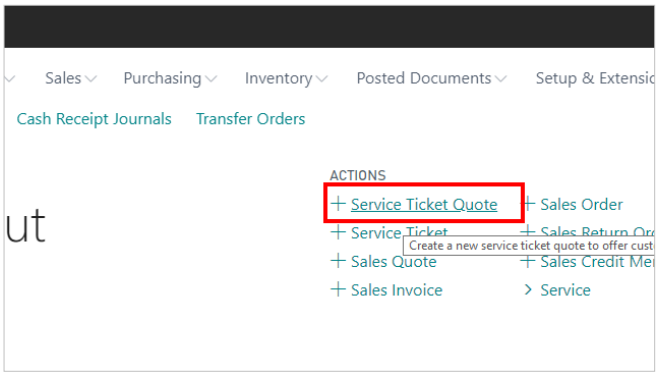
3.4.2.2. How to Create a Service Ticket Quote from Actions

Sales Order Process Profile

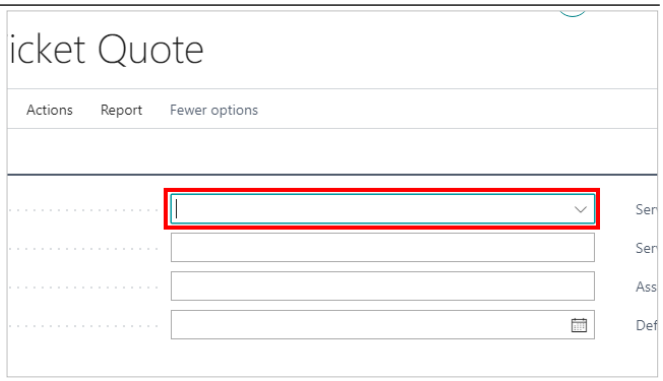
The same steps can be used when a user has the Business Manager Profile.

The following demonstrates the creation of a Service Ticket Quote from the Actions, +Service Ticket Quote option.

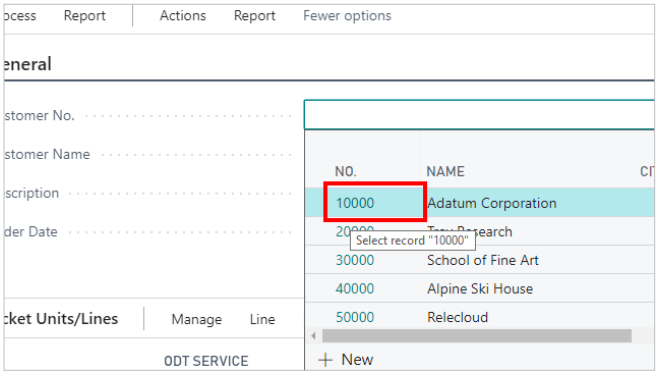
Click on the navigation menu item **Service Ticket Quote**



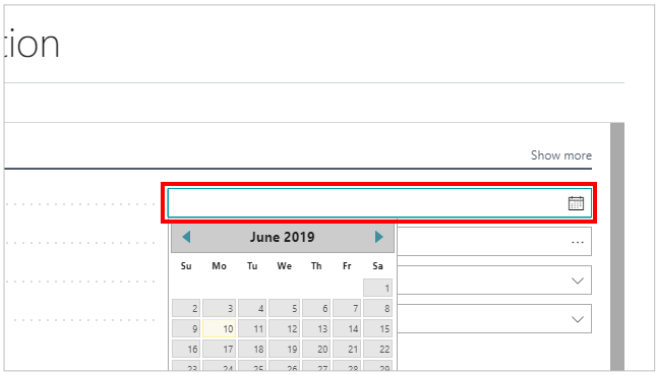
Click on the field **Customer No.**



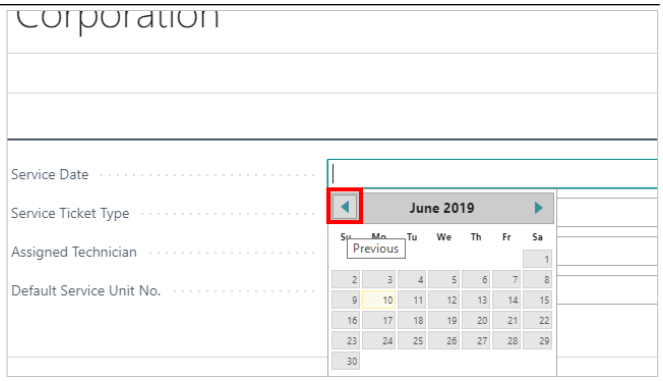
Click on the link in cell **No.** with the value **10000**
Select the applicable Customer.



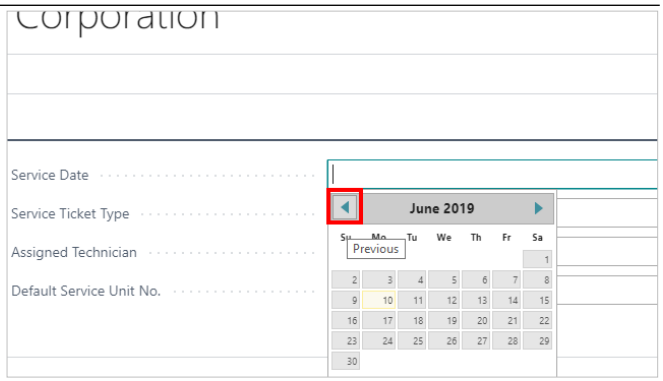
Click on the field **Service Date**



Click on the link **Previous**

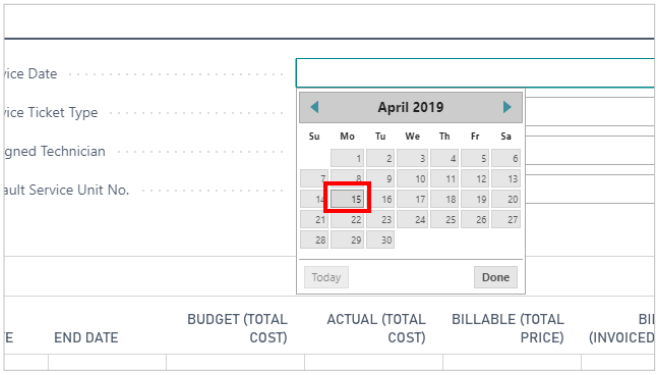


Click on the link **Previous**

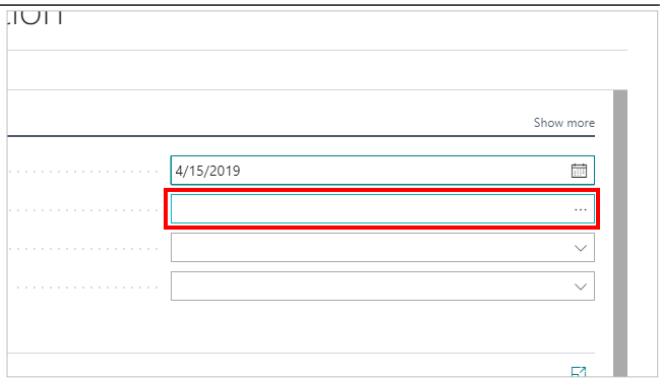


Click on a date in the calendar

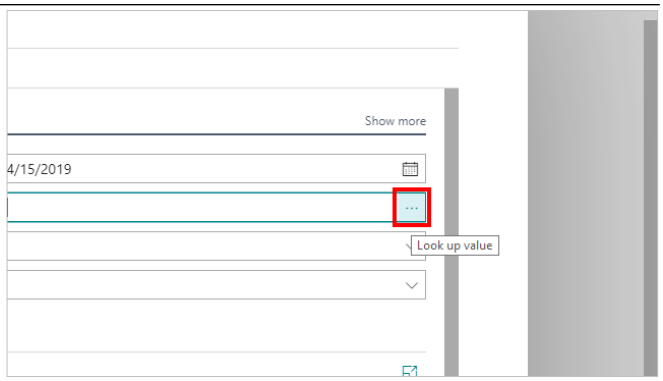
Select the date on which the service is to be performed, if different from the defaulted date, from the Users' Work Date.



Click on the field **Service Ticket Type**



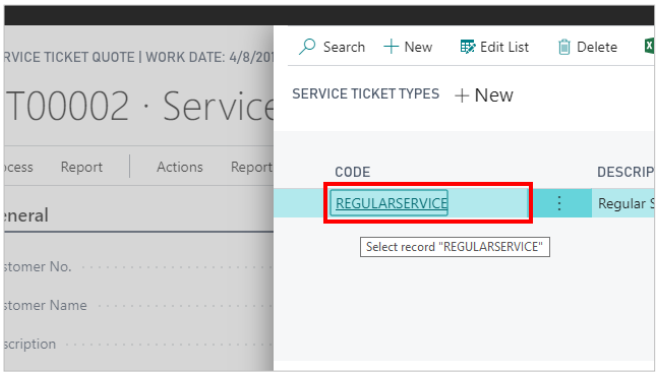
Click on the lookup button **Service Ticket Type**



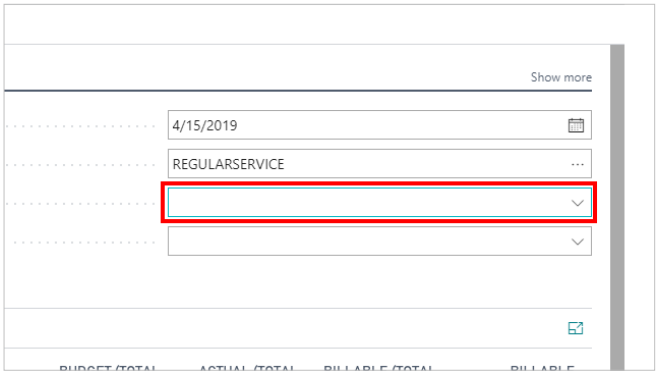
Click on the link in cell **Code** with the value **REGULARSERVICE**

The specification of a Ticket Type is optional.

The use of the Ticket Type to specify differing types of servicing can be beneficial for analysis of past servicing.

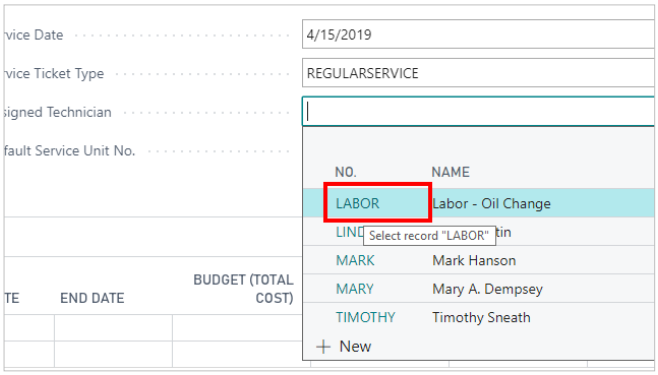


Click on the field **Assigned Technician**



Click on the link in cell **No.** with the value **LABOR**

The specification of an Assigned Technician is optional.

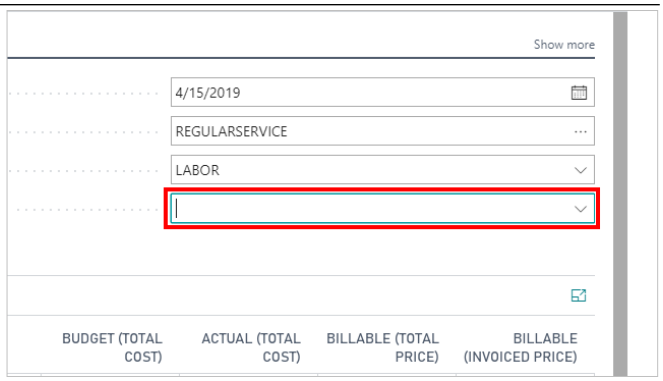


Click on the field **Default Service Unit No.**

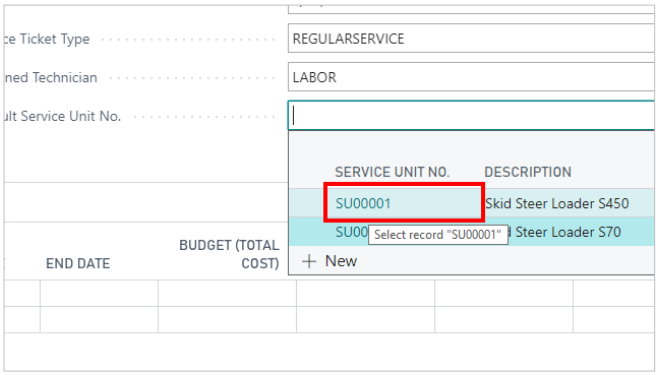
When a service ticket quote is for a single product, then when this field is populated, a Heading type Ticket Unit/Line, will automatically be created.

If the selected service unit is already on another open service ticket, a message will be displayed to indicate this and confirm if you want to proceed.

This selection of a Default Service Unit is optional.



Click on the link in cell **Service Unit No.** with the value **SU00001**



3.4.2.3. How to Add a Service Template to a Quote

The listing of the Service Templates available is filtered to display only those templates, which have the same Maintenance Group as on the Service Unit.

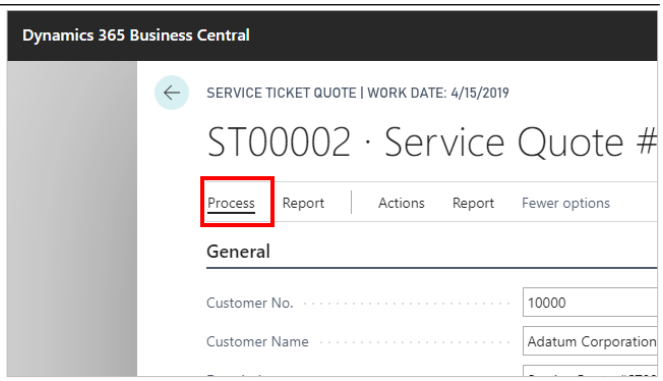
When adding a Service Template from the Ticket main menu, Process, Add Service Template, then the

Default Service Unit, Maintenance Group is used in the filtering of the available Service Templates.

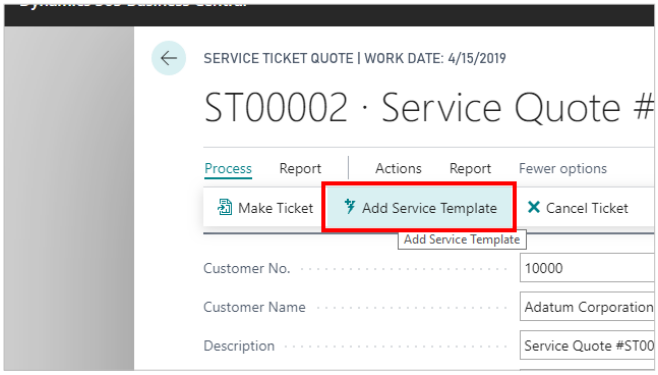
When adding a Service Template from the Ticket Units/Lines tab via Manage - Add Service Template, the available templates is filtered by the Maintenance Group of the Service Unit on the selected line with a Task Type of Heading.

The following demonstrates the adding of a service template from the Ticket main menu.

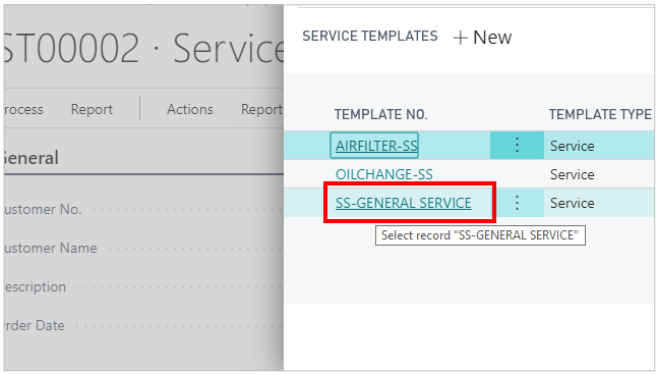
Click on the navigation menu item popup **Process**



Click on the navigation menu item **Add Service Template**



Click on the link in cell **Template No.** with the value **SS-GENERAL SERVICE**

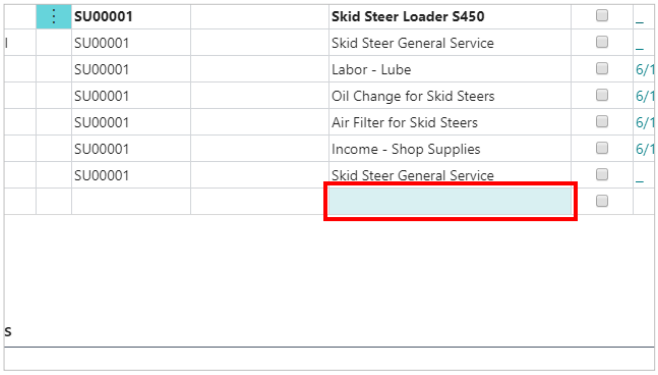


The lines will automatically be populated with the template lines, of the selected Service Template.

3.4.2.4. How to Enter Manual Lines on a Service Ticket Quote

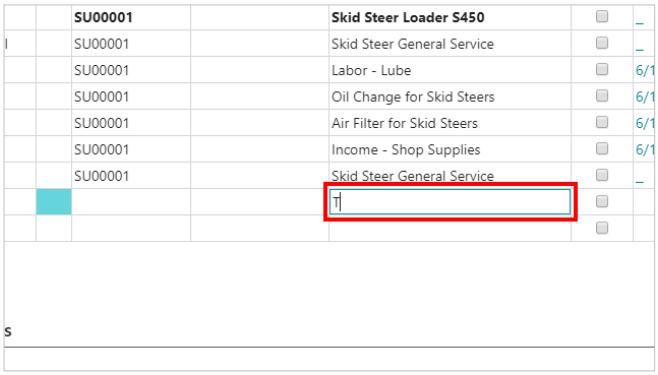
The following demonstrates the entry and configuration of a manually entered line in the Ticket Units/Lines tab for the same Service Unit as used when adding the Service Template.

Click on the cell **Description**

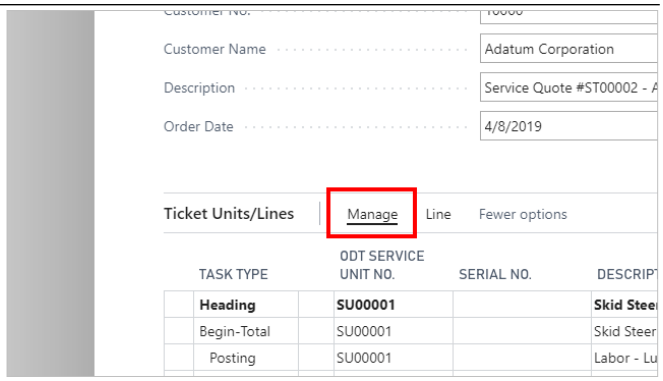


Enter the text **Test Battery**.

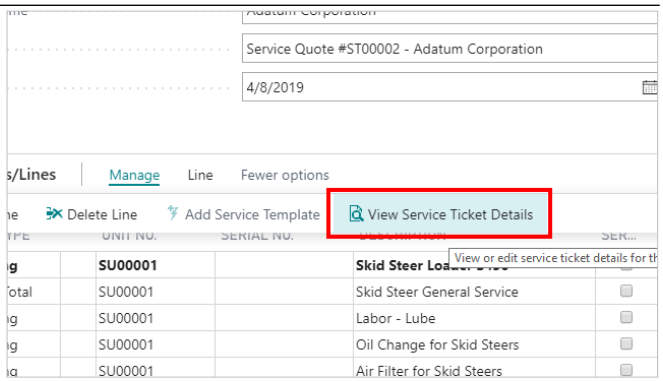
The ODT Service Unit No. field will automatically be populated with the same Service Unit No., when moving off and back to the line, as the Task Type is left as the default of Posting.



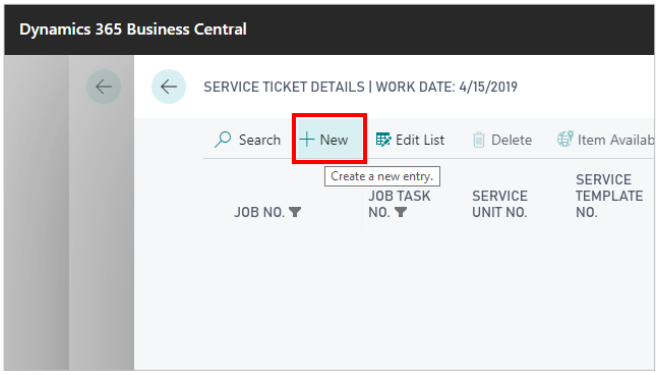
Click on the navigation menu item popup **Manage**



Click on the navigation menu item **View Service Ticket Details**



Click on the navigation menu item **New**



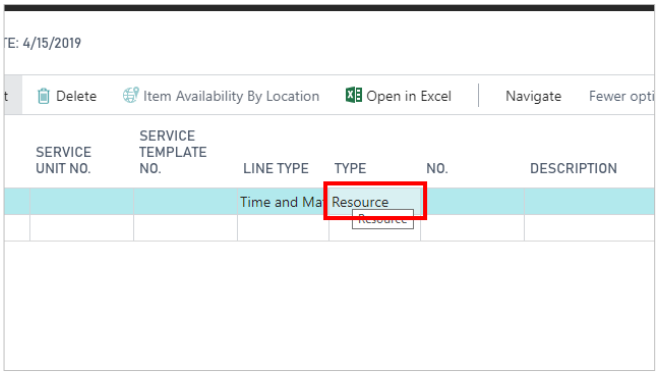
The Task No. Field is automatically populated on the line.

Note that the Line Type is automatically set to Time and Materials, when servicing external customer equipment.

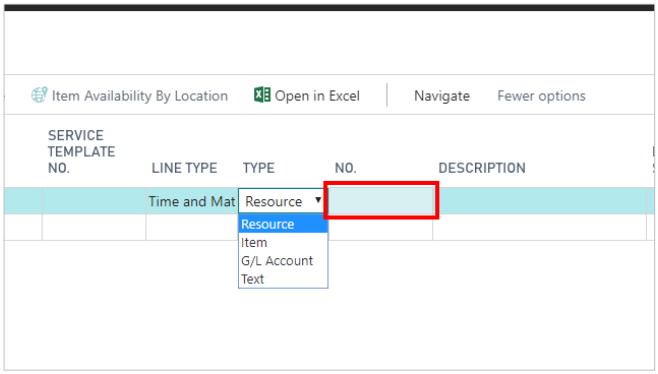
Click on the cell **Type** with the value **Resource Item G/L Account Text**

Select the applicable type to be used for the line.

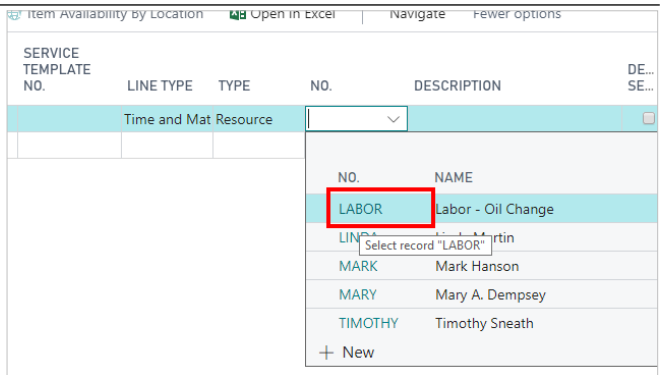
In this example the line is for a technician to perform a task, therefore, Resource is used.



Click on the cell **No.**

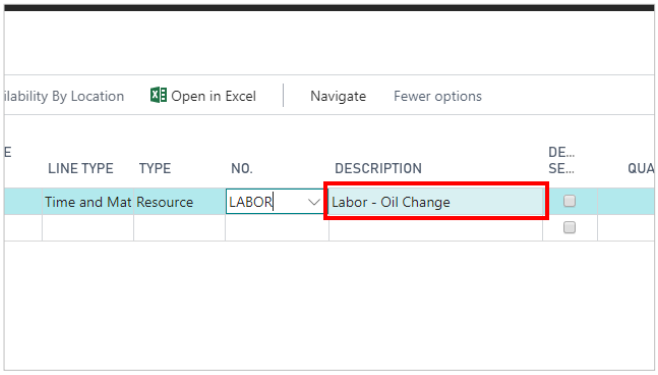


Click on the link in cell **No.** with the value **LABOR**

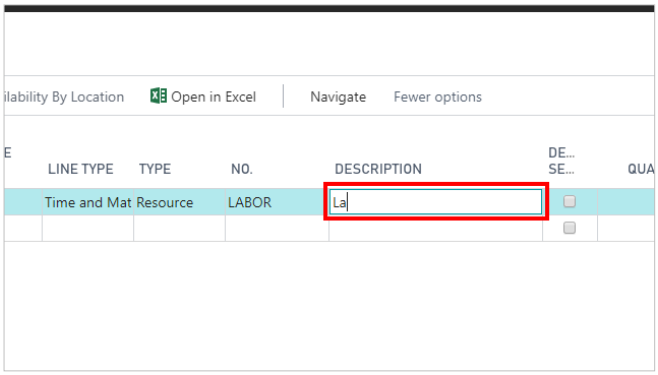


Click on the cell **Description** with the value **Labor - Oil Change**

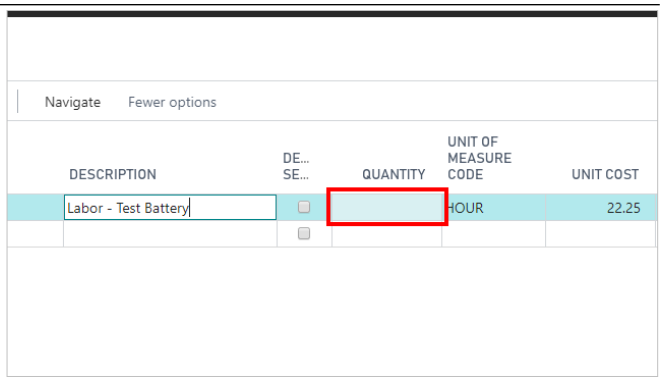
The description will default from Resource card selected and can be overridden to be indicative of the task to be performed.



Enter the text **labor - Test Battery**.

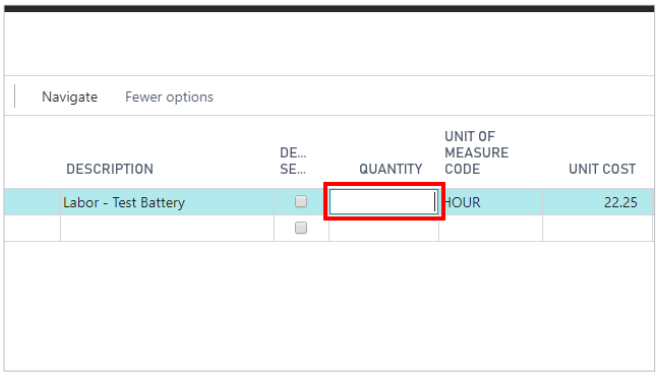


Click on the cell **Quantity**



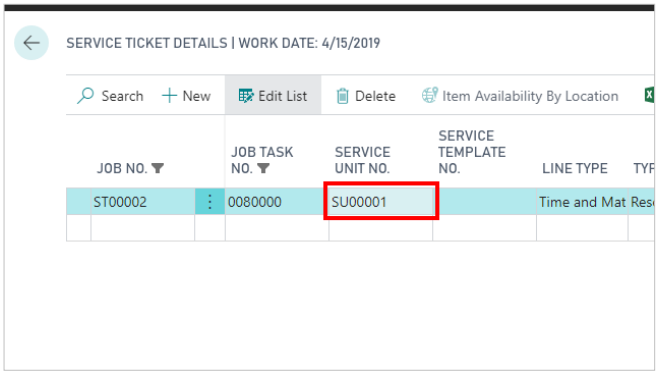
Enter the text **.25**.

Enter the budgeted quantity for performing the task.

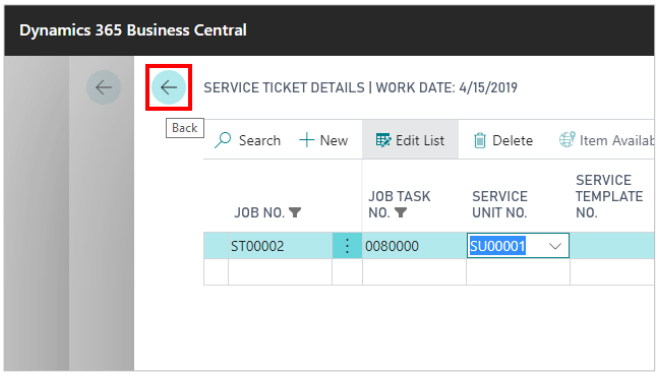


Click on the cell **Service Unit No.** with the value **SU00001**

Note that the Service Unit No. is automatically populated.

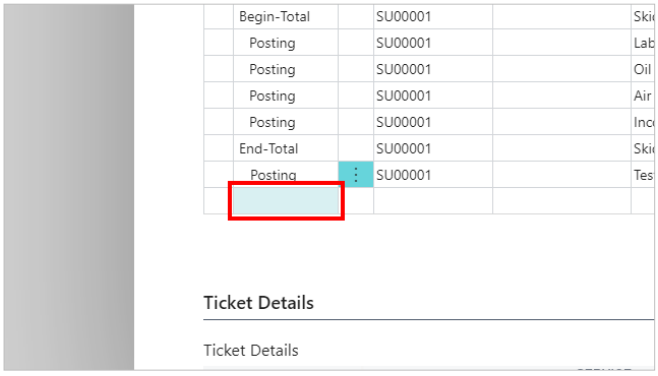


Click on the back button

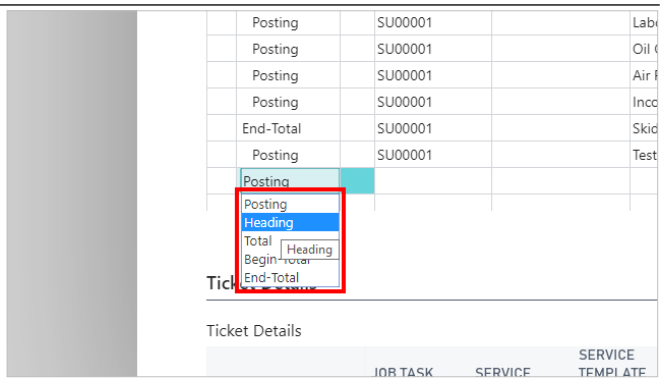


The following demonstrates the manual entry of lines for a different Service Unit on the Ticket Units/Lines tab and the configuration of the Service Ticket Detail lines.

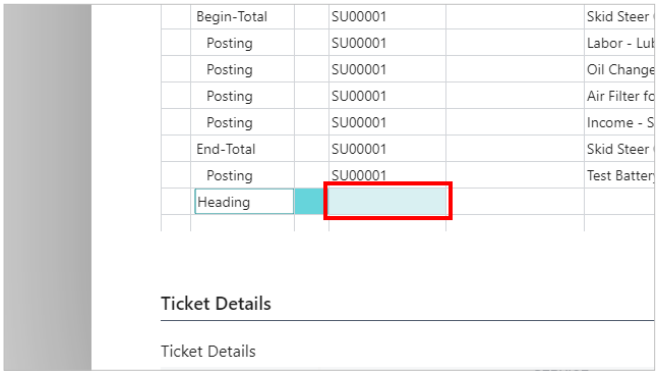
Click on the cell **Task Type**



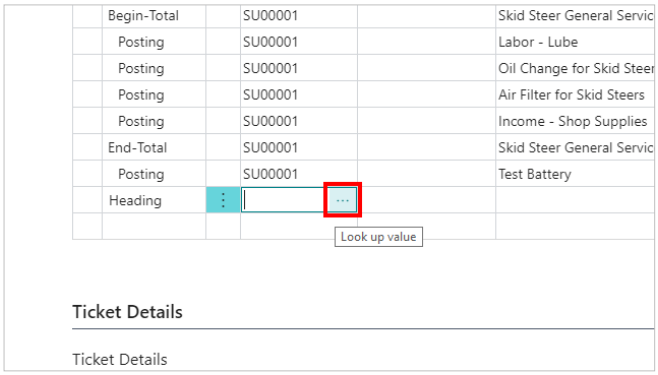
Click on the item **Heading** in the list



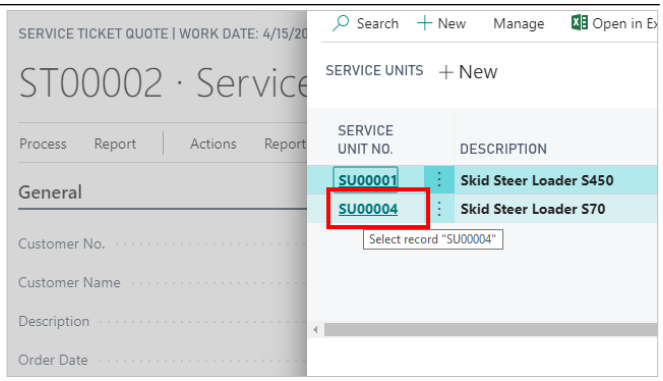
Click on the cell **ODT Service Unit No.**



Click on the lookup button in the cell **ODT Service Unit No.**



Click on the link in cell **Service Unit No.** with the value **SU00004**



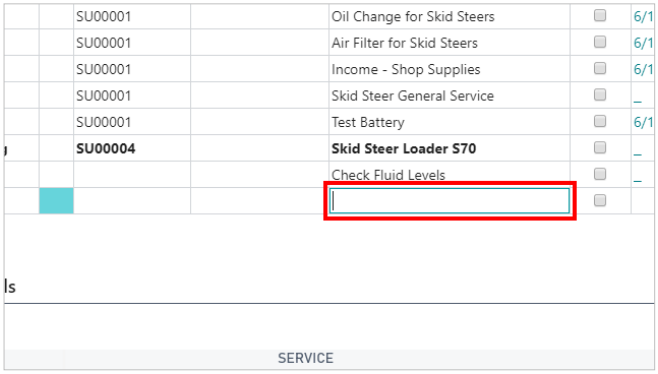
Click on the cell **Description**

Enter the text **Check Fluid Levels**.

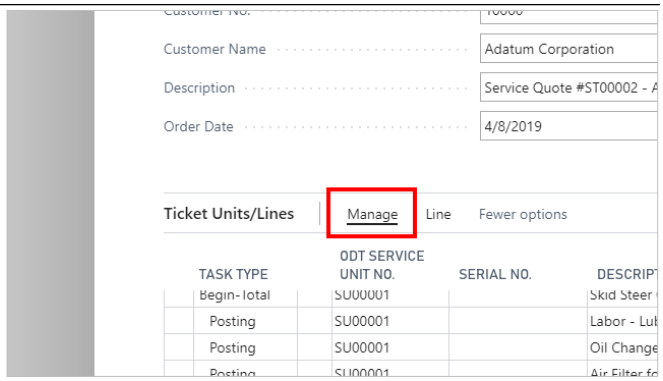
The ODT Service Unit No. field will automatically be populated with the same Service Unit No., when moving off and back to the line, as the Task Type is left as the default of Posting.

Press the **Arrow down** key.

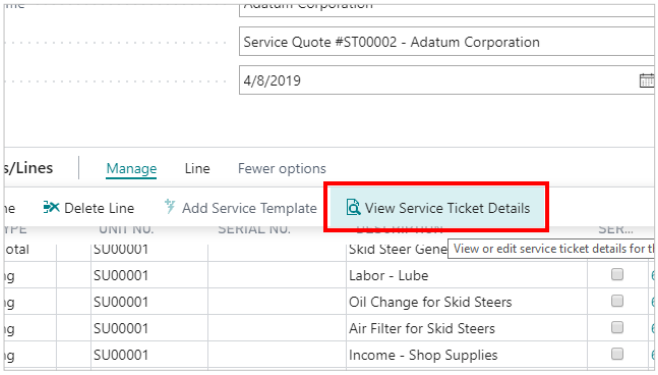
Press the **Arrow up** key.



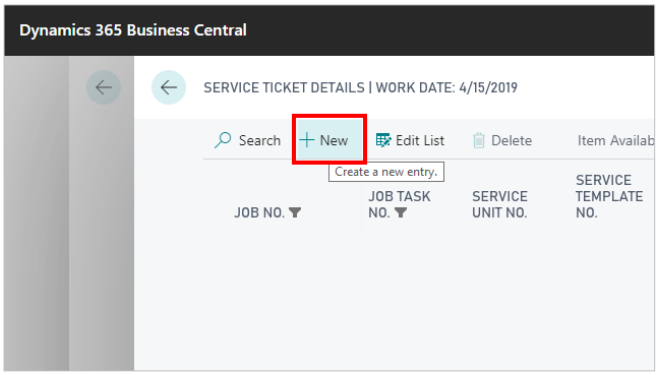
Click on the navigation menu item popup **Manage**



Click on the navigation menu item **View Service Ticket Details**

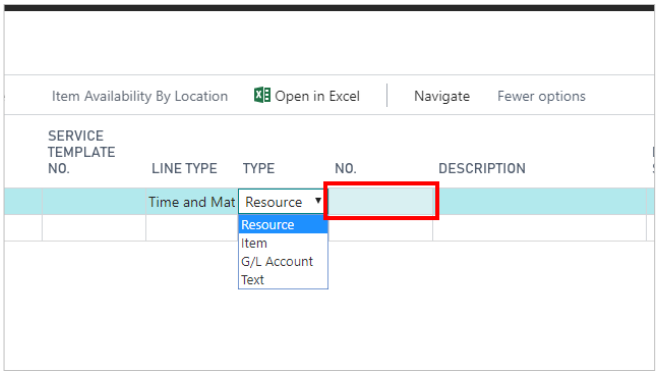


Click on the navigation menu item **New**

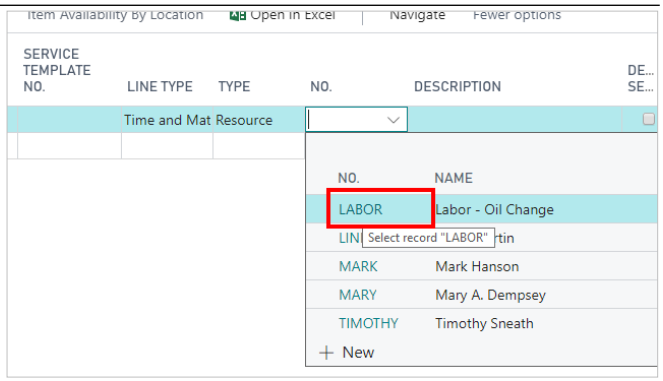


As the line is to be for a technician, a default type of Resource will be used.

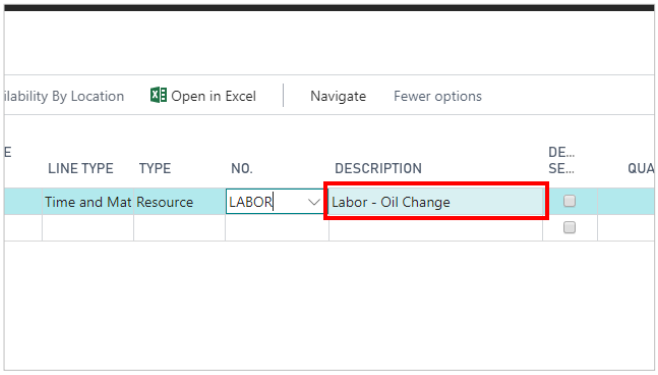
Click on the cell **No.**



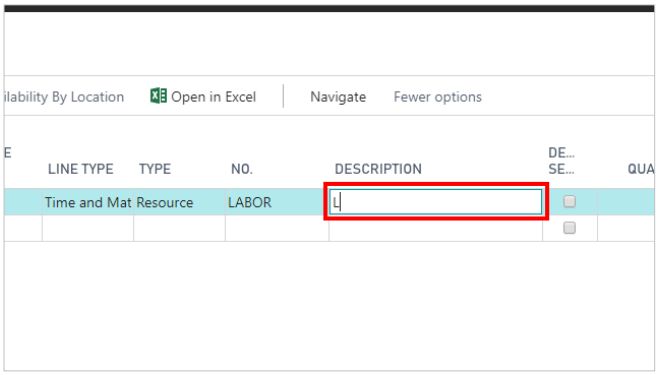
Click on the link in cell **No.** with the value **LABOR**



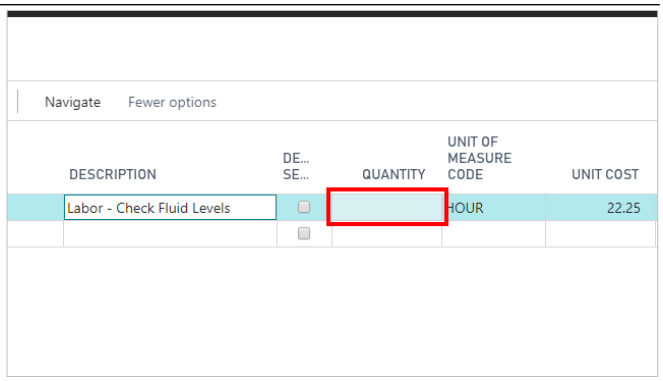
Click on the cell **Description** with the value **Labor - Oil Change**



Enter the text **Labor - Check Fluid Levels**.

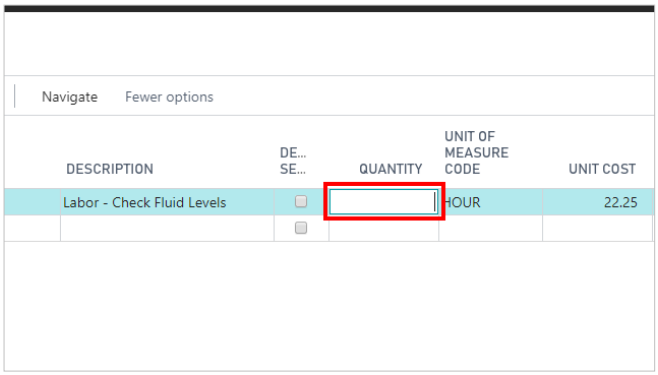


Click on the cell **Quantity**

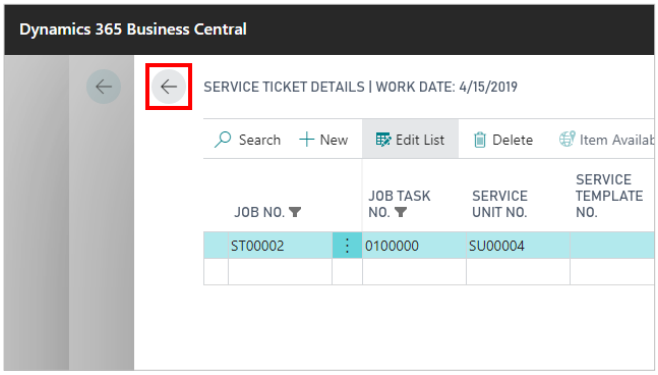


Enter the text **.25**.

Enter the quantity of time it will take to perform the task.

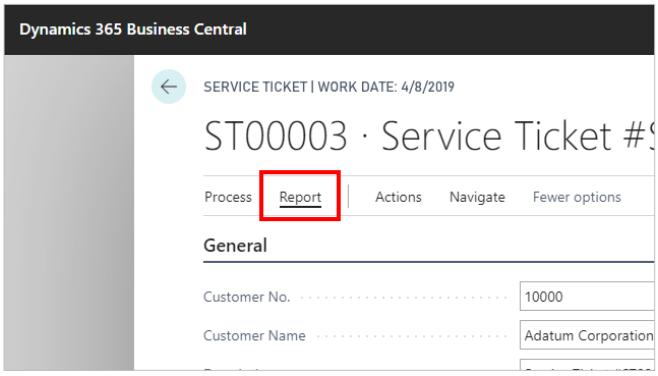


Click on the back button

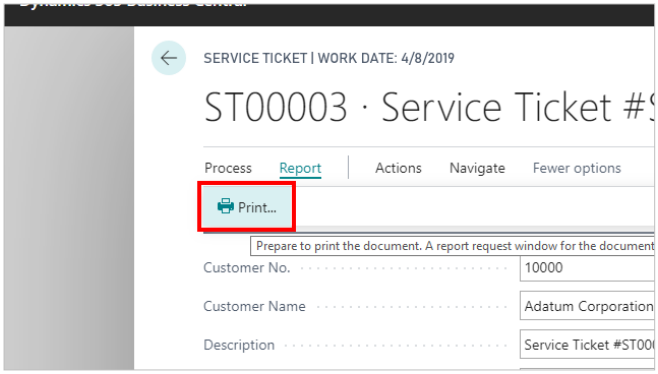


3.4.2.5. How to Print the Service Ticket

Click on the navigation menu item popup **Report**

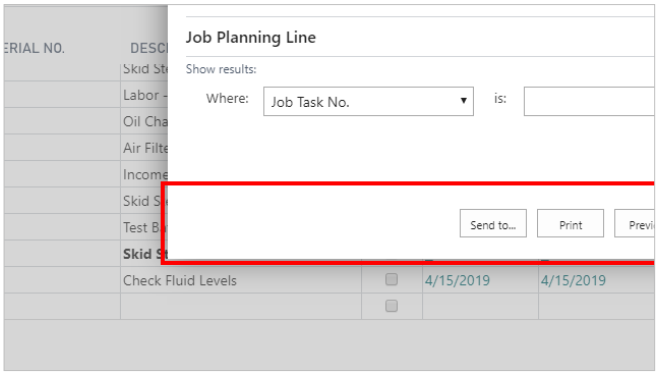


Click on the navigation menu item **Print...**

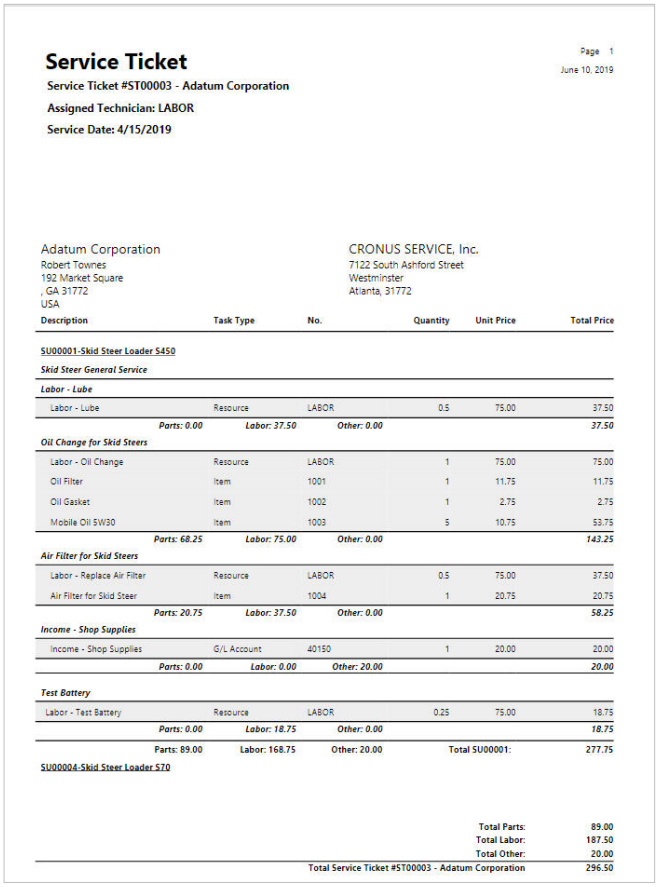


Click on **Send to... Print Preview Cancel**

The standard Microsoft Dynamics 365 Business Central, printing options are available to select from.



The following picture displays the Service Ticket document.



Service Ticket

Service Ticket #ST00003 - Adatum Corporation

Assigned Technician: LABOR

Service Date: 4/15/2019

Page 1

June 10, 2019

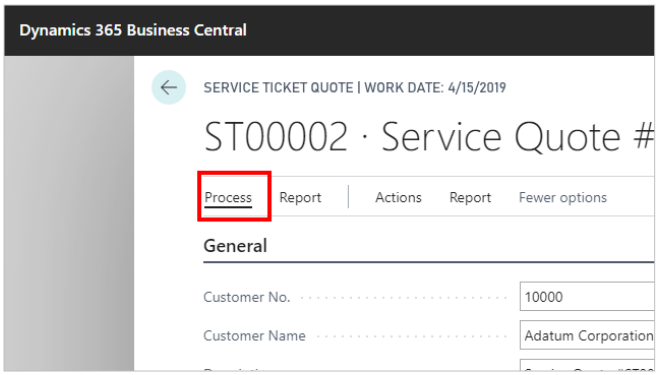
Adatum Corporation
Robert Townes
192 Market Square
, GA 31772
USA

CRONUS SERVICE, Inc.
7122 South Ashford Street
Westminster
Atlanta, 31772

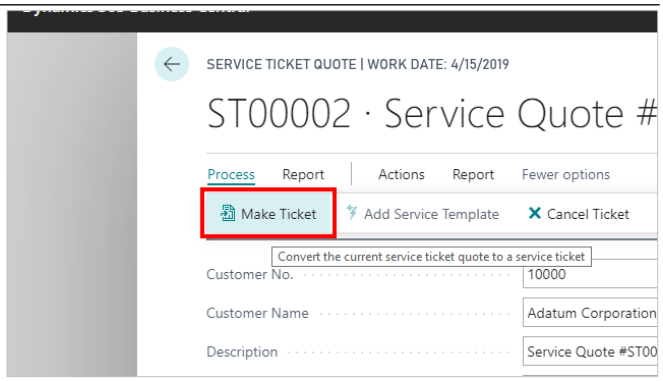
Description	Task Type	No.	Quantity	Unit Price	Total Price
SU00001-Skid Steer Loader S450					
Skid Steer General Service					
Labor - Lube					
Labor - Lube	Resource	LABOR	0.5	75.00	37.50
Parts: 0.00	*Labor: 37.50*	*Other: 0.00*			*37.50*
Oil Change for Skid Steers					
Labor - Oil Change	Resource	LABOR	1	75.00	75.00
Oil Filter	Item	1001	1	11.75	11.75
Oil Gasket	Item	1002	1	2.75	2.75
Mobile Oil 5W30	Item	1003	5	10.75	53.75
Parts: 68.25	*Labor: 75.00*	*Other: 0.00*			*143.25*
Air Filter for Skid Steers					
Labor - Replace Air Filter	Resource	LABOR	0.5	75.00	37.50
Air Filter for Skid Steer	Item	1004	1	20.75	20.75
Parts: 20.75	*Labor: 37.50*	*Other: 0.00*			*58.25*
Income - Shop Supplies					
Income - Shop Supplies	G/L Account	40150	1	20.00	20.00
Parts: 0.00	*Labor: 0.00*	*Other: 20.00*			*20.00*
Test Battery					
Labor - Test Battery	Resource	LABOR	0.25	75.00	18.75
Parts: 0.00	*Labor: 18.75*	*Other: 0.00*			*18.75*
Parts: 89.00	Labor: 168.75	Other: 20.00	Total SU00001:		277.75
SU00004-Skid Steer Loader S70					

Total Parts:	89.00
Total Labor:	187.50
Total Other:	20.00
Total Service Ticket #ST00003 - Adatum Corporation	296.50

Click on the navigation menu item popup **Process**

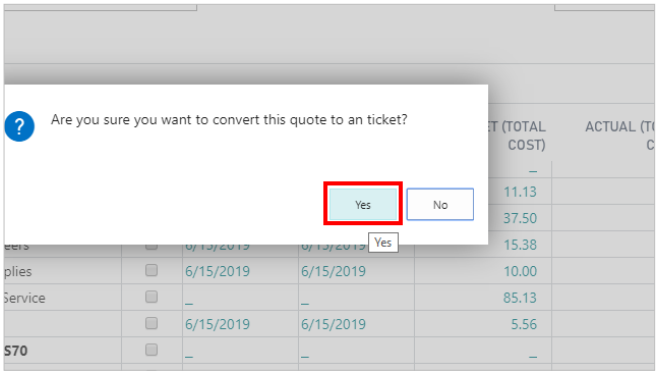


Click on the navigation menu item **Make Ticket**



Click on the button **Yes**

Upon selecting Yes, the Service Ticket will open.



3.4.3. How to Process External Customer Service Tickets

3.4.3.1. Overview

A Service Ticket for customer owned equipment can be created:

- From the main menu option, Service, by selecting Service Tickets, which opens the Service Ticket list where New can be selected.
- From the Actions part of the profile by selecting, +Service Ticket.
- From the Actions part of the profile by selecting, Service, then Service Tickets.
- From the Activities Cue, Service Tickets Open and then selecting New.
- From the Service Unit, which is to be serviced.

It is highly recommending to review the help, Service Ticket Overview.

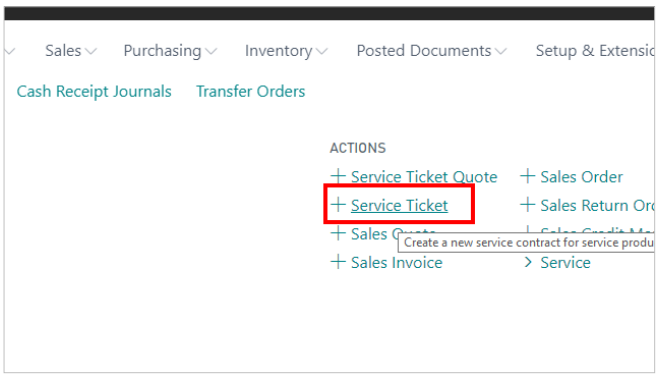
3.4.3.2. How to Create an Internal Service Ticket from Actions

Sales Order Process Profile

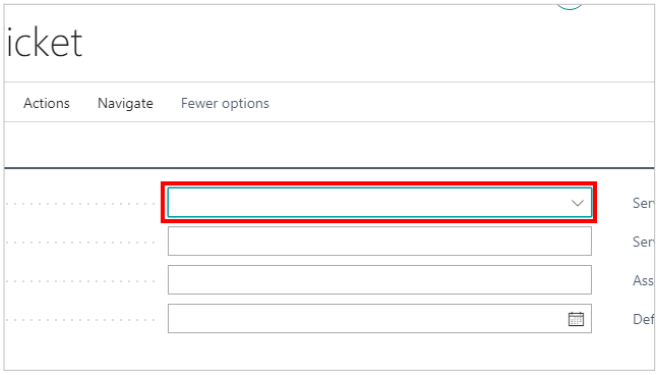
The same steps can be used when a user has the Business Manager Profile.

The following demonstrates the creation of a Service Ticket from the Actions, +Service Ticket option.

Click on the navigation menu item **Service Ticket**

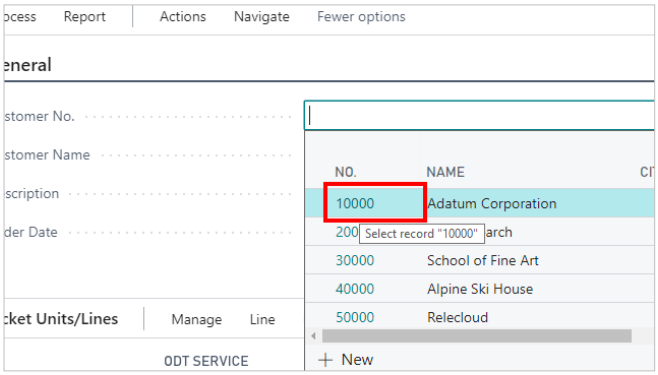


Click on the field **Customer No.**

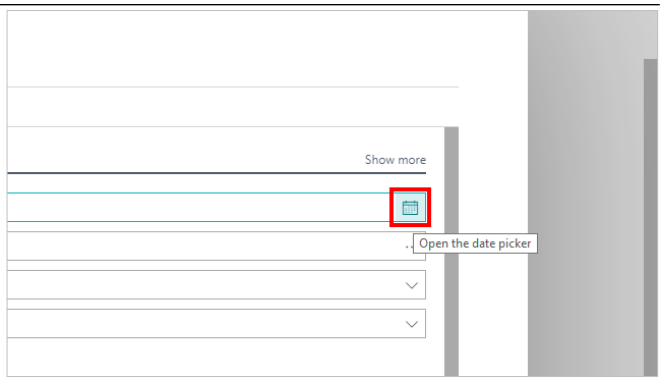


Click on the link in cell **No.** with the value **10000**

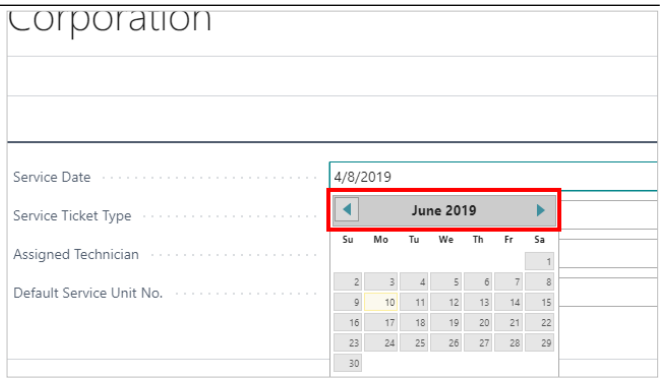
Select the applicable customer.



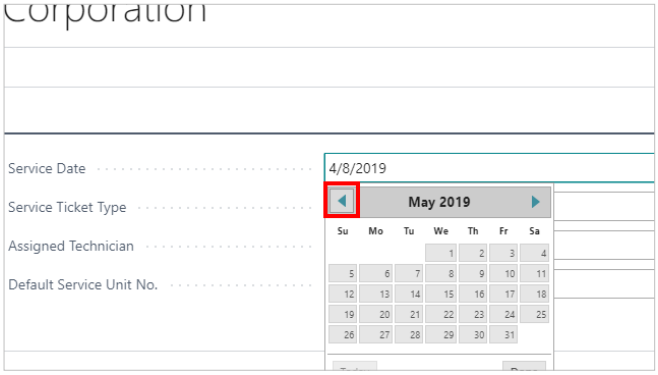
Click on the link **Open the date picker**



Click on **Previous Next June 2019**

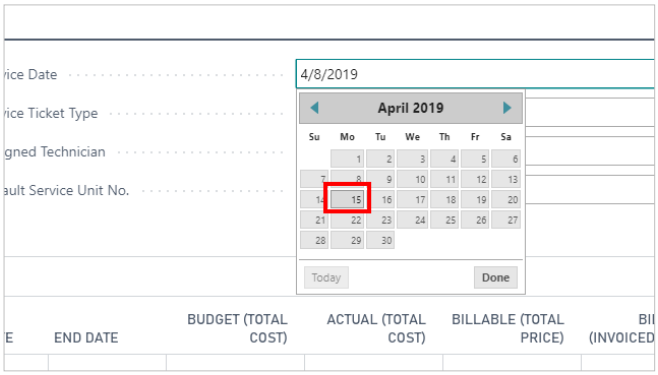


Click on the link **Previous**

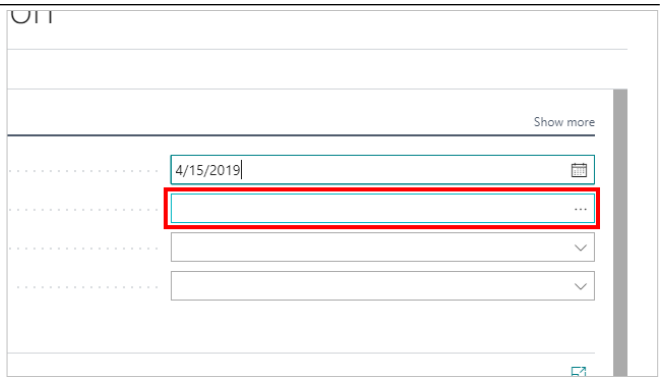


Click on a date in the calendar

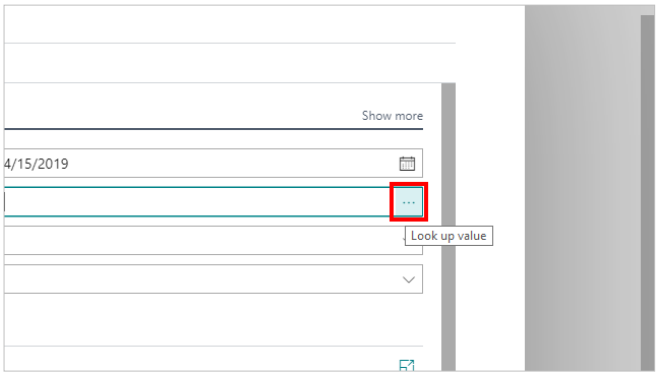
Select the date on which the service is to be performed, if different from the defaulted date, from the Users' Work Date.



Click on the field **Service Ticket Type**



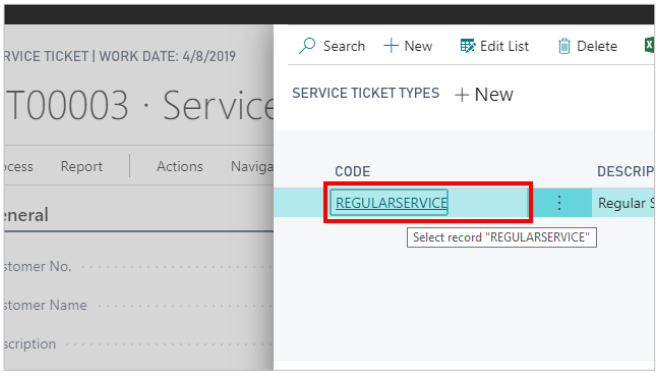
Click on the lookup button **Service Ticket Type**



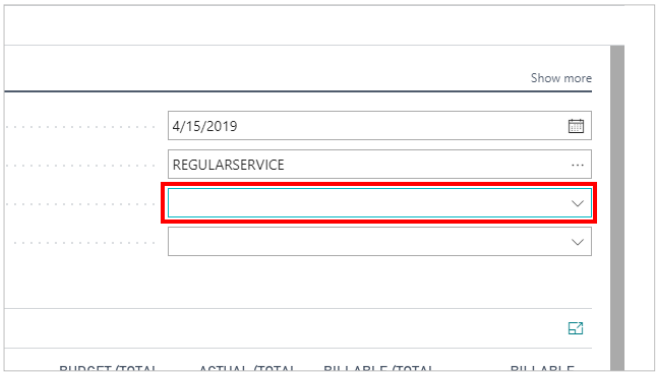
Click on the link in cell **Code** with the value **REGULARSERVICE**

The specification of a Ticket Type is optional.

The use of the Ticket Type to specify differing types of servicing can be beneficial for analysis of past servicing.



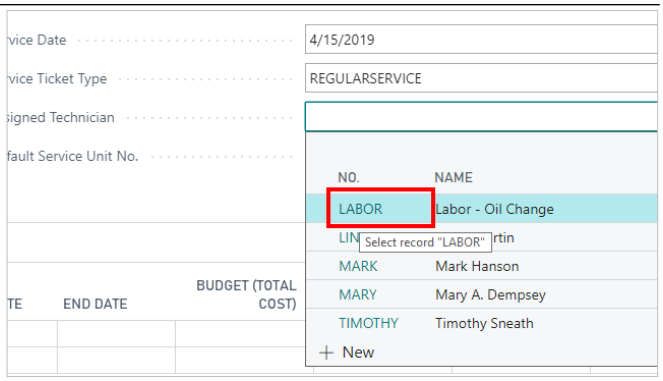
Click on the field **Assigned Technician**



Click on the link in cell **No.** with the value **LABOR**

The technician/resource who is to perform the service can be assigned on the header of the ticket.

The selection of an Assigned Technician is optional.

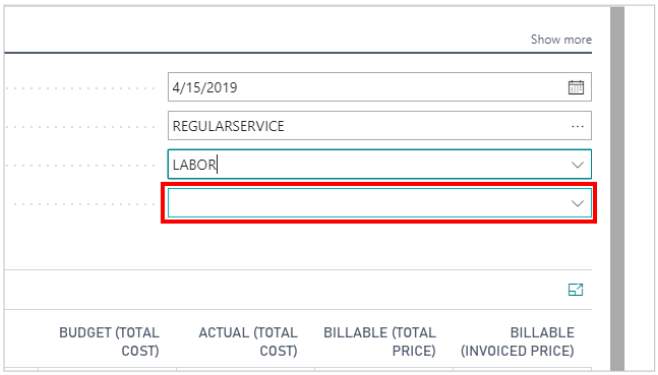


Click on the field **Default Service Unit No.**

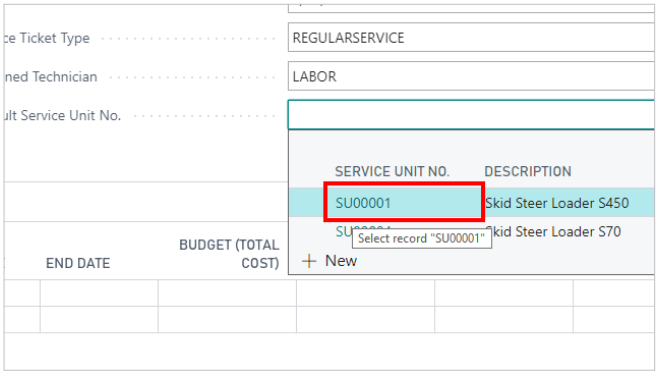
When a service ticket is for a single product, then when this field is populated, a Heading type Ticket Unit/Line, will automatically be created.

If the selected Service Unit is already on another open ticket, a message will be displayed to indicate this and confirm if you want to proceed.

This selection of a Default Service Unit is optional.



Click on the link in cell **Service Unit No.** with the value **SU00001**



3.4.3.3. How to Add a Service Template to a Ticket

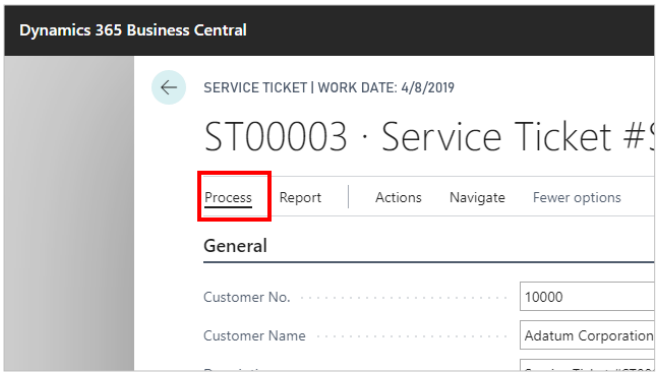
The listing of the Service Templates available is filtered to display only those templates, which have the same Maintenance Group as on the Service Unit.

When adding a Service Template from the Ticket main menu, Process, Add Service Template, then the Default Service Unit, Maintenance Group is used in the filtering of the available Service Templates.

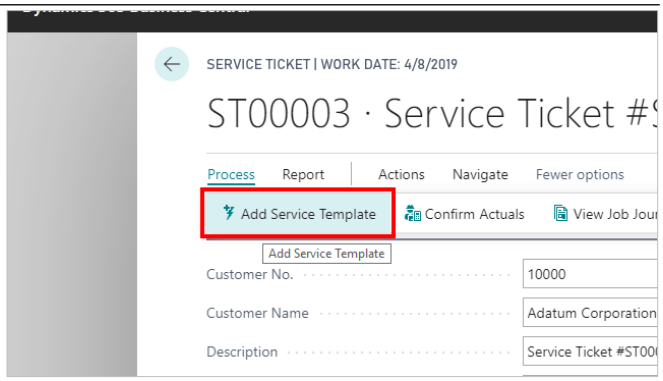
When adding a Service Template from the Ticket Units/Lines tab via Manage - Add Service Template, the available templates is filtered by the Maintenance Group of the Service Unit on the selected line with a Task Type of Heading.

The following demonstrates the adding of a service template from the Ticket main menu.

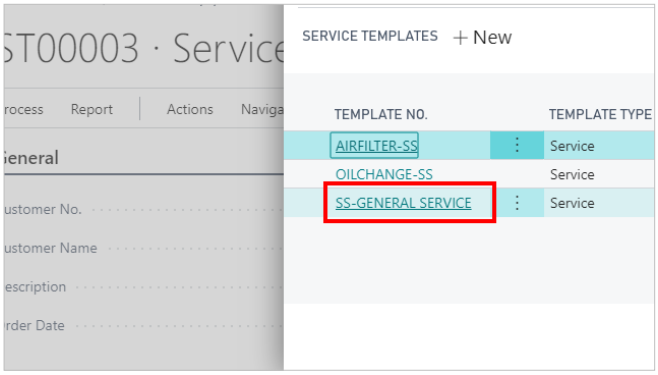
Click on the navigation menu item popup **Process**



Click on the navigation menu item **Add Service Template**



Click on the link in cell **Template No.** with the value **SS-GENERAL SERVICE**

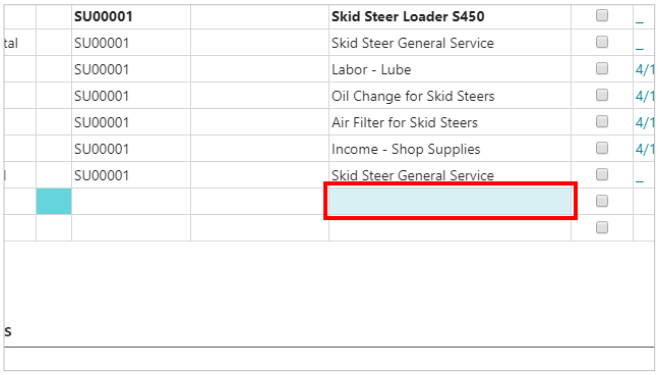


The lines will automatically be populated with the template lines, of the selected Service Template.

3.4.3.4. How to Enter Manual Lines on a Service Ticket

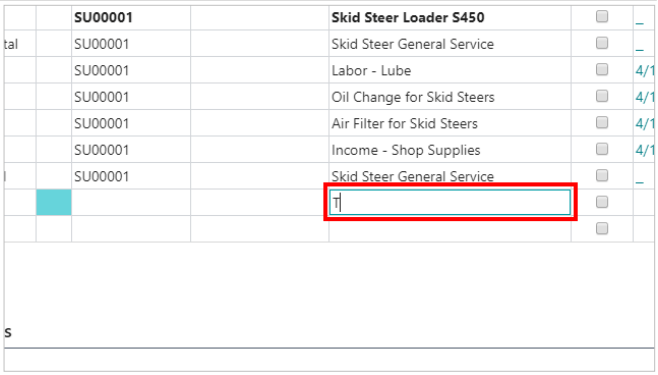
The following demonstrates the entry and configuration of a manually entered line in the Ticket Units/Lines tab for the same Service Unit as used when adding the Service Template.

Click on the cell **Description**

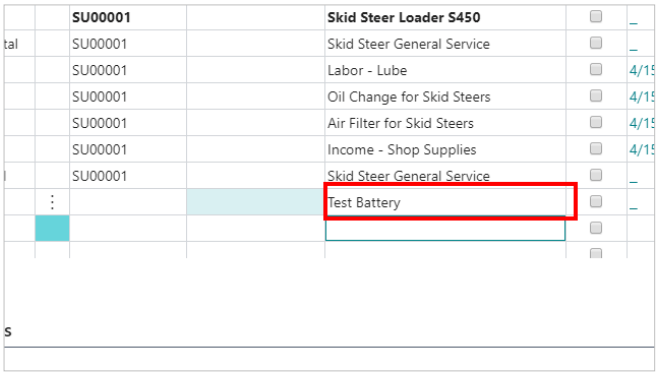


Enter the text **Test Battery**. Press the **Arrow down** key.

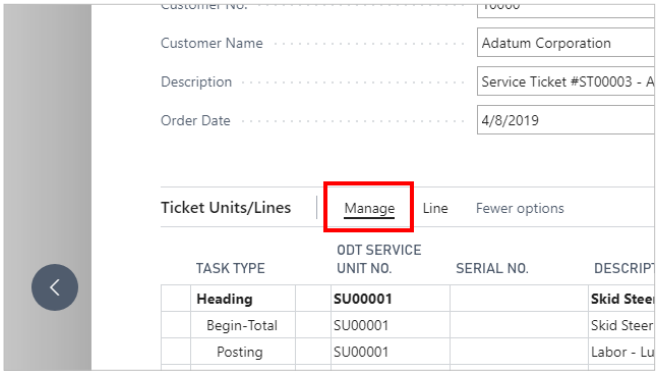
The ODT Service Unit No. field will automatically be populated with the same Service Unit No., when moving off and back to the line. The Task Type is left as the default of Posting.



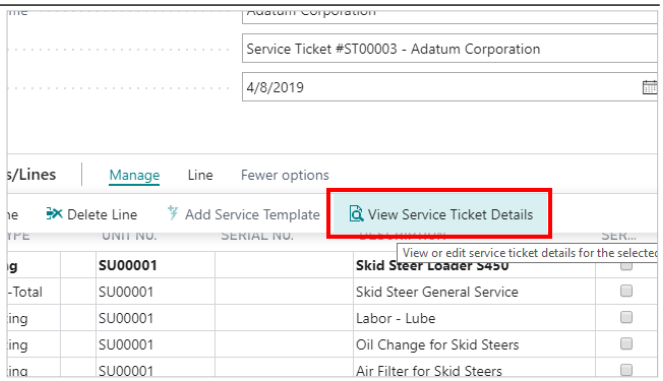
Press the **Arrow up** key.



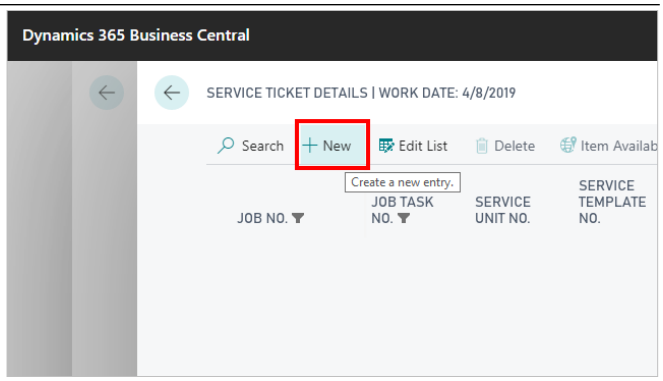
Click on the navigation menu item popup **Manage**



Click on the navigation menu item **View Service Ticket Details**



Click on the navigation menu item **New**

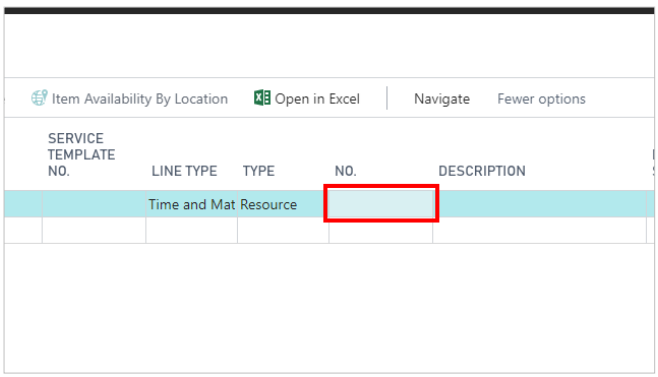


The Task No. Field is automatically populated on the line.

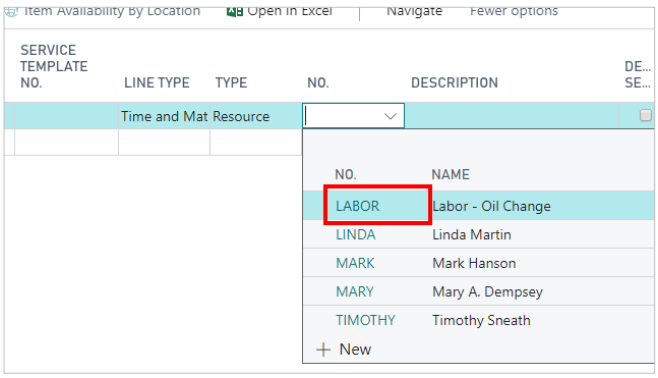
Note that the Line Type is automatically set to Time and Materials, when servicing external customer equipment.

As the line is to be for a technician the default type of Resource will be used.

Click on the cell **No.**

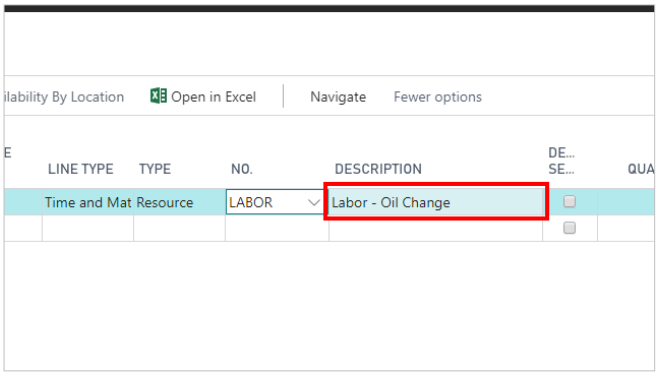


Click on the link in cell **No.** with the value **LABOR**

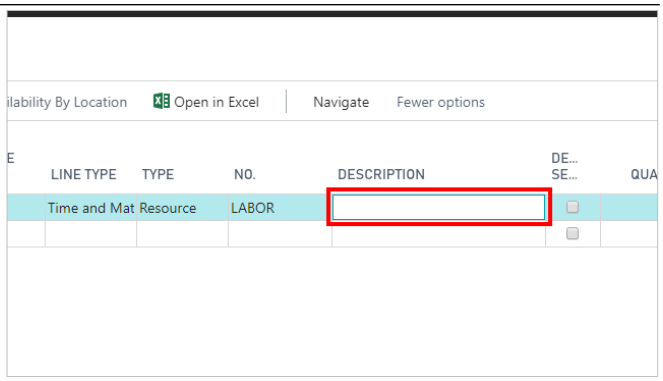


Click on the cell **Description** with the value **Labor - Oil Change**

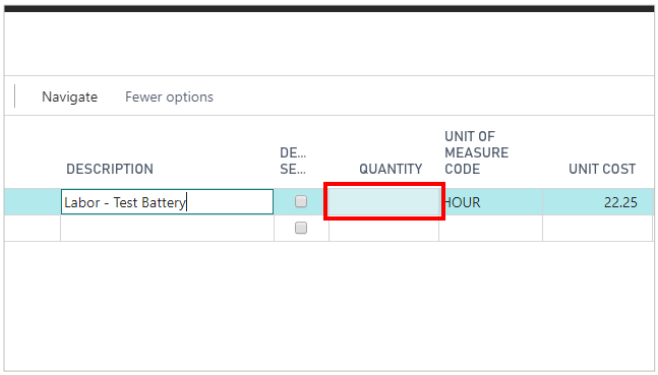
The default description will be from the Resource card selected and can be overridden to be indicative of the task to be performed.



Enter the text **Labor - Test Battery**.

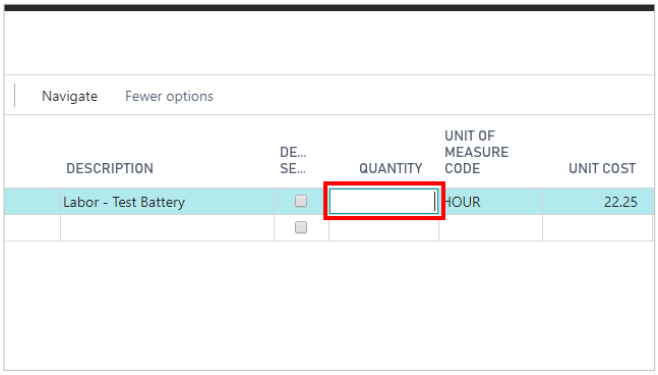


Click on the cell **Quantity**



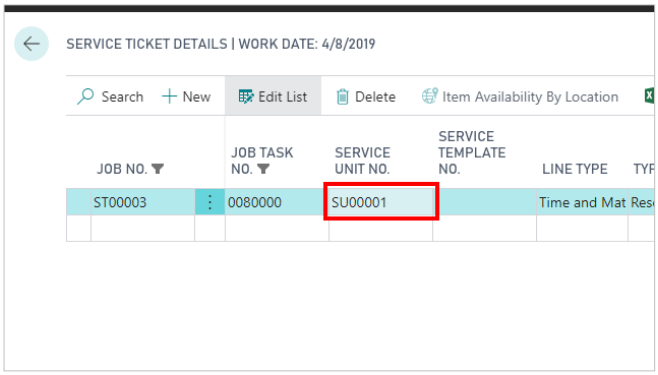
Enter the text **.25**.

Enter the quantity for performing the task.

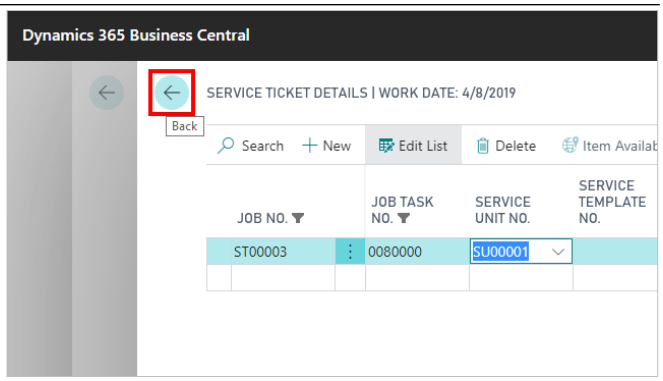


Click on the cell **Service Unit No.** with the value **SU00001**

Note that the Service Unit No. is automatically populated.

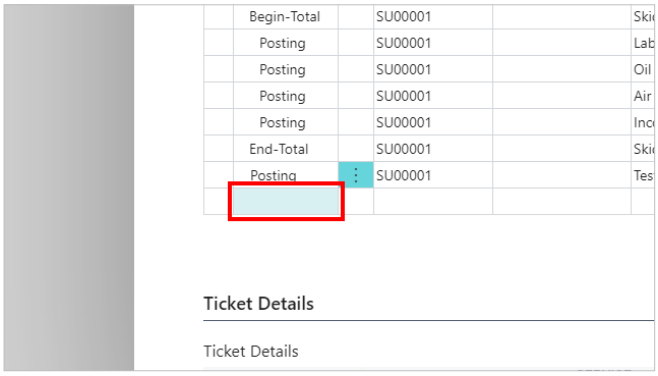


Click on the back button

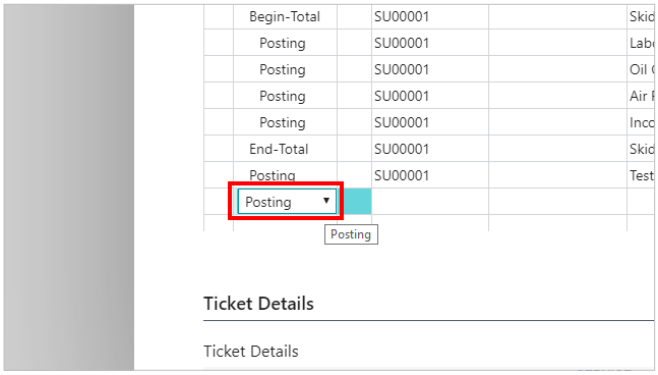


The following demonstrates the manual entry of lines for a different Service Unit on the Ticket Units/Lines tab and the configuration of the Service Ticket Detail lines.

Click on the cell **Task Type**

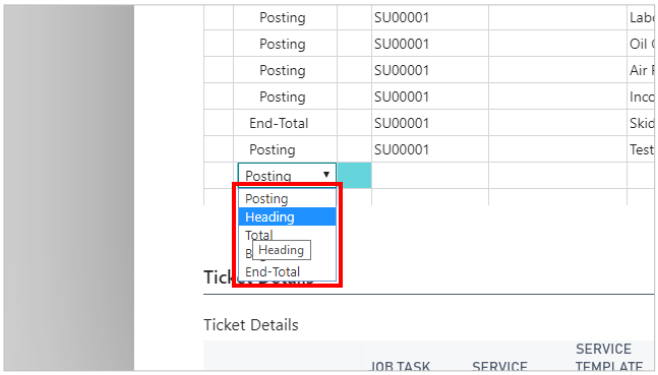


Click on the cell **Task Type** with the value **Posting Heading Total Begin-Total End-Total**

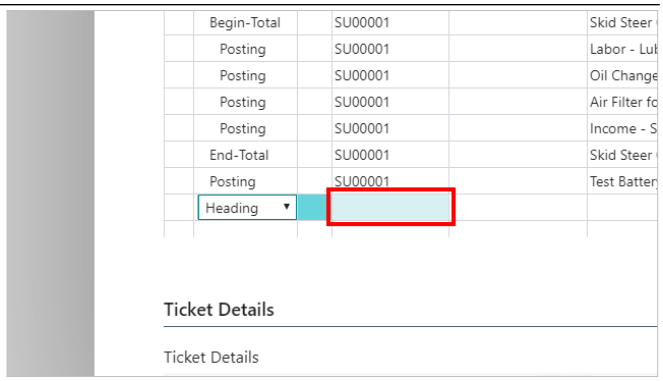


Click on the item **Heading** in the list

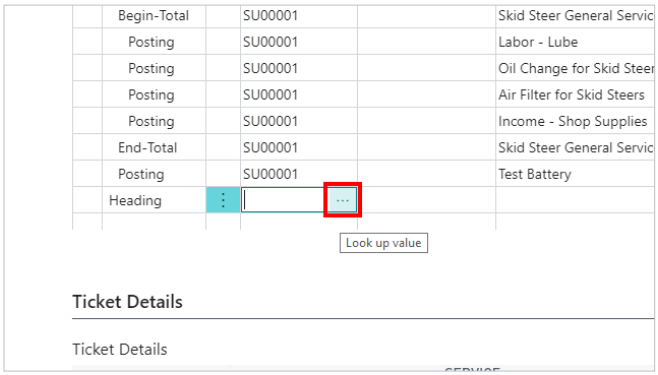
When adding a line for a different Service Unit, the Task Type must be set to Heading.



Click on the cell **ODT Service Unit No.**



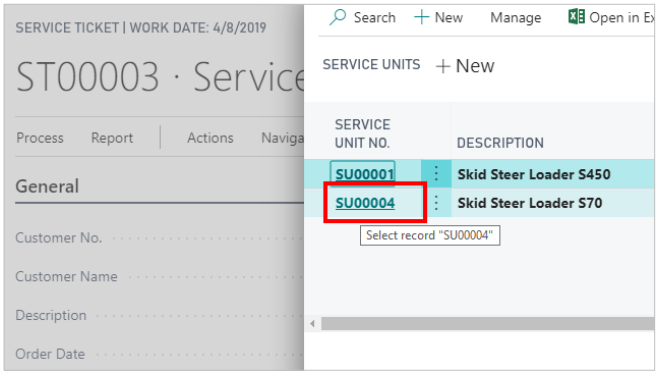
Click on the lookup button in the cell **ODT Service Unit No.**



Click on the link in cell **Service Unit No.** with the value **SU00004**

Select the Service Unit to be added to the ticket.

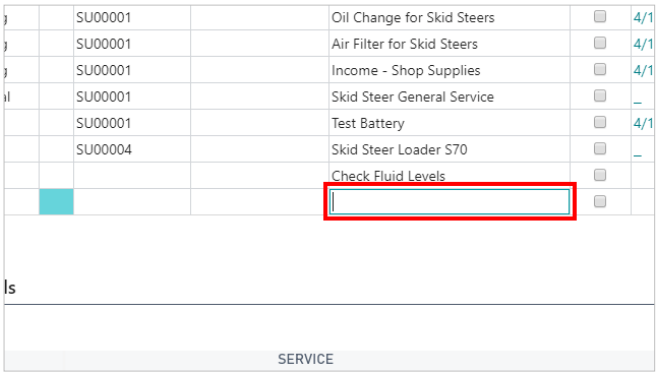
NOTE:
The Default Service Unit field on the General tab will automatically be cleared, as the ticket is now for multiple units.



Click on the cell **Description**

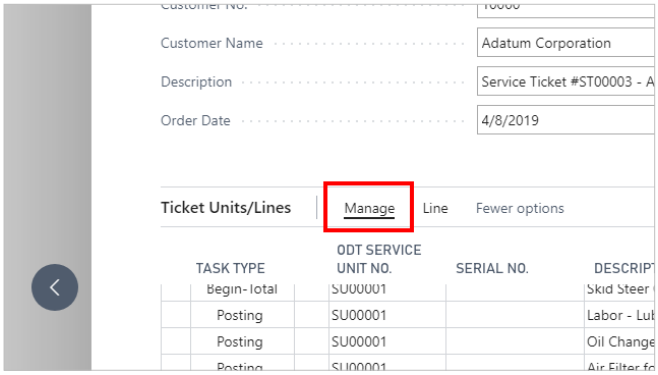
Enter the text **Check Fluid Levels**. Press the **Arrow down** key.

Press the **Arrow up** key.

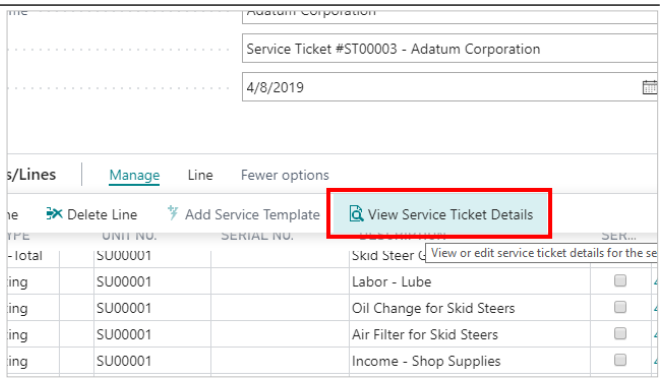


The ODT Service Unit No. field will automatically be populated with the same Service Unit No., when moving off and back to the line. The Task Type is left as the default of Posting.

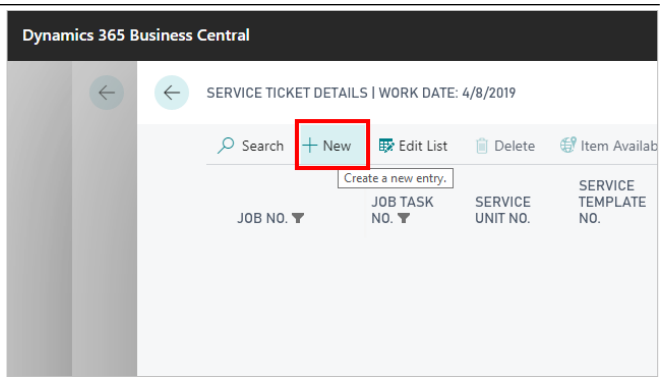
Click on the navigation menu item popup **Manage**



Click on the navigation menu item **View Service Ticket Details**

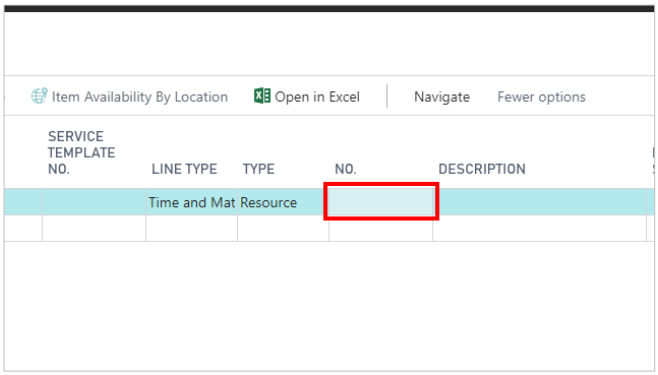


Click on the navigation menu item **New**

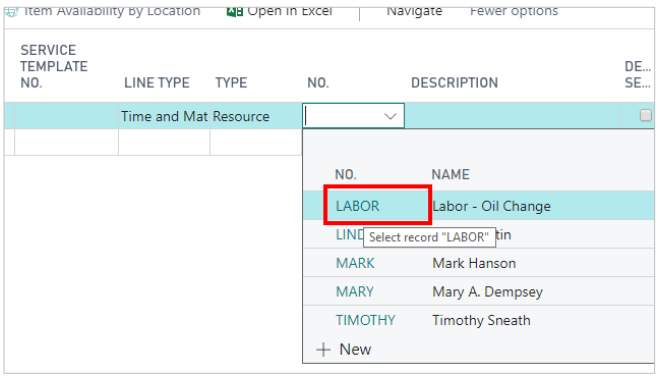


As the line is to be for a technician the default type of Resource will be used.

Click on the cell **No.**

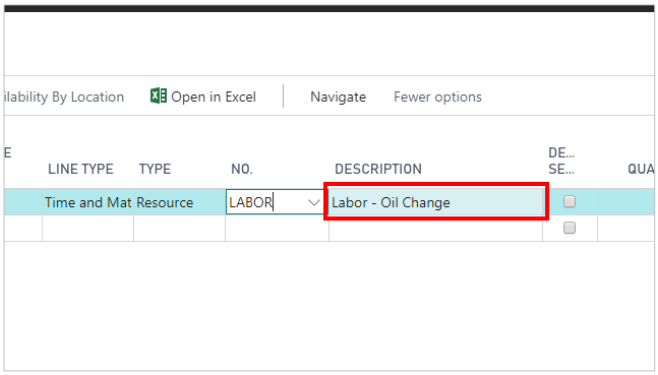


Click on the link in cell **No.** with the value **LABOR**

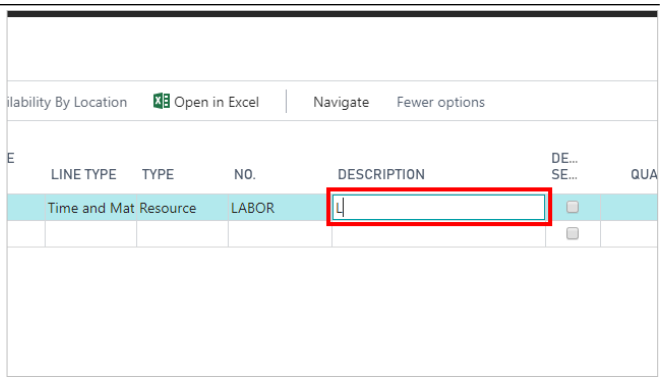


Click on the cell **Description** with the value **Labor - Oil Change**

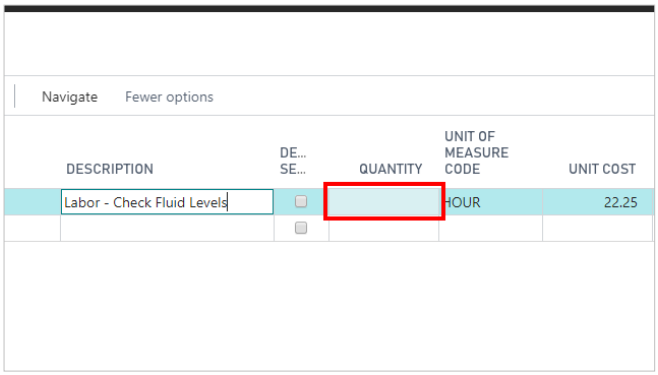
The default description will be from the Resource card selected and can be overridden to be indicative of the task to be performed.



Enter the text **Labor - Check Fluid Levels**.

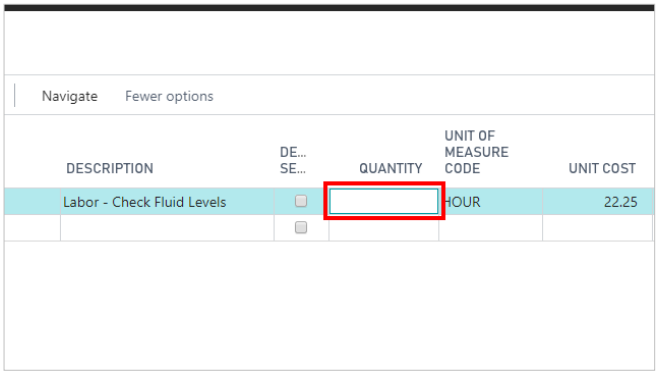


Click on the cell **Quantity**

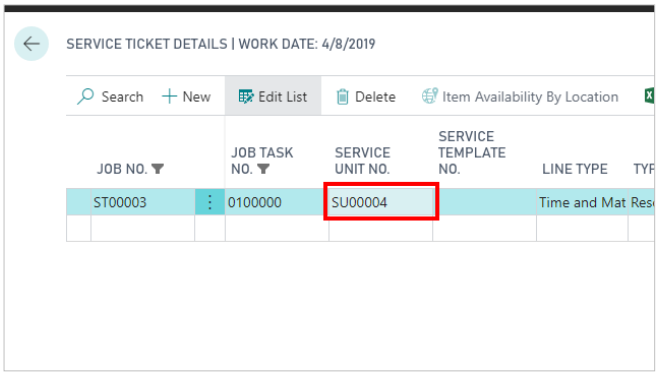


Enter the text **.25**.

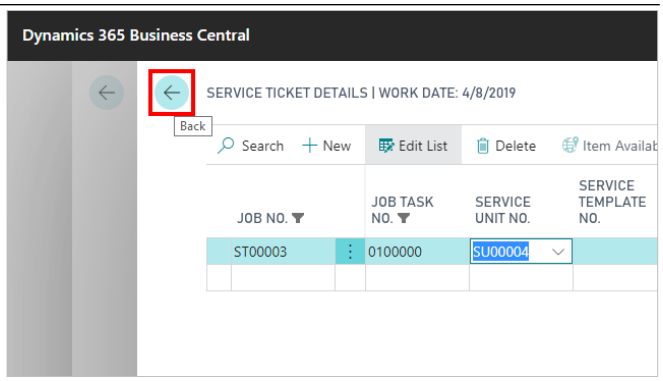
Enter the quantity of time it will take to perform the task.



Click on the cell **Service Unit No.** with the value **SU00004**

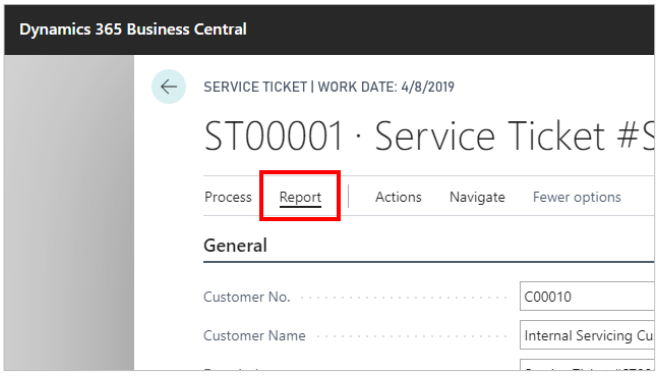


Click on the back button

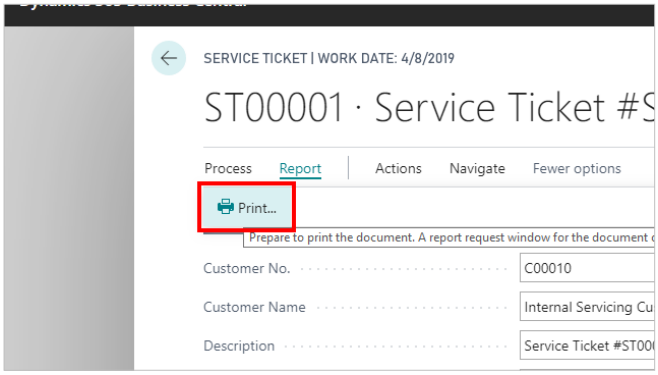


3.4.3.5. How to Print the Service Ticket

Click on the navigation menu item popup **Report**

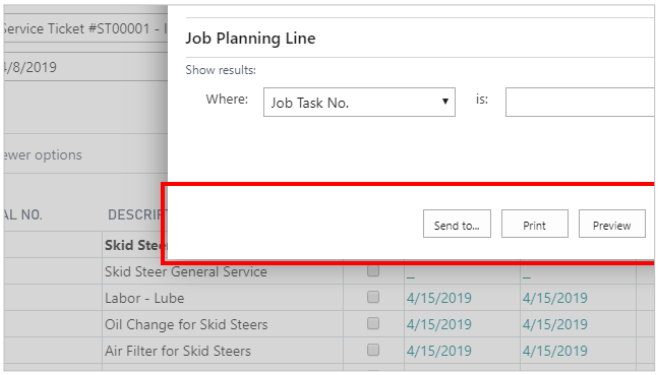


Click on the navigation menu item **Print...**

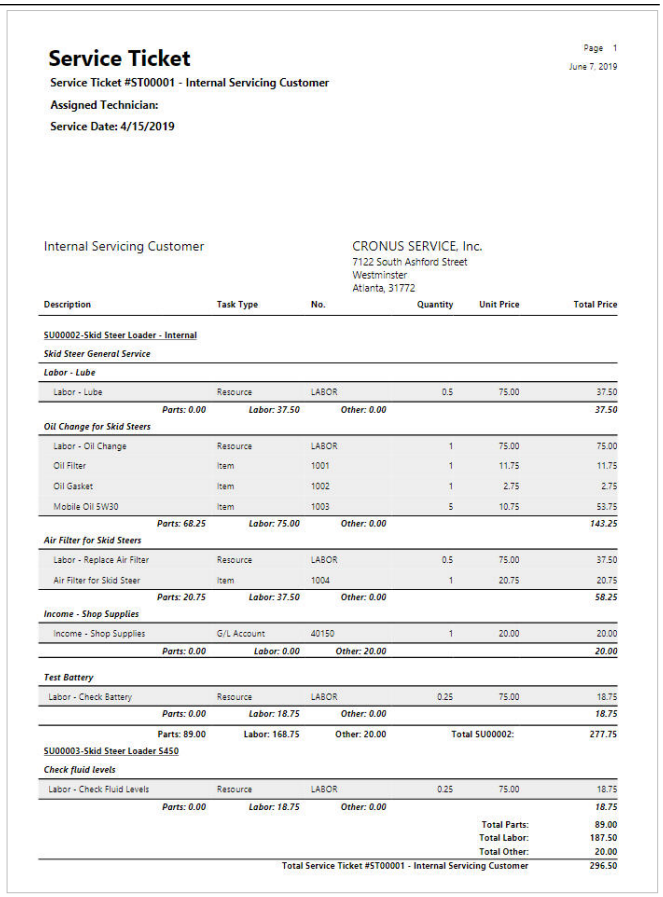


Click on **Send to... Print Preview Cancel**

The standard Microsoft Dynamics 365 Business Central, printing options are available to select from.



The following picture displays the Service Ticket document.



Service Ticket

Page 1
June 7, 2019

Service Ticket #ST00001 - Internal Servicing Customer
Assigned Technician:
Service Date: 4/15/2019

Internal Servicing Customer

CRONUS SERVICE, Inc.
7122 South Ashford Street
Westminster
Atlanta, 31772

Description	Task Type	No.	Quantity	Unit Price	Total Price
SU00002-Skid Steer Loader - Internal					
Skid Steer General Service					
Labor - Lube					
Labor - Lube	Resource	LABOR	0.5	75.00	37.50
Parts: 0.00 *Labor: 37.50* *Other: 0.00*					*37.50*
Oil Change for Skid Steers					
Labor - Oil Change	Resource	LABOR	1	75.00	75.00
Oil Filter	Item	1001	1	11.75	11.75
Oil Gasket	Item	1002	1	2.75	2.75
Mobile Oil 5W30	Item	1003	5	10.75	53.75
Parts: 68.25 *Labor: 75.00* *Other: 0.00*					*143.25*
Air Filter for Skid Steers					
Labor - Replace Air Filter	Resource	LABOR	0.5	75.00	37.50
Air Filter for Skid Steer	Item	1004	1	20.75	20.75
Parts: 20.75 *Labor: 37.50* *Other: 0.00*					*58.25*
Income - Shop Supplies					
Income - Shop Supplies	G/L Account	40150	1	20.00	20.00
Parts: 0.00 *Labor: 0.00* *Other: 20.00*					*20.00*
Test Battery					
Labor - Check Battery	Resource	LABOR	0.25	75.00	18.75
Parts: 0.00 *Labor: 18.75* *Other: 0.00*					*18.75*
Parts: 89.00 Labor: 168.75 Other: 20.00				Total SU00002:	277.75
SU00003-Skid Steer Loader S450					
Check fluid levels					
Labor - Check Fluid Levels	Resource	LABOR	0.25	75.00	18.75
Parts: 0.00 *Labor: 18.75* *Other: 0.00*					*18.75*
				Total Parts:	89.00
				Total Labor:	187.50
				Total Other:	20.00
				Total Service Ticket #ST00001 - Internal Servicing Customer	296.50

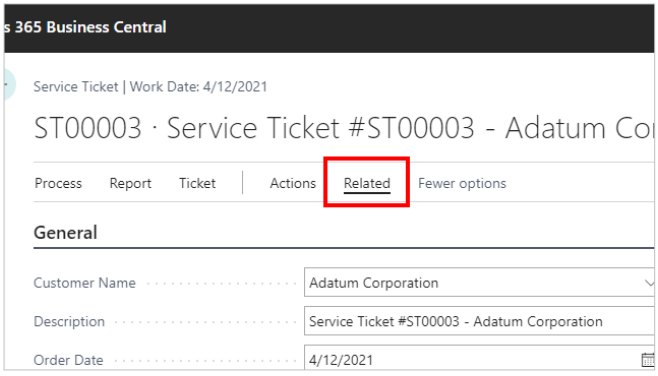
3.4.3.6. Service Template Checklists

Should the Service Template(s) added to a Service Ticket contain a Checklist(s), then the checklist(s) can be printed for or by the technician for reference and the recording of their findings.

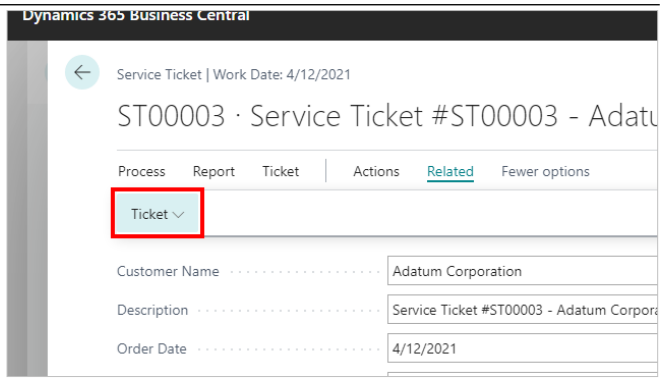
Additionally the technicians' findings can be entered onto the Service Ticket Checklist.

The following demonstrates the printing of a Service Template Checklist.

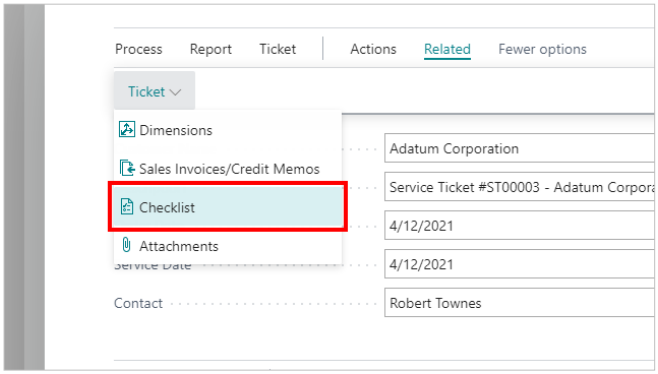
Click on the navigation menu item popup **Related**



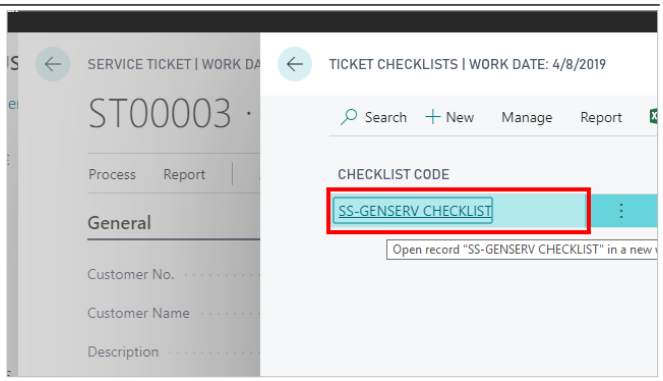
Click on the navigation menu item popup **Ticket**



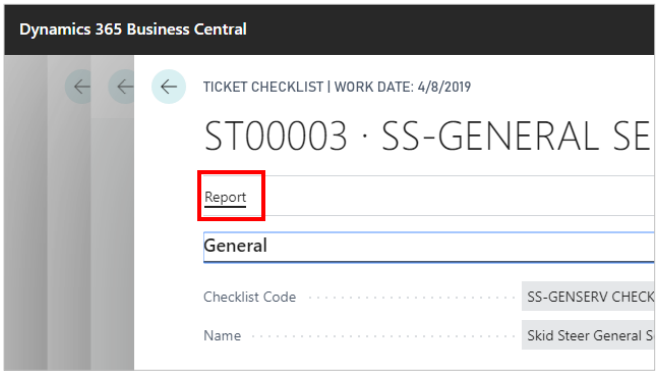
Click on the navigation menu item **Checklist**



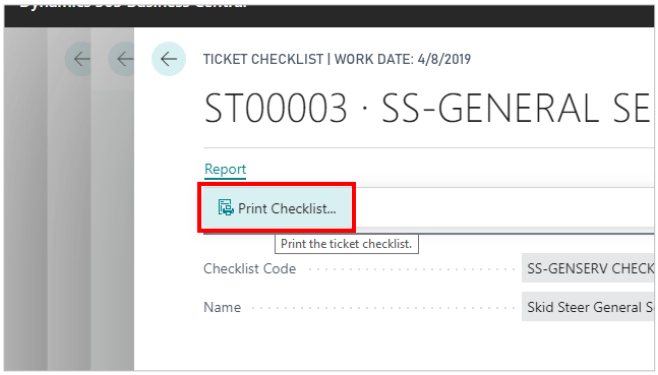
Click on the link in cell **Checklist Code** with the value **SS-GENSERV CHECKLIST**



Click on the navigation menu item popup **Report**

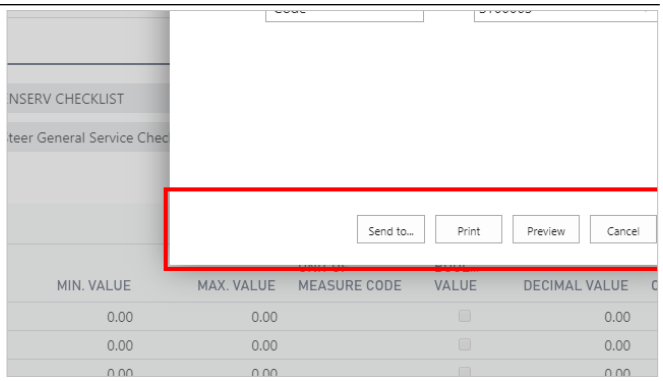


Click on the navigation menu item **Print Checklist...**

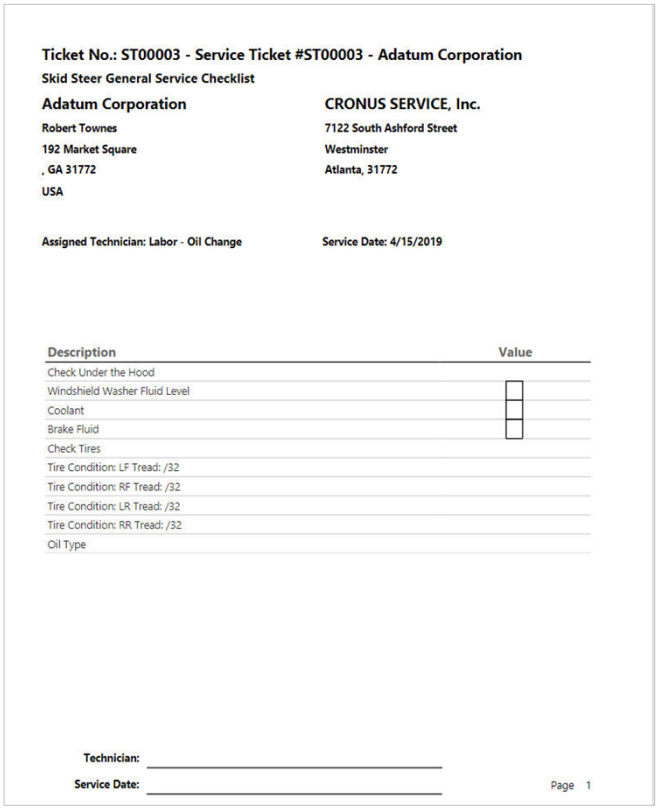


Click on **Send to... Print Preview Cancel**

The standard Microsoft Dynamics 365 Business Central, printing options are available to select from.



The following picture displays the Checklist document which is for the template, SS-General Service.



Ticket No.: ST00003 - Service Ticket #ST00003 - Adatum Corporation
Skid Steer General Service Checklist

Adatum Corporation
Robert Townes
192 Market Square
, GA 31772
USA

CRONUS SERVICE, Inc.
7122 South Ashford Street
Westminster
Atlanta, 31772

Assigned Technician: Labor - Oil Change
Service Date: 4/15/2019

Description	Value
Check Under the Hood	
Windshield Washer Fluid Level	☐
Coolant	☐
Brake Fluid	☐
Check Tires	
Tire Condition: LF Tread: /32	
Tire Condition: RF Tread: /32	
Tire Condition: LR Tread: /32	
Tire Condition: RR Tread: /32	
Oil Type	

Technician: _____
Service Date: _____

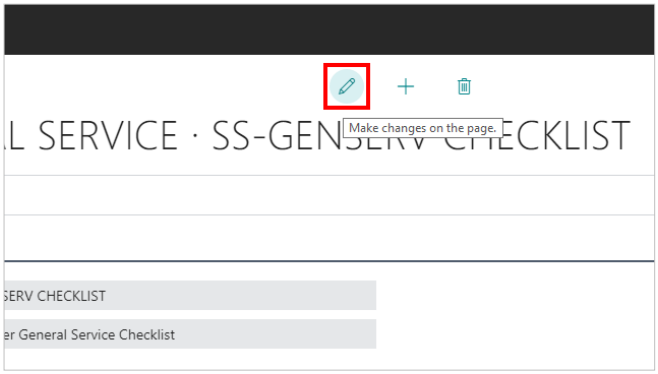
Page 1

The following demonstrates the entering of the technicians' results from completing the checklist tasks.

The entry is optional.

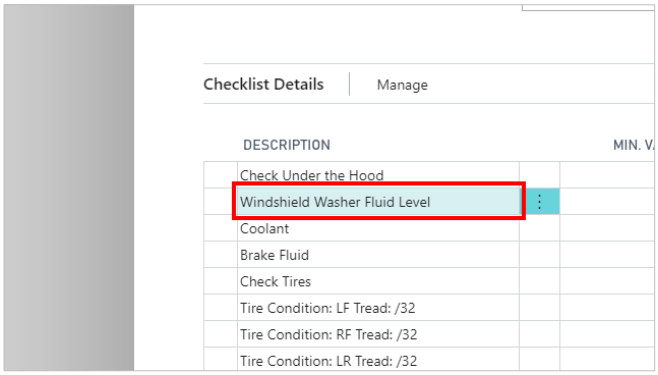
Click on the action toggle **edit/view**

The Checklist must be set to Edit mode to enter the technicians' findings.

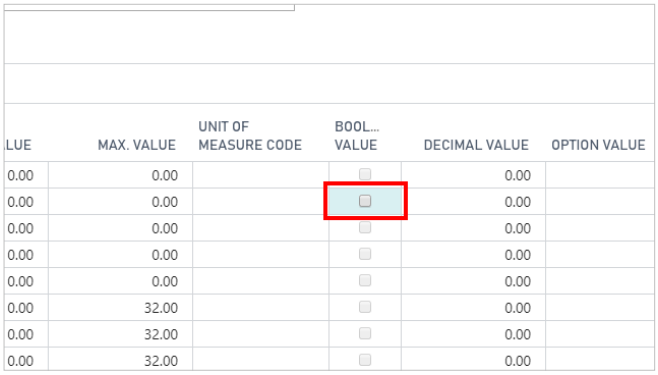


For Boolean/Checkbox lines each line must be selected, before checking the boolean/checkbox

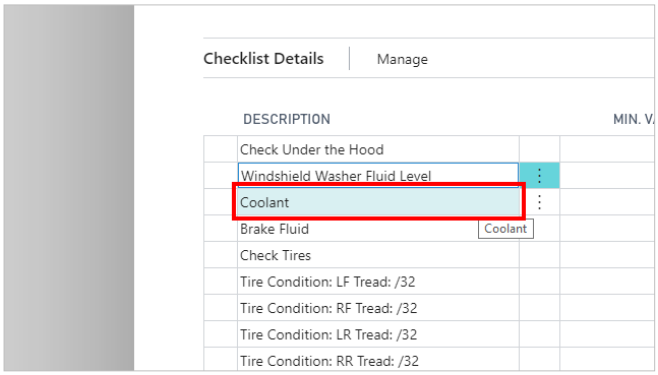
Click on the cell **Description** with the value **Windshield Washer Fluid Level**



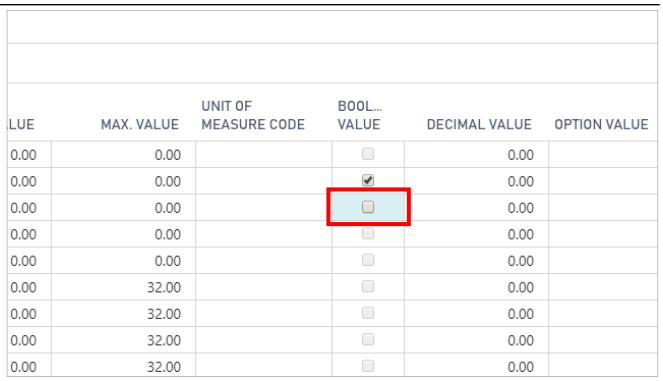
Click on **Boolean Value**



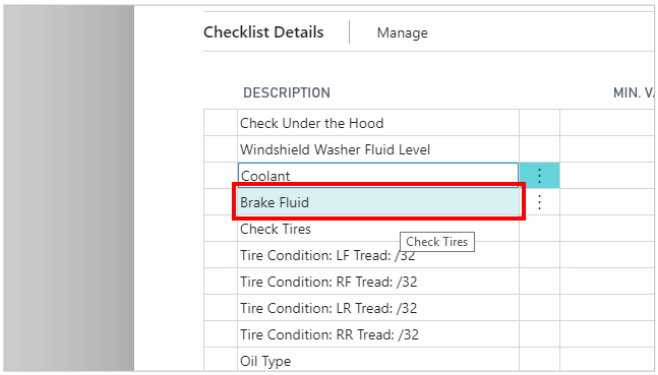
Click on the cell **Description** with the value **Coolant**



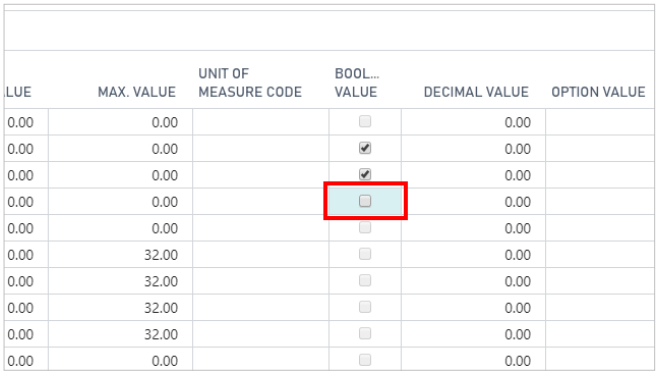
Click on **Boolean Value**



Click on the cell **Description** with the value **Brake Fluid**



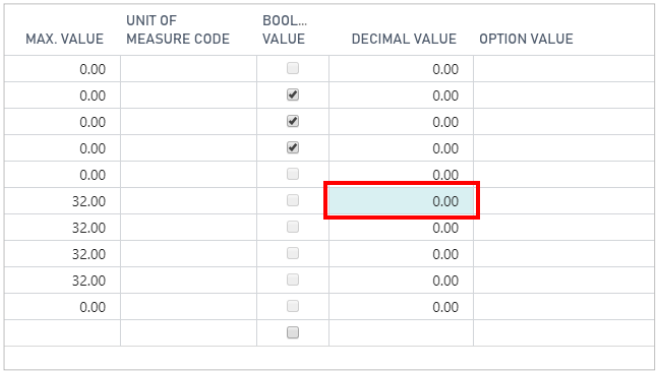
Click on **Boolean Value**



LUE	MAX. VALUE	UNIT OF MEASURE CODE	BOOL... VALUE	DECIMAL VALUE	OPTION VALUE
0.00	0.00		☐	0.00	
0.00	0.00		☑	0.00	
0.00	0.00		☑	0.00	
0.00	0.00		☐	0.00	
0.00	0.00		☐	0.00	
0.00	32.00		☐	0.00	
0.00	32.00		☐	0.00	
0.00	32.00		☐	0.00	
0.00	32.00		☐	0.00	
0.00	0.00		☐	0.00	

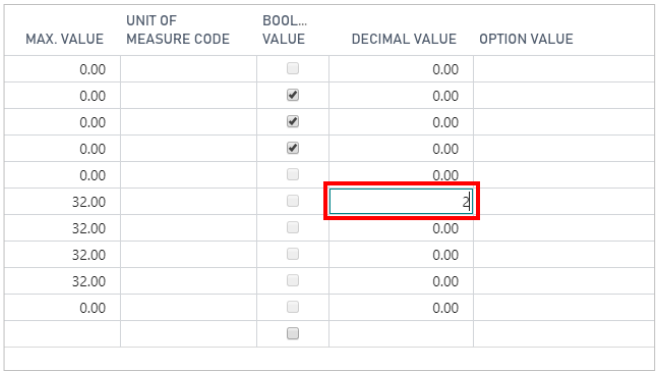
The following demonstrates entering decimal values for the tire tread readings.

Click on the cell **Decimal Value** with the value **0.00**



MAX. VALUE	UNIT OF MEASURE CODE	BOOL... VALUE	DECIMAL VALUE	OPTION VALUE
0.00		☐	0.00	
0.00		☑	0.00	
0.00		☑	0.00	
0.00		☑	0.00	
0.00		☐	0.00	
32.00		☐	0.00	
32.00		☐	0.00	
32.00		☐	0.00	
32.00		☐	0.00	
0.00		☐	0.00	
		☐		

Enter the text **22**.

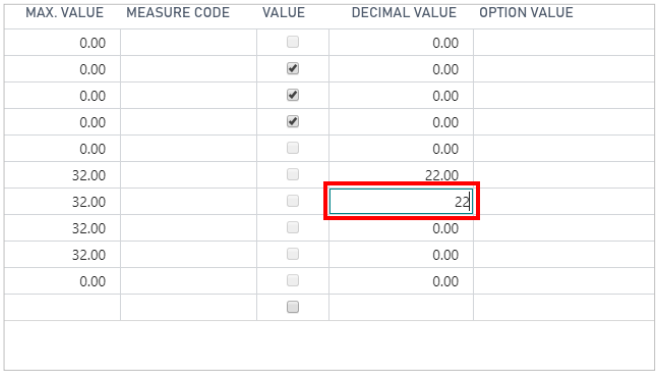


MAX. VALUE	UNIT OF MEASURE CODE	BOOL... VALUE	DECIMAL VALUE	OPTION VALUE
0.00		☐	0.00	
0.00		☑	0.00	
0.00		☑	0.00	
0.00		☑	0.00	
0.00		☐	0.00	
32.00		☐	2	
32.00		☐	0.00	
32.00		☐	0.00	
32.00		☐	0.00	
0.00		☐	0.00	
		☐		

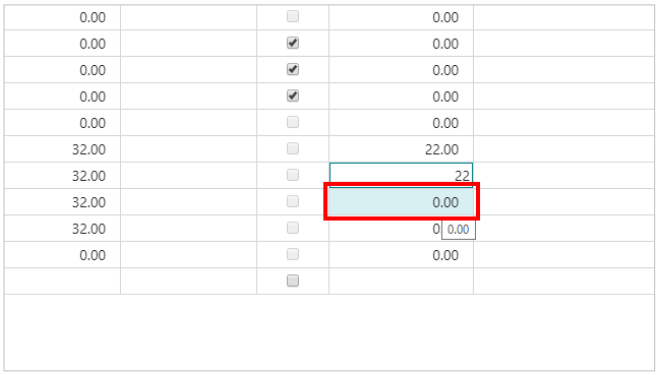
Click on the cell **Decimal Value** with the value **0.00**

MAX. VALUE	MEASURE CODE	VALUE	DECIMAL VALUE	OPTION VALUE
0.00		☐	0.00	
0.00		☑	0.00	
0.00		☑	0.00	
0.00		☑	0.00	
0.00		☐	0.00	
32.00		☐	22	
32.00		☐	0.00	
32.00		☐	0.00	
32.00		☐	0.00	
0.00		☐	0.00	
		☐		

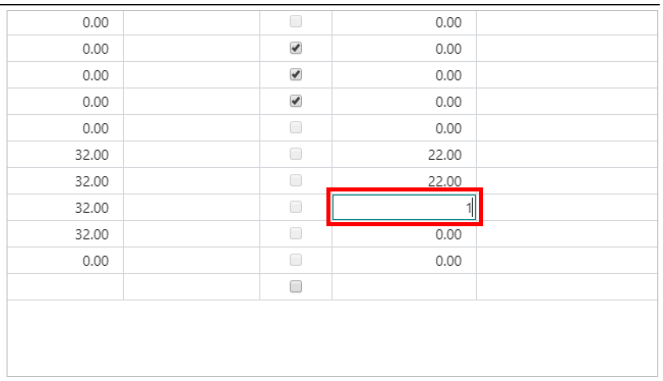
Enter the text **22**.



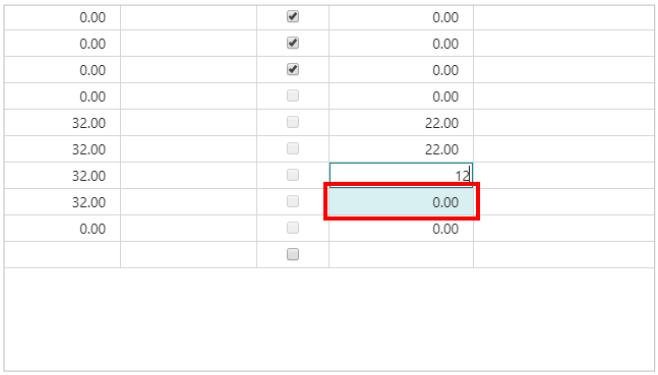
Click on the cell **Decimal Value** with the value **0.00**



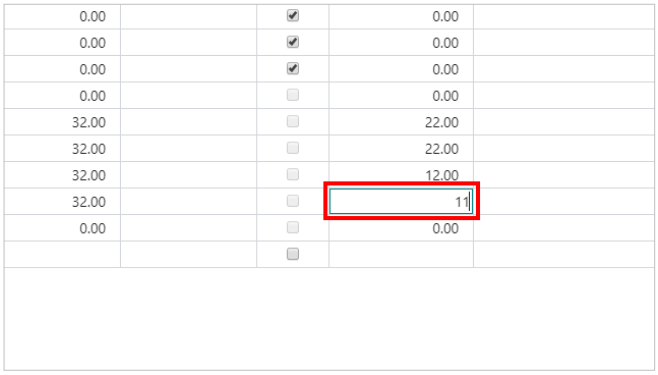
Enter the text **12**.



Click on the cell **Decimal Value** with the value **0.00**

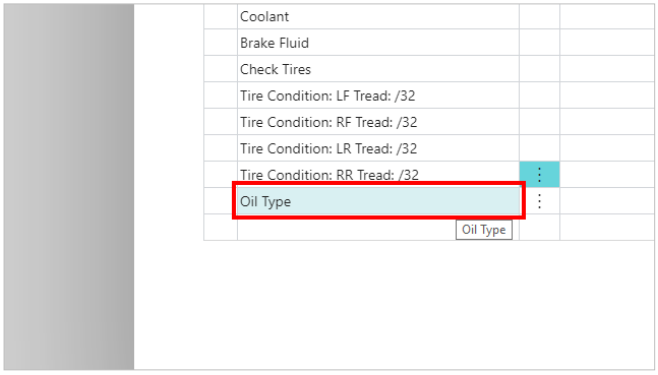


Enter the text **11**.

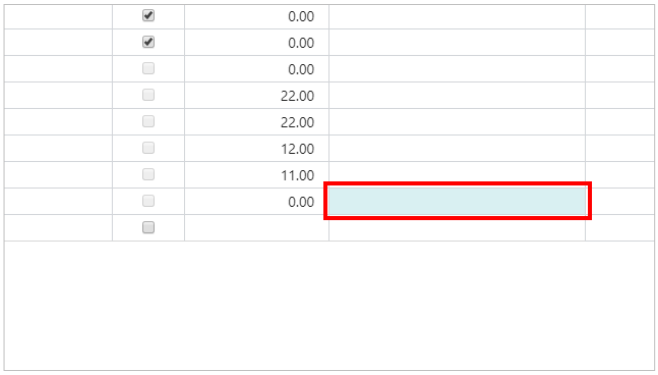


The following demonstrates the entry where there are multiple option values to choose from.

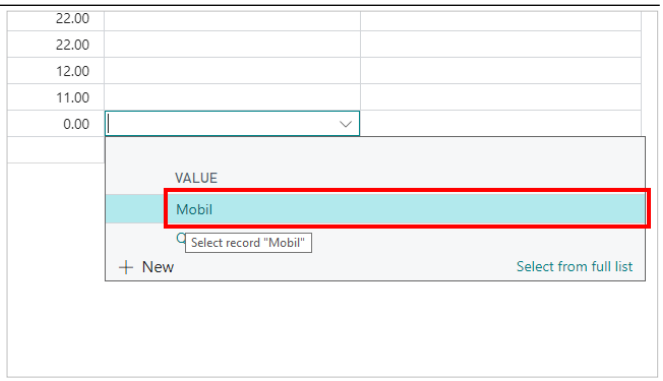
Click on the cell **Description** with the value **Oil Type**



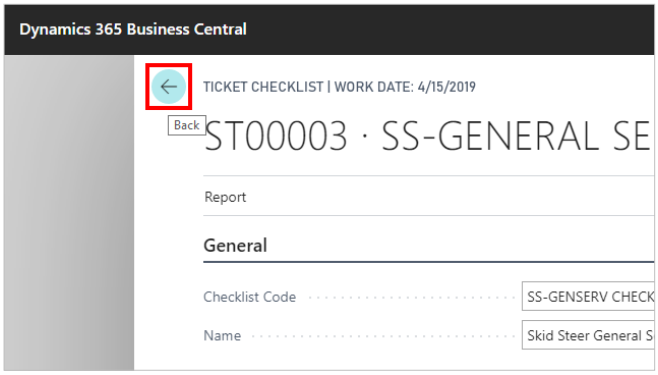
Click on the cell **Option Value**



Click on the link in cell **Value** with the value **Mobil**



Click on the back button



3.4.3.7. How to Process the Usage Actuals for the Ticket

The following demonstrates the confirmation of actual quantities for all the Service Ticket Detail lines.

The following example is for when the actuals are the same as the estimated quantities.

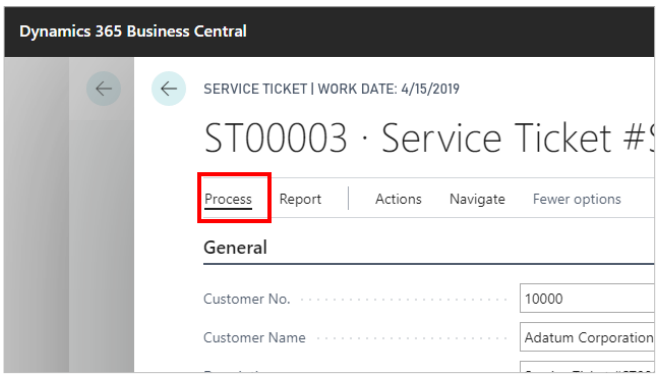
Should the actuals be different from the budgeted quantities, then on the Ticket Detail Lines, the quantity should be revised to reflect the actual quantities prior to running the Confirm Actuals.

Alternatively, the quantity can be revised on the Job Journal records prior to posting the journal when only a portion of the usage is to be posted at the specified posting date.

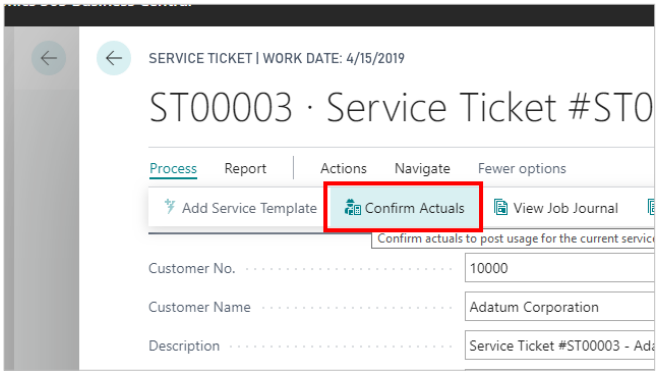
This process automatically creates records in a Job Journal, which automatically opens and must be posted to record the usage on the ticket and job.

NOTE:
The first time a user completes the following steps a Job Journal Batch will automatically be created for the user.

Click on the navigation menu item popup **Process**

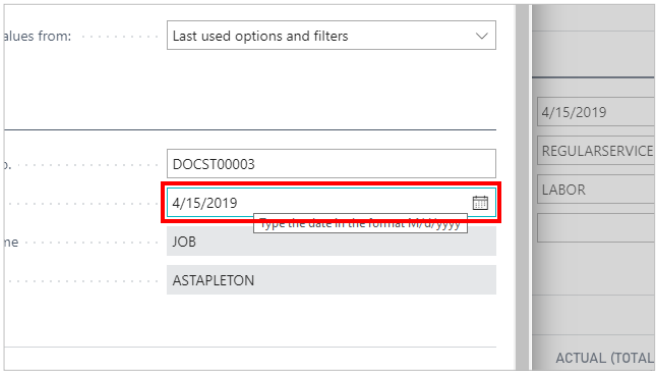


Click on the navigation menu item **Confirm Actuals**



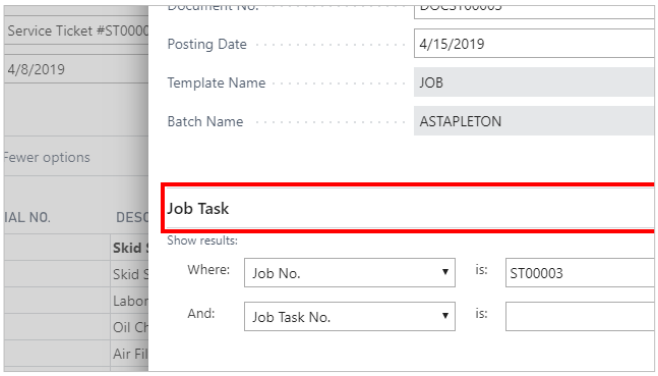
Click on the field **Posting Date**

Verify the Posting Date is the correct date and if not, then enter or select the applicable date.

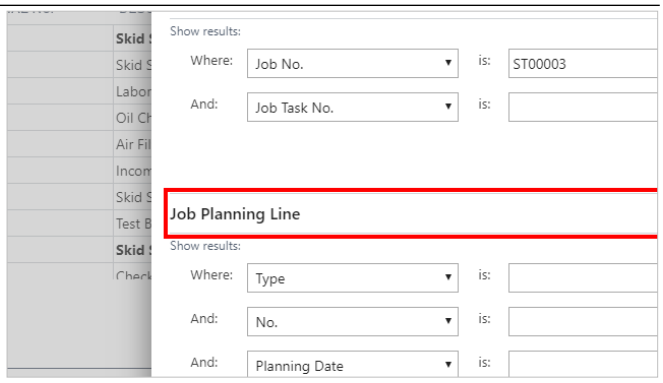


Should only some of the Ticket Detail records need to have the usage calculated, then filters can be set on the following tabs of Job Task and Job Planning Lines on the Confirm Actuals request page.

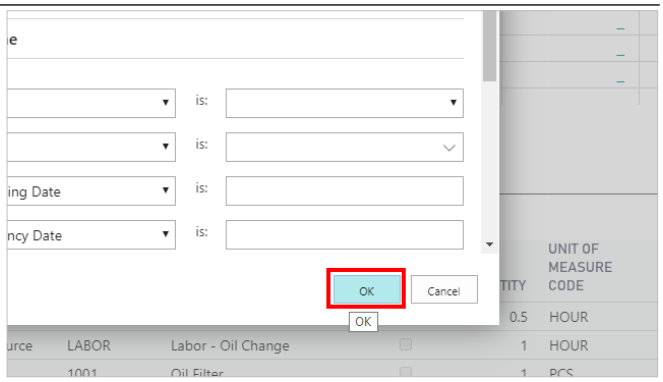
Click on **Job Task**



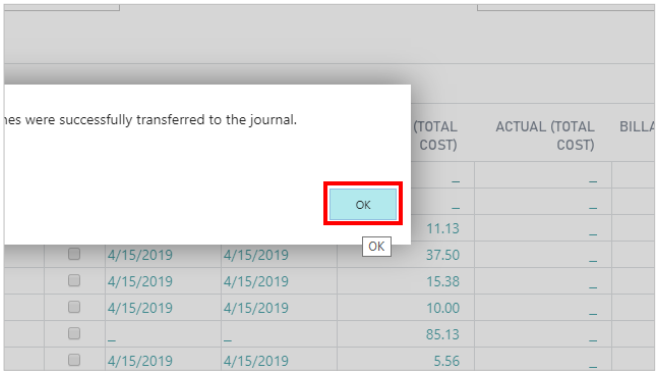
Click on **Job Planning Line**



Click on the button **OK**



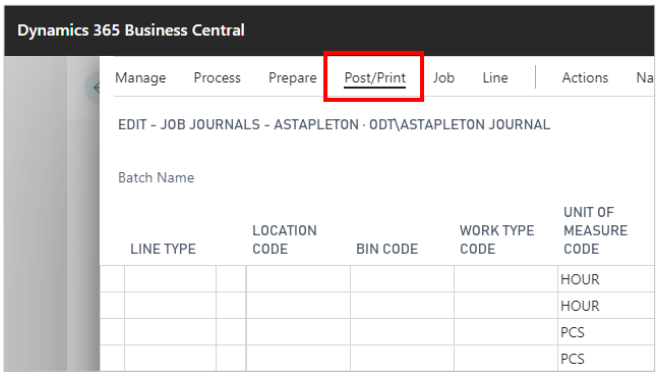
Click on the button **OK**



The Job Journal will automatically open for review and modification, if needed.

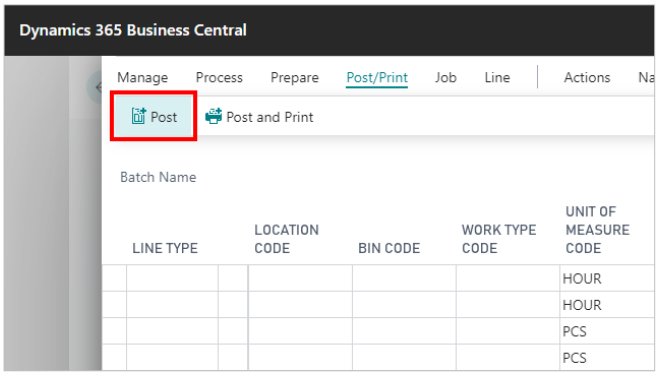
NOTE: Should you wish to change the Line Type field, you must first clear the Job Planning Line No. field.

Click on the navigation menu item popup **Post/Print**

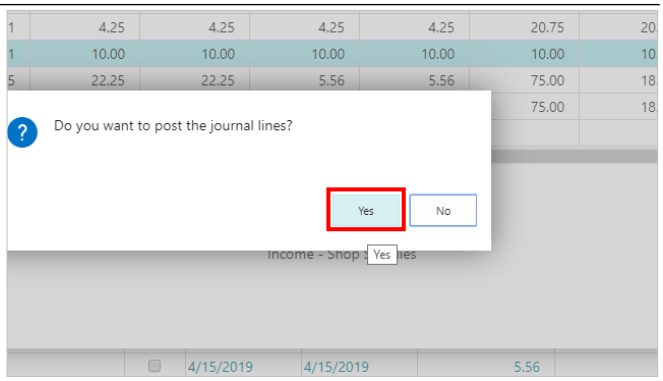


Click on the link **Post**

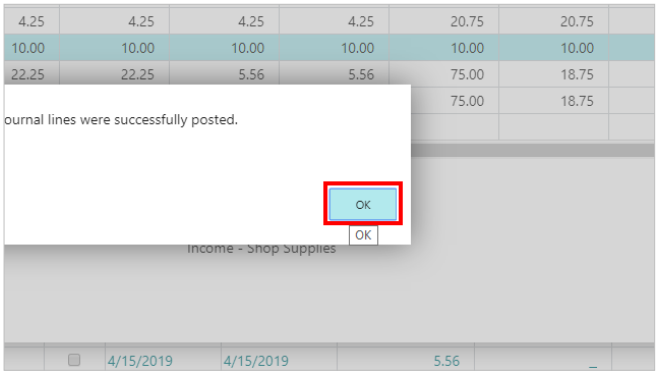
Alternatively Post and Print can be selected.



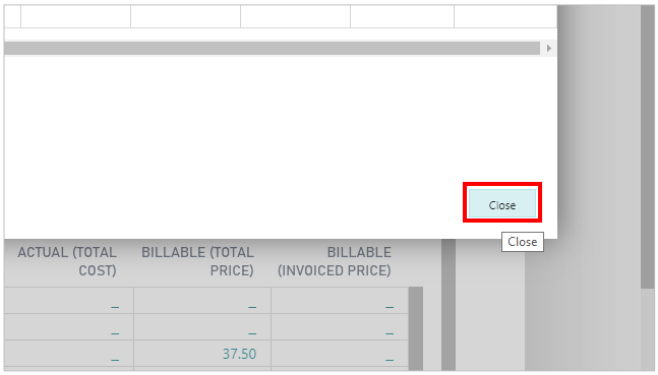
Click on the button **Yes**



Click on the button **OK**



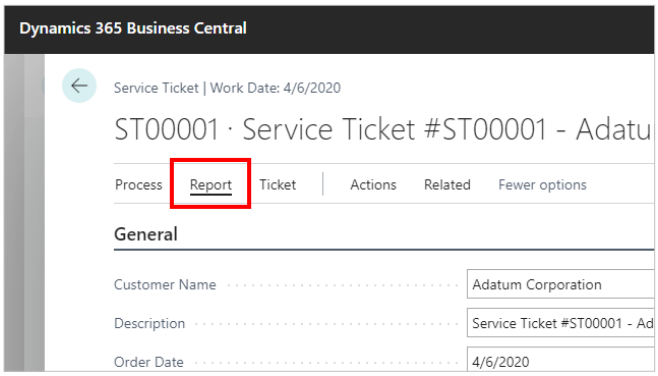
Click on the button **Close**



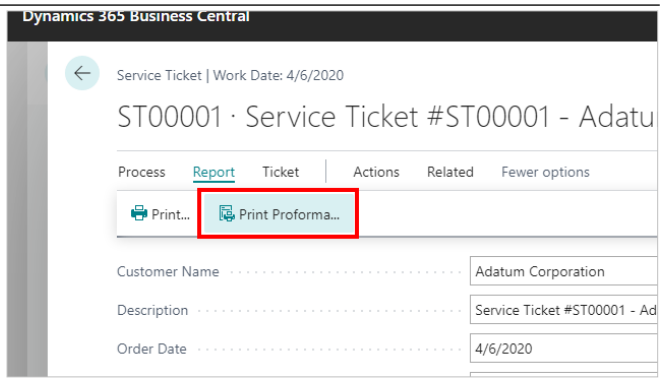
3.4.3.8. How to Print the Proforma Invoice

The following demonstrates printing the proforma invoice for a service ticket.

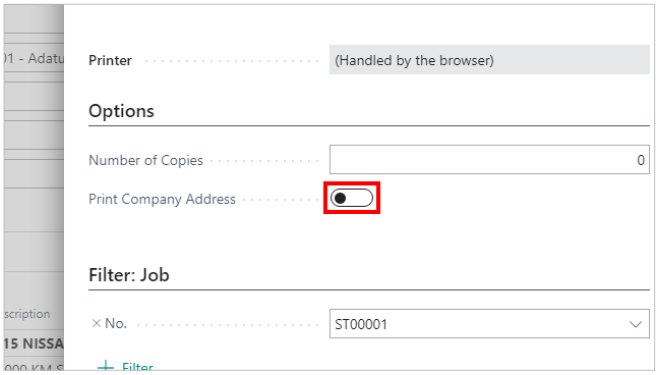
Click on the navigation menu item popup **Report**



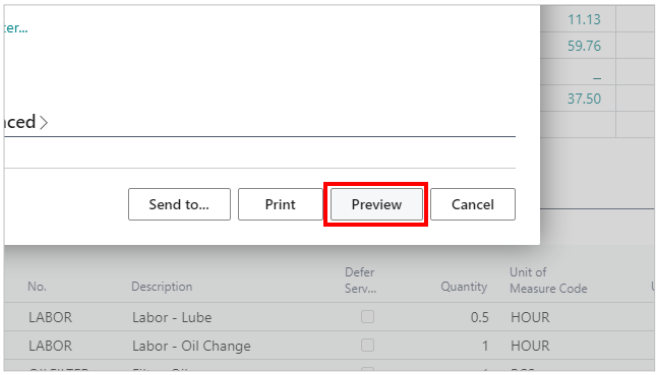
Click on the navigation menu item **Print Proforma...**



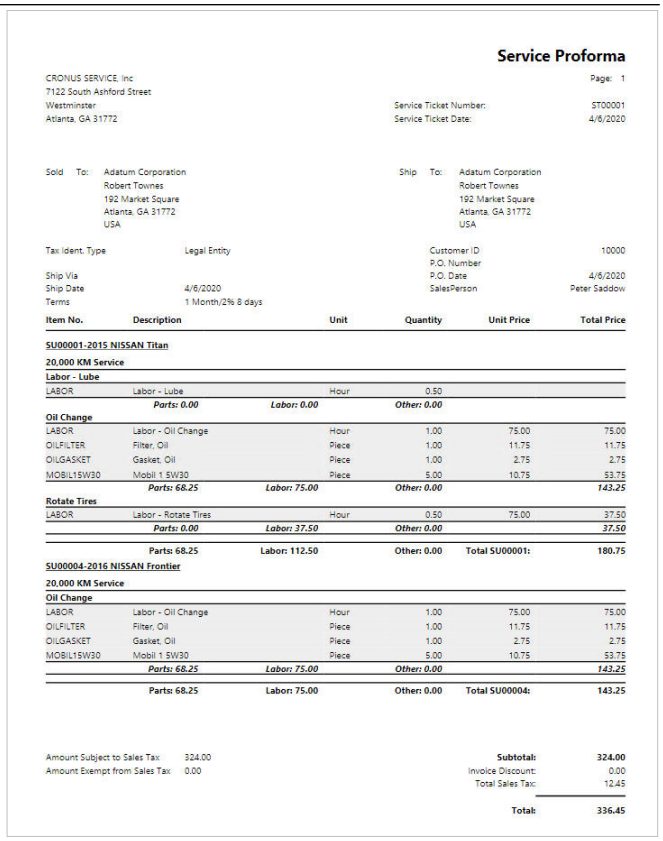
Click on the toggle field **Print Company Address**



Click on the button **Preview**



The following picture is an example of a proforma invoice.



Service Proforma

CRONUS SERVICE, Inc
7122 South Ashford Street
Westminster
Atlanta, GA 31772

Page: 1
Service Ticket Number: ST00001
Service Ticket Date: 4/6/2020

Sold To: Adatum Corporation
Robert Townes
192 Market Square
Atlanta, GA 31772
USA

Ship To: Adatum Corporation
Robert Townes
192 Market Square
Atlanta, GA 31772
USA

Tax Ident. Type: Legal Entity
Customer ID: 10000
P.O. Number:
Ship Via:
P.O. Date: 4/6/2020
Ship Date: 4/6/2020
SalesPerson: Peter Saddow
Terms: 1 Month/2% 8 days

Item No.	Description	Unit	Quantity	Unit Price	Total Price
SU00001-2015 NISSAN Titan					
20,000 KM Service					
Labor - Lube					
LABOR	Labor - Lube	Hour	0.50		
	Parts: 0.00	***Labor: 0.00***	***Other: 0.00***		
Oil Change					
LABOR	Labor - Oil Change	Hour	1.00	75.00	75.00
OILFILTER	Filter, Oil	Piece	1.00	11.75	11.75
OILGASKET	Gasket, Oil	Piece	1.00	2.75	2.75
MOBIL15W30	Mobil 1 5W30	Piece	5.00	10.75	53.75
	Parts: 68.25	***Labor: 75.00***	***Other: 0.00***		***143.25***
Rotate Tires					
LABOR	Labor - Rotate Tires	Hour	0.50	75.00	37.50
	Parts: 0.00	***Labor: 37.50***	***Other: 0.00***		***37.50***
	Parts: 68.25	**Labor: 112.50**	**Other: 0.00**	**Total SU00001:**	**180.75**
SU00004-2016 NISSAN Frontier					
20,000 KM Service					
Oil Change					
LABOR	Labor - Oil Change	Hour	1.00	75.00	75.00
OILFILTER	Filter, Oil	Piece	1.00	11.75	11.75
OILGASKET	Gasket, Oil	Piece	1.00	2.75	2.75
MOBIL15W30	Mobil 1 5W30	Piece	5.00	10.75	53.75
	Parts: 68.25	***Labor: 75.00***	***Other: 0.00***		***143.25***
	Parts: 68.25	**Labor: 75.00**	**Other: 0.00**	**Total SU00004:**	**143.25**

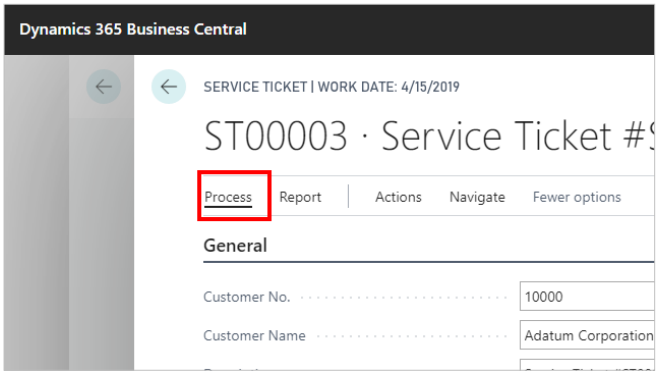
Amount Subject to Sales Tax: 324.00
Amount Exempt from Sales Tax: 0.00

Subtotal: 324.00
Invoice Discount: 0.00
Total Sales Tax: 12.45
Total: 336.45

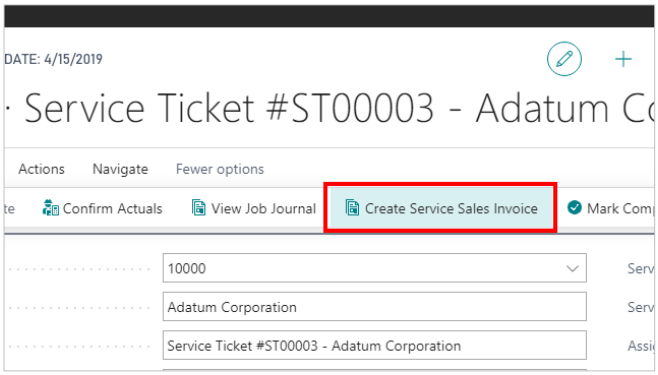
3.4.3.9. How to Invoice a Service Ticket

The following demonstrates the invoicing of a Service Ticket.

Click on the navigation menu item popup **Process**

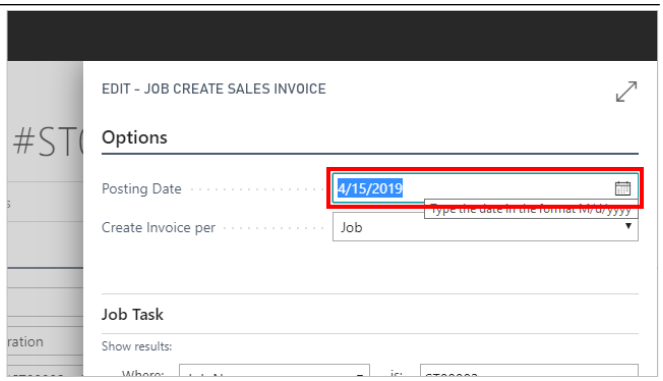


Click on the navigation menu item **Create Service Sales Invoice**

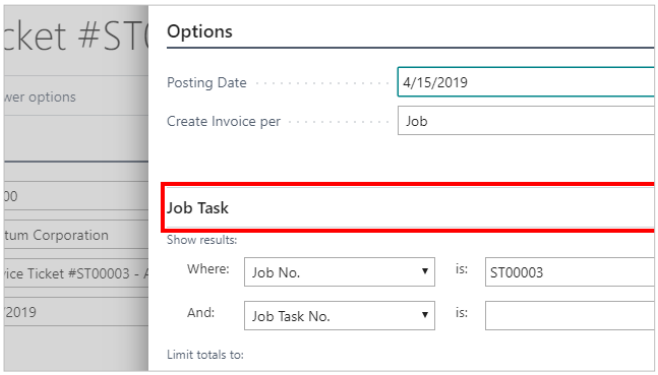


Click on the field **Posting Date**

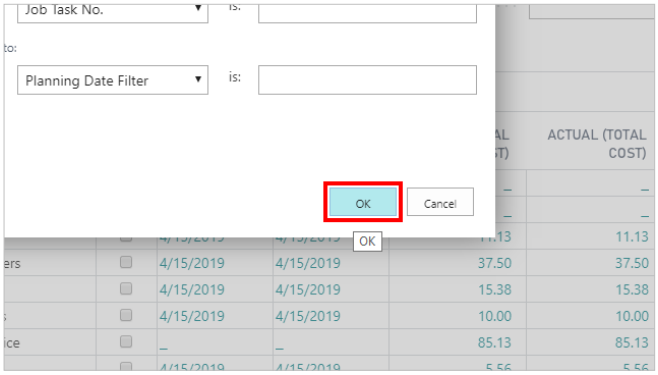
Verify that the Posting Date is the correct date. If not, then enter or select the applicable date.



Click on **Job Task**



Click on the button **OK**



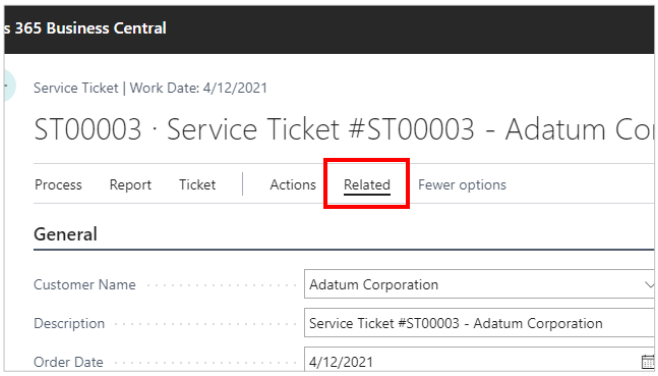
A pop-up window will occur providing the choice to open the Sales Invoice or not.

When No is selected, then the pop-up window will close.
When Yes is selected, then the open Sales Invoice will be displayed, where the invoice can be reviewed and posted, if desired.

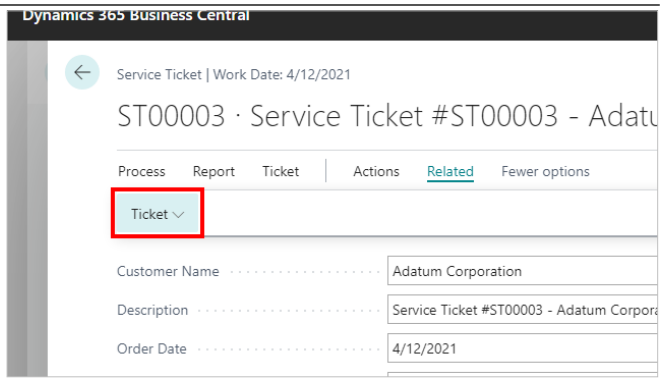
In this example No was selected.

The following demonstrates opening the outstanding Sales Invoice from the ticket and posting the invoice.

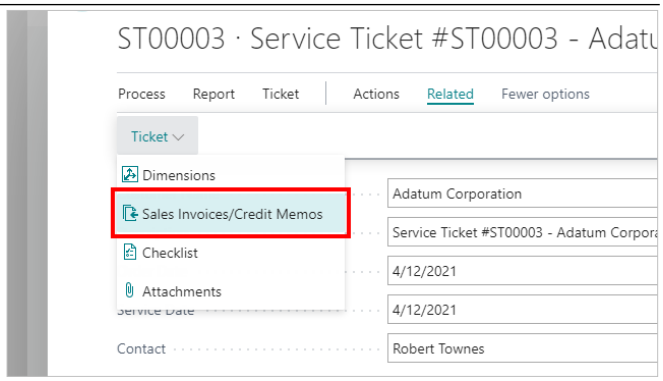
Click on the navigation menu item popup **Related**



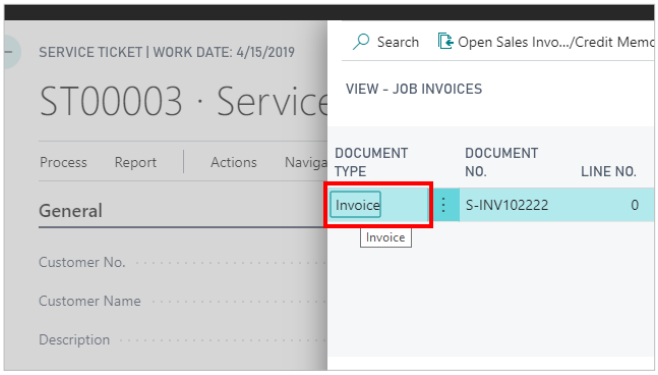
Click on the navigation menu item popup **Ticket**



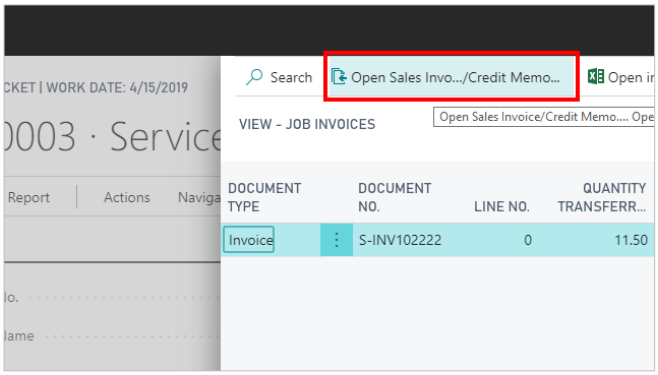
Click on the navigation menu item **Sales Invoices/Credit Memos**



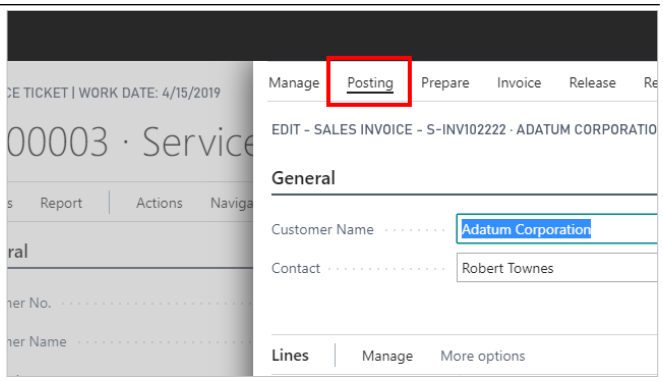
Click on the cell **Document Type** with the value **Invoice**



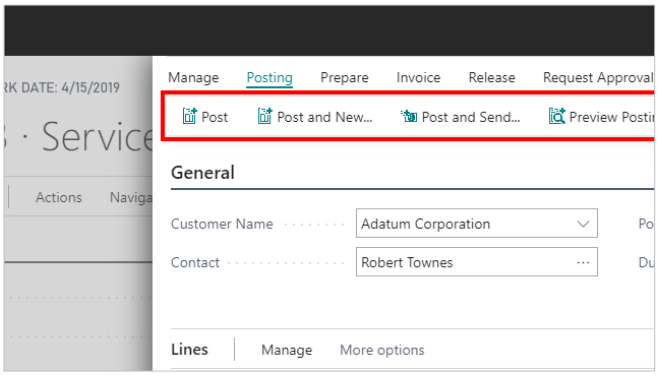
Click on the navigation menu item **Open Sales Invoice/Credit Memo...**



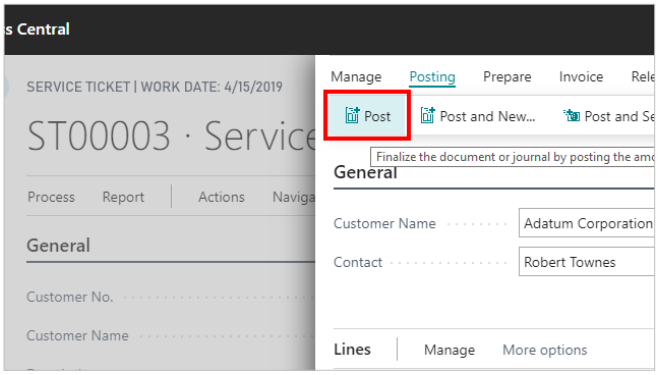
Click on the navigation menu item popup **Posting**



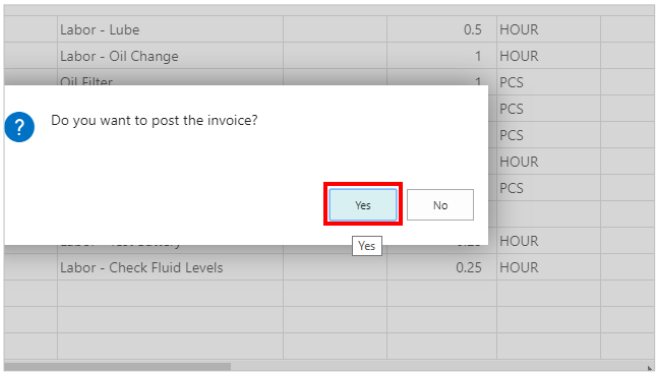
Click on **Post Post and New... Post and Send... Preview Posting**
The standard Microsoft Dynamics 365 Business Central options are available for posting.



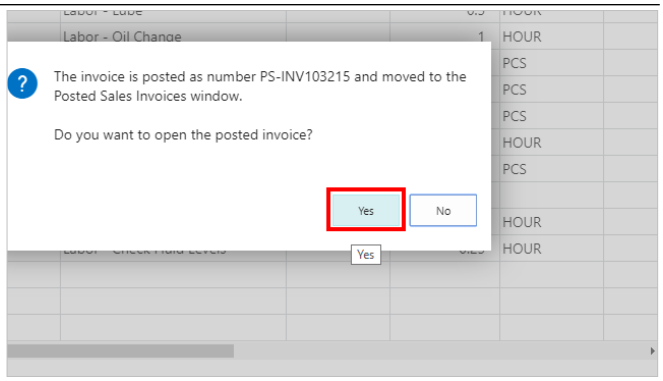
Click on the navigation menu item **Post**



Click on the button **Yes**

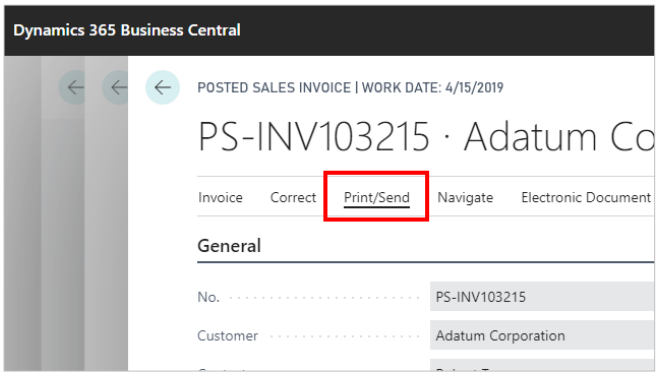


Click on the button **Yes**

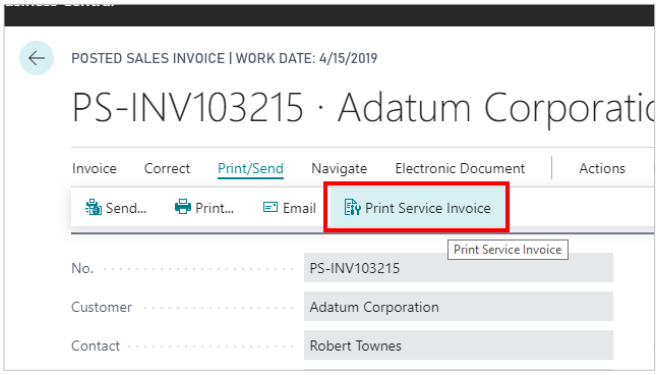


The following demonstrates printing the Service Invoice.

Click on the navigation menu item popup **Print/Send**

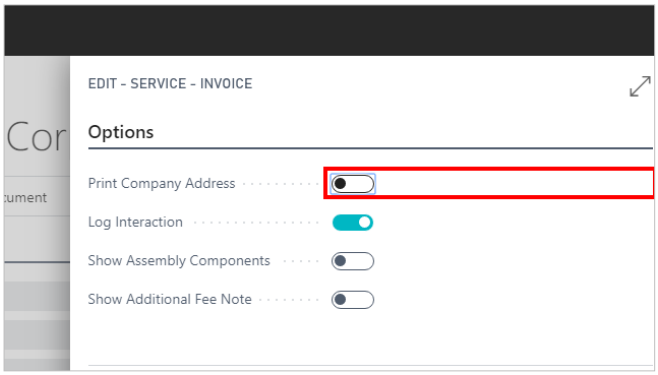


Click on the navigation menu item **Print Service Invoice**



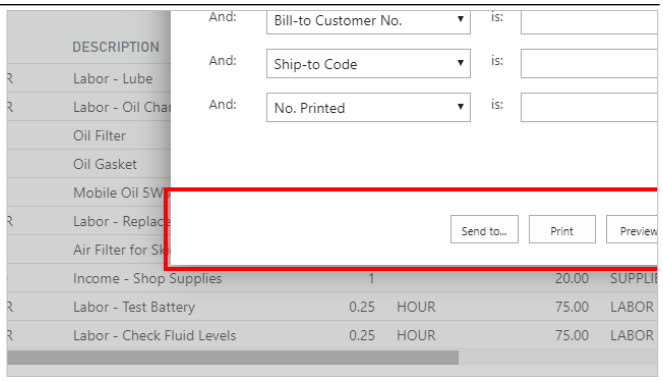
Click on **Print Company Address, No**

By default the first time the Print - Service Invoice is ran the Print Company Information is by default disabled. Therefore, to print company information, this field must be enabled.

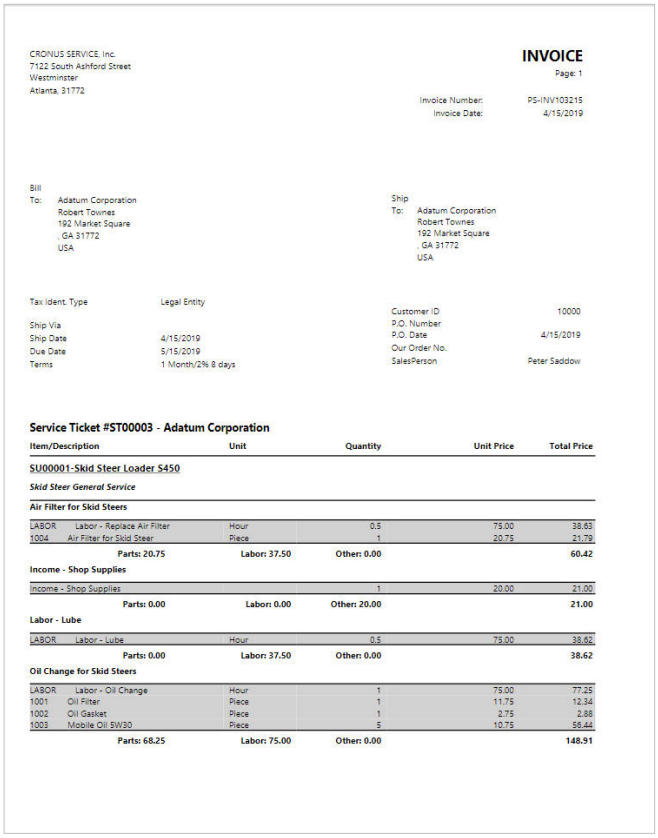


Click on **Send to... Print Preview Cancel**

The standard Microsoft Dynamics 365 Business Central, printing options are available to select from.



The following pictures display a posted Service Invoice.



CRONUS SERVICE, Inc.
7122 South Ashford Street
Westminster
Atlanta, 31772

INVOICE
Page: 1

Invoice Number: PS-INV103215
Invoice Date: 4/15/2019

Bill To: Adatum Corporation
Robert Townes
192 Market Square
, GA 31772
USA

Ship To: Adatum Corporation
Robert Townes
192 Market Square
, GA 31772
USA

Tax Ident. Type	Legal Entity	Customer ID	10000
Ship Via		P.O. Number	
Ship Date	4/15/2019	P.O. Date	4/15/2019
Due Date	5/15/2019	Our Order No.	
Terms	1 Month/2% 8 days	SalesPerson	Peter Saddow

Service Ticket #ST00003 - Adatum Corporation

Item/Description		Unit	Quantity	Unit Price	Total Price
SU00001-Skid Steer Loader S450					
Skid Steer General Service					
Air Filter for Skid Steers					
LABOR	Labor - Replace Air Filter	Hour	0.5	75.00	38.63
1004	Air Filter for Skid Steer	Piece	1	20.75	21.79
	Parts: 20.75	**Labor: 37.50**	**Other: 0.00**		**60.42**
Income - Shop Supplies					
Income - Shop Supplies			1	20.00	21.00
	Parts: 0.00	**Labor: 0.00**	**Other: 20.00**		**21.00**
Labor - Lube					
LABOR	Labor - Lube	Hour	0.5	75.00	38.62
	Parts: 0.00	**Labor: 37.50**	**Other: 0.00**		**38.62**
Oil Change for Skid Steers					
LABOR	Labor - Oil Change	Hour	1	75.00	77.25
1001	Oil Filter	Piece	1	11.75	12.34
1002	Oil Gasket	Piece	1	2.75	2.88
1003	Mobile Oil 5W30	Piece	5	10.75	56.44
	Parts: 68.25	**Labor: 75.00**	**Other: 0.00**		**148.91**

CRONUS SERVICE, Inc.
7122 South Ashford Street
Westminster
Atlanta, 31772

INVOICE

Page: 2

Invoice Number: PS-INV103215
Invoice Date: 4/15/2019

Bill
To: Adatum Corporation
Robert Townes
192 Market Square
, GA 31772
USA

Ship
To: Adatum Corporation
Robert Townes
192 Market Square
, GA 31772
USA

Tax Ident. Type Legal Entity

Ship Via
Ship Date 4/15/2019
Due Date 5/15/2019
Terms 1 Month/2% 8 days

Customer ID 10000
P.O. Number
P.O. Date 4/15/2019
Our Order No.
SalesPerson Peter Saddow

Test Battery

LABOR	Labor - Test Battery	Hour	0.25	75.00	19.31
	Parts: 0.00	**Labor: 18.75**	**Other: 0.00**		**19.31**
	Parts: 89.00	**Labor: 168.75**	**Other: 20.00**	**Total SU00001**	**288.26**

SU00004-Skid Steer Loader S70

Skid Steer General Service

Check Fluid Levels

LABOR	Labor - Check Fluid Levels	Hour	0.25	75.00	19.32
	Parts: 0.00	**Labor: 18.75**	**Other: 0.00**		**19.32**
	Parts: 0.00	**Labor: 18.75**	**Other: 0.00**	**Total SU00004**	**19.32**

Amount Subject to Sales Tax USD	296.50	**Subtotal:**	**296.50**
Amount Exempt from Sales Tax USD	0.00	Invoice Discount:	0.00
		Total Sales Tax:	11.08
		Total USD:	**307.58**

NOTE:

When processing a ticket, the posting of the invoice and confirming of actuals are not limited to, confirming actuals, then invoicing.
Invoicing can be done first, then confirmation of the actuals.

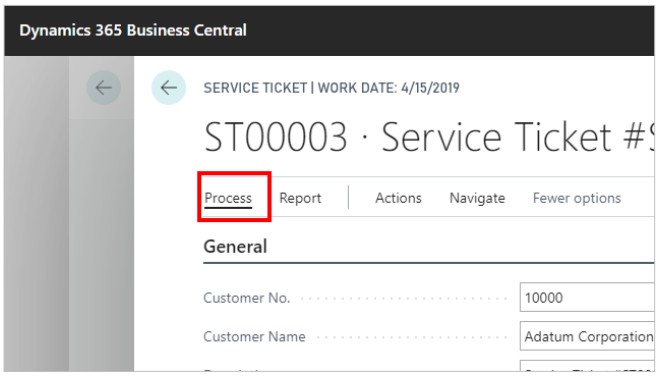
3.4.3.10. How to Close the Ticket

The final step is to mark the ticket as completed once all usage has been posted and the ticket has been fully invoiced.

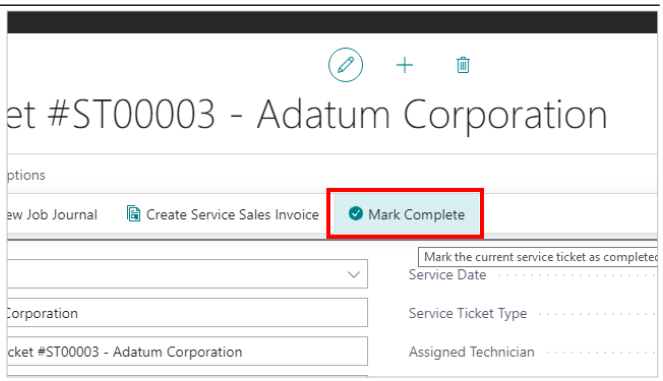
This will set the Status on the Job card to Completed.

The following demonstrates this process.

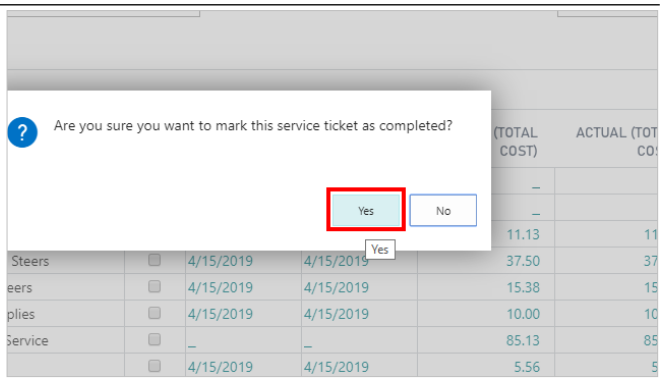
Click on the navigation menu item popup **Process**



Click on the navigation menu item **Mark Complete**



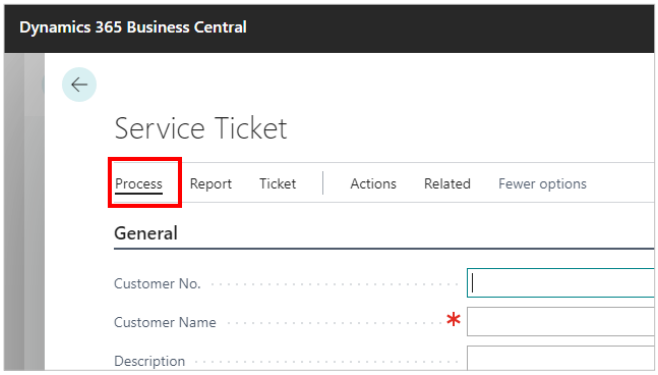
Click on the button **Yes**
Upon selecting Yes, the related Job Card, Status field will be set to Completed.



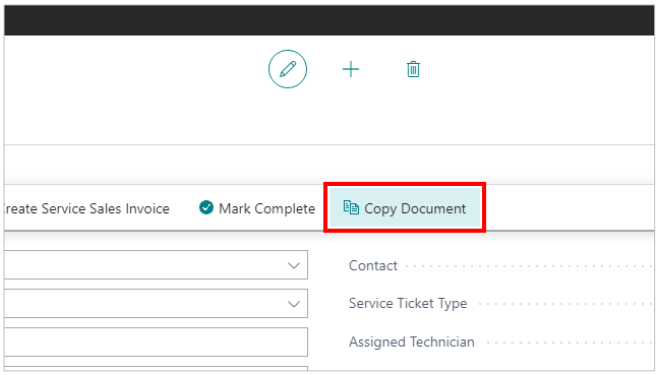
3.4.3.11. How to use the Copy Document Feature

The following demonstrates how to sue the Copy Document Feature.
Please note that the Service Ticket that will be used for this example was created in advance.

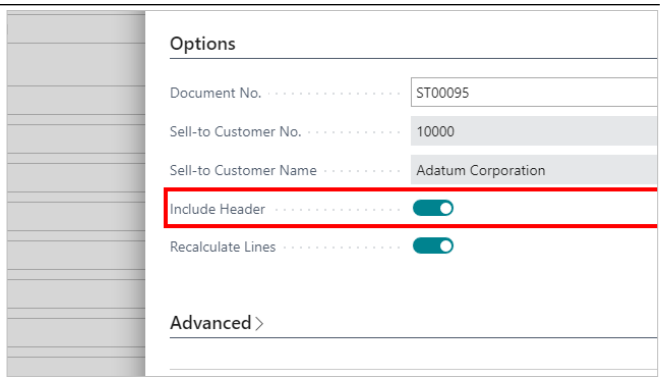
Click on the navigation menu item popup **Process**



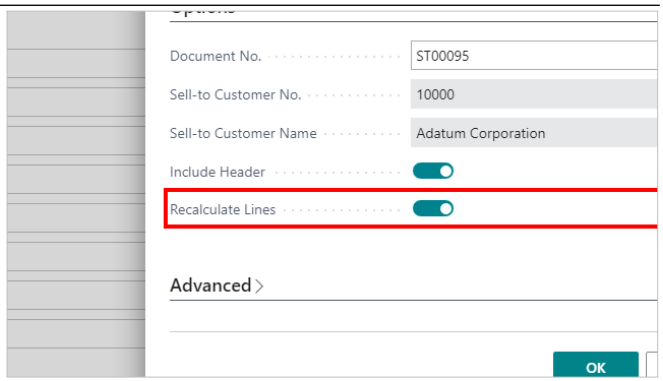
Click on the navigation menu item **Copy Document**



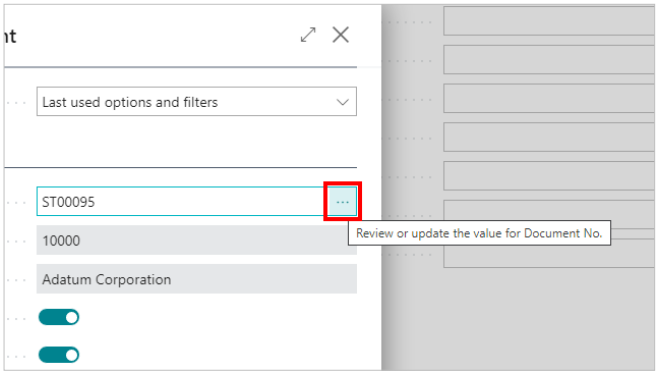
The Include Header toggle can be used to toggle if information from the header of the selected ticket is copied. It is enabled by default if a customer has not been selected before copying, and is disabled by default if a customer has been selected before copying.



The Recalculate Lines toggle can be used to toggle if service lines that get copied should have their prices recalculated after being copied.

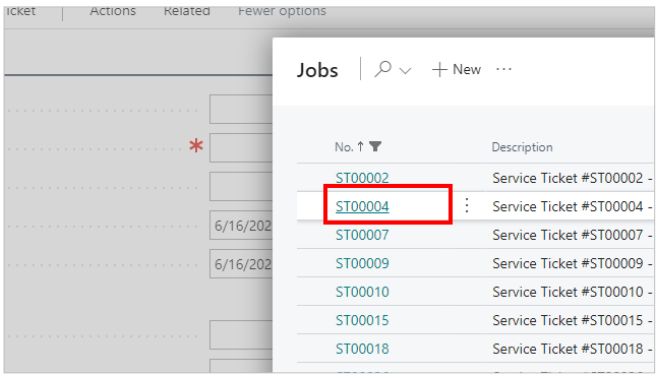


Click on the lookup button **Document No.**

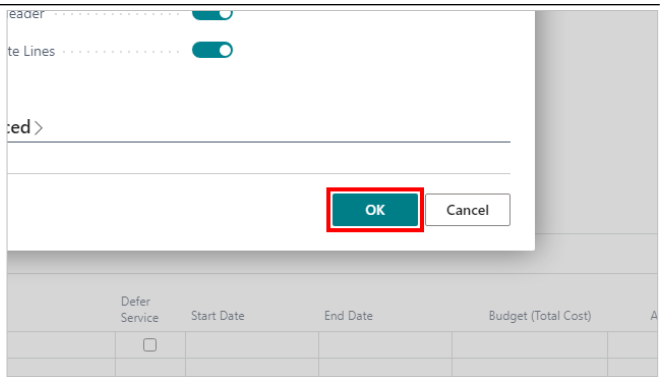


Select the service ticket that you want to copy.

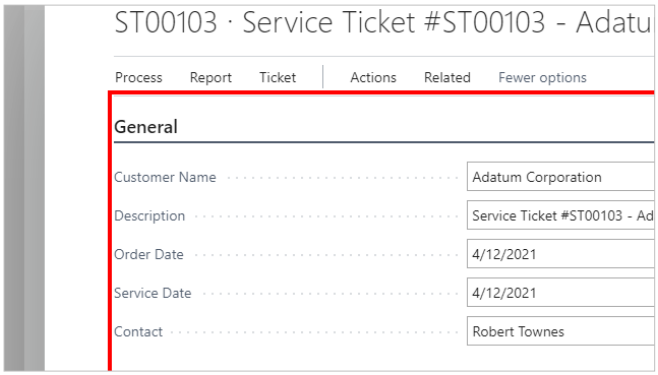
Click on the link in cell **No.** with the value **ST00004**



Click on the button **OK**



Notice that information from the selected ticket has now been copied to the current service ticket.



3.5. How to Create a Service Ticket from a Service Unit

3.5.1. Overview

ODT Service provides the ability to create a Service Ticket directly from the Service Unit card. There are two methods available to create the Service Ticket.

One is without a Service Template and the other is with a Service Template.

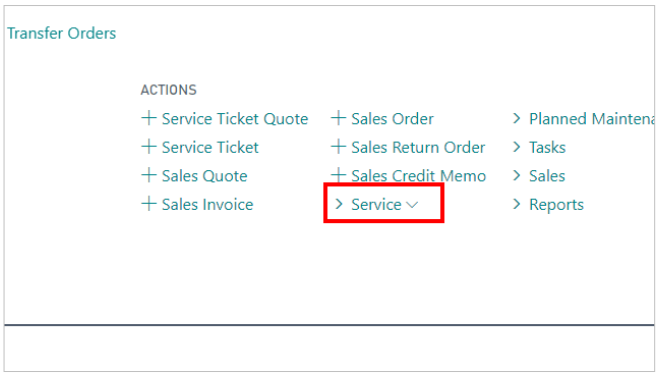
3.5.2. How to Create a Service Ticket

Sales Order Processor Profile

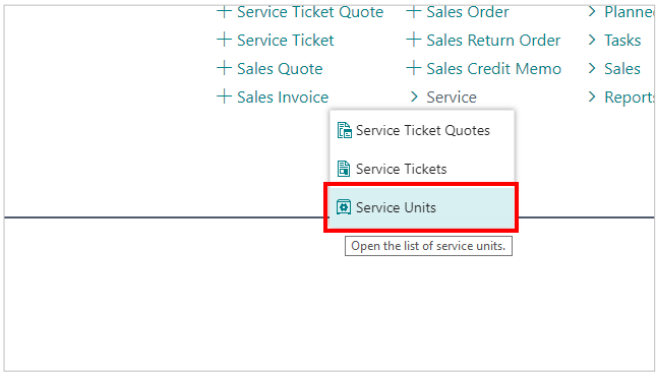
The same steps can be used when the user has the Business Manager Profile assigned to them.

The following demonstrates creating a Service Ticket without a Service Template being included.

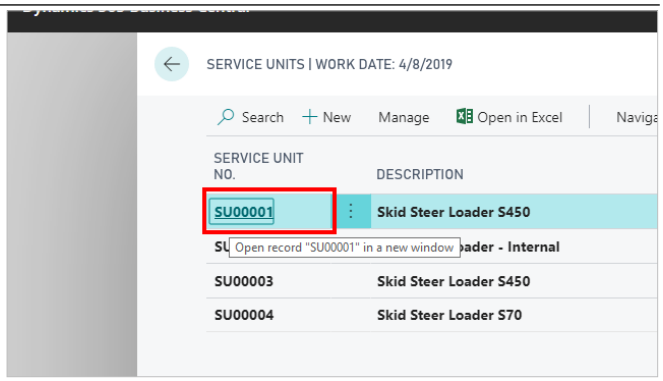
Click on the navigation menu item popup **Service**



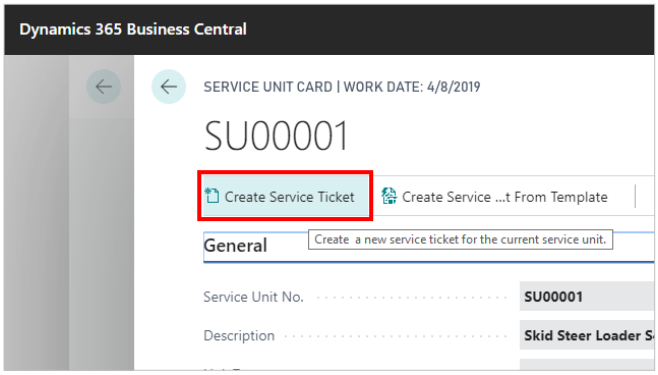
Click on the navigation menu item **Service Units**



Click on the link in cell **Service Unit No.** with the value **SU00001**

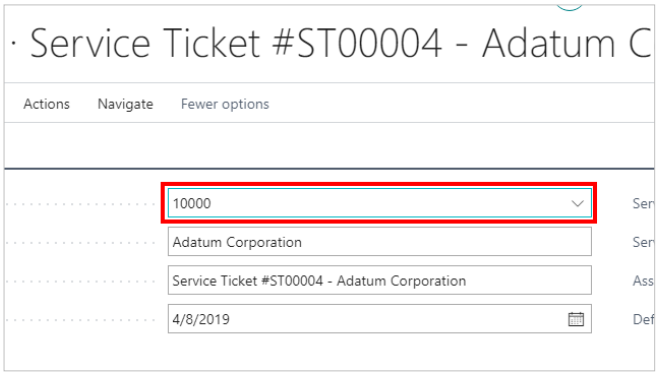


Click on the navigation menu item **Create Service Ticket**
If the selected service unit is already on another open service ticket, a message will be displayed to indicate this and confirm if you want to proceed.



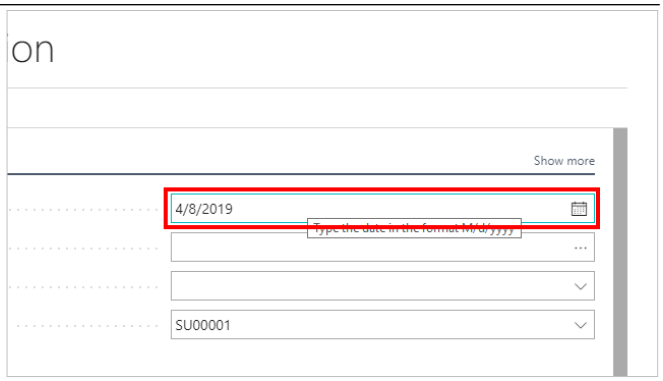
Click on the field **Customer No.**

The Customer No. is automatically populated based on the Customer setup on the Service Unit.



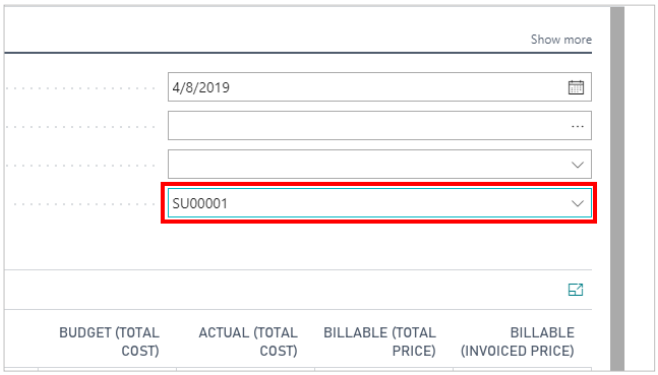
Click on the field **Service Date**

The Service Date defaults from the users' Work Date. Should the planned Service Date be different, then enter or lookup and select the date on which the servicing is to occur on.



Click on the field **Default Service Unit No.**

The Service Unit No. from which the Create Service Ticket was ran from will automatically populate the Default Service Unit field.



To learn how to add Ticket Units/Lines records and processing a Service Ticket, please see the user help in Processing Service of Service for Internal Equipment, or Service for External Customers.

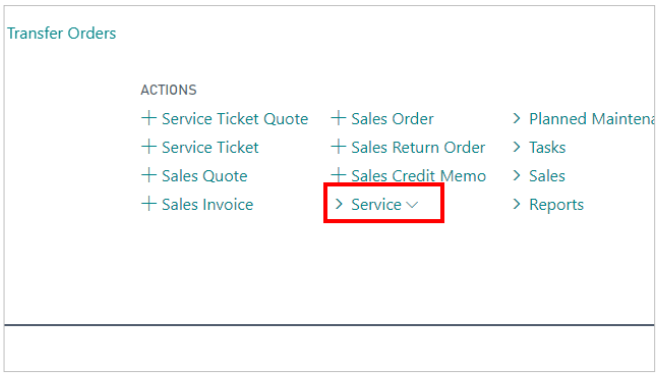
3.5.3. How to Create a Service Ticket with a Service Template

Sales Order Processor Profile

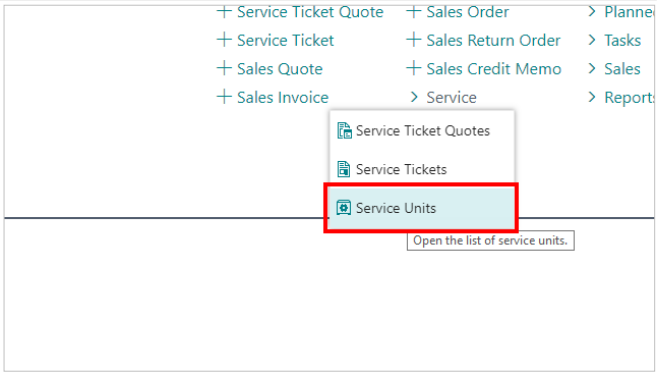
The same steps can be used when the user has the Business Manager Profile assigned to them.

The following demonstrates creating a Service Ticket with a Service Template being included.

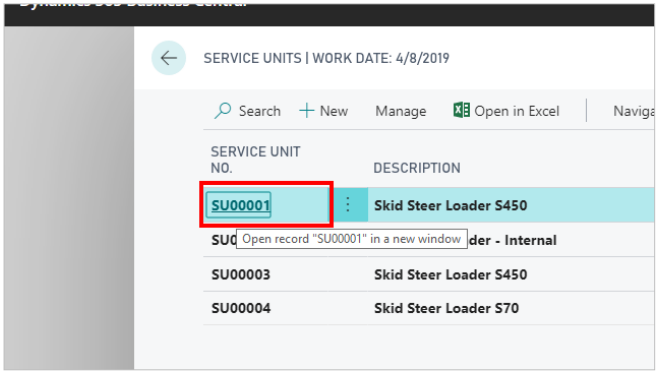
Click on the navigation menu item popup **Service**



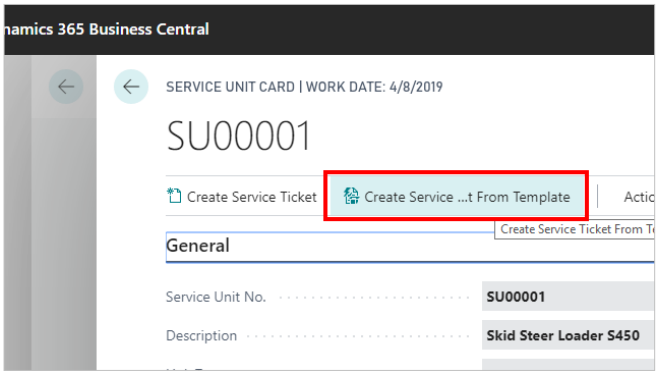
Click on the navigation menu item **Service Units**



Click on the link in cell **Service Unit No.** with the value **SU00001**



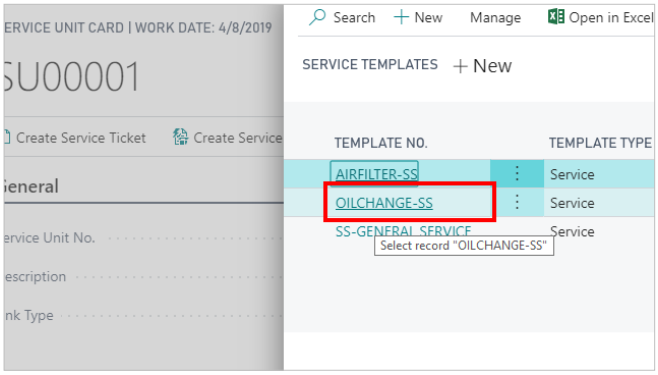
Click on the navigation menu item **Create Service Ticket From Template**



Click on the link in cell **Template No.** with the value **OILCHANGE-SS**

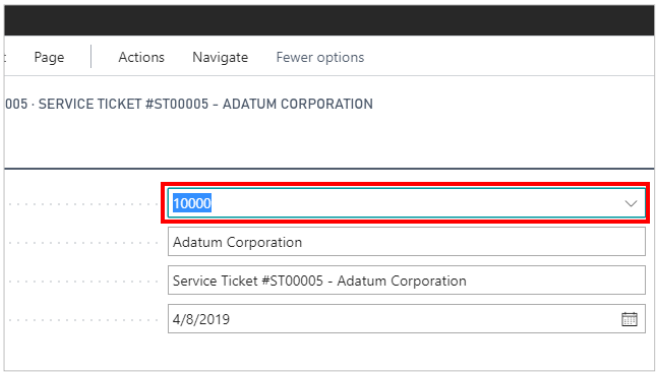
Select the Service Template to be included on the Service Ticket being created.

If the selected service unit is already on another open service ticket, a message will be displayed to indicate this and confirm if you want to proceed.



Click on the field **Customer No.**

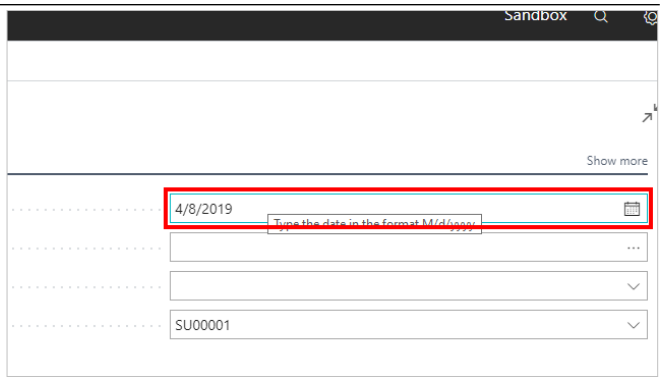
The Customer No. is automatically populated based on the Customer setup on the Service Unit.



Click on the field **Service Date**

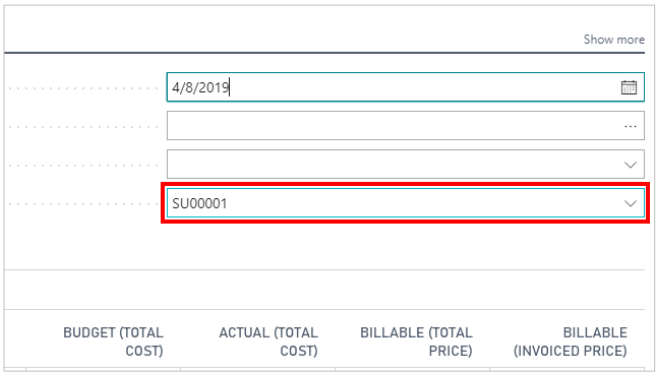
The Service Date defaults from the users' Work Date. Should the planned Service Date be different, then enter or lookup and select the date on which the servicing is to occur on.

The Ticket Units/Lines are automatically created based on the date from the users' Work Date. Should the Service date be changed to a later date, a pop-up will occur asking if the user would like to update the lines. The user should select Yes, to update the lines.



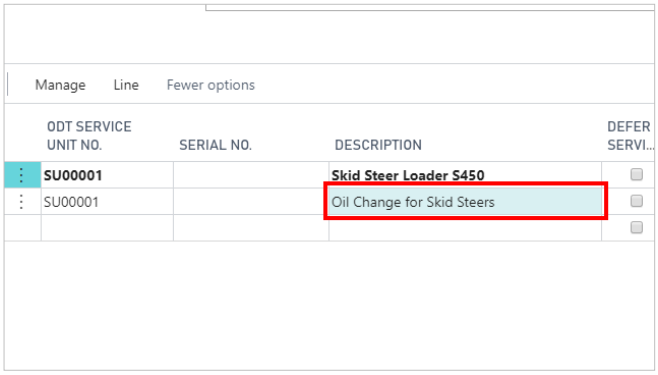
Click on the field **Default Service Unit No.**

The Service Unit No. from which the Create Service Ticket was ran from will automatically populate the Default Service Unit field.



Click on the cell **Description** with the value **Oil Change for Skid Steers**

The Service Template will automatically populate the Ticket Units/Lines, and the details of the template will populate the Service Ticket Details.

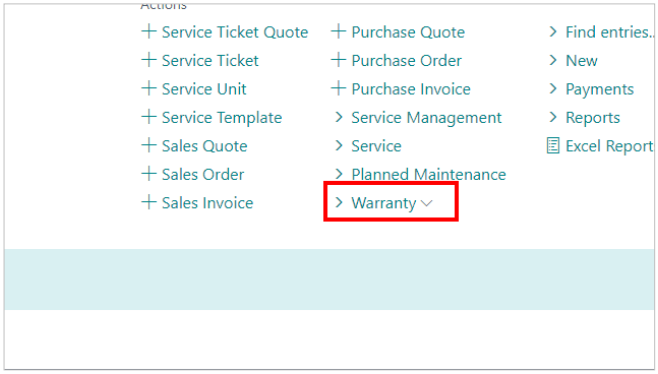


To learn how to process a Service Ticket, please see the user help in Processing Service of Service for Internal Equipment, or Service for External Customers.

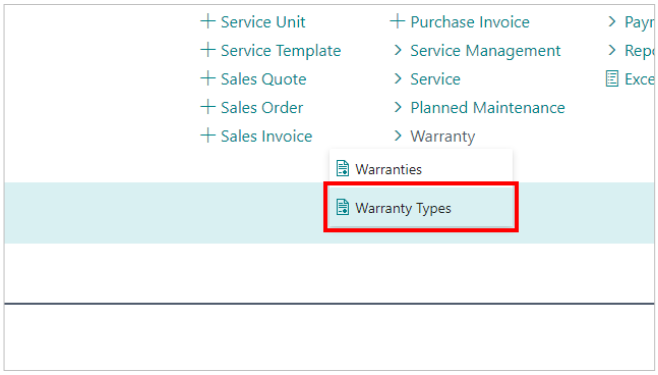
3.6. Service Warranties

3.6.1. How to set up Warranty Types

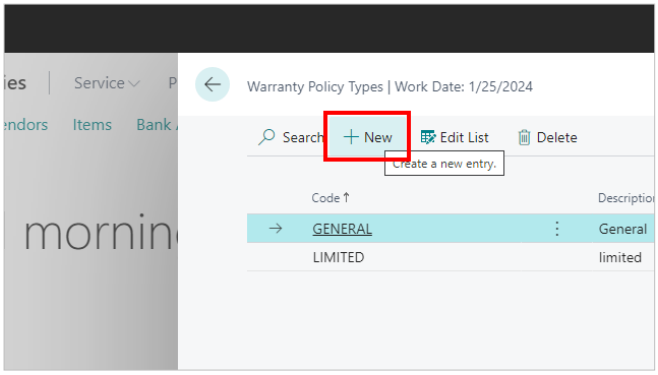
Click on the navigation menu item popup **Warranty**



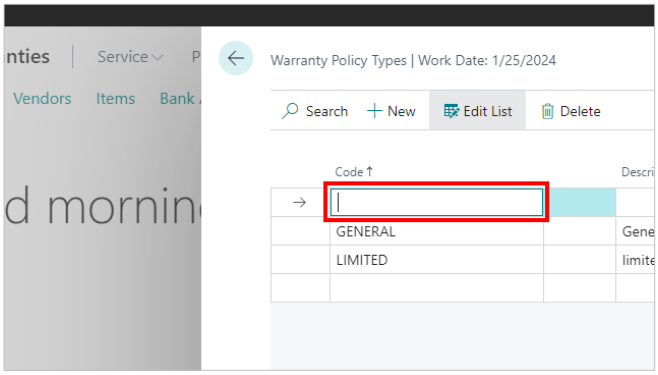
Click on the navigation menu item Warranty Types



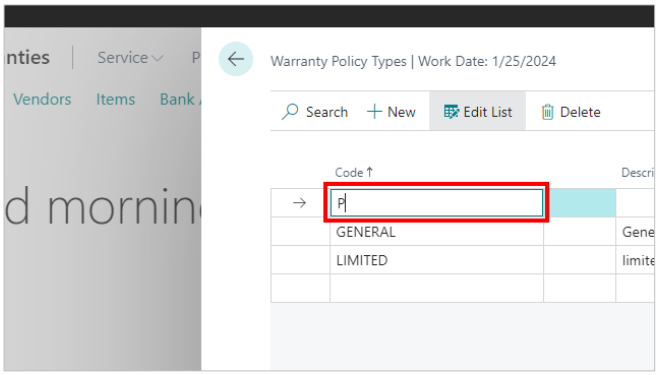
Click on the navigation menu item **New**



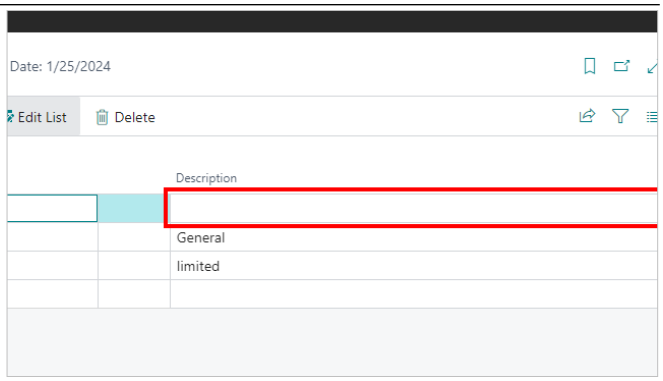
Click on the cell **Code**



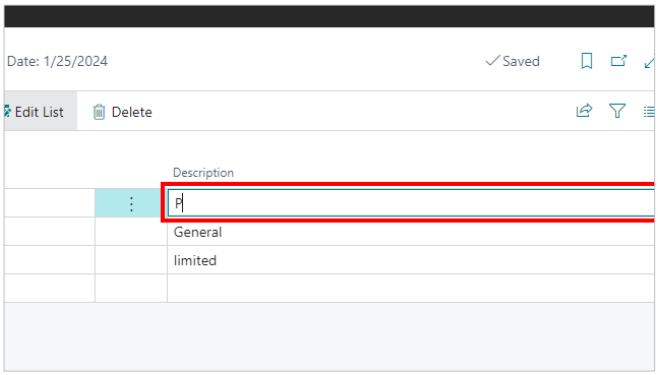
Enter the text **Power Train**.



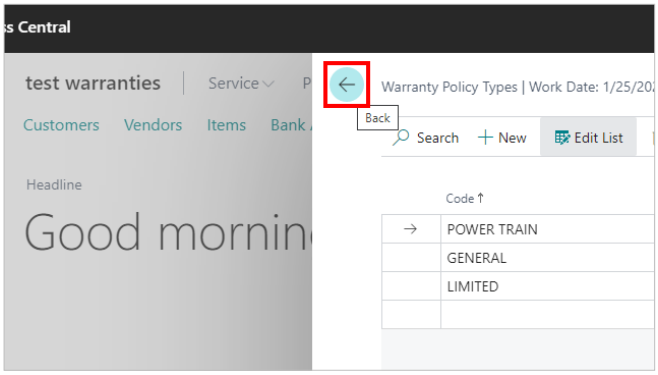
Click on the cell **Description**



Enter the text **Power Train**.

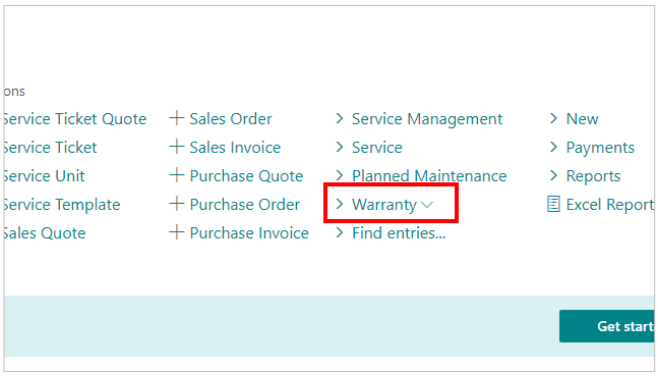


Click on the back button

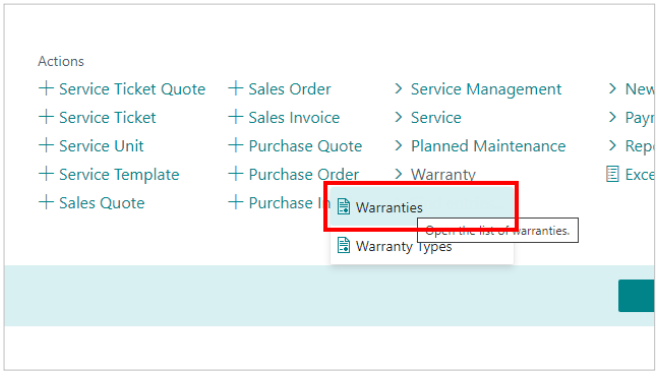


3.6.2. How to set up Warranies

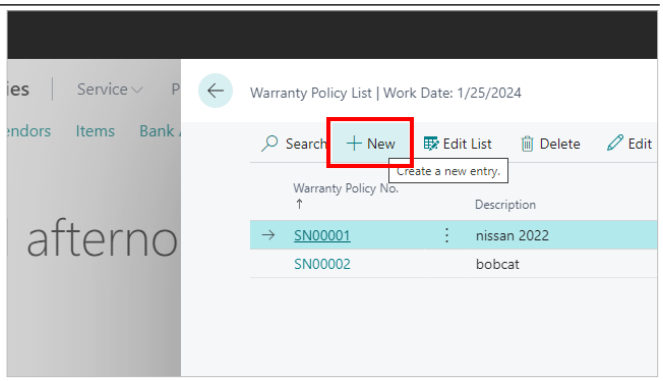
Click on the navigation menu item popup **Warranty**



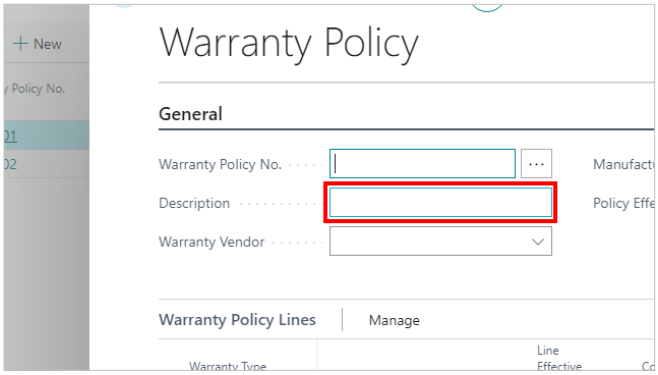
Click on the navigation menu item **warranties.**



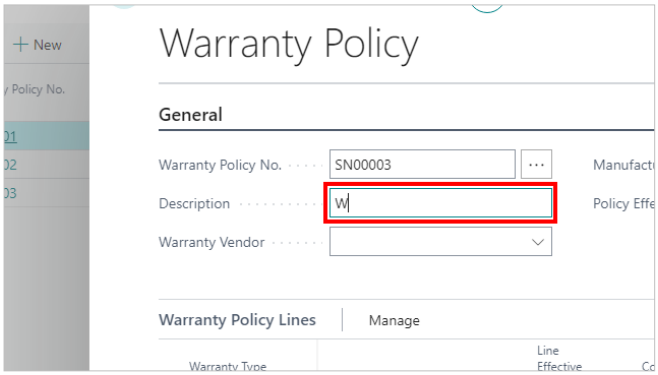
Click on the navigation menu item **New**



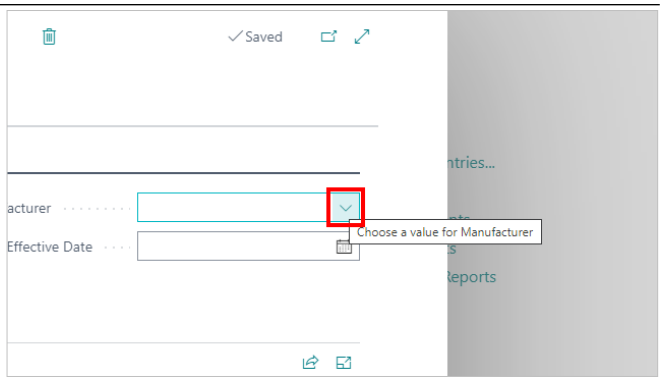
Click on the field **Description**



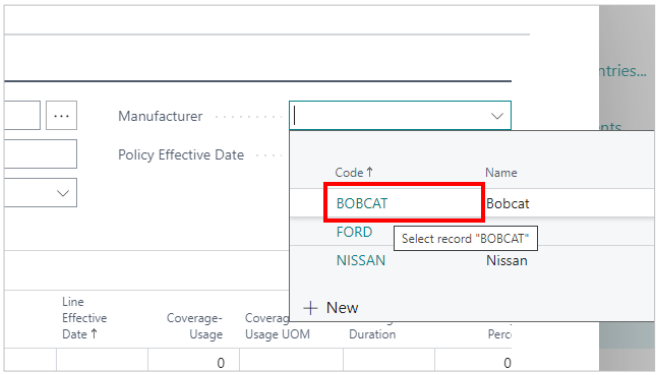
Enter the text **Warranty Policy 2022**.



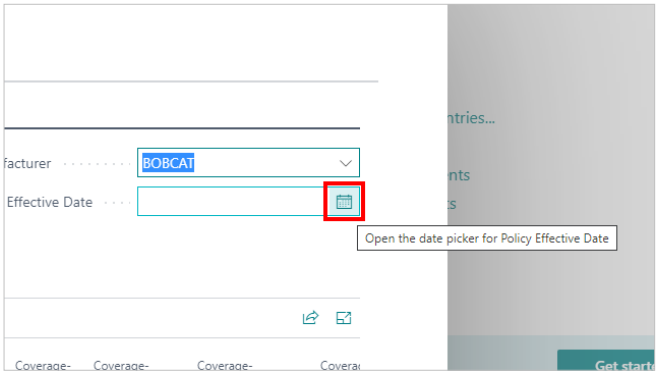
Click on the lookup button **Manufacturer**



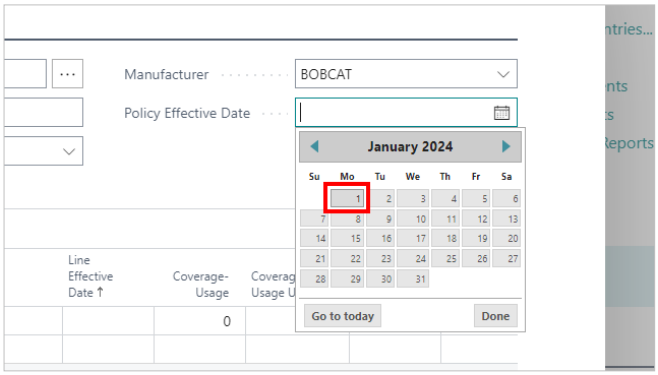
Select the manufacturer this warranty will apply to.
Click on the link in cell **Code** with the value **BOBCAT**



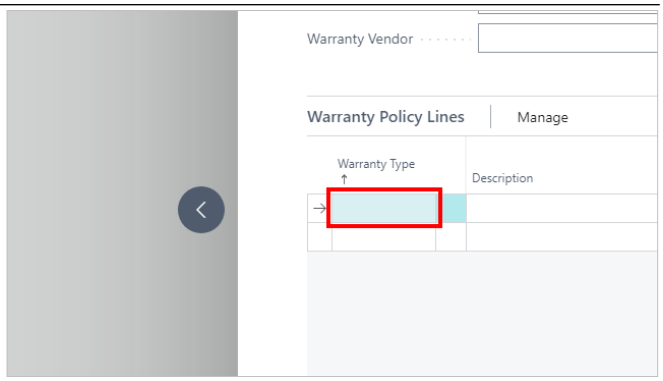
Select the date this policy will become effective.
Click on the link **Open the date picker**



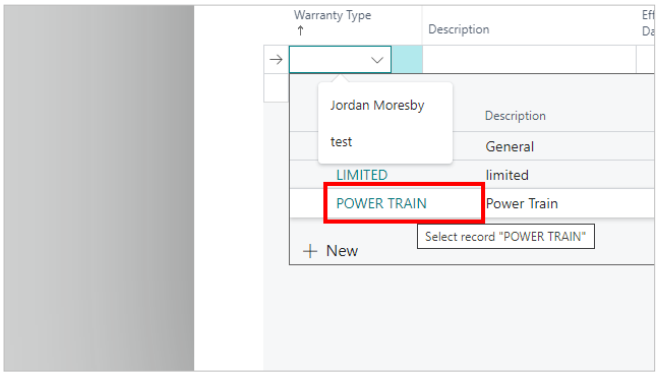
Click on a date in the calendar



Click on the cell **Warranty Type**

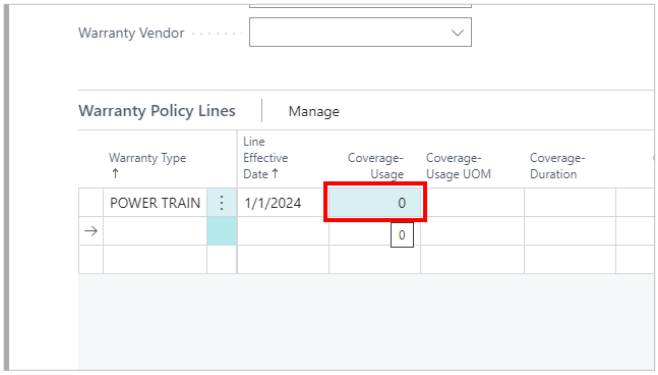


Select the Warranty that you wish to be part of this policy. The following example will only select one, but it is possible for multiple warranty types to be added.
Click on the link in cell **Code** with the value **POWER TRAIN**

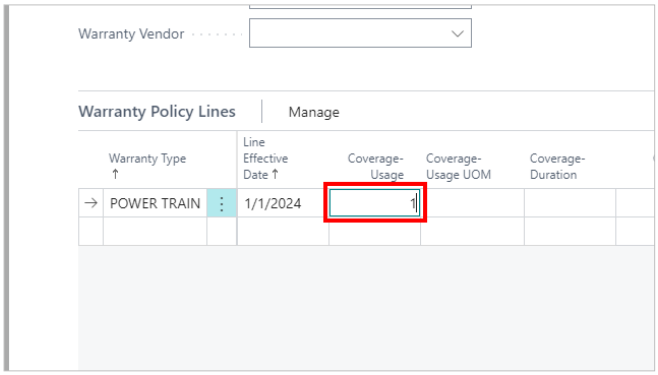


Coverage-Usage and Coverage-Usage UOM are used to determine if warranty coverage applies based on the Service Meter of a service unit.

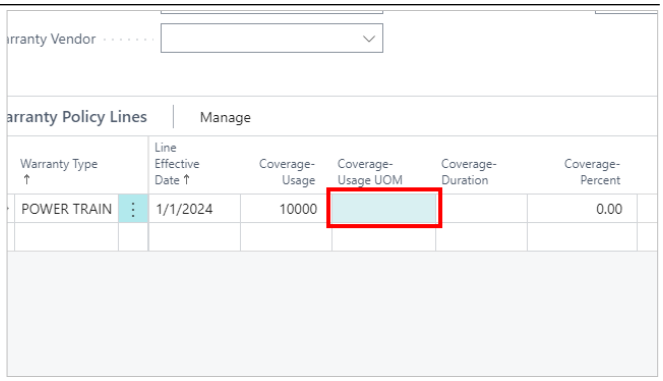
Click on the cell **Coverage-Usage** with the value **0**



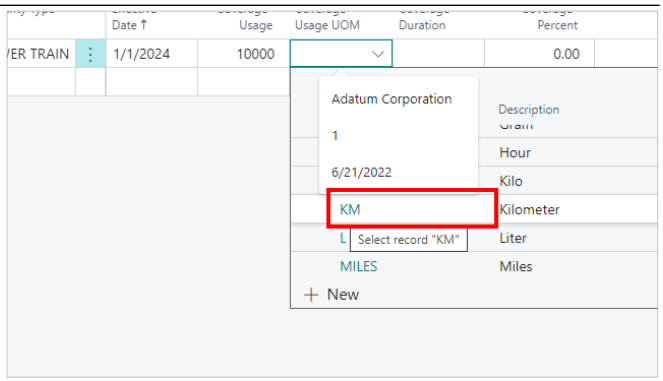
Enter the text **10000**.



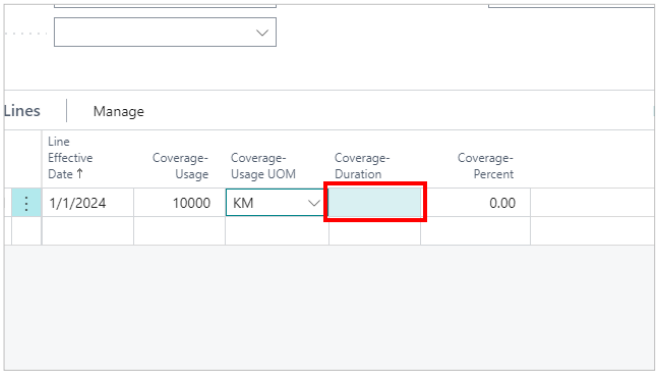
Click on the cell **Coverage-Usage UOM**



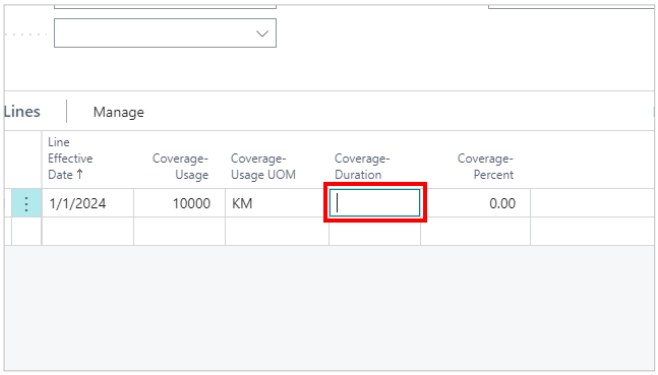
Click on the link in cell **Code** with the value **KM**



Coverage Duration determines how long this policy will remain in effect.
Click on the cell **Coverage-Duration**

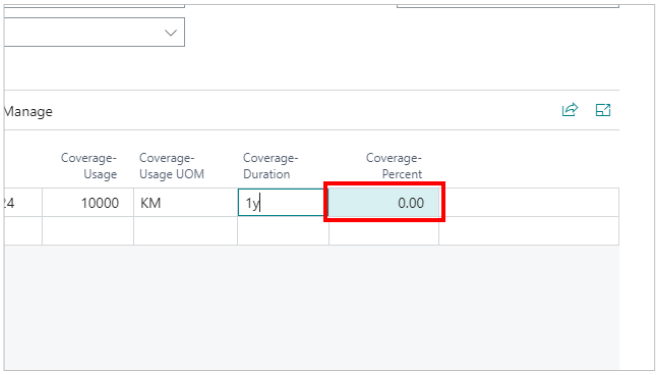


Enter the text **1y**.

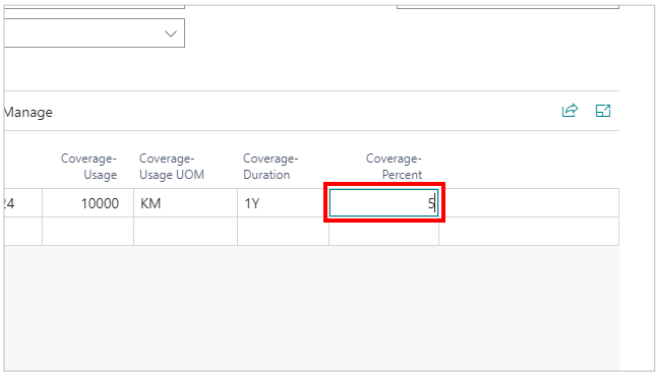


Coverage Percent specifies what percentage of service will be covered under warranty.

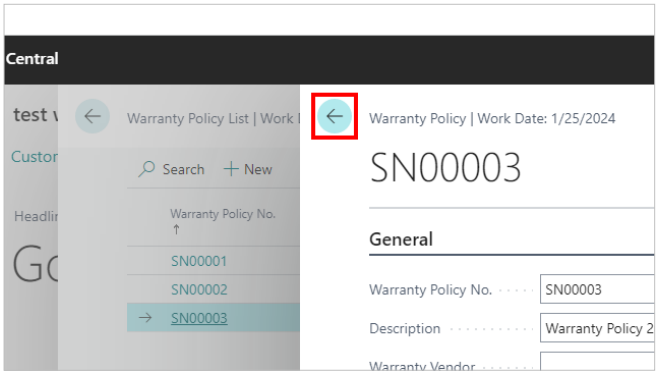
Click on the cell **Coverage-Percent** with the value **0.00**



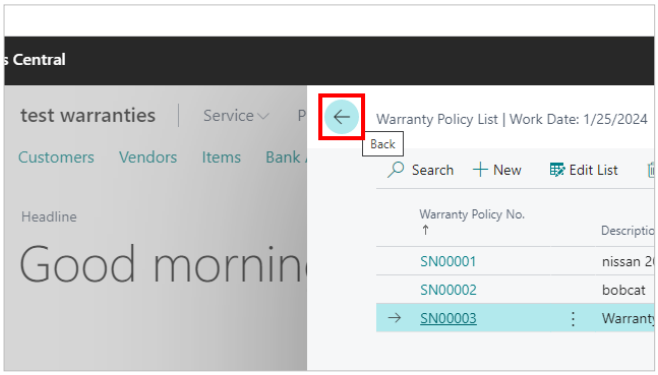
Enter the text **50**.



Click on the back button

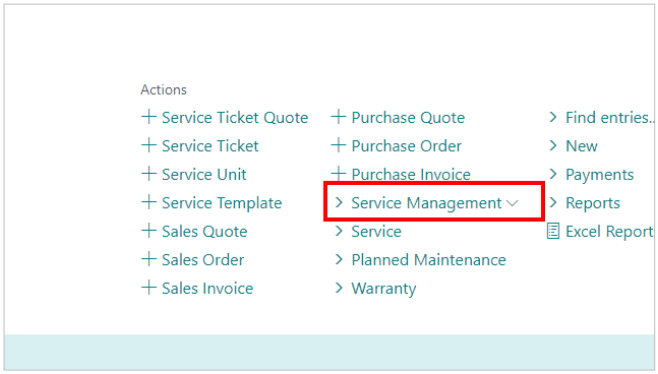


Click on the back button

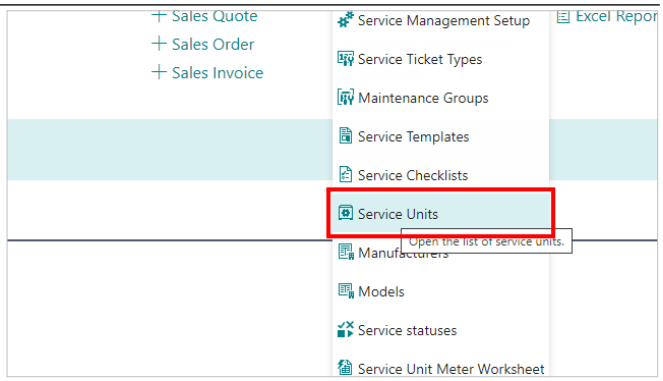


3.6.3. How to Assign Warranties to Service Units

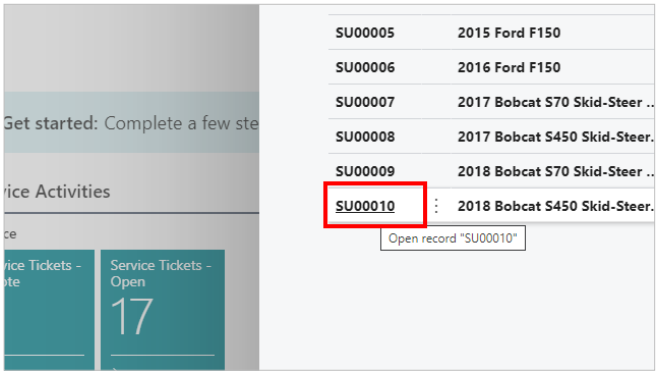
Click on the navigation menu item popup **Service Management**



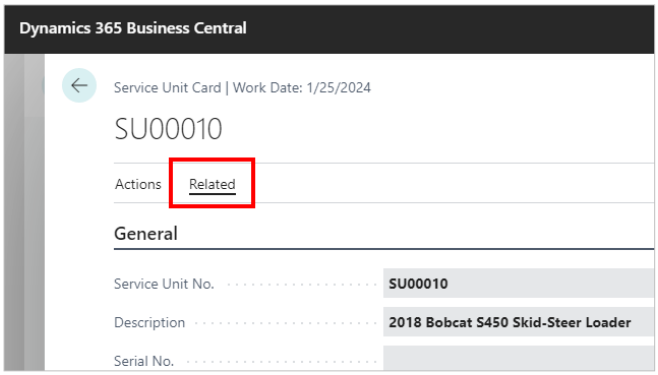
Click on the navigation menu item **Open the list of service units.**



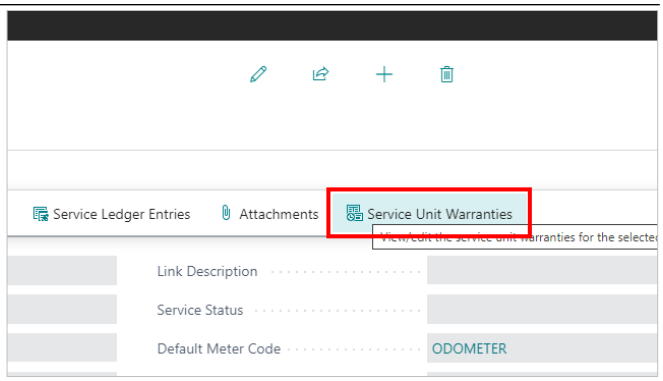
Select the Service Unit you wish to assign a warranty to.
Click on the link in cell **Service Unit No.** with the value **SU00010**



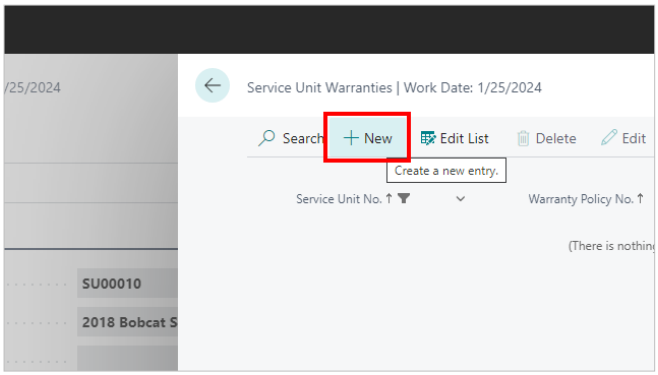
Click on the navigation menu item popup **Related**



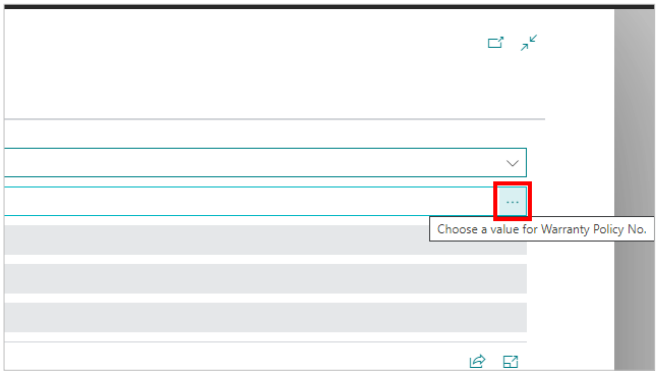
Click on the navigation menu item **Service Unit Warranties**



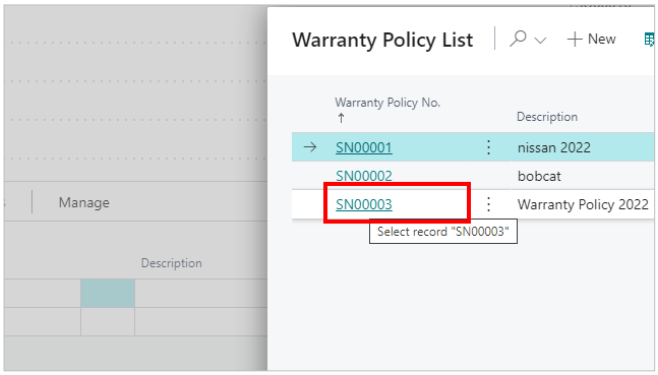
Click on the navigation menu item **New**



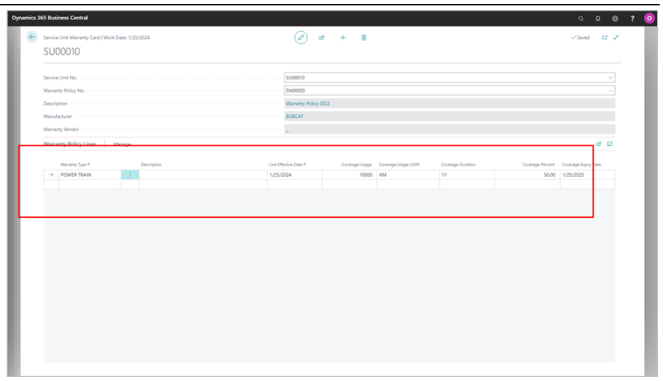
Click on the lookup button **Warranty Policy No.**



Select the Warranty Policy you wish to be assigned to this unit
Click on the link in cell **Warranty Policy No.** with the value **SN00003**

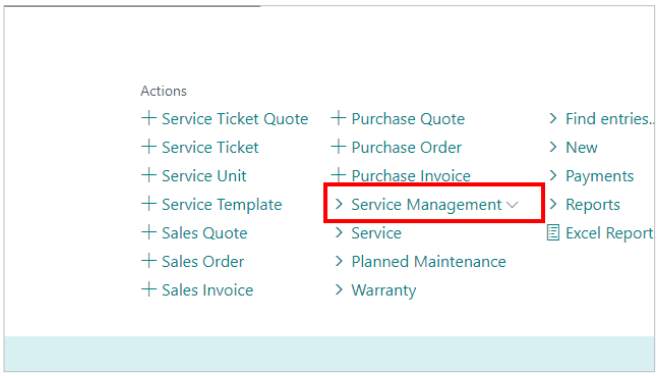


Notice that the Warranty Policy Lines have been automatically filled in based on the Warranties that were set up previously

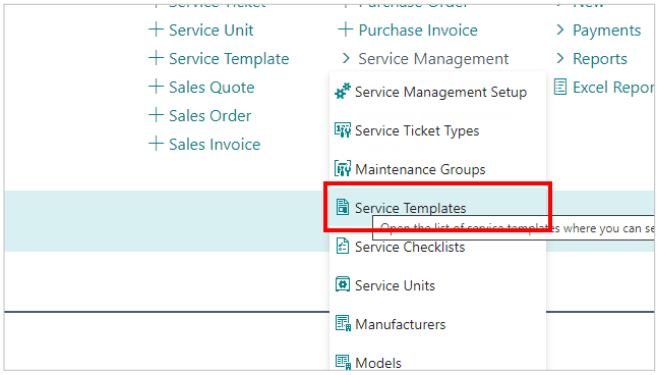


3.6.4. How to assign a Warranty to a Service Template

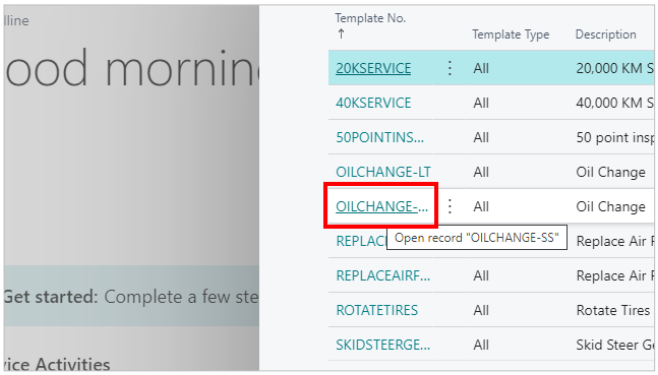
Click on the navigation menu item popup **Service Management**



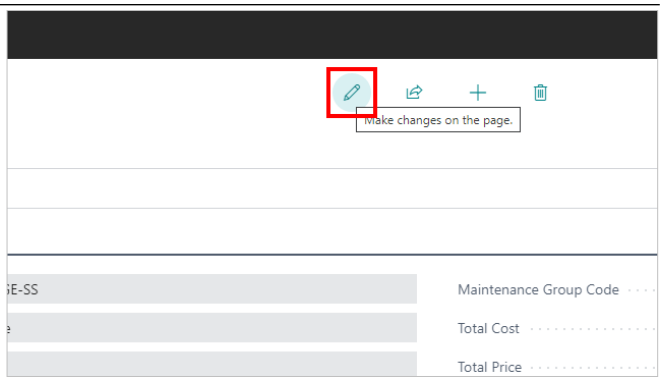
Click on the navigation menu item Service Templates



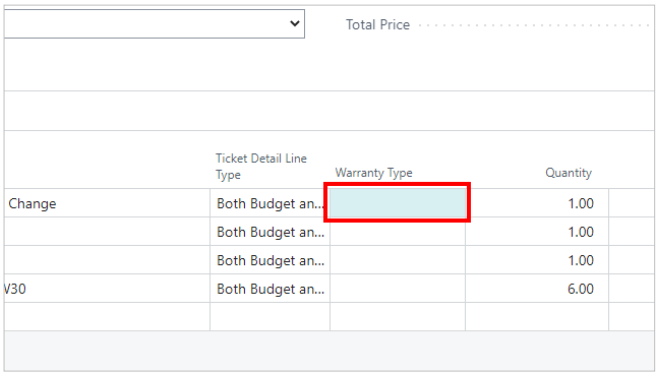
Select the Service Template you wish to assign a warranty.
Click on the link in cell **Template No.** with the value **OILCHANGE-SS**



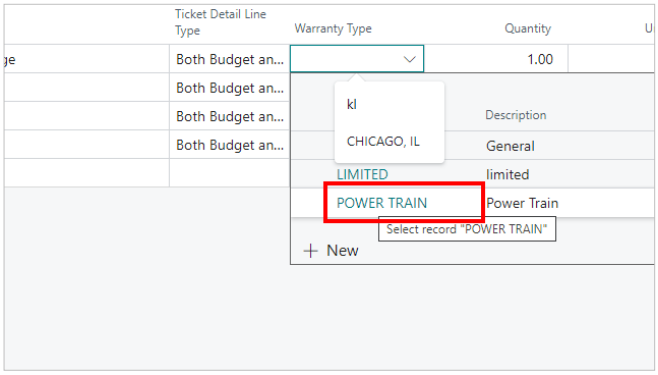
Click on the action toggle **edit/view**



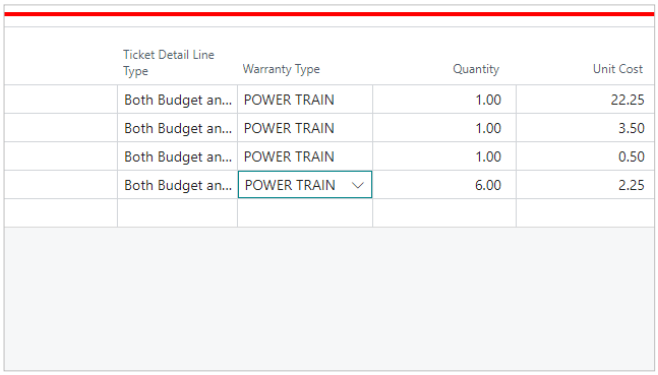
Click on the cell **Warranty Type**



Select the warranty that this Service Template will apply to.
Click on the link in cell **Code** with the value **POWER TRAIN**

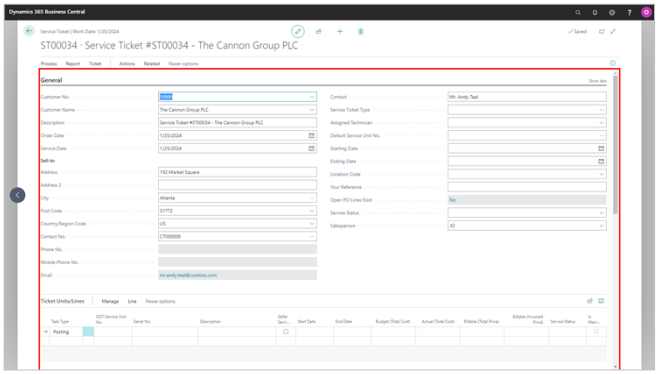


Repeat this process for all lines in the Service Template

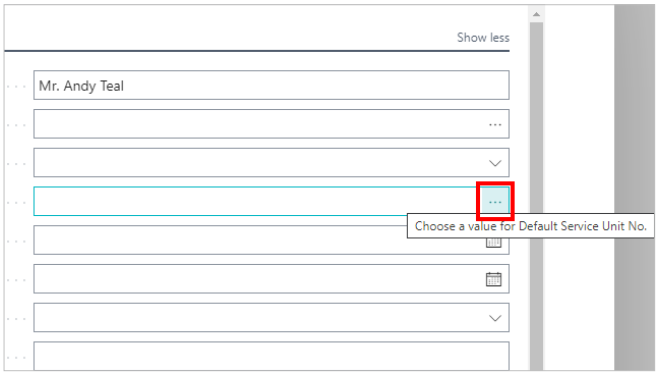


3.6.5. How to Process a Warranty on Service Tickets

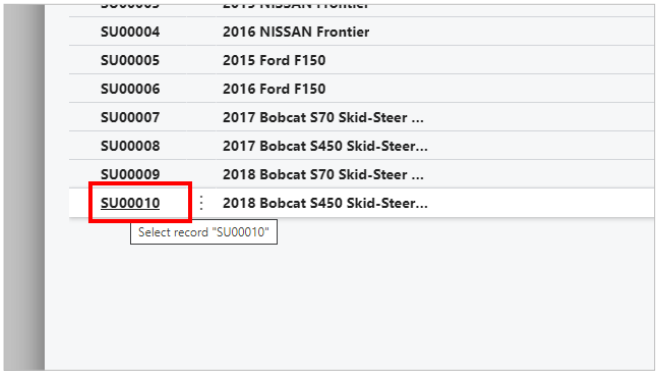
The following example will start from a new service ticket.



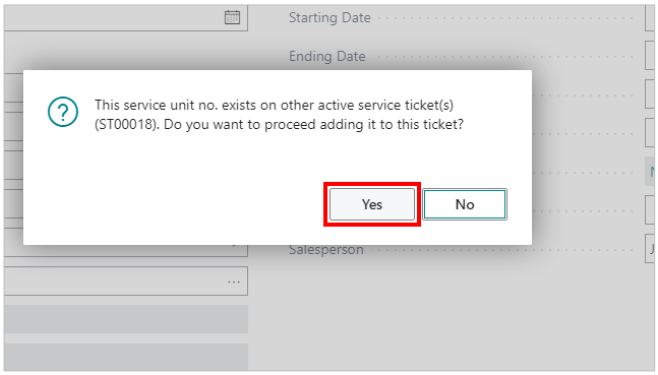
Click on the lookup button **Default Service Unit No.**



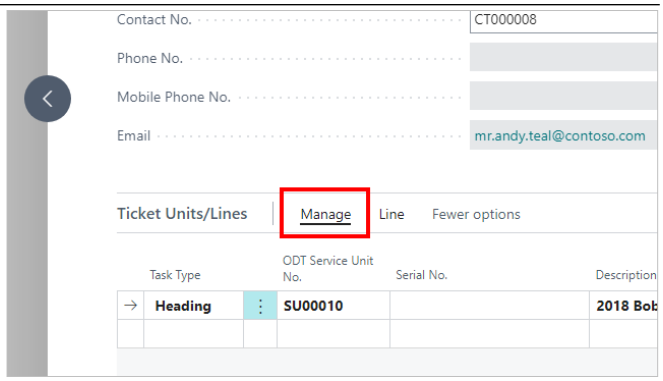
Select the Service Unit that has the warranty applied to it.
Click on the link in cell **Service Unit No.** with the value **SU00010**



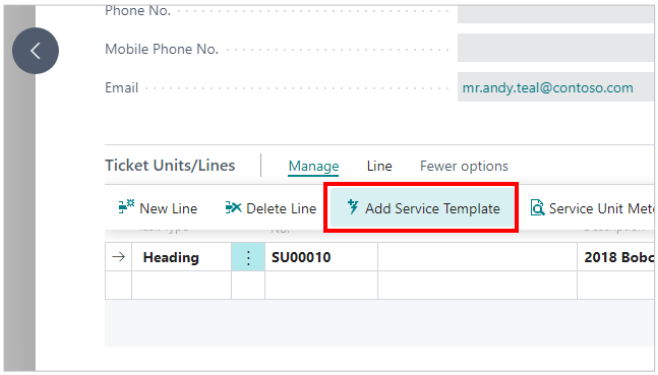
Click on the button **Yes**



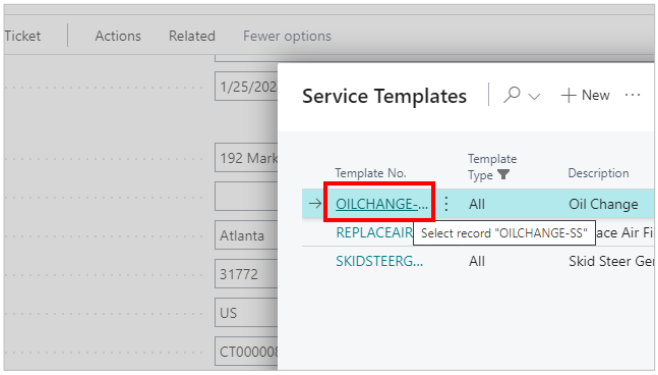
Click on the navigation menu item popup **Manage**



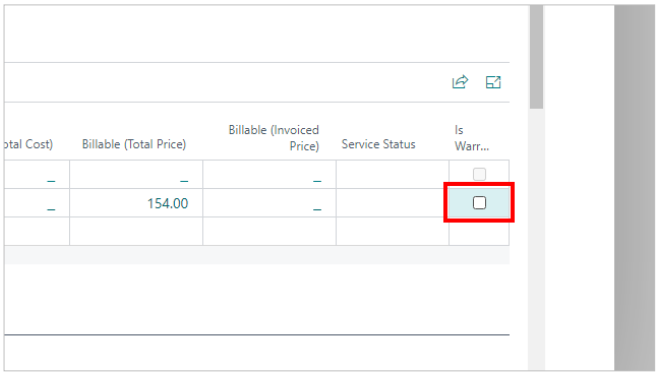
Click on the navigation menu item **Add Service Template**



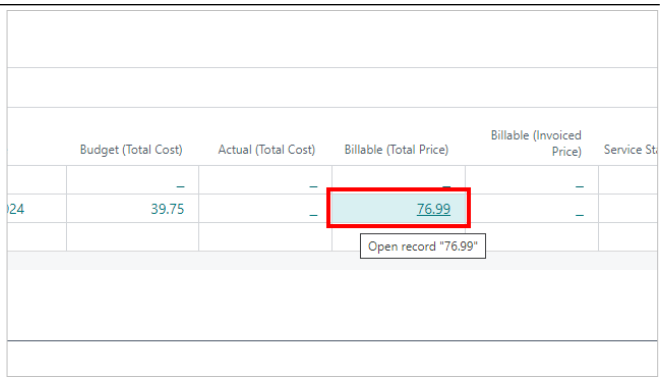
Select the service that will be performed under warranty
Click on the link in cell **Template No.** with the value **OILCHANGE-SS**



The Is Warrantable field can be used to toggle if the service is being performed under warranty.
Click on **Is Warrantable**



Notice that the Total Price has been reduced, based on what was specified during the warranty setup.



3.7. Apply Maintenance Expense

The Apply Maintenance Expense feature allows you to post service costs back to a fixed asset or item that has been linked to a service unit. Apply Maintenance Expense can be used from both Service Tickets and Planned Maintenance Tickets.

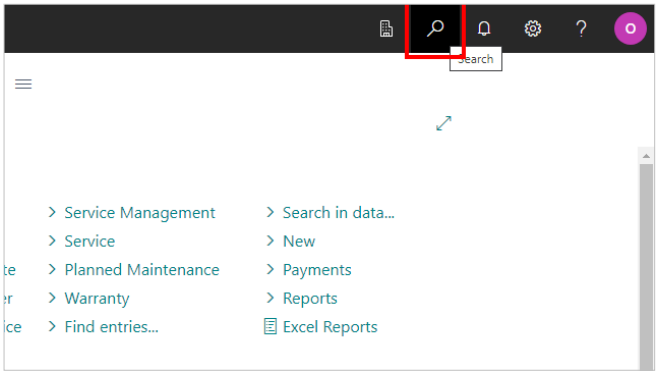
The following demonstrates how to apply a maintenance expense from a Service Ticket. A similar process can be used to apply a maintenance expense from a Planned Maintenance Ticket.

3.7.1. How to setup Apply Maintenance Expense

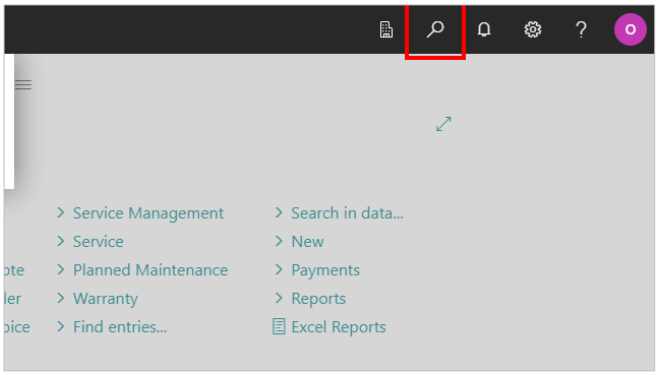
The Apply Maintenance Expense feature allows you to post service costs back to a fixed asset or item that has been linked to a service unit. Apply Maintenance Expense can be used from both Service Tickets and Planned Maintenance Tickets.

The following demonstrates how to apply a maintenance expense from a Service Ticket. A similar process can be used to apply a maintenance expense from a Planned Maintenance Ticket.

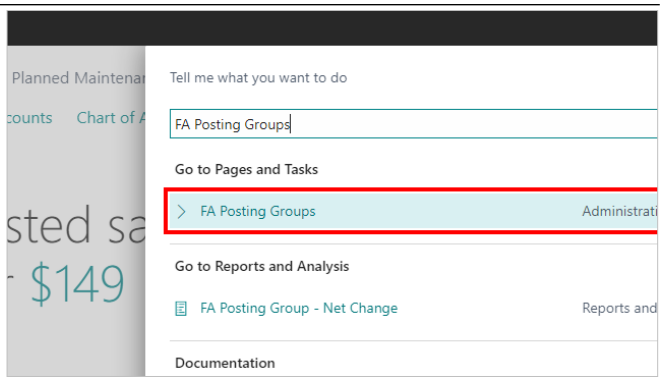
Click on the button **Search**



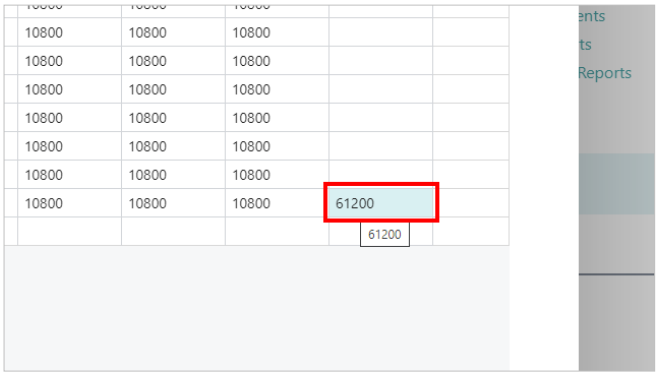
Enter the text **FA Posting Groups**.



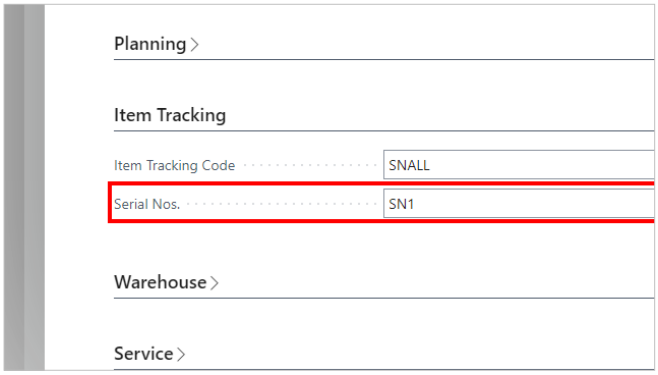
Click on **FA Posting Groups Administration**



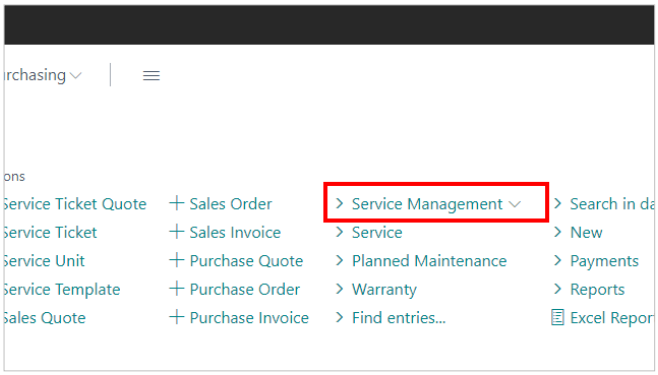
Ensure that the Applied Maintenance Expense Account field is populated in the FA Posting Groups page.



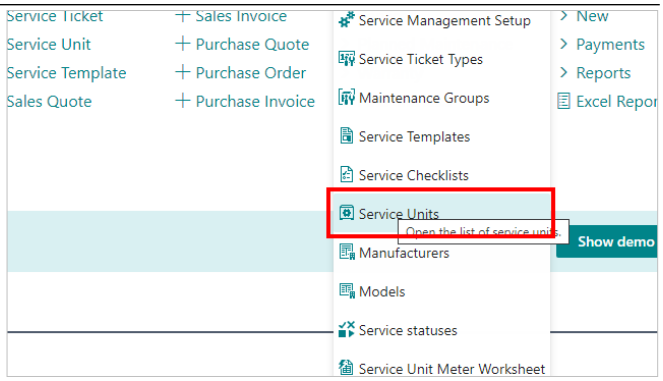
Apply Maintenance Expense can be used with either Fixed Assets or Items .
If using items, they must have Serial Numbers set up.



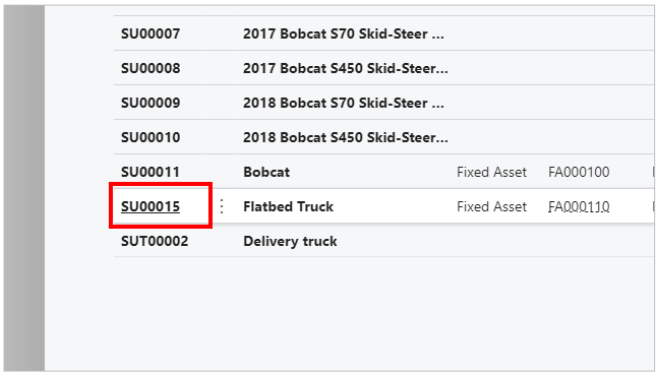
Click on the navigation menu item popup **Service Management**



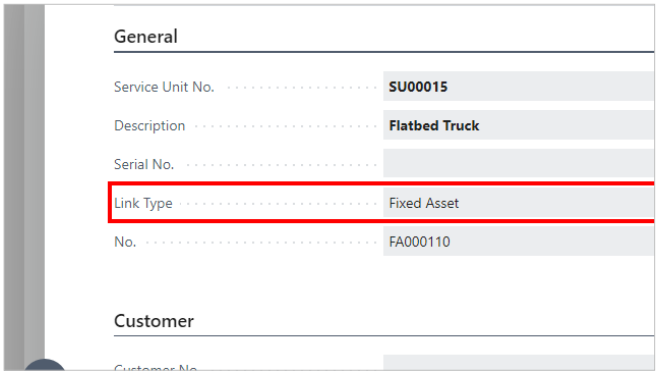
Click on the navigation menu item **Open the list of service units.**



Click on the link in cell **Service Unit No.** with the value **SU00015**

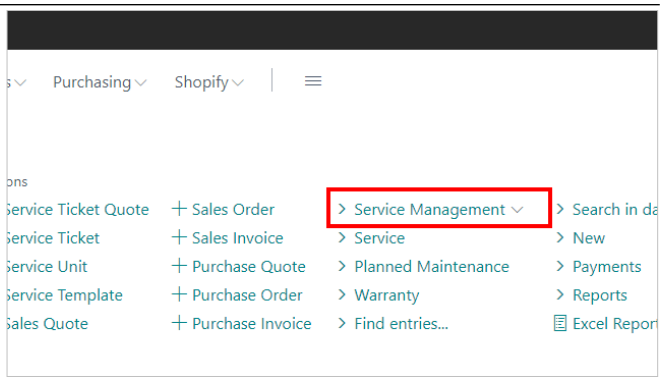


Ensure that the Fixed Asset or Item is linked to a Service Unit

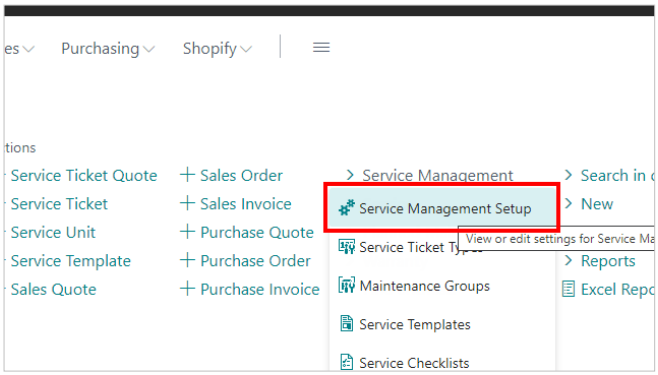


Apply Maintenance Expense will only work for Internal Customers

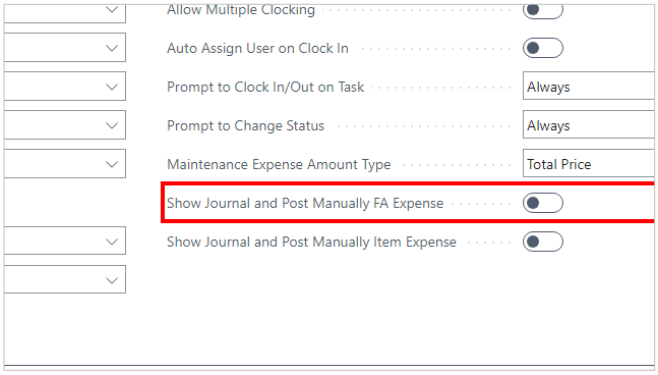
Click on the navigation menu item popup **Service Management**



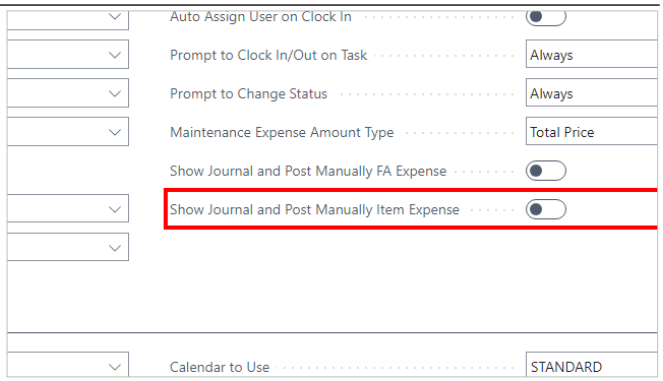
Click on the navigation menu item **Service Management Setup**



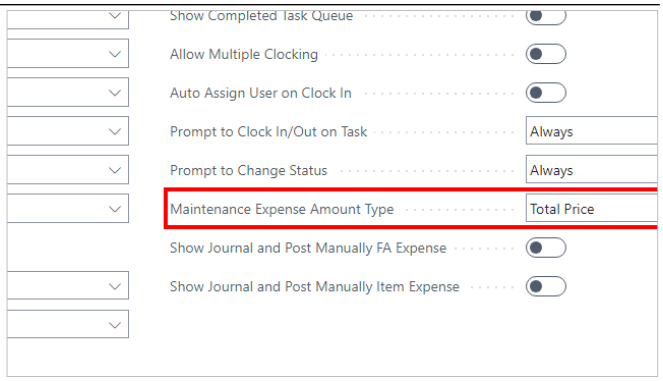
Service Management Setup contains to toggle between manually or automatically posting maintenance expense for fixed assets and items.



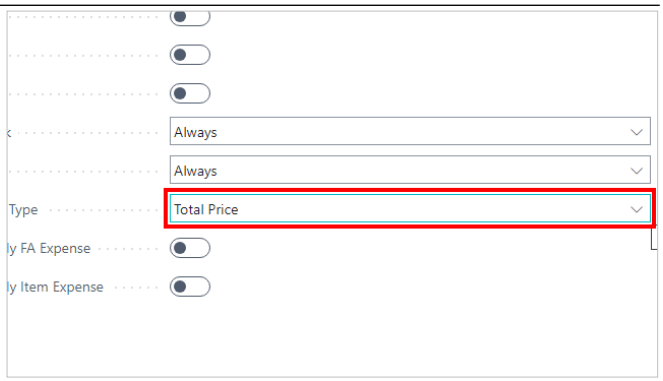
The automatic or manual posting of Items and Fixed Assets can be toggled separately.



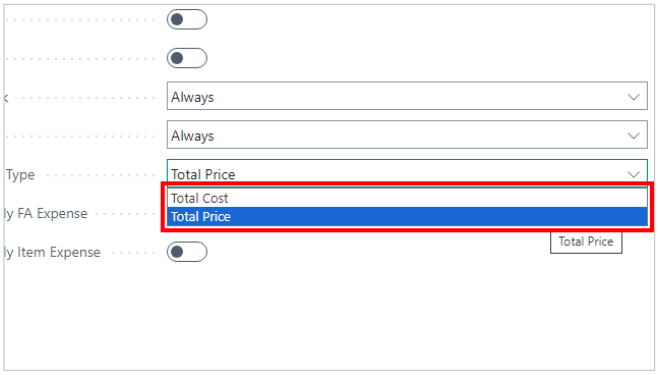
Click on **Maintenance Expense Amount Type Total Cost Total Price**



Click on the field **Maintenance Expense Amount Type**

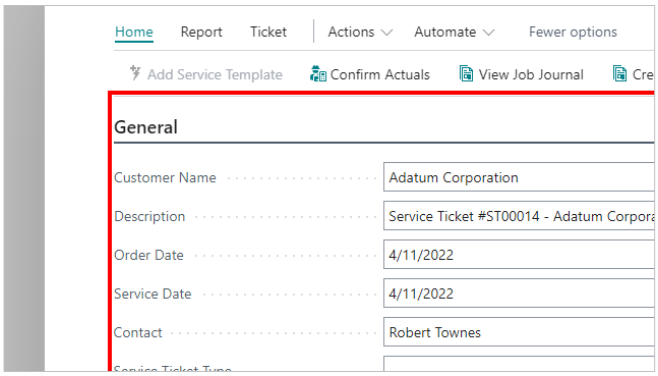


Click on the item **Total Price** in the list

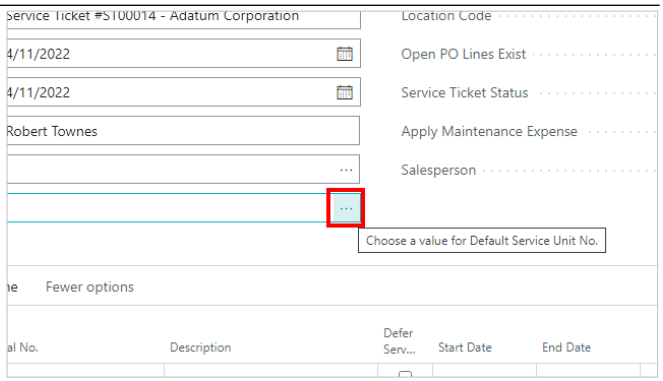


3.7.2. How to process Apply Maintenance Expense

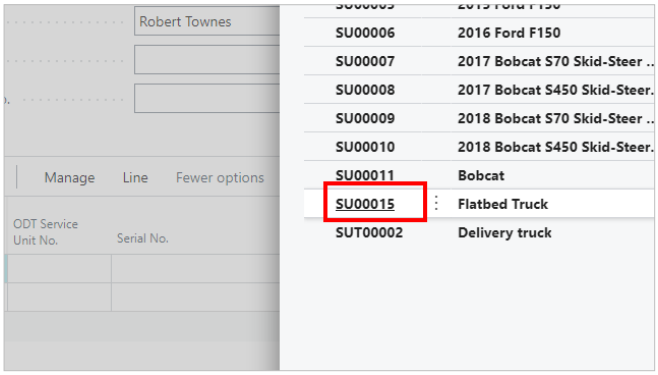
To apply a maintenance expense, first create a Service Ticket or Planned Maintenance Ticket using the Service Unit that has a Fixed Asset linked to it. You must also select a customer that has Internal Customer enabled in the customer card



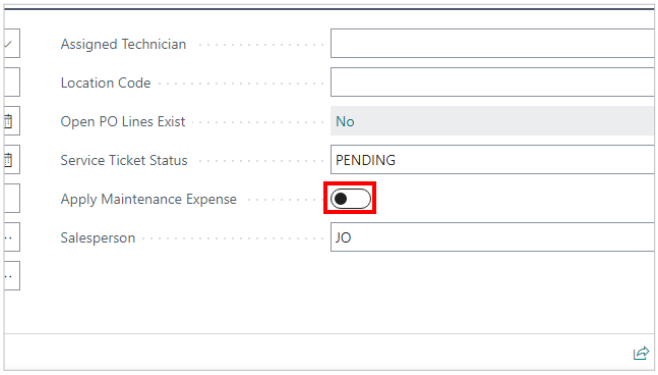
Click on the lookup button **Default Service Unit No.**



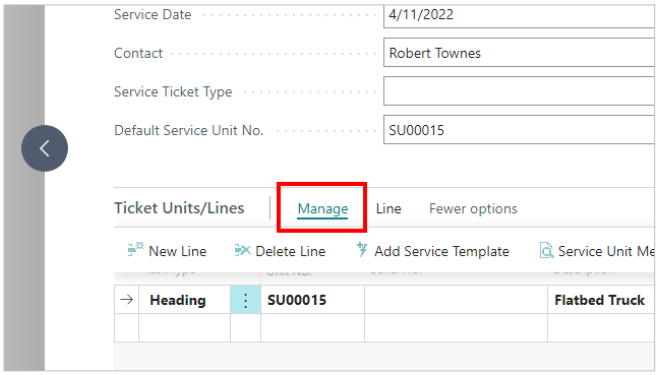
Click on the link in cell **Service Unit No.** with the value **SU00015**



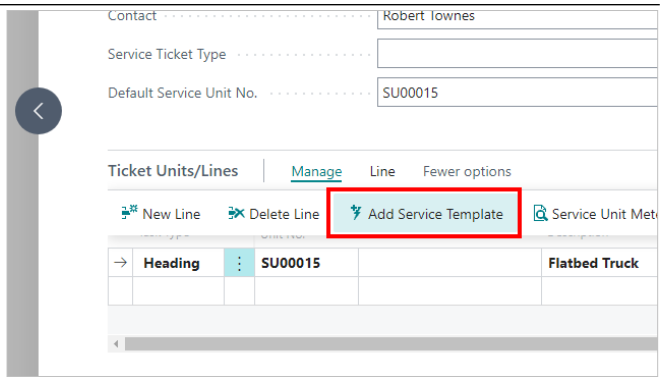
After creating the ticket, the Apply Maintenance Expense toggle must be enabled
Click on the toggle field **Apply Maintenance Expense**



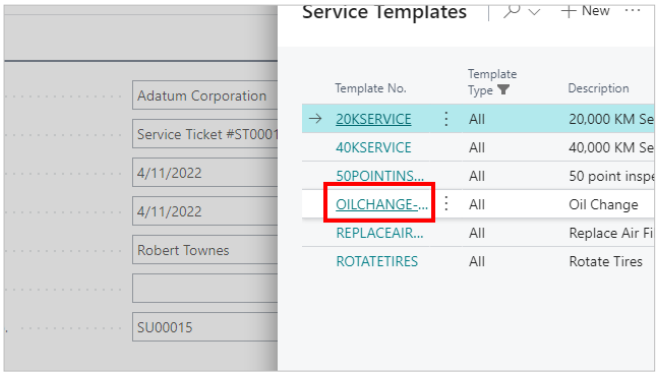
Click on the navigation menu item popup **Manage**



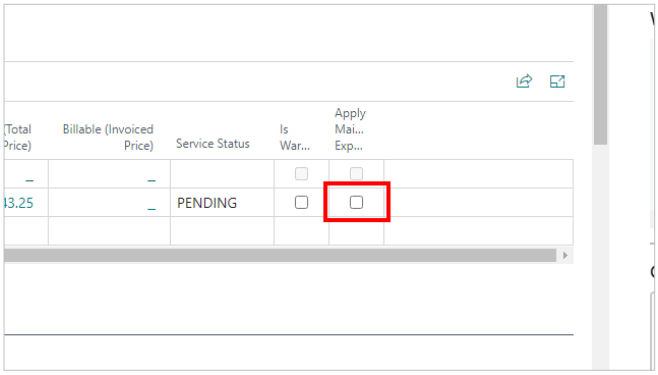
Click on the navigation menu item **Add Service Template**



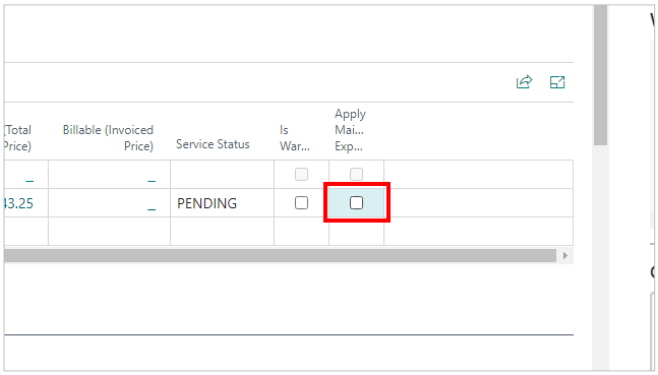
Click on the link in cell **Template No.** with the value **OILCHANGE-LT**



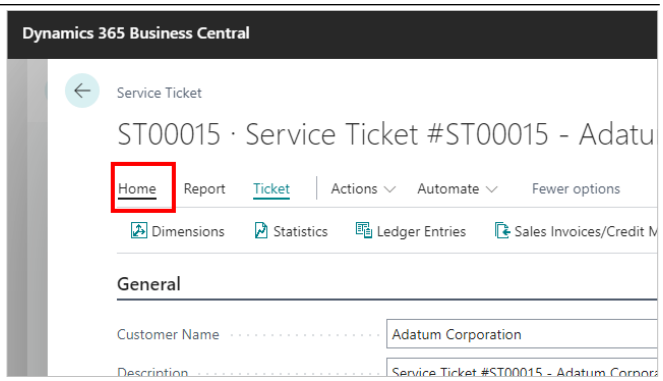
The Apply Maintenance Expense checkbox is used to specify which service templates will be applied as a maintenance expense



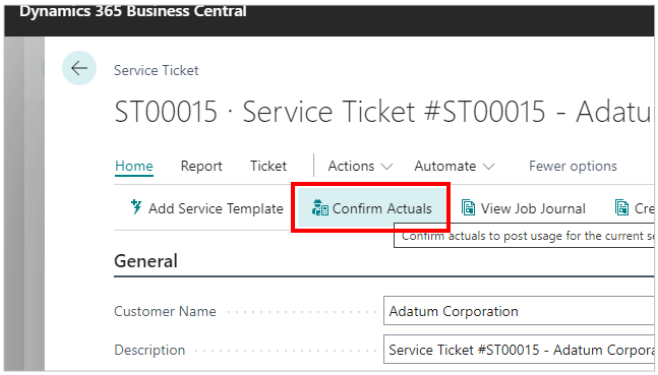
Click on **Apply Maintenance Expense**



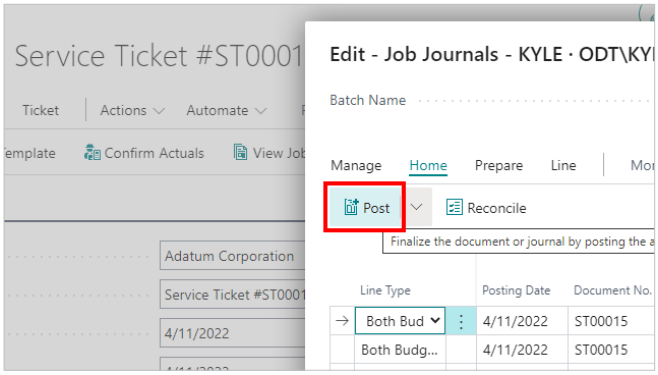
Click on the navigation menu item **Home**



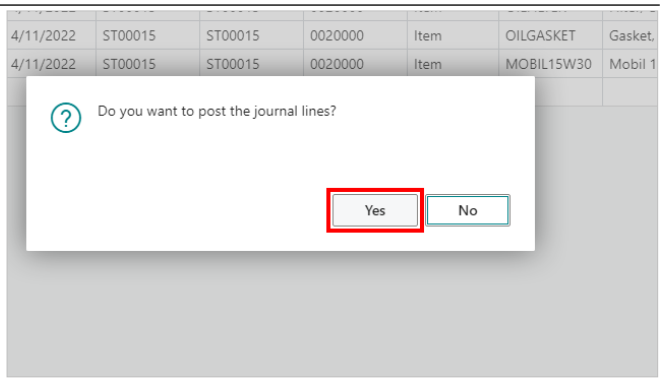
Before applying the maintenance expense, Confirm Actuals must be ran.
Click on the navigation menu item **Confirm Actuals**



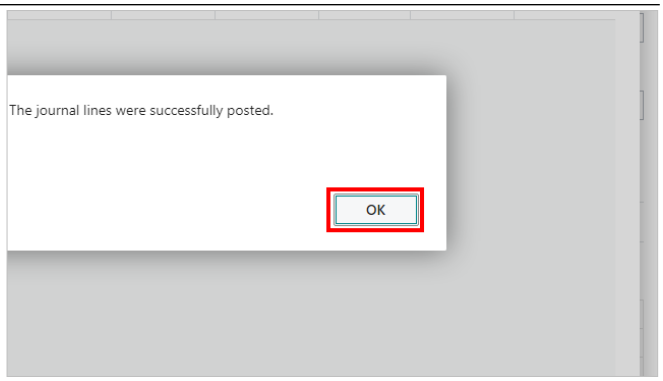
Click on the navigation menu item **Post**



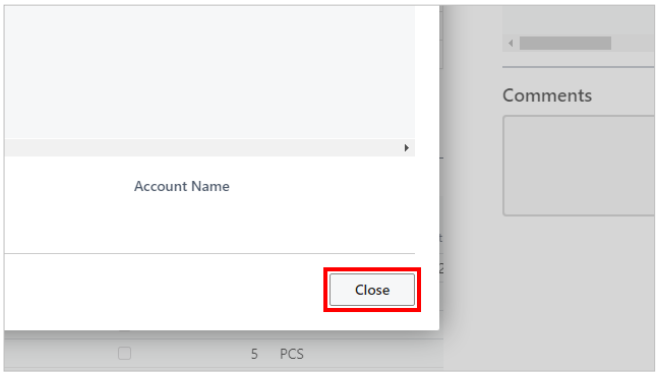
Click on the button **Yes**



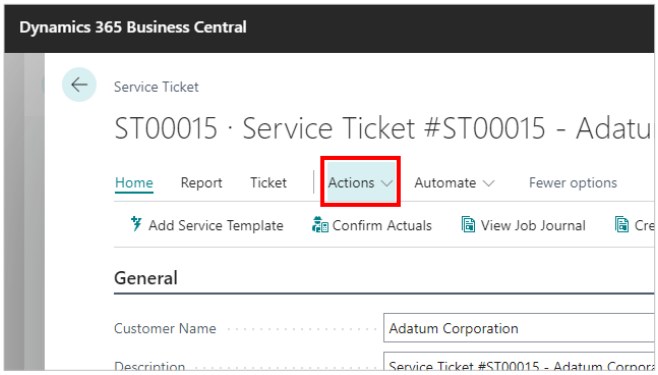
Click on the button **OK**



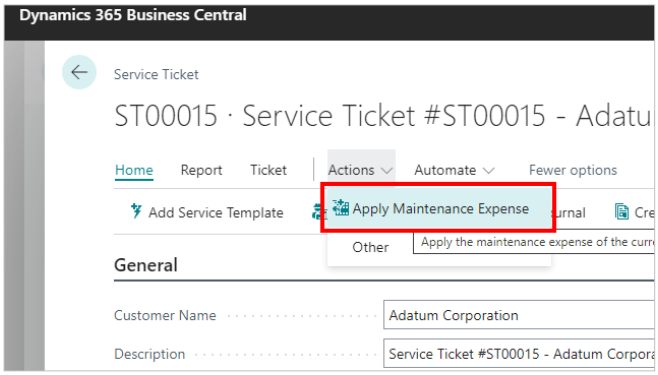
Click on the button **Close**



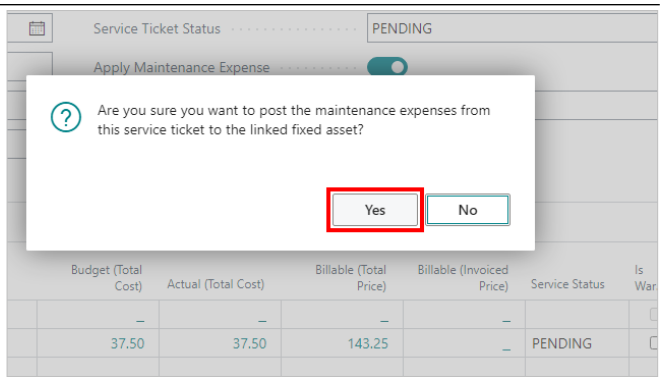
Now that Confirm Actuals has been ran, the Apply Maintenance Expense action can be ran
Click on the navigation menu item popup **Actions**



Click on the navigation menu item **Apply Maintenance Expense**

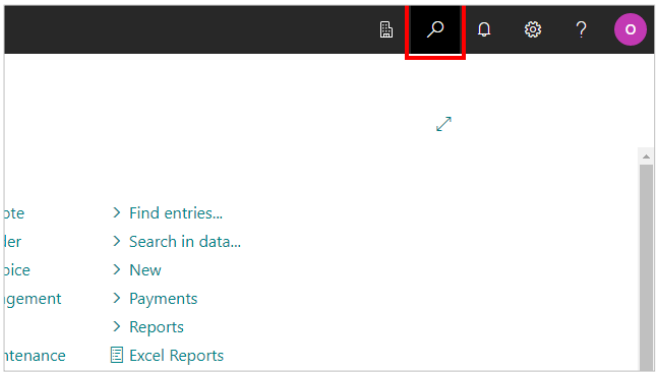


Click on the button **Yes**

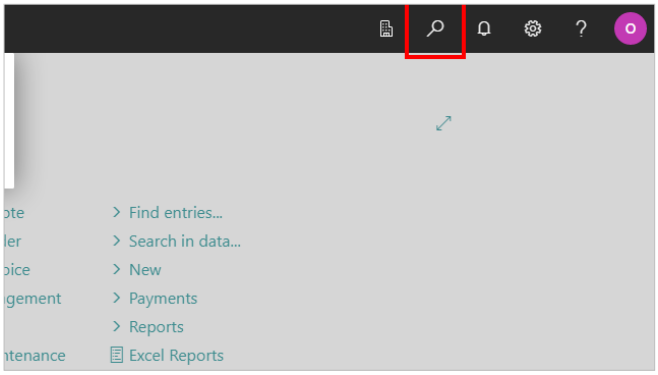


Now that the maintenance has been applied, we can view it from the Fixed Asset card.

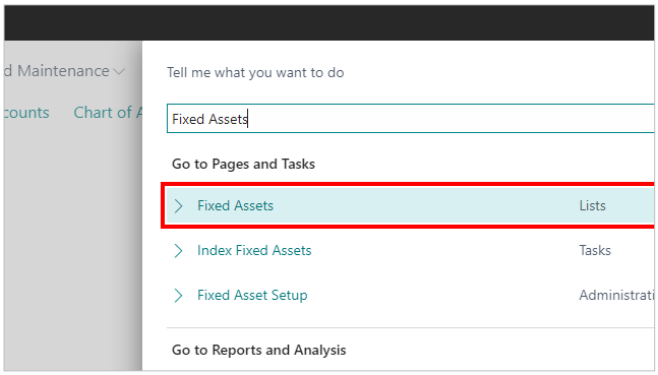
Click on the button **Search**



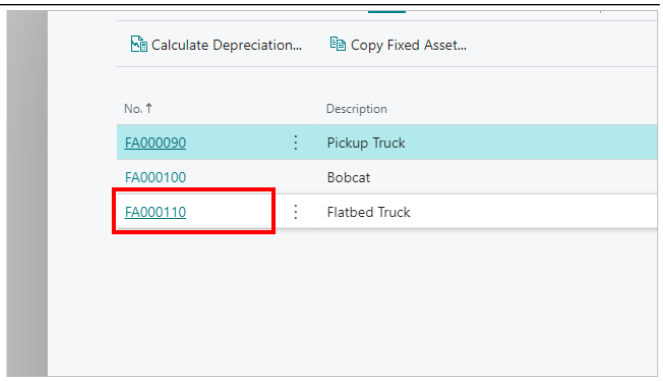
Enter the text **Fixed Assets**.



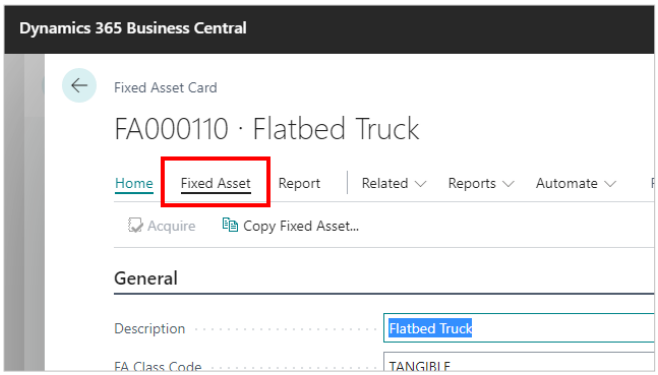
Click on **Fixed Assets Lists**



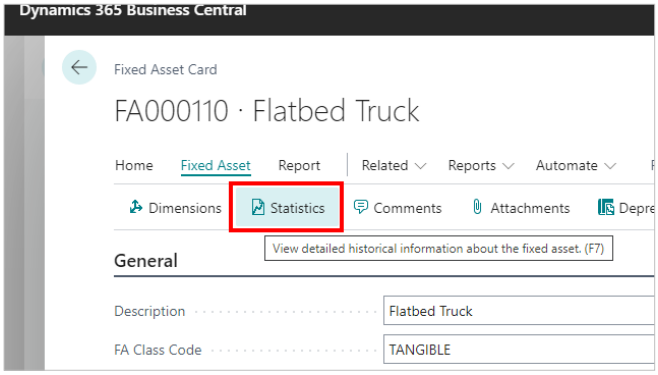
Click on the link in cell **No.** with the value **FA000110**



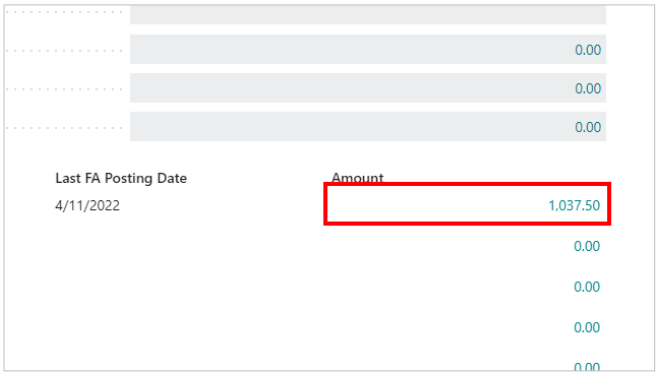
Click on the navigation menu item **Fixed Asset**



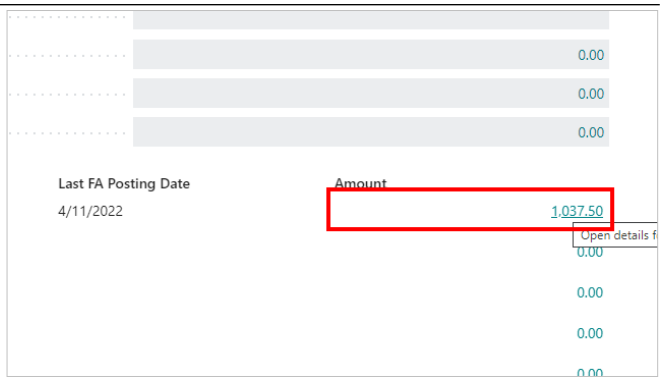
Click on the navigation menu item **Statistics**



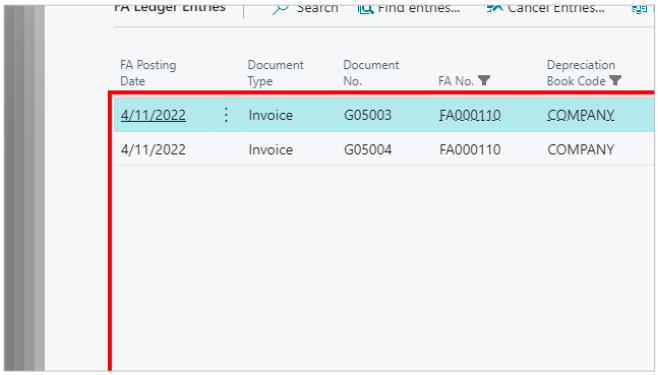
Notice that some of the amounts have now been updated.



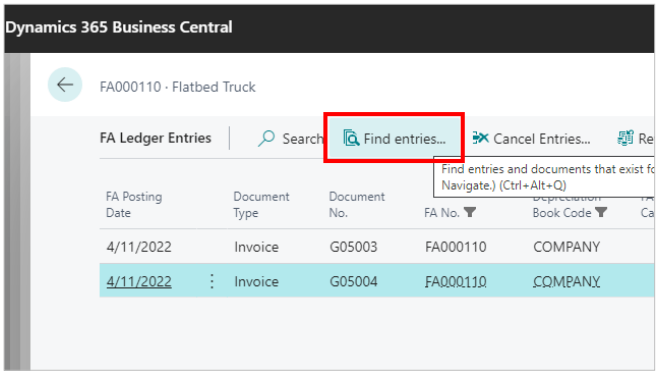
Click on **Amount**



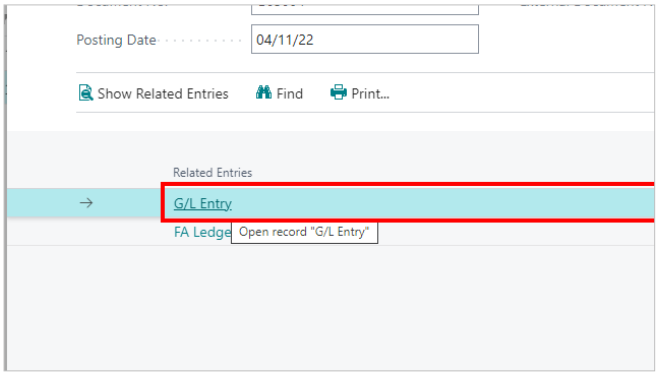
Notice that a new FA Ledger Entry has been added.



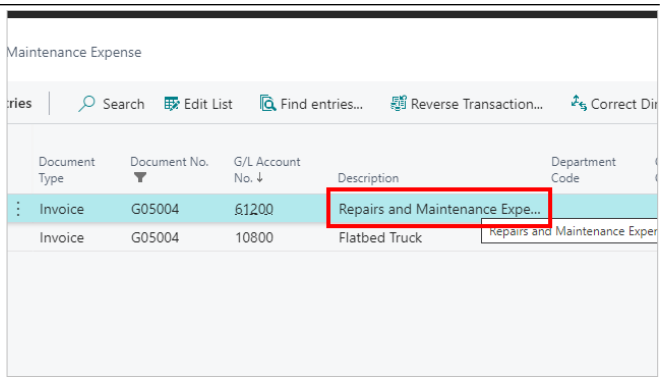
Drilling own into the entry can provide more details about the entry.
Click on the navigation menu item **Find entries...**



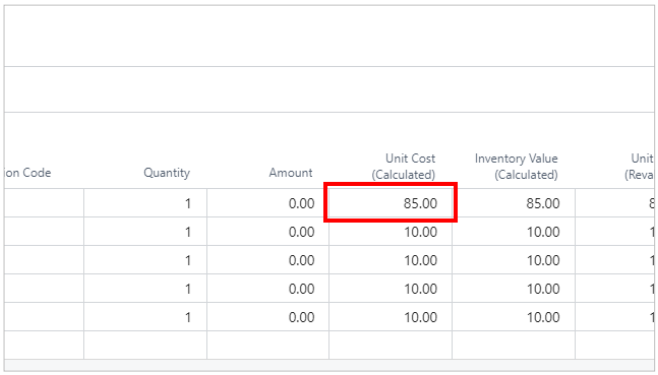
Click on the link in cell **Related Entries** with the value **G/L Entry**



From here we can view details about where the entry came from.



If you applied a maintenance expense to an item, this can be viewed using the revaluation journal.



3.8. Visual Resource Scheduler

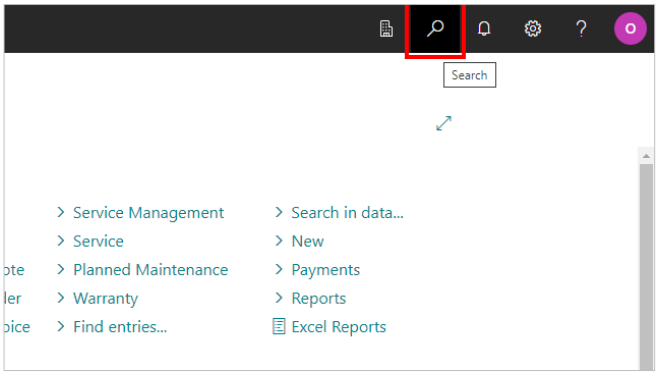
The Visual Resource Scheduler allows you to view a list of service tasks and tickets, and assign them to technicians using a drag and drop interface.

The following demonstrates how to set up and use the Visual Resource Scheduler.

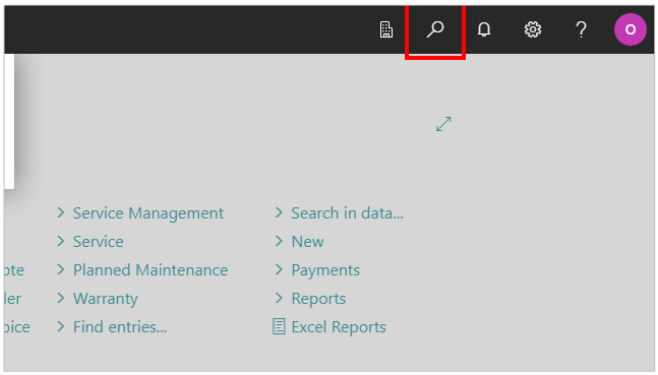
3.8.1. How to set up the Visual Resource Scheduler

To use the Visual Resource Scheduler, you must have a Base Calendar set up

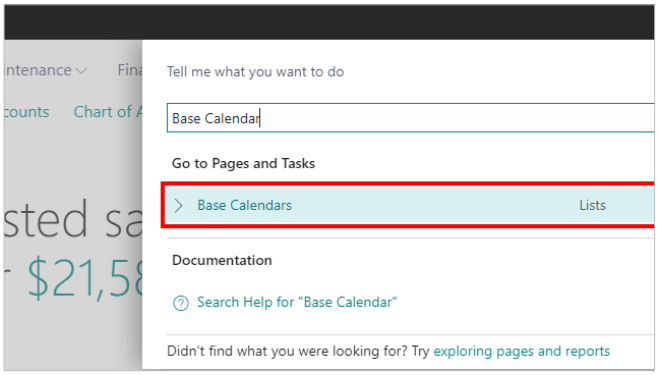
Click on the button **Search**



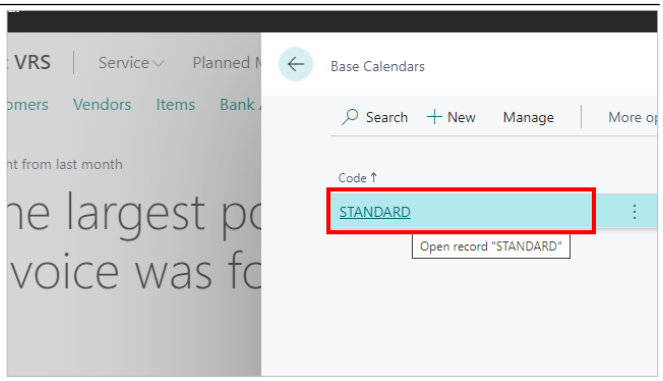
Enter the text **Base Calendar**.



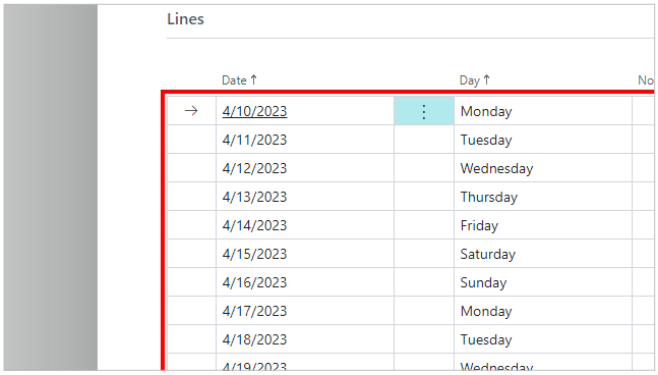
Click on **Base Calendars Lists**



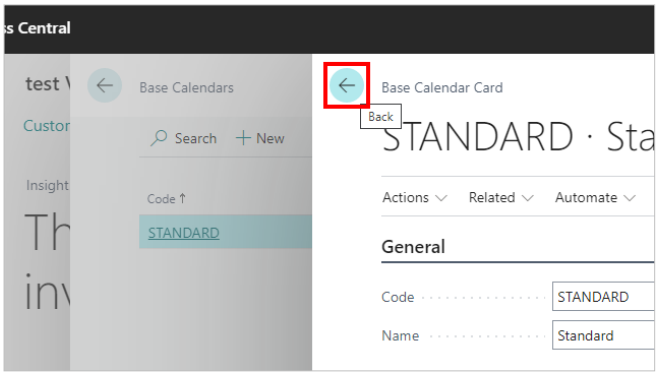
Click on **Code**



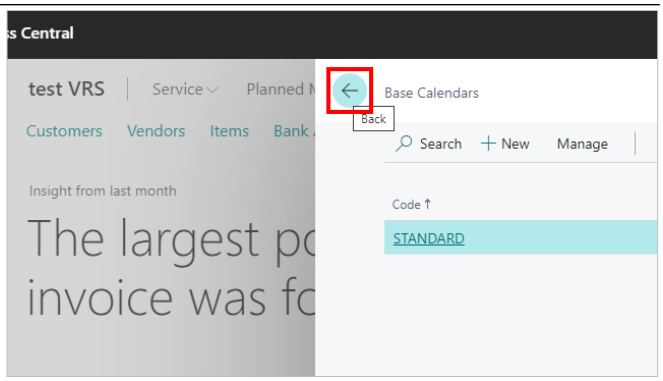
The dates in the Visual Resource Scheduler will display according to what is specified in the Base Calendar.



Click on the back button

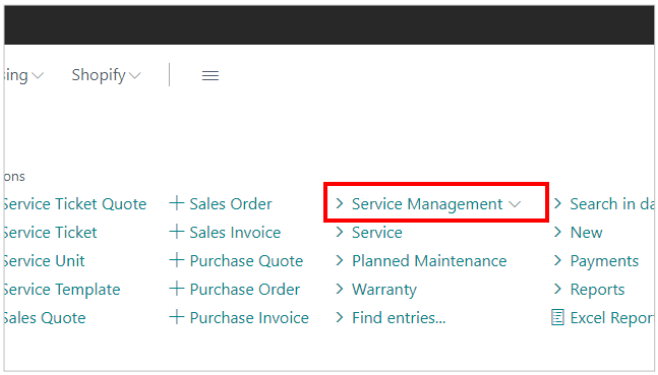


Click on the back button

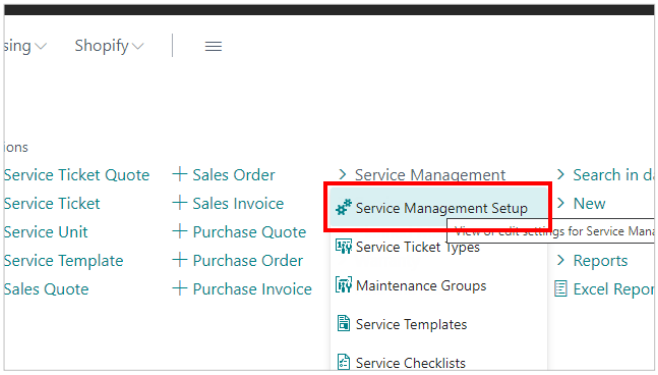


There are some additional settings that can be configured in Service Management Setup.

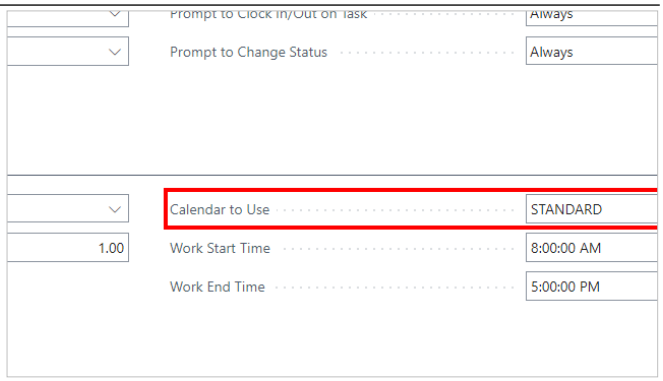
Click on the navigation menu item popup **Service Management**



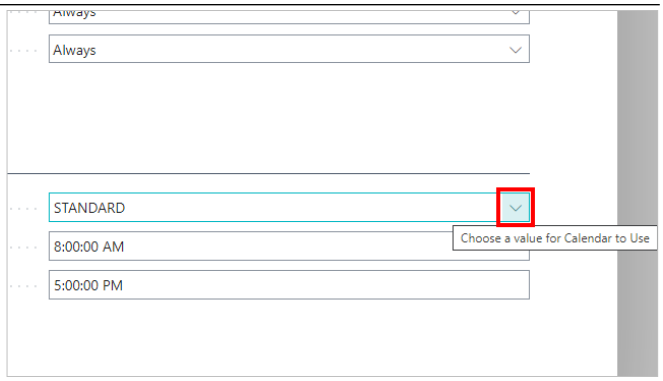
Click on the navigation menu item **Service Management Setup**



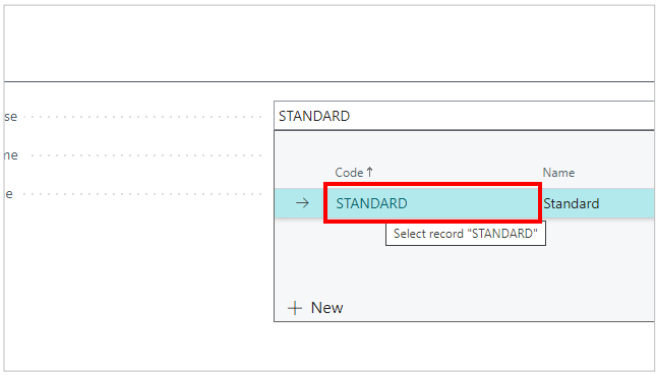
The Calendar To Use field specifies that Base Calendar that will be used when displaying the Visual Resource Scheduler.



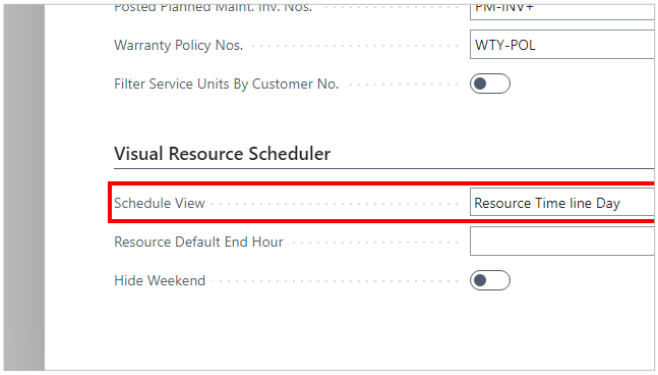
Click on the lookup button **Calendar to Use**



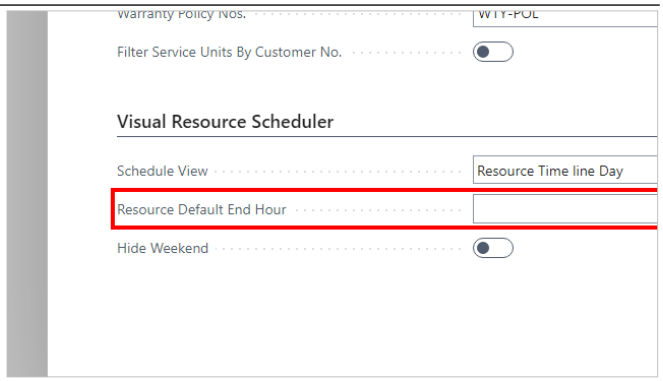
Click on STANDARD



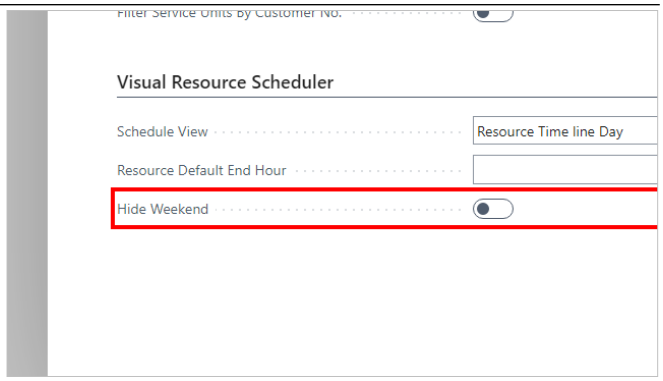
The Schedule View field specifies how the VIsual Resource Scheduler is displayed. By default it will be displayed in Day view, but you can also change it to display in Week or Month view.



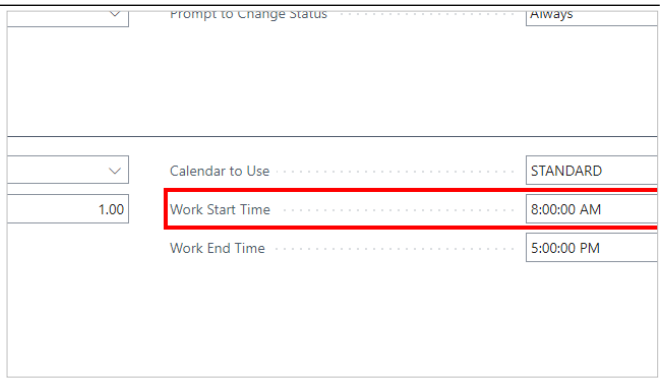
The Resource Default End Hour field specifies the default time that will be scheduled when a resource is added to the schedule. The default time is set to 1 hour, but you can change this if needed.



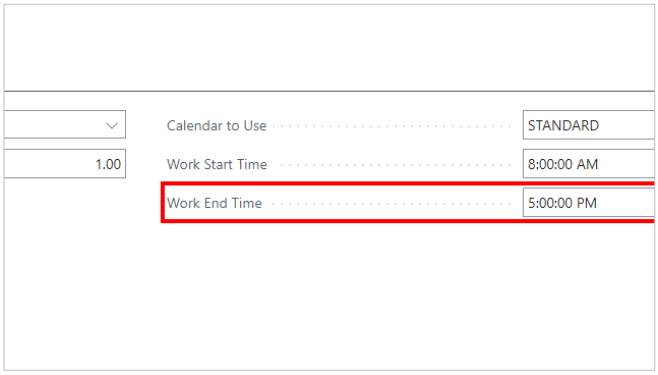
The Hide Weekend field will toggle if weekends are displayed on the Visual Resource Scheduler



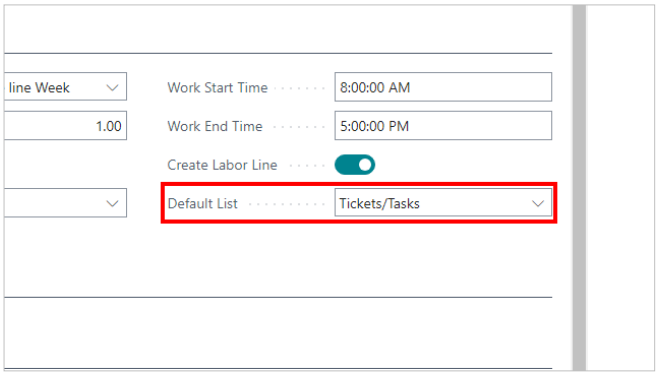
Work Start Time specifies what time the work day starts on the Visual Resource Scheduler.



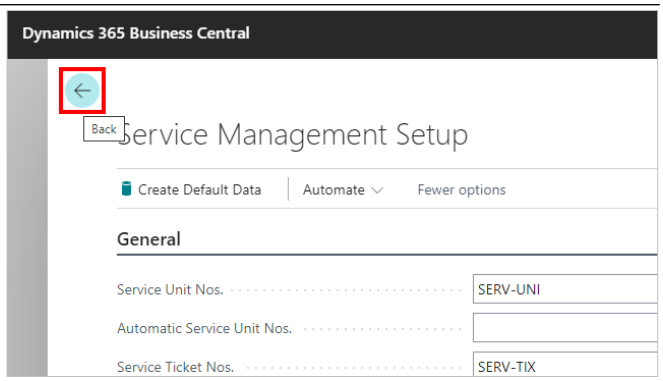
Work End Time specifies what time the work ends starts on the Visual Resource Scheduler.



Default List specifies how service tickets and tasks are displayed. The Tickets/Tasks option will display all service tickets and tasks, while the Ticket option will only display a list of service tickets

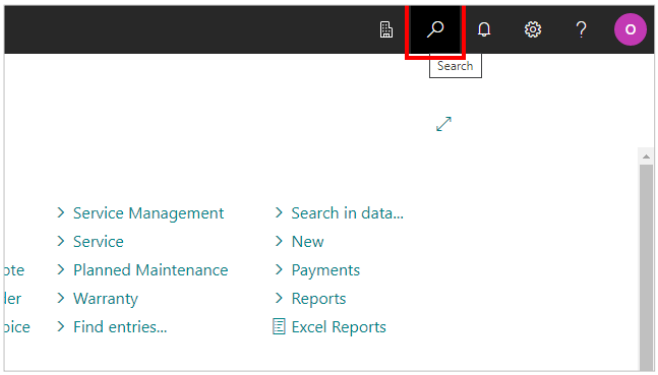


Click on the back button

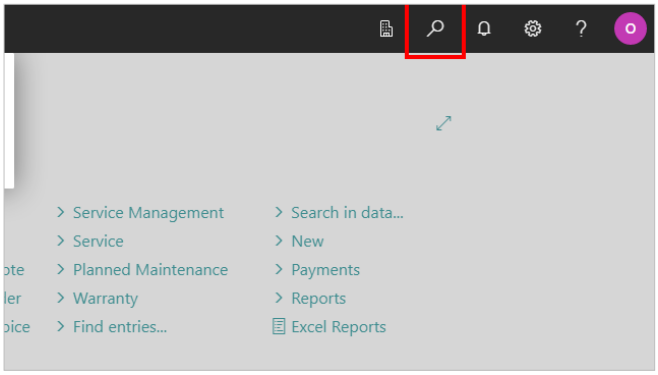


Next, you must configure the resources that will appear in the Visual Resource Scheduler.

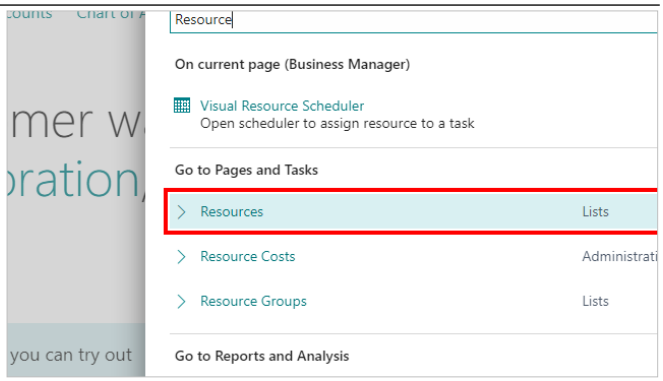
Click on the button **Search**



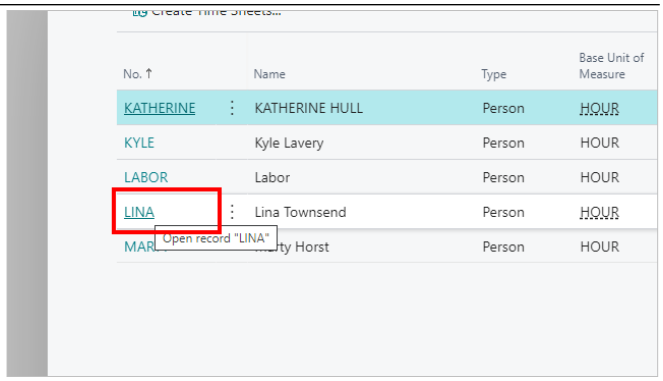
Enter the text **Resource**.



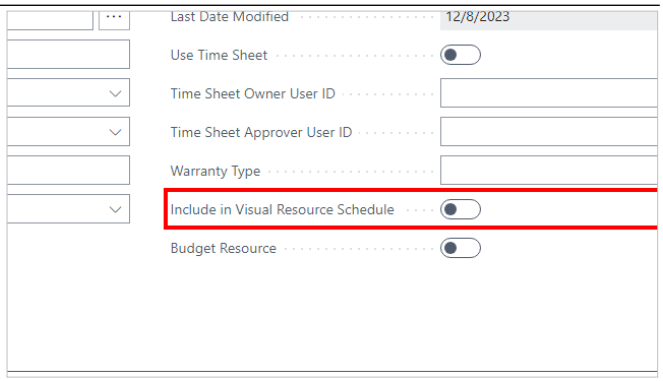
Click on **Resources Lists**



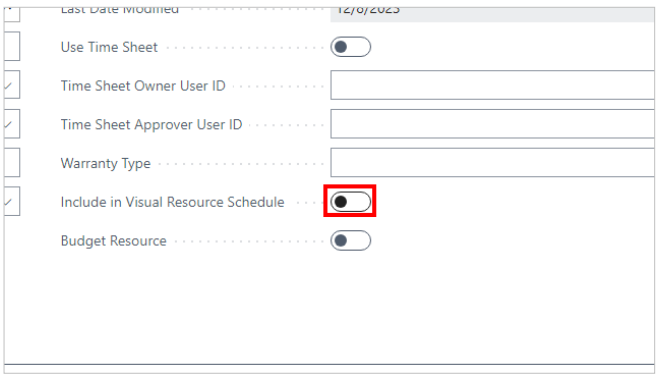
Click on **No.**



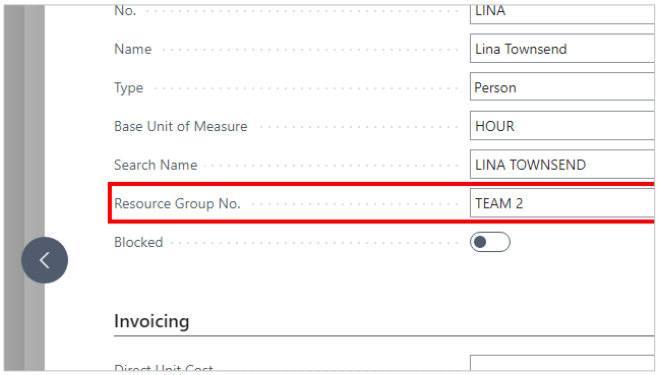
The Include In Visual Resource Scheduler option will toggle which resources will appear in the scheduler



Click on the toggle field **Include in Visual Resource Schedule**

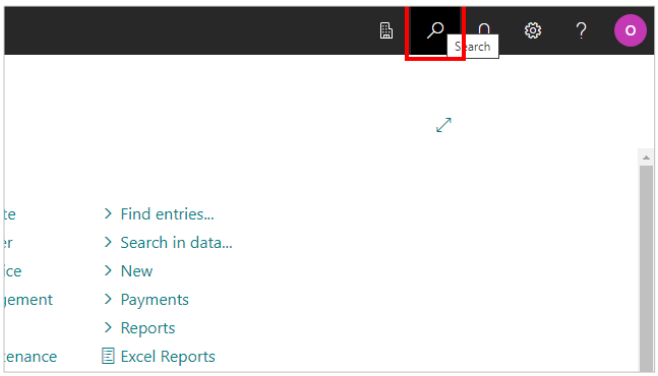


Resources displayed in the visual scheduler will be sorted based on there Resource Group.

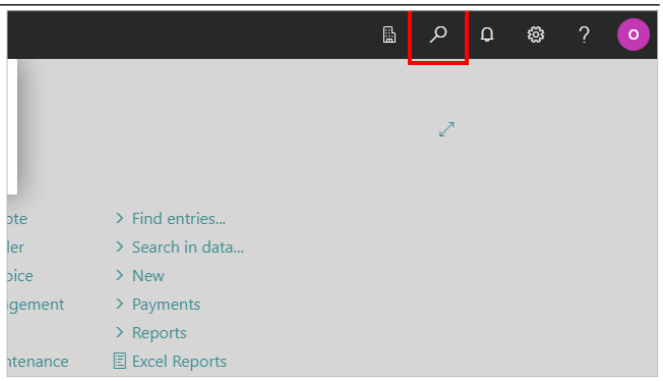


3.8.2. How to use the Visual Resource Scheduler

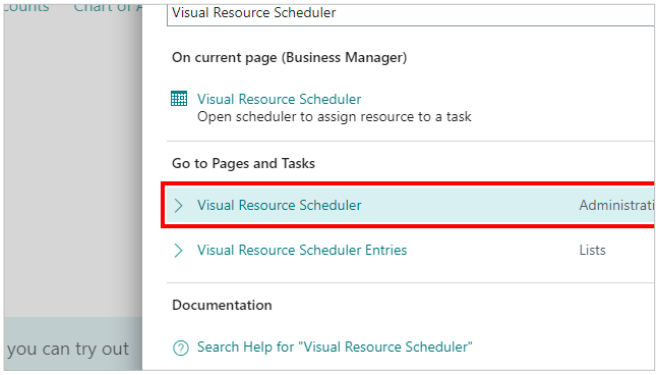
Click on the button **Search**



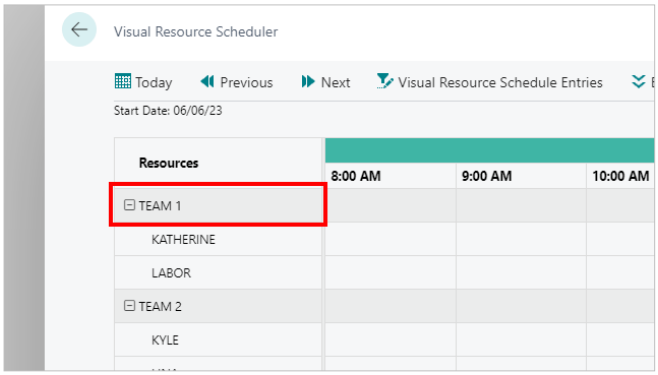
Enter the text **Visual Resource Scheduler**.



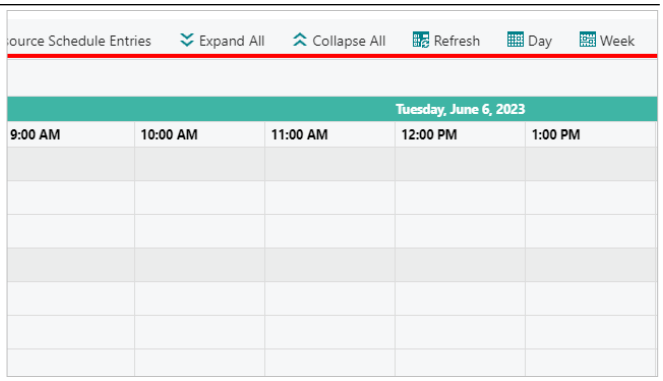
Click on **Visual Resource Scheduler Administration**



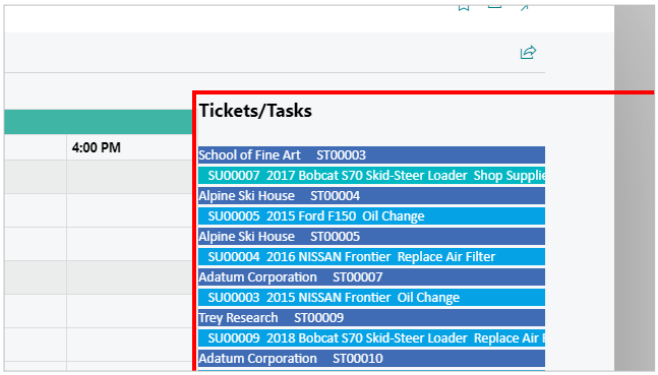
On the left side of the screen is a list of the resources that were configure to display on the visual scheduler, sorted by Resource Group



The center of the screen displays the days and times that can be scheduled.

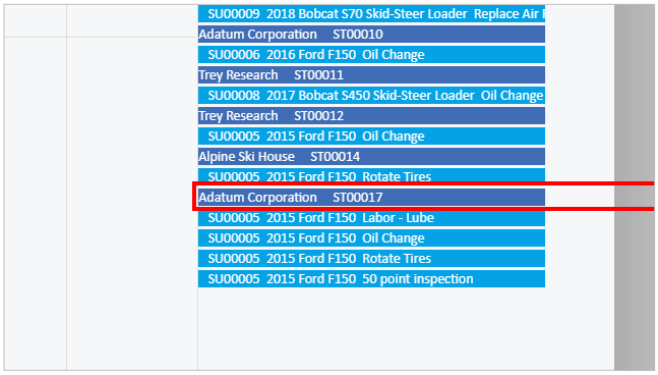


The right side of screen shows a list of Service Tickets and Tasks. Dark blue represents a Service Ticket, light blue represents a Service Task, and green represents a task that has already been scheduled.

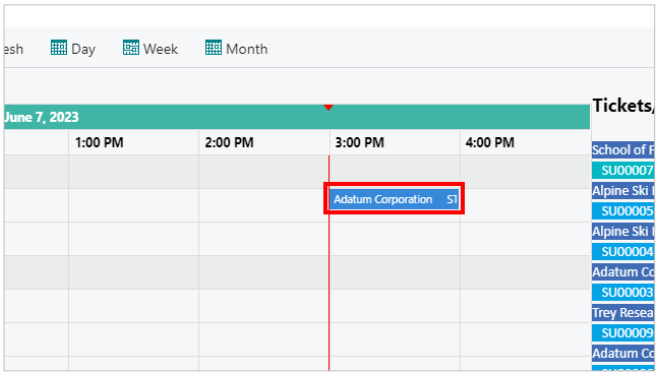


To assign a ticket or task, click and drag an item from the list on the right, to the schedule in the center.

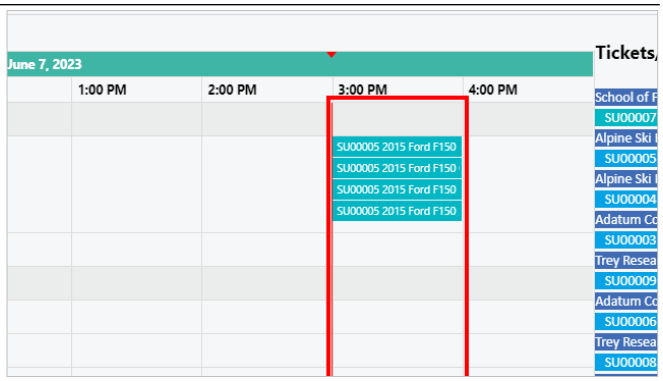
Click and hold the left mouse button on **Adatum Corporation ST00017**



Release the left mouse button on the link **Adatum Corporation ST00017**

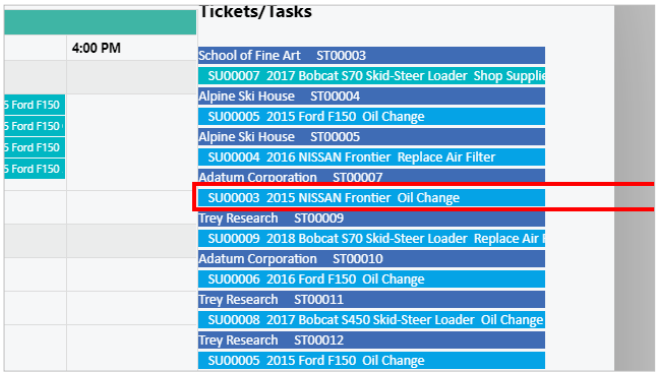


Notice that all tasks that were part of the ticket have now been assigned to the resource

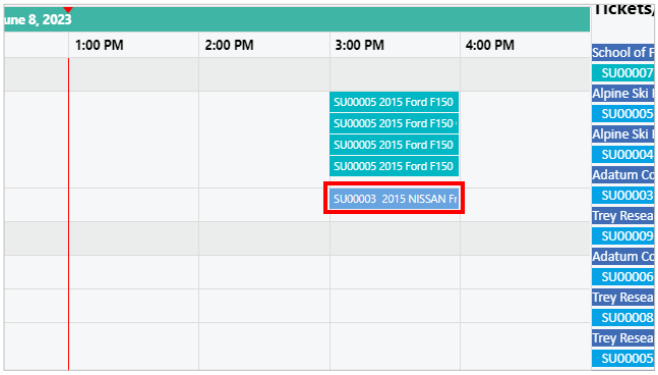


You can also assign tasks individually

Click and hold the left mouse button on **SU00003 2015 NISSAN Frontier Oil Change**

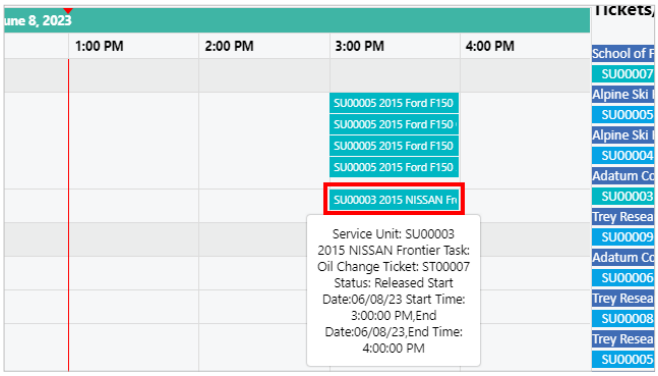


Release the left mouse button on the link **SU00003 2015 NISSAN Frontier Oil Change**

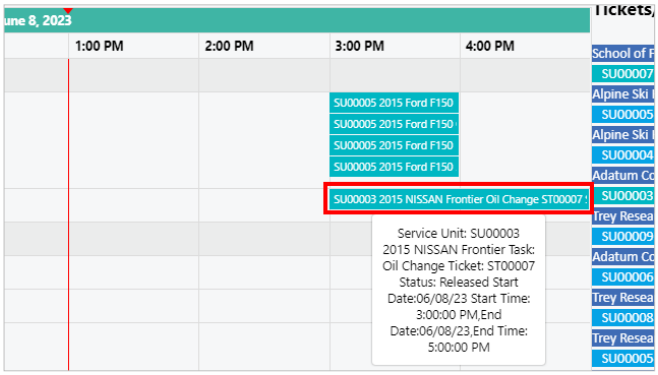


When a task is assigned, the amount of time it is scheduled for is based on what was specified in Service Management Setup. If you wish to change the amount of time scheduled, you can click and drag from the edge of the task.

Click and hold the left mouse button on the link **SU00003 2015 NISSAN Frontier Oil Change ST00007 Status: Released**

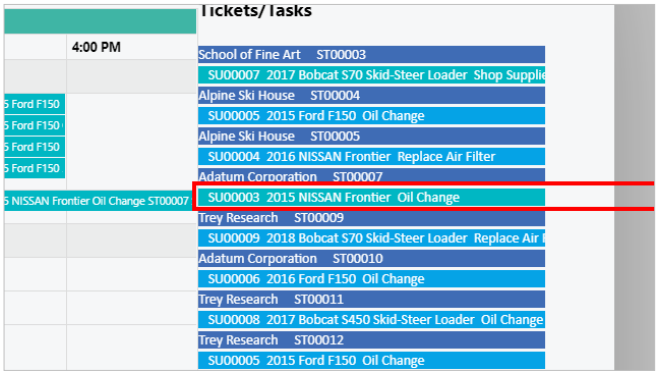


Release the left mouse button on the link **SU00003 2015 NISSAN Frontier Oil Change ST00007 Status: Released**

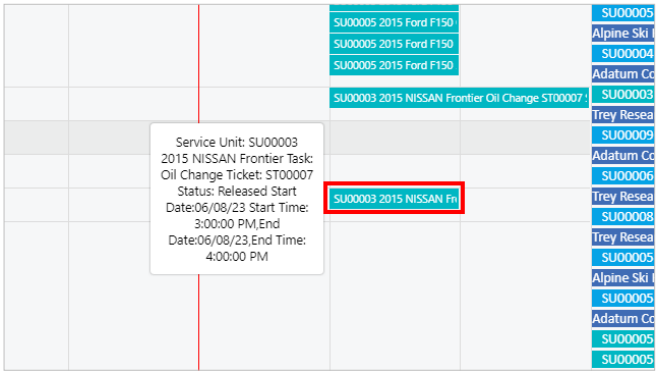


The same task can be assigned to multiple technicians.

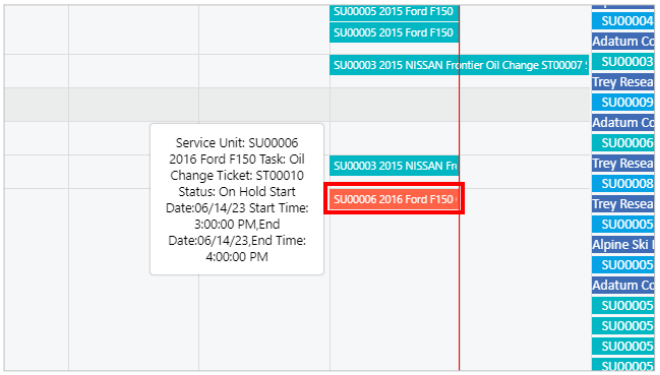
Click and hold the left mouse button on **SU00003 2015 NISSAN Frontier Oil Change**



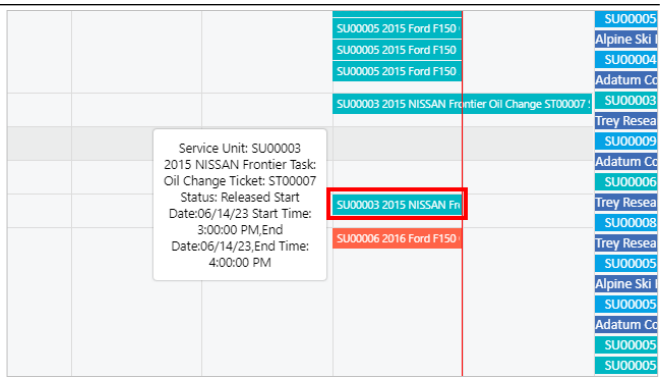
Release the left mouse button on the link **SU00003 2015 NISSAN Frontier Oil Change**



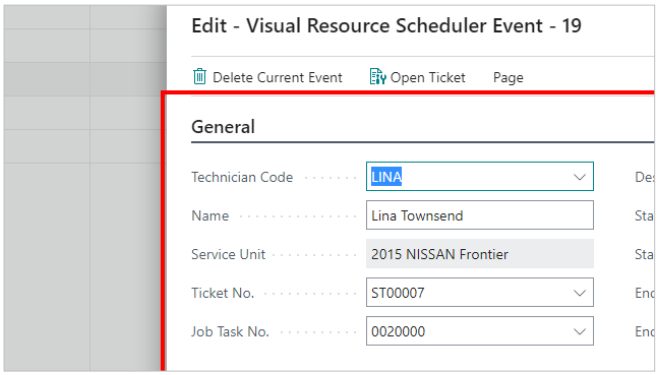
Tasks on the scheduler will change color based on the current status of the task. For example, a task will be colored orange when it has a status of On Hold.



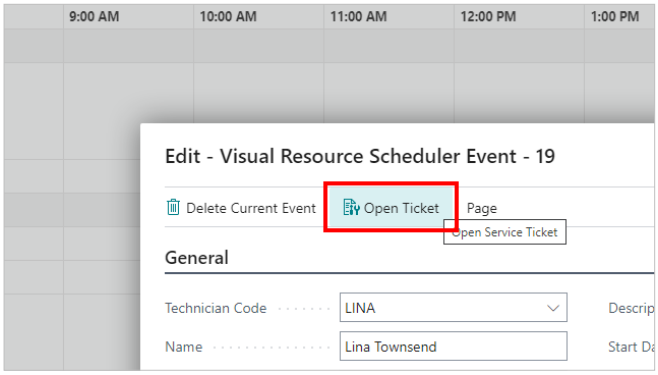
Double click on the link **SU00003 2015 NISSAN Frontier Oil Change ST00007 Status: Released**



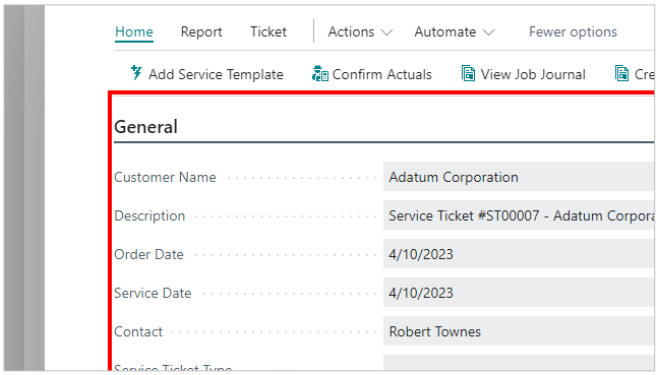
Double clicking on a task will display more detailed information about the task.



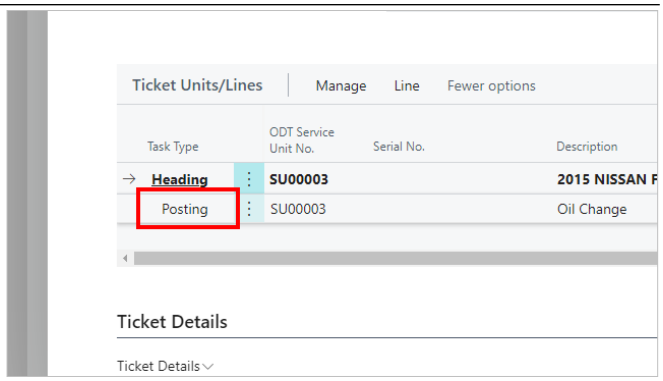
Click on the navigation menu item **Open Ticket**



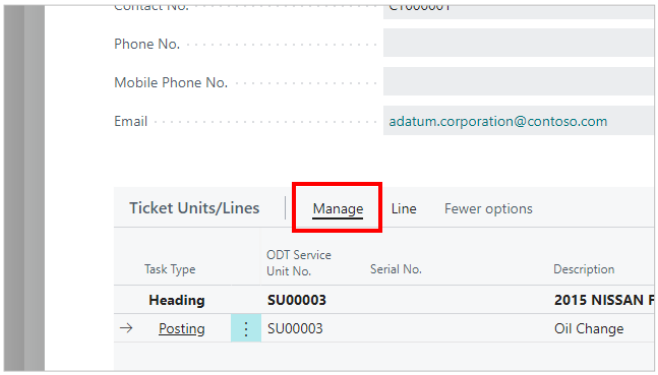
You can also open the ticket the task is part of to view information about it directly.



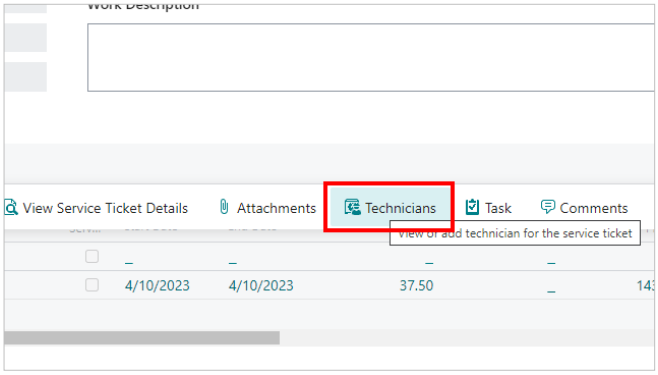
Click on **Task Type**



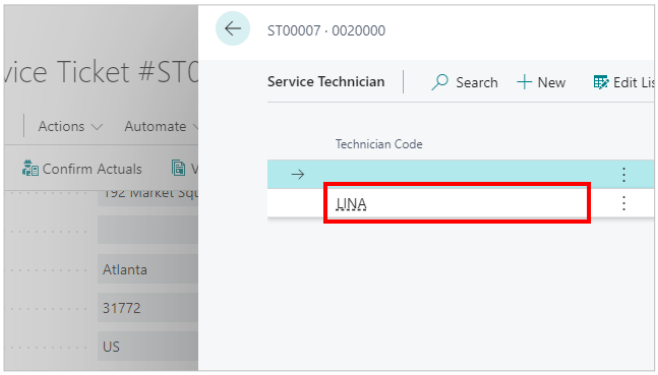
Click on the navigation menu item popup **Manage**



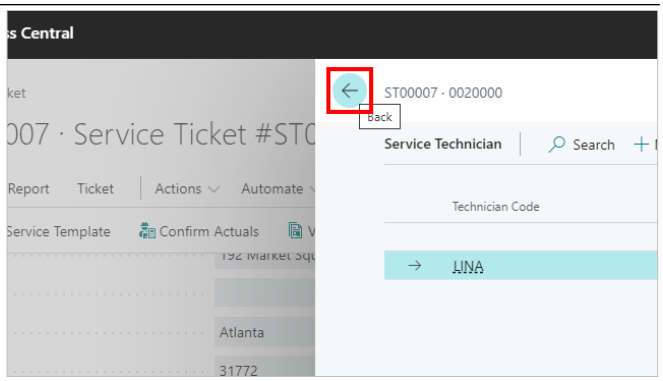
Click on the navigation menu item **Technicians**



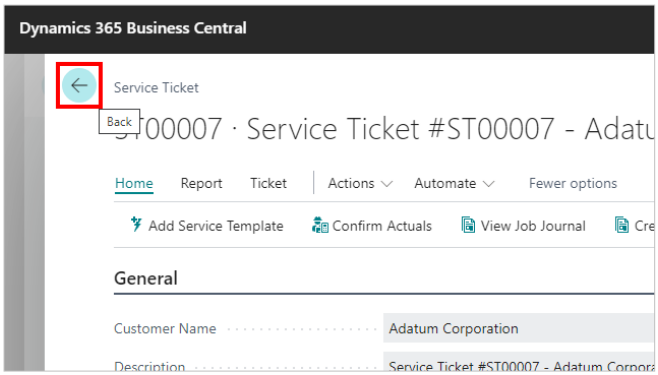
Notice that the Technician has automatically been assigned to the task.



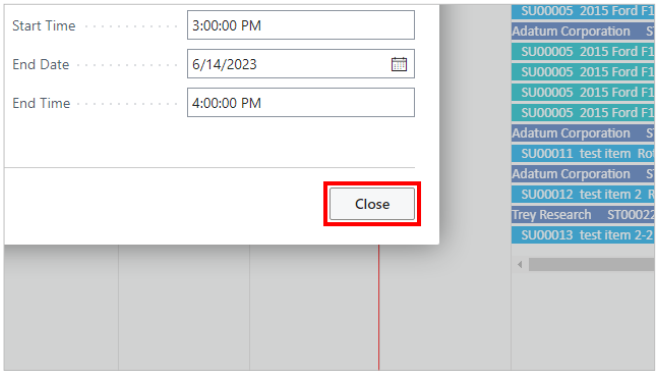
Click on the back button



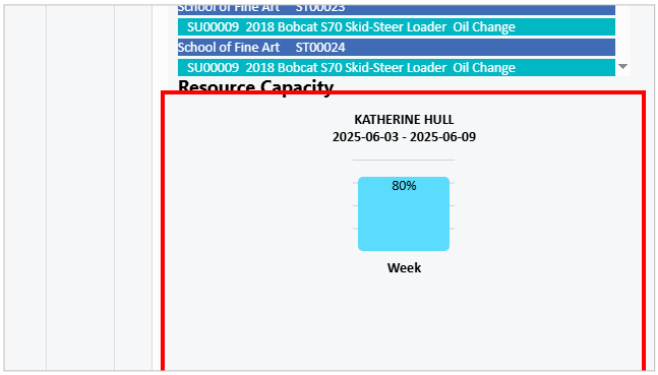
Click on the back button



Click on the button **Close**



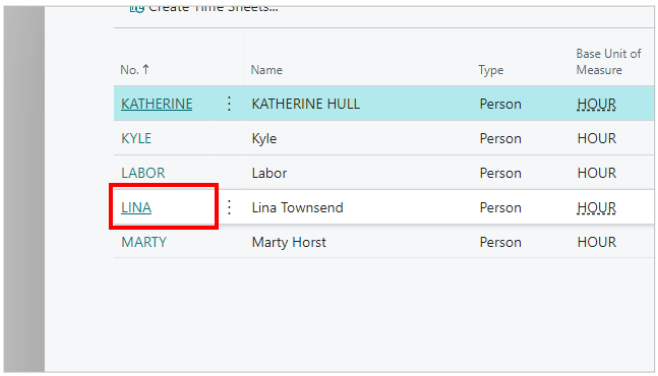
If a resource is selected, the bottom right of the screen will display a capacity graph indicating that resources current workload. The amount will update as tasks are assigned and modified.



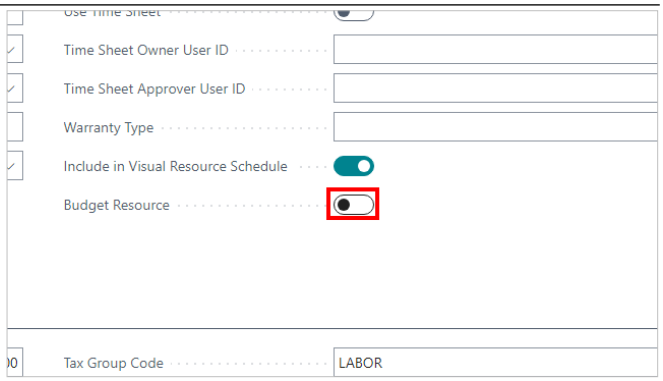
3.8.3. How to use Budget Resources

The Budget Resource toggle allows the Visual Scheduler to determine the time for a task based on the value that is specified on a Service Template that uses that resource.

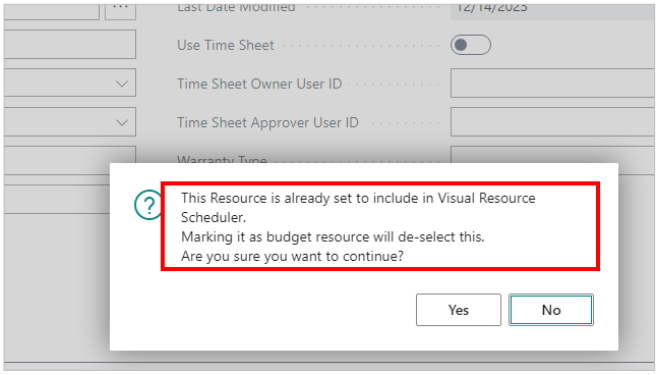
Select the resource you would like to use as a Budget Resource
Click on the link in cell **No.** with the value **LINA**



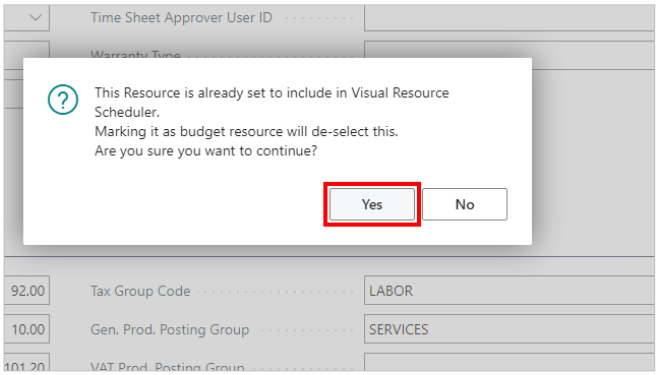
Click on the toggle field **Budget Resource**



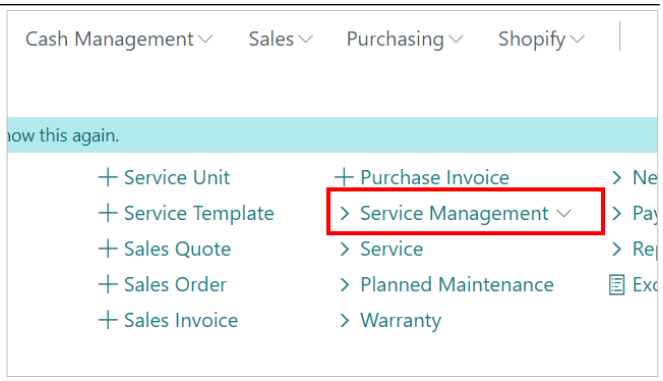
Note that the Budget Resource toggle cannot be enabled at the same time as the Include In Visual Resource Scheduler toggle.



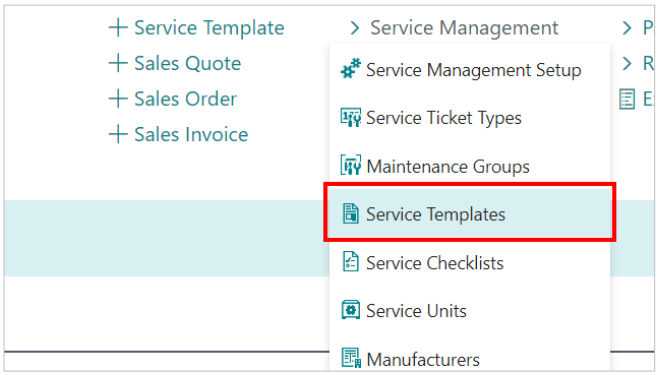
Click on the button **Yes**



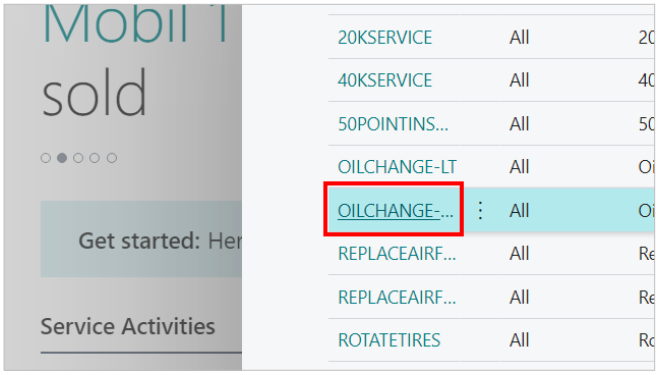
Click on the navigation menu item popup **Service Management**



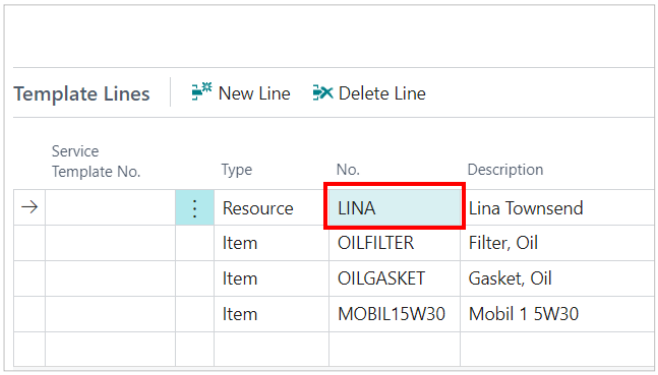
Click on the navigation menu item **Service Templates**



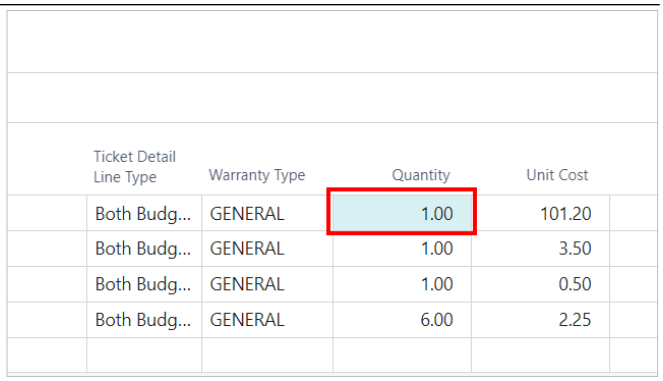
Click on the link in cell **Template No.** with the value **OILCHANGE-SS**



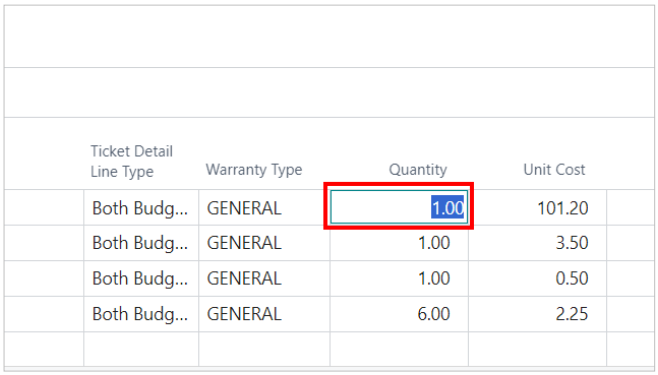
Make sure that the Budget Resource has been added to the Service Template



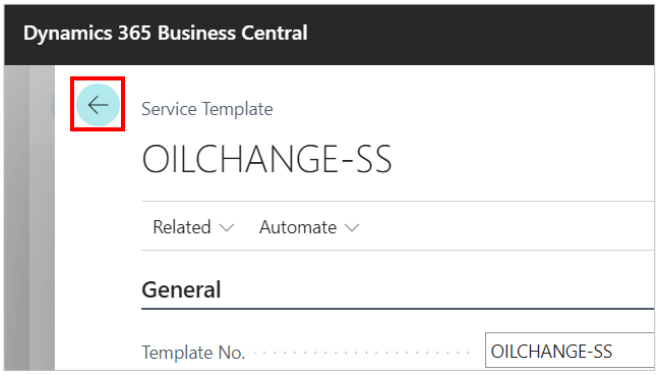
Enter the amount of time you would like to be displayed on the Visual Scheduler
Click on the cell **Quantity** with the value **1.00**



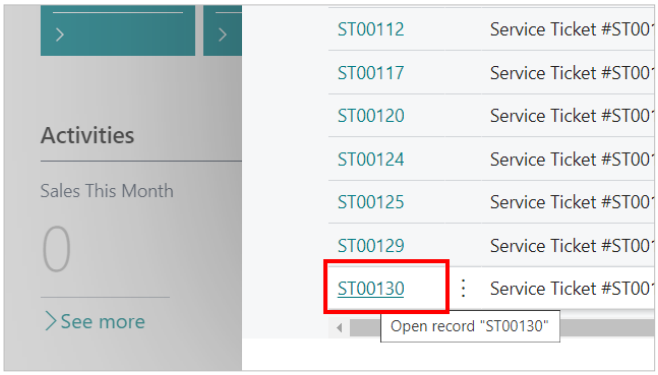
Enter the text **3**.



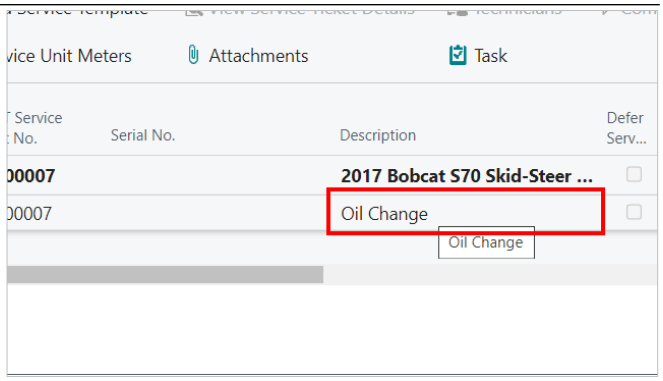
Click on the back button



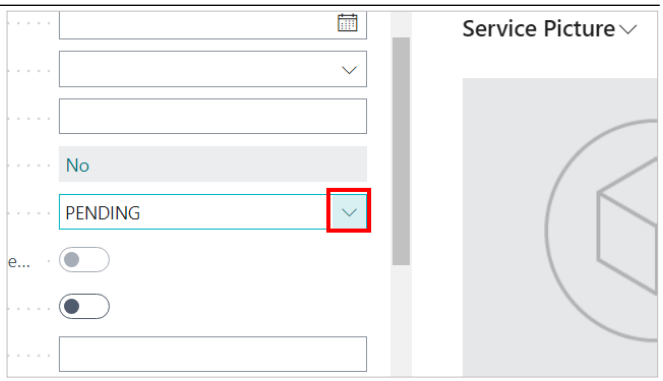
After the Service Template has been set up, create a new Service Ticket



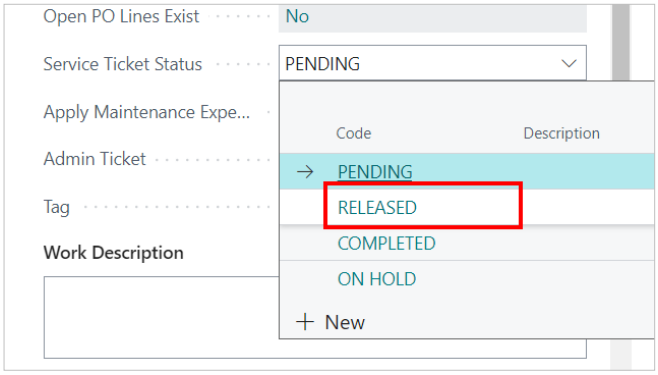
Add the Service Template to the ticket



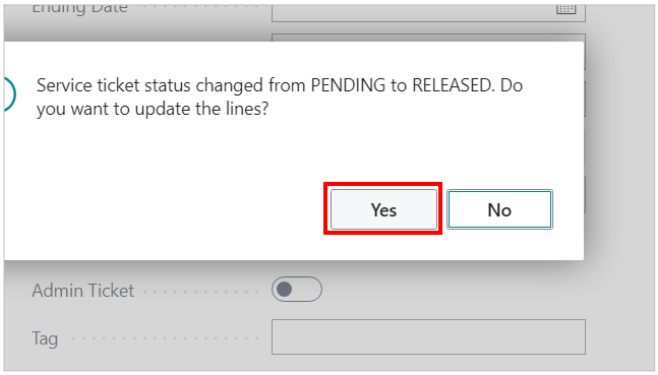
Make sure that the ticket is set to a status of Released so it will display in the Visual Scheduler



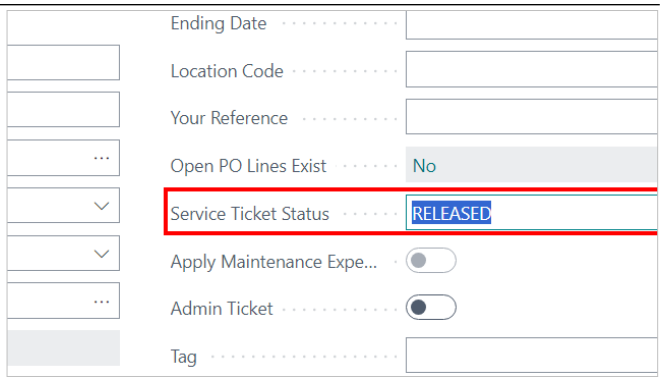
Click on the link in cell **Code** with the value **RELEASED**



Click on the button **Yes**

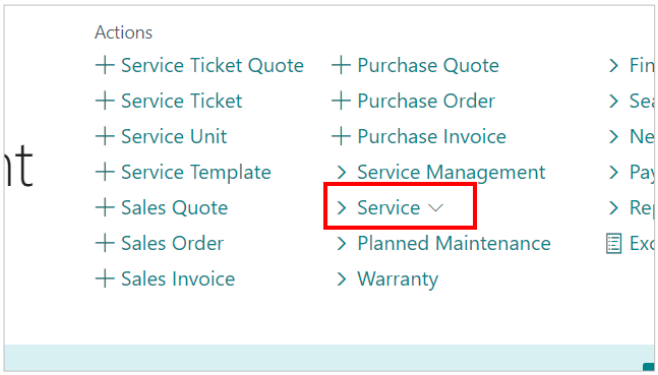


Click on **Service Ticket Status**

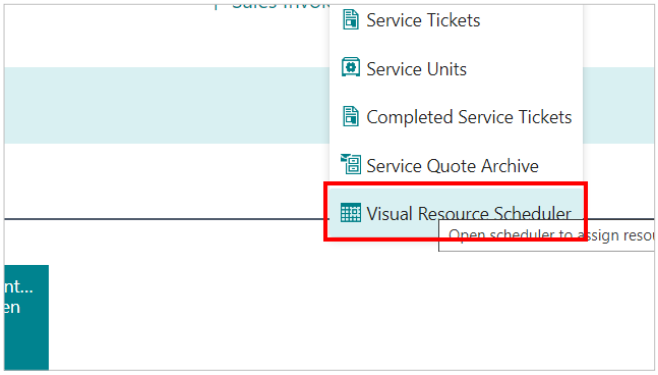


Once the ticket has finished being set up, open the Visual Resource Scheduler

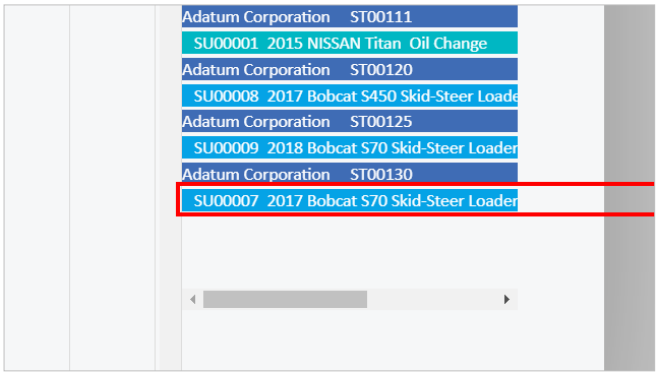
Click on the navigation menu item popup **Service**



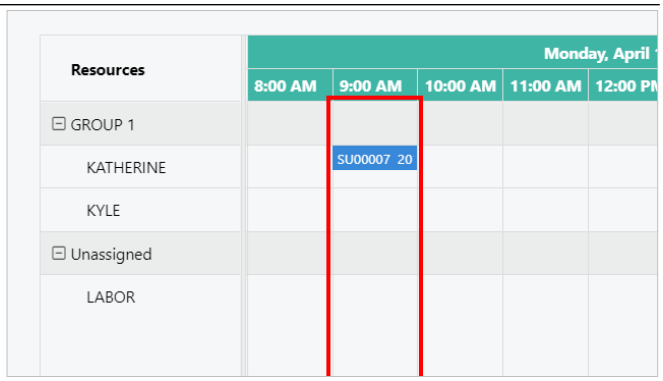
Click on the navigation menu item **Visual Resource Scheduler**



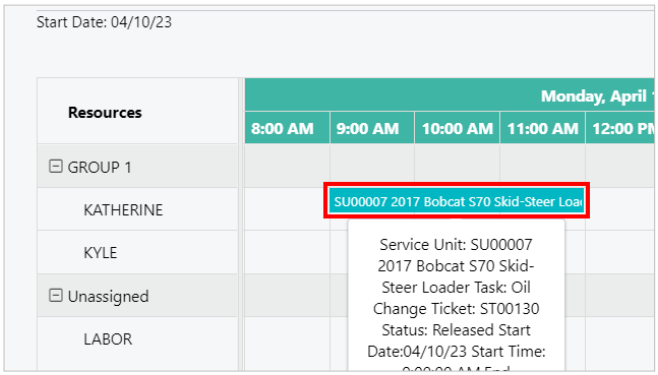
Click and Drag the task to assign it to a Resource



Release the left mouse button on



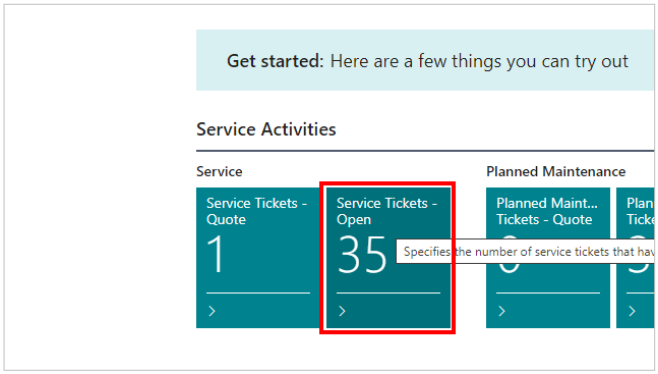
Notice that the task is automatically scheduled based on the amount of time that was specified on the Budget Resource used when creating the Service Template.



3.8.4. How to use Admin Tickets

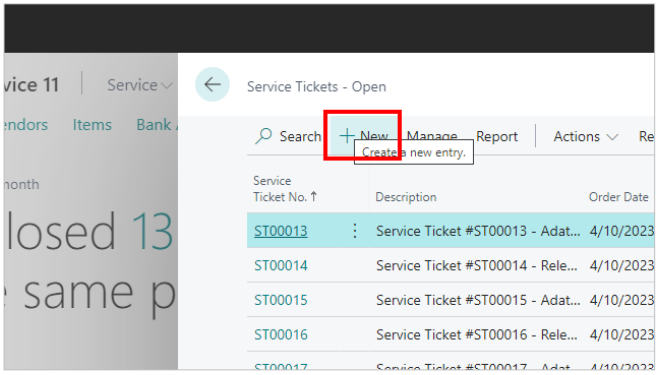
Admin Tickets can be used to create events such as Sick or Vacation that can be assigned to resources on the Visual Resource Scheduler.

Click on the Service Tickets Cue

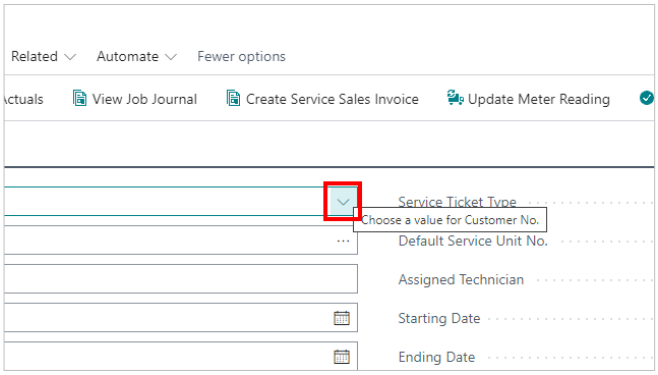


Start by creating a new service ticket

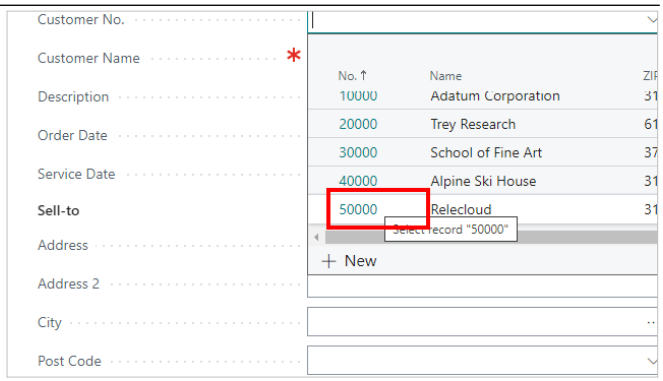
Click on the navigation menu item **New**



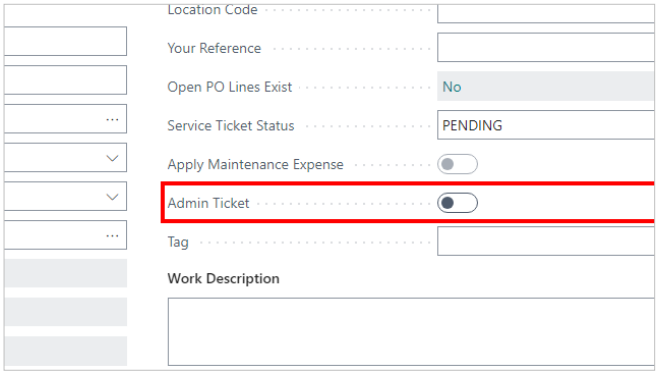
Click on the lookup button **Customer No.**



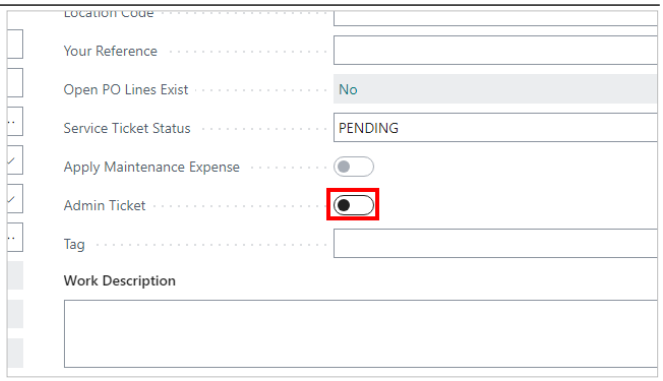
Click on the link in cell **No.** with the value **50000**



There is a new field labeled Admin Ticket. Toggling this will indicate that this is an admin ticket to be used for events.

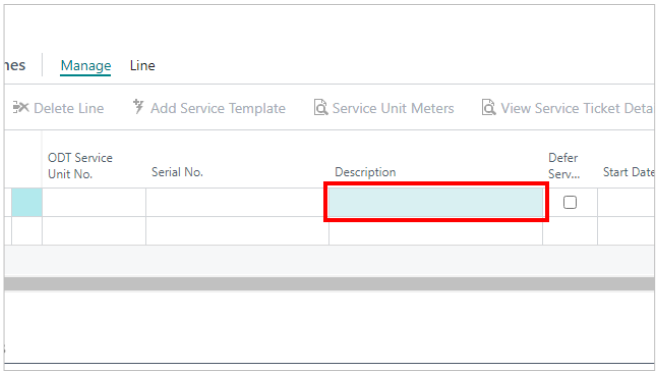


Click on the toggle field **Admin Ticket**

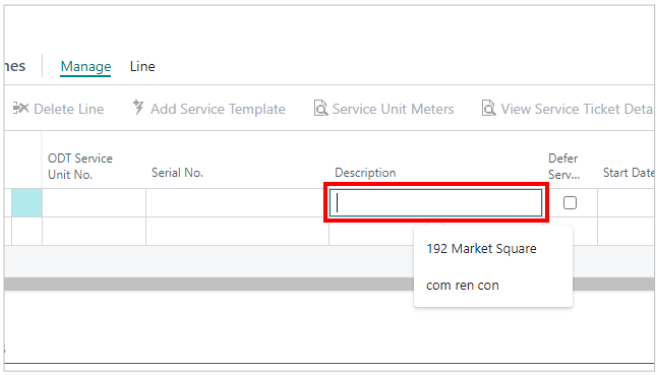


Enter the events you would like to have in the Description field of the Task Lines

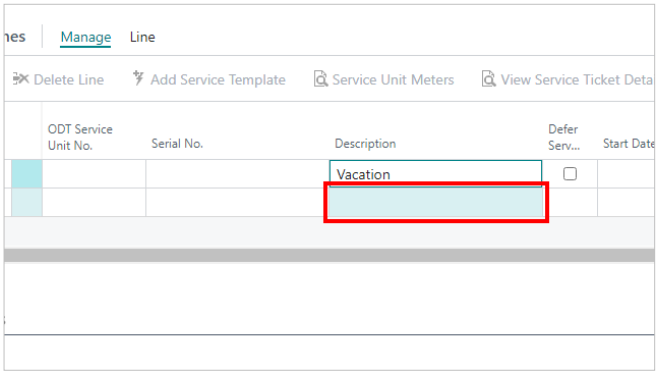
Click on the cell **Description**



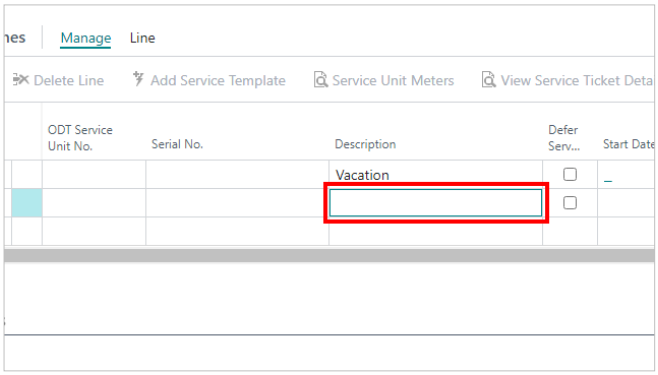
Enter the text **Vacation**.



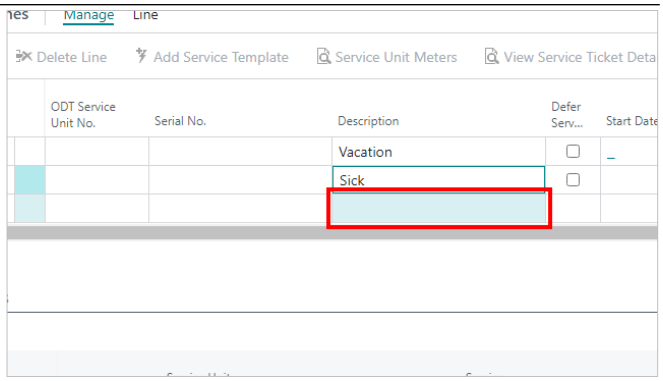
Click on the cell **Description**



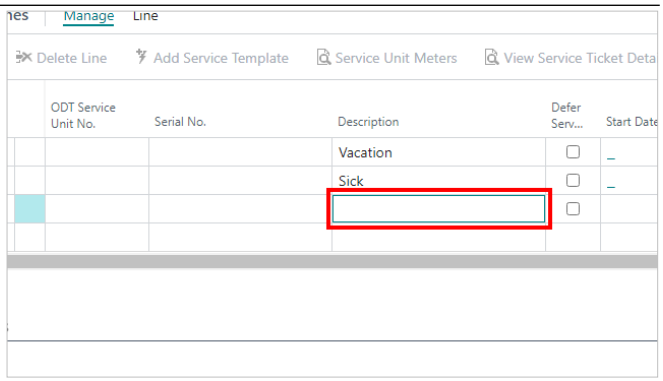
Enter the text **Sick**.



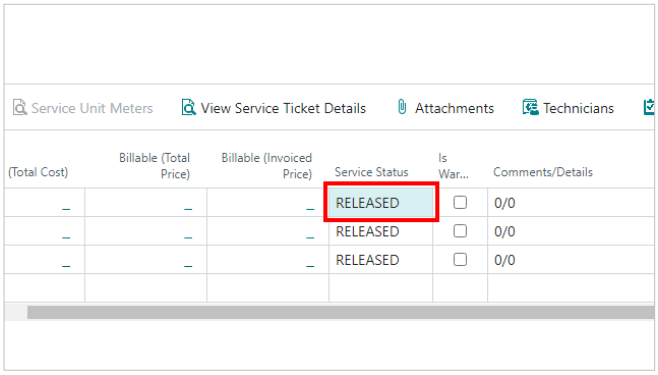
Click on the cell **Description**



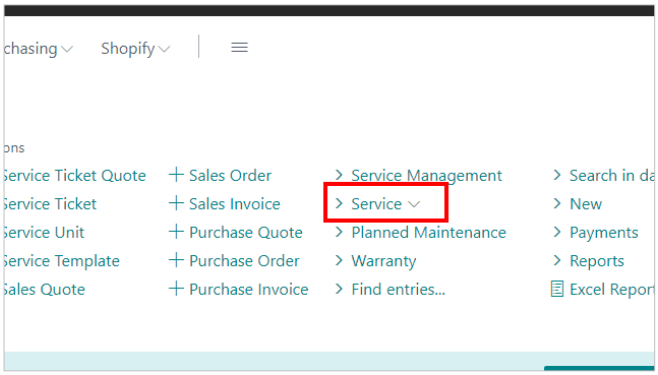
Enter the text **Emergency**.



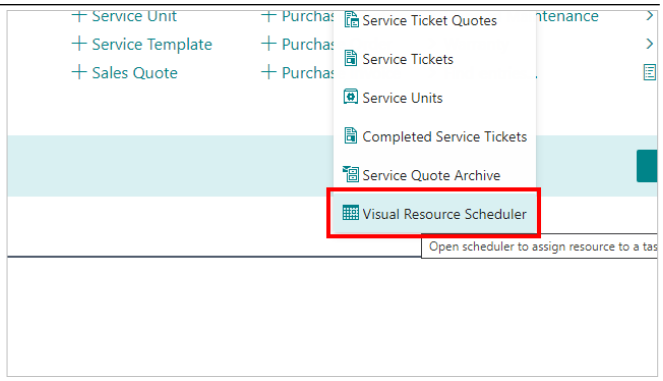
Click on the cell **Service Status** with the value **RELEASED**



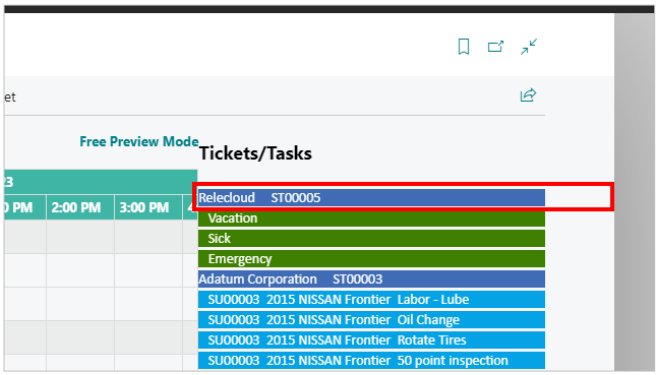
Click on the navigation menu item popup **Service**



Click on the navigation menu item **Visual Resource Scheduler**

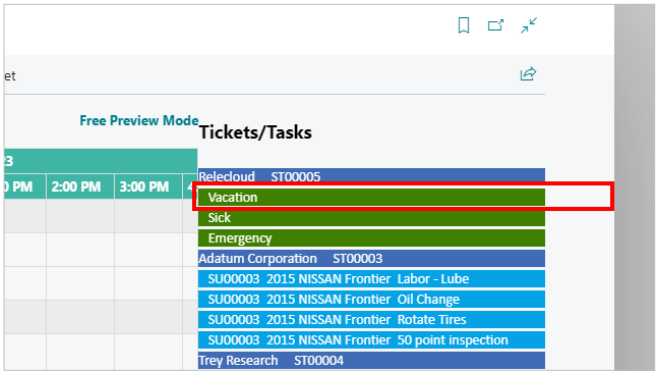


Admin Tickets and related events are always displayed at the top of the task list and highlighted in green.

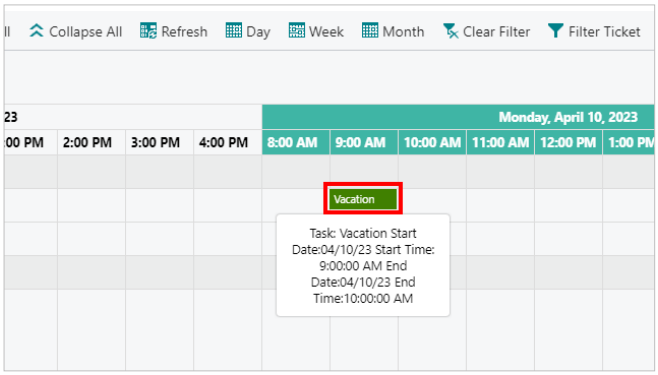


Events can be assigned to technicians the same way you assign tasks

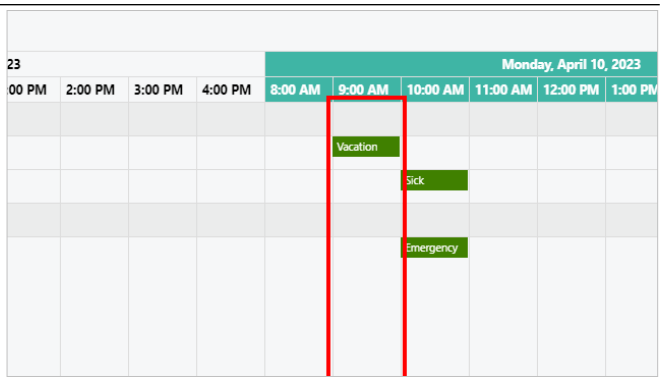
Click and hold the left mouse button on **Vacation**



Drag the event to the resource you want to assign it to.



Events are highlighted in green to be easy to identify



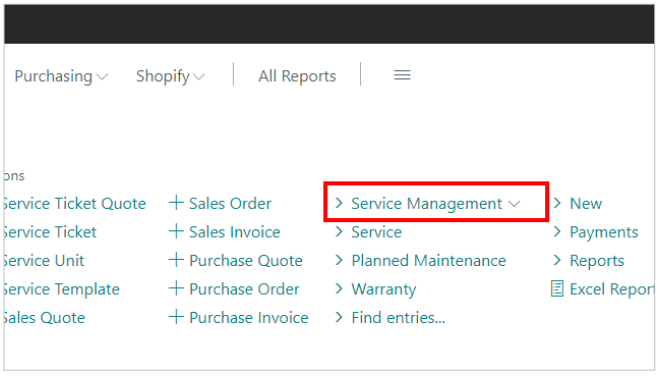
...

3.9. Warranty RMA

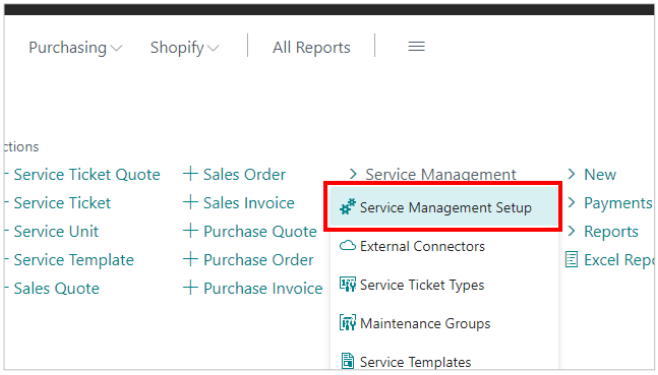
The Return Merchandise Authorization function is an extension of the warranty feature that will allow you to review and approve a warranty claim. Approved amounts can be sent to a vendor and any unapproved amounts can be billed back to the customer.

3.9.1. How to setup RMA functionality

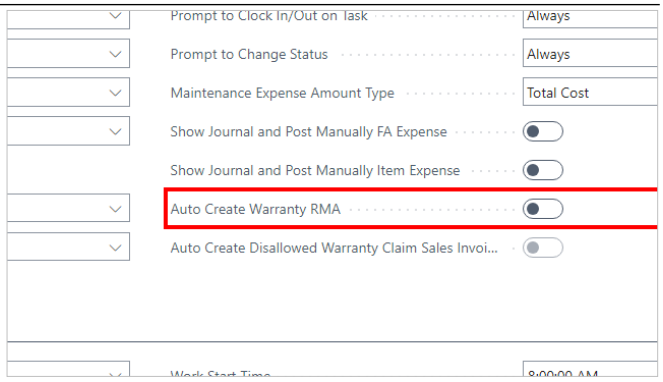
Click on the navigation menu item popup **Service Management**



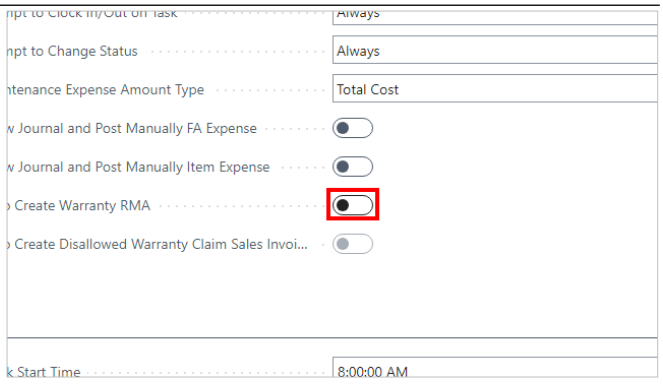
Click on the navigation menu item **Service Management Setup**



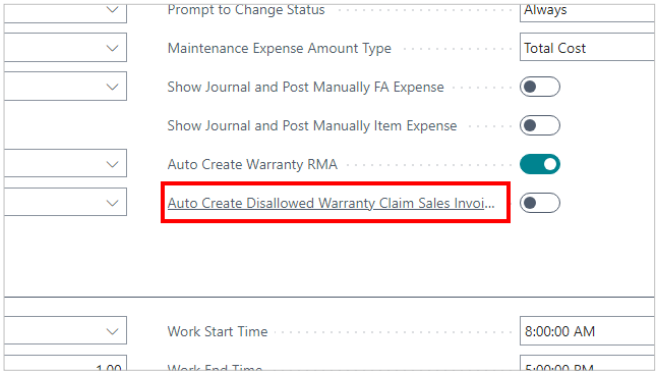
The Auto Create Warranty RMA option must be enabled to use the RMA feature.



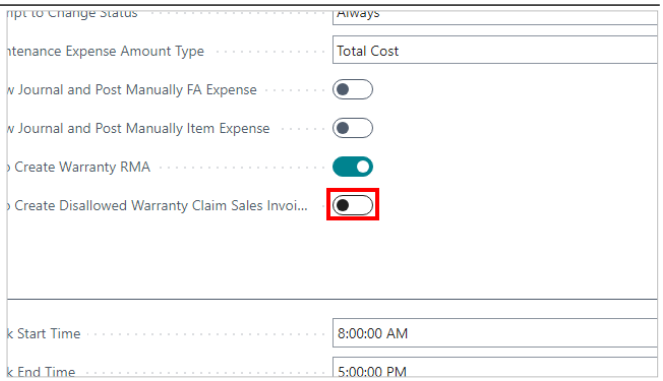
Click on the toggle field **Auto Create Warranty RMA**



If Auto Create Disallowed Warranty Claim Sales Invoice is enabled, a sales invoice for the disallowed warranty amount will automatically be created when the RMA is posted. If this option is disabled, the invoice can still be created manually.

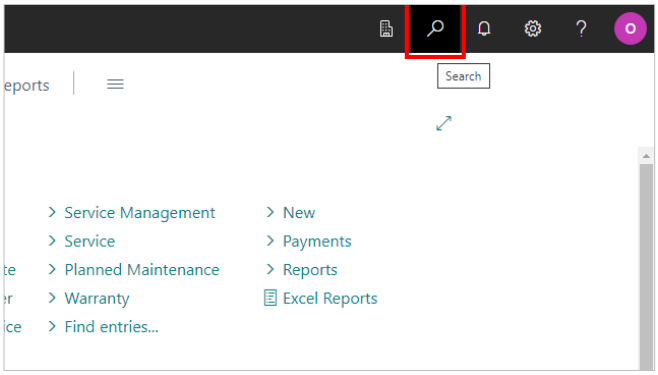


Click on the toggle field **Auto Create Disallowed Warranty Claim Sales Invoice**

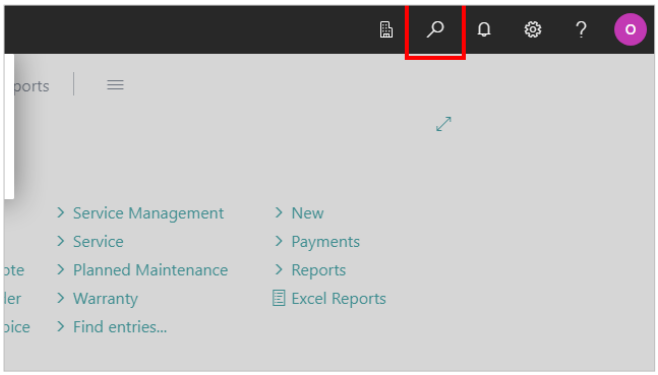


There are some additional fields that must be populated

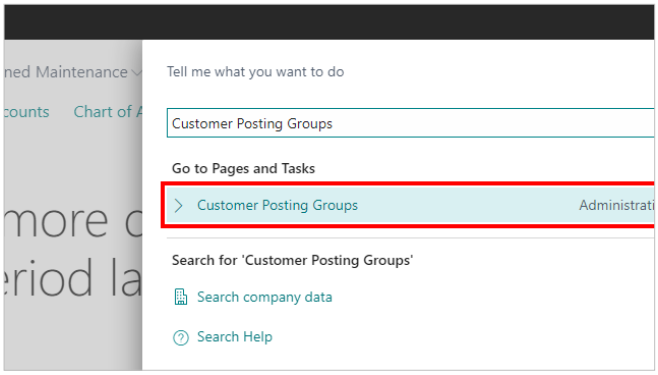
Click on the button **Search**



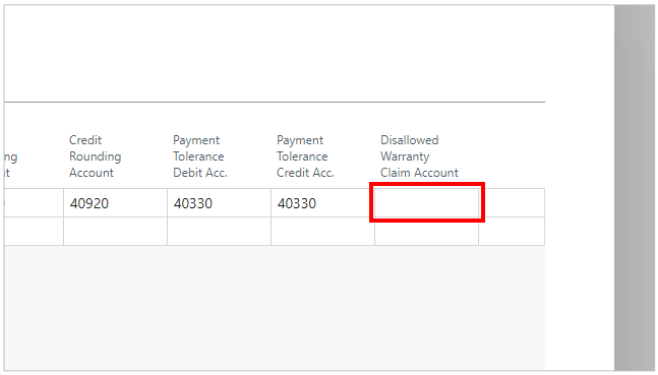
Enter the text **Customer Posting Groups**.



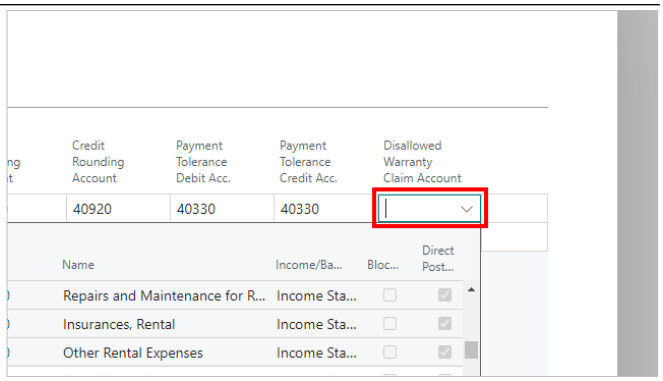
Click on **Customer Posting Groups Administration**



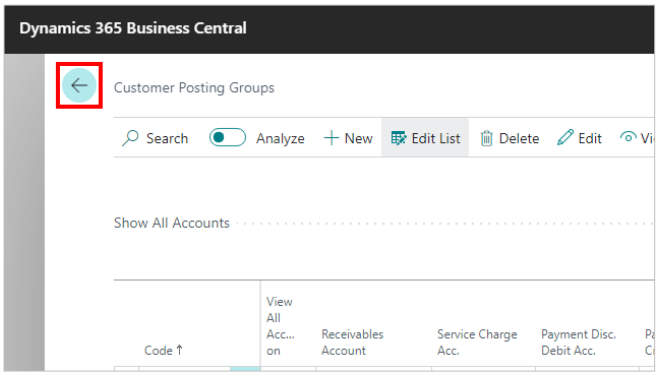
Click on the cell **Disallowed Warranty Claim Account**



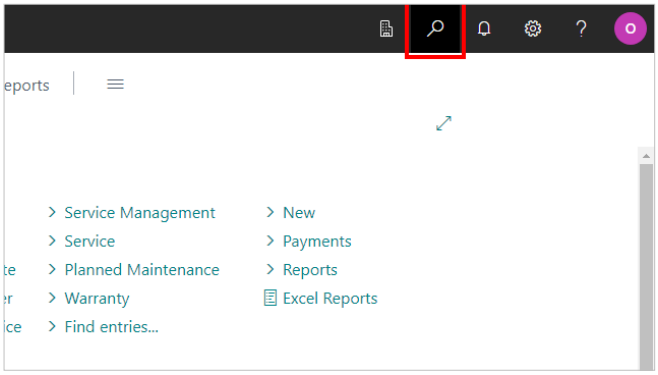
Enter **the Disallowed Warranty Claim Account number**.



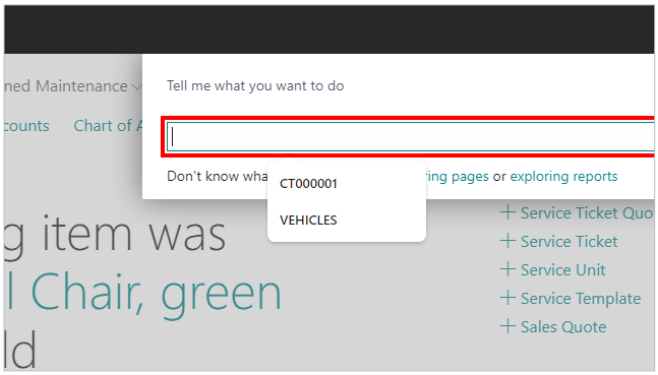
Click on the back button



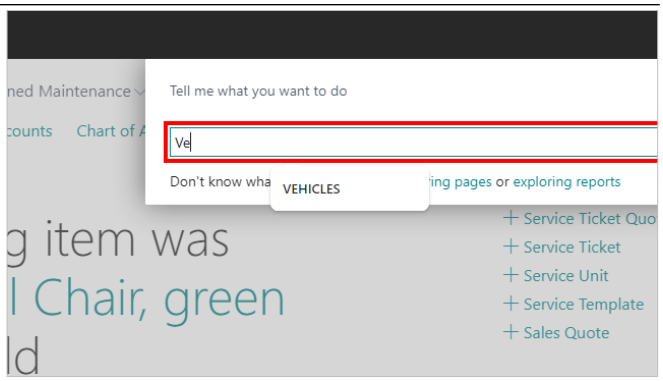
Click on the button **Search**



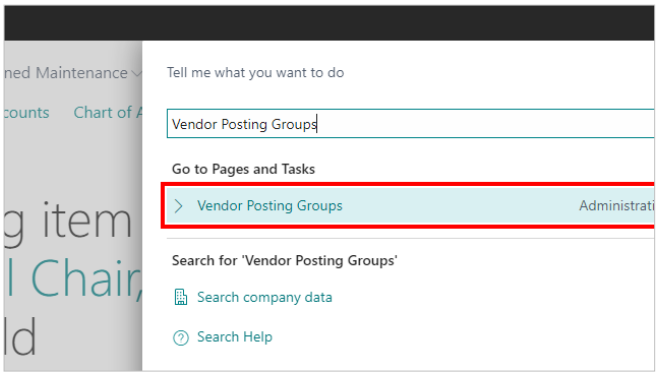
Click on the field **Tell me what you want to do**



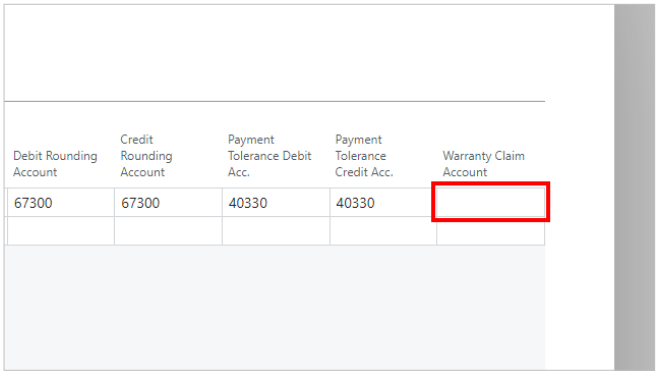
Enter the text **Vendor Posting Groups**.



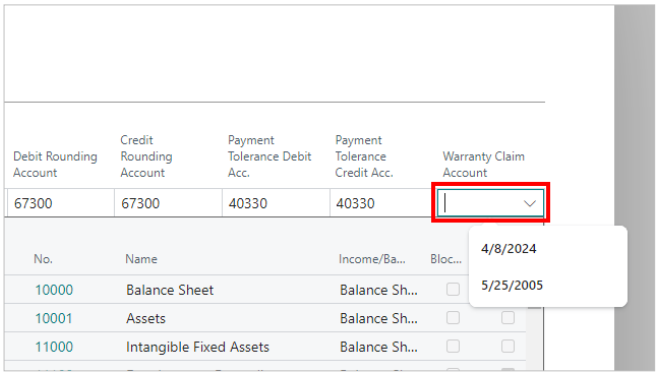
Click on **Vendor Posting Groups Administration**



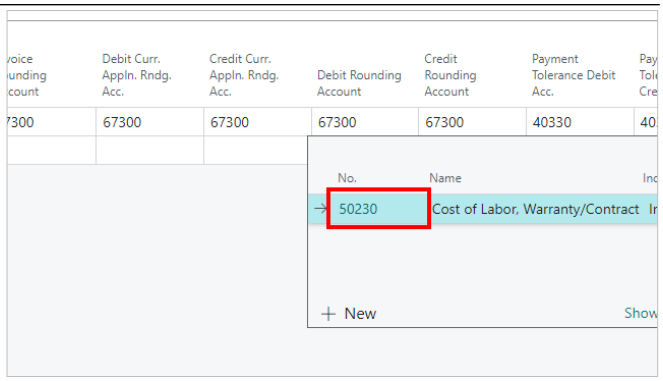
Click on the cell **Warranty Claim Account**



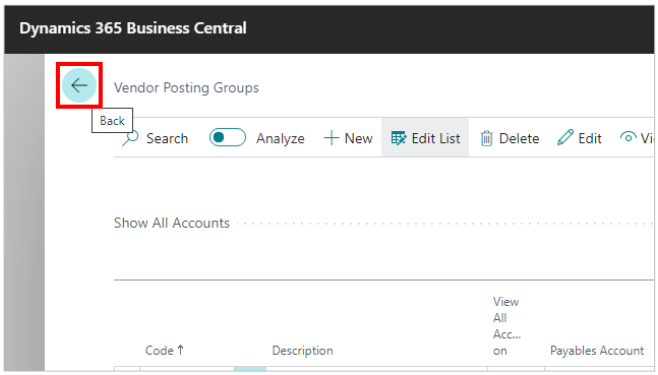
Enter **Warranty Claim Account**.



Click on the link in cell **No.** with the value **50230**



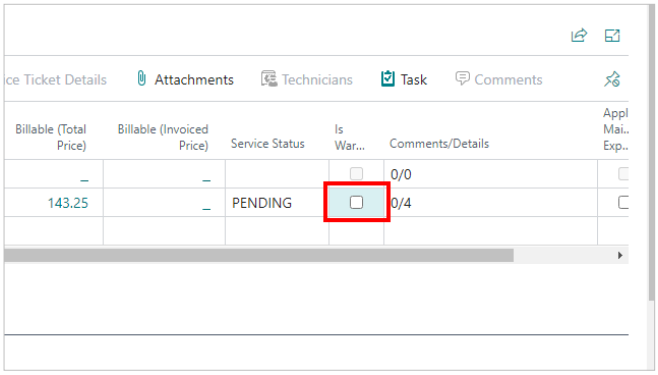
Click on the back button



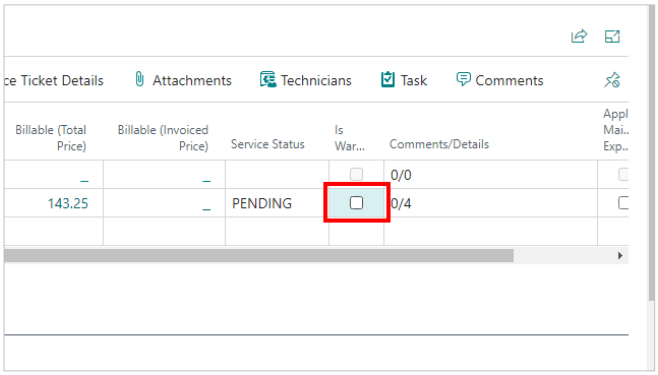
3.9.2. How to Process a RMA

The following will demonstrate how to process an RMA. Note that these steps assume a warranty has already been created and assigned to a service unit.

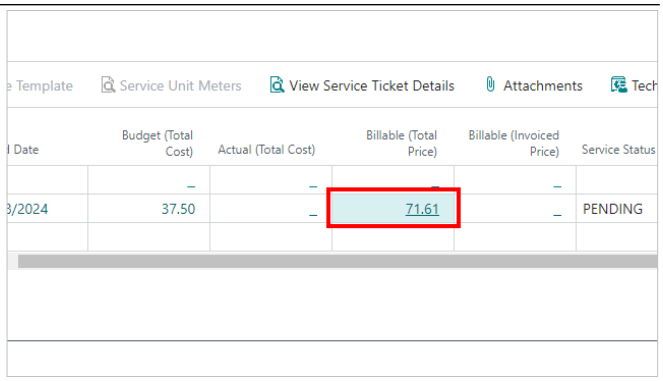
Click on the cell **Is Warrantable** with the value **on**



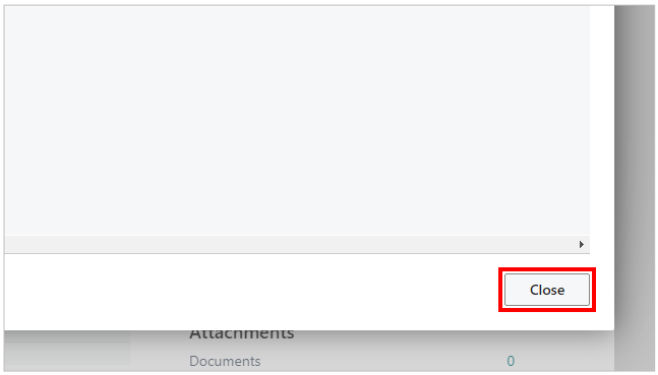
Click on **Is Warrantable**



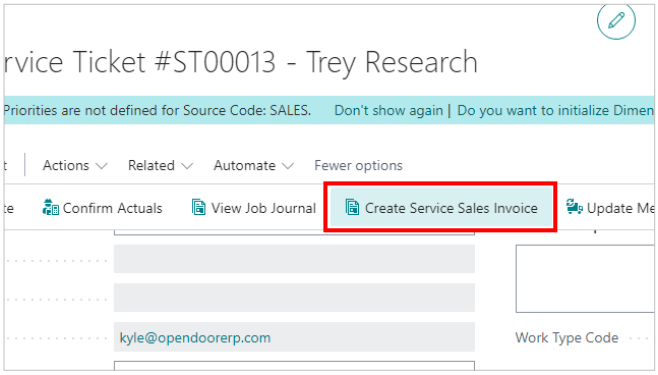
Click on the link in cell **Billable (Total Price)** with the value **71.61**



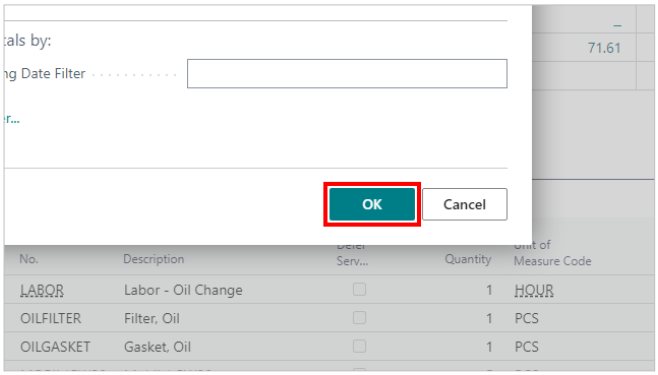
Click on the button **Close**



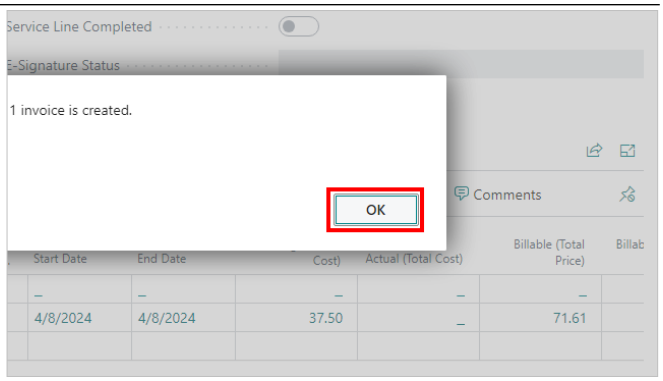
Click on the navigation menu item **Create Service Sales Invoice**



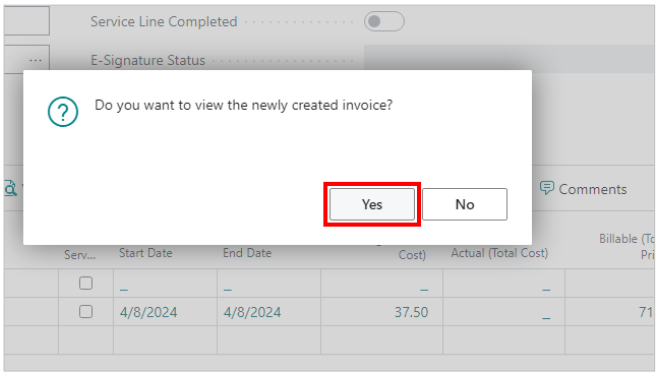
Click on the button **OK**



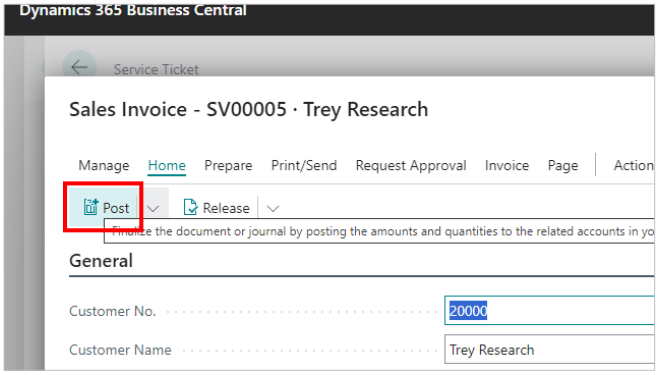
Click on the button **OK**



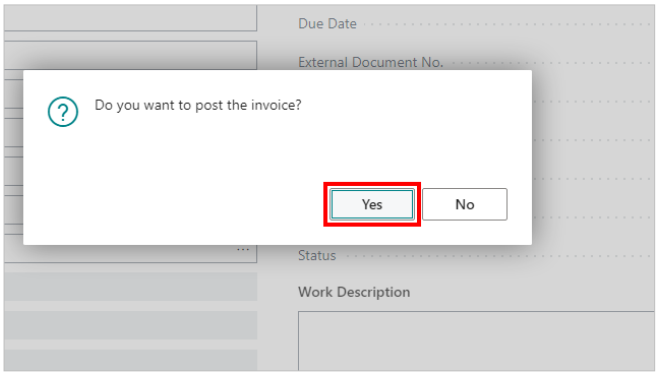
Click on the button **Yes**



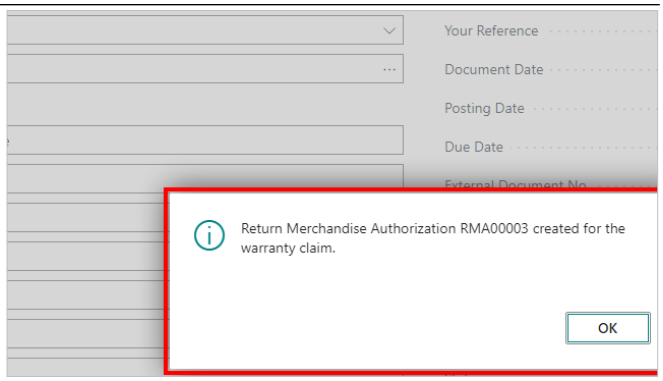
Click on the button **Post**



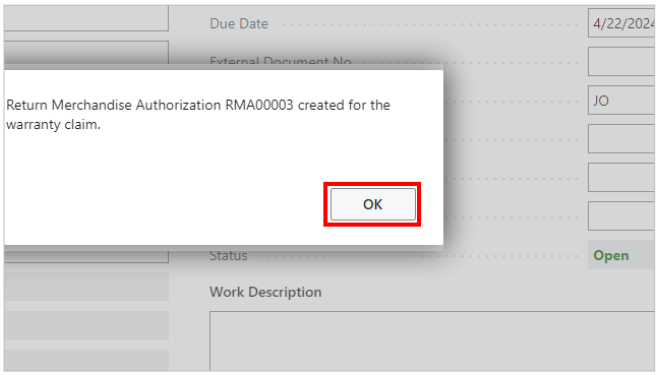
Click on the button **Yes**



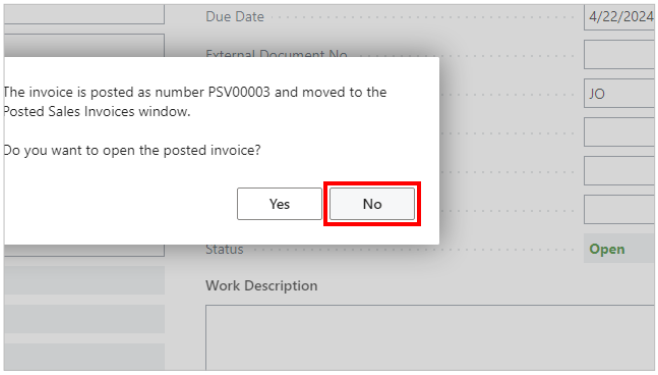
A message will appear after posting confirming that the RMA document has been created.



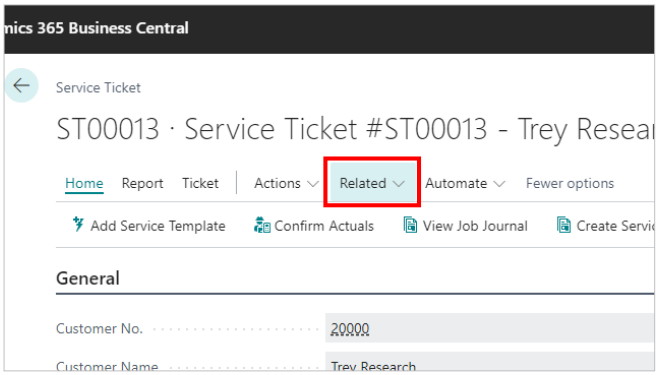
Click on the button **OK**



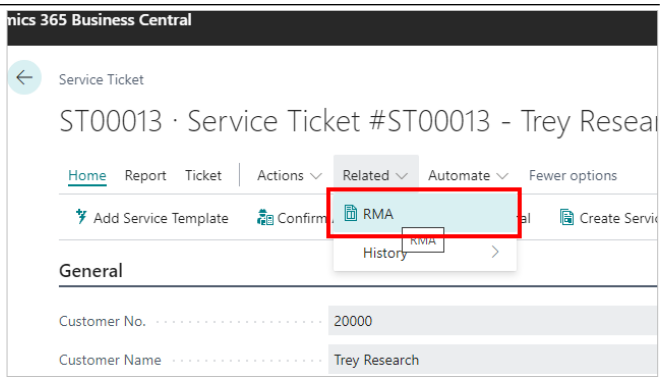
Click on the button **No**



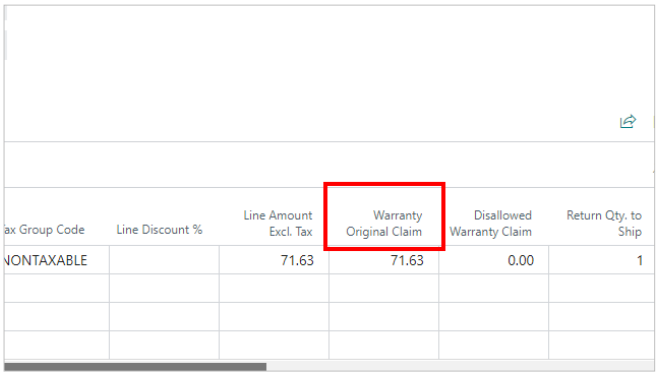
Click on the navigation menu item popup **Related**



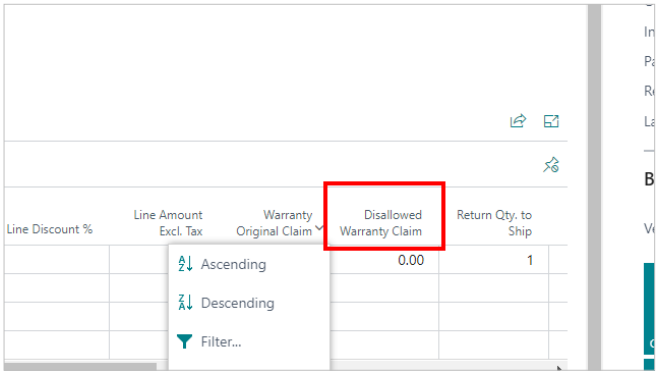
the RMA action in the Related tab will link to the created RMA document
Click on the navigation menu item **RMA**



The **Warranty Original Claim** field displays the amount of the original warranty claim.

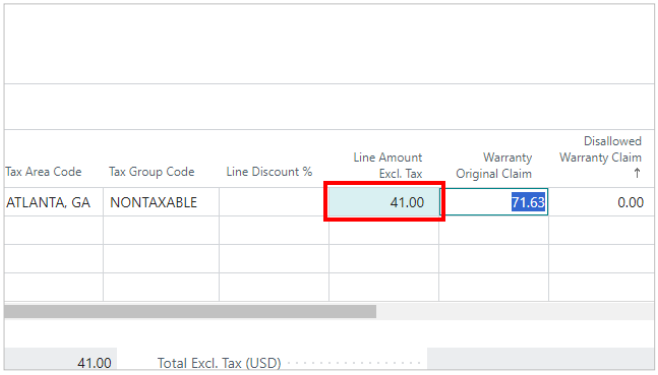


The **Disallowed Warranty Claim** field displays the amount of the claim that was determined to not be valid and will not be paid

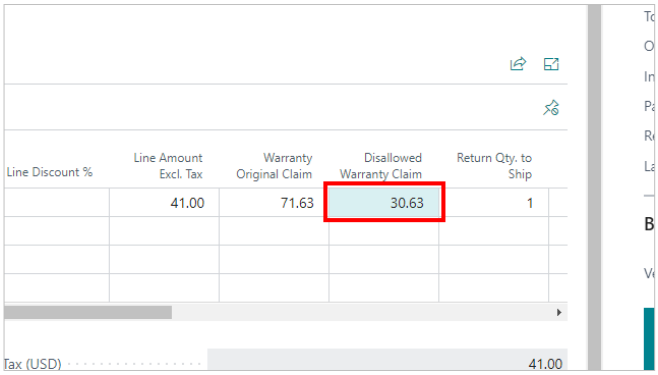


You can change the claim amount by changing the Line Amount field

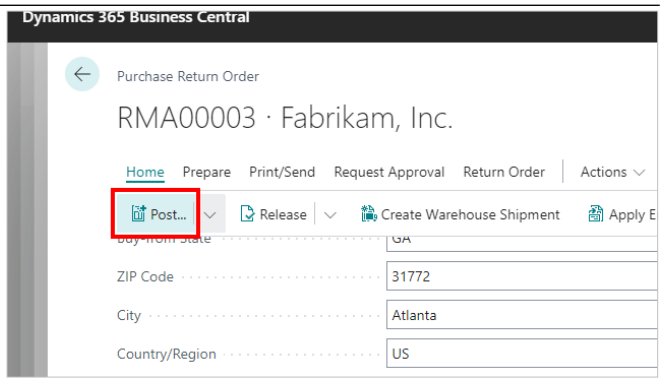
Click on the cell **Line Amount Excl. Tax** and enter the value **41**



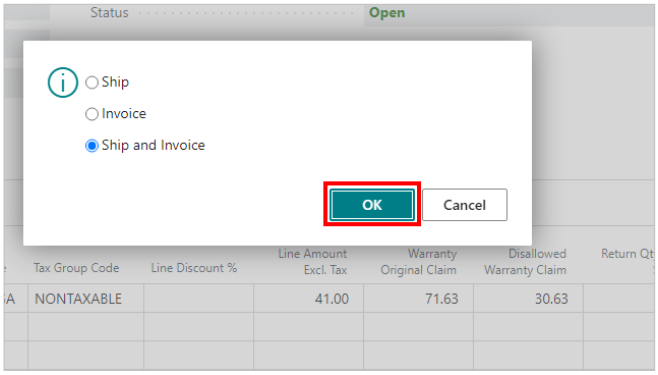
Notice that Disallowed Warranty Claim field has been updated to reflect the amount that is not approved



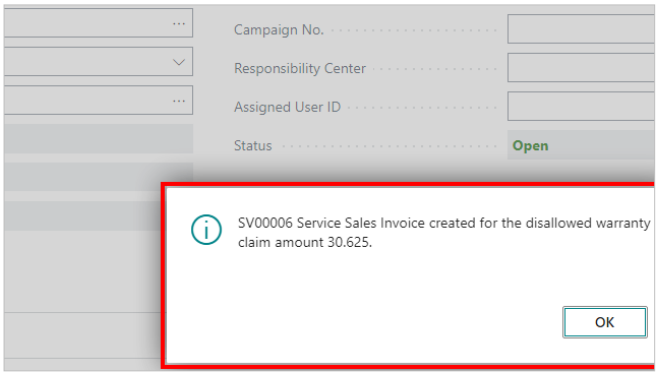
Click on the button **Post...**



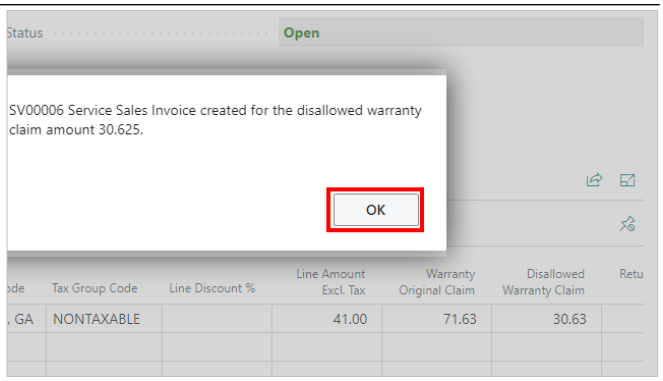
Click on the button **OK**



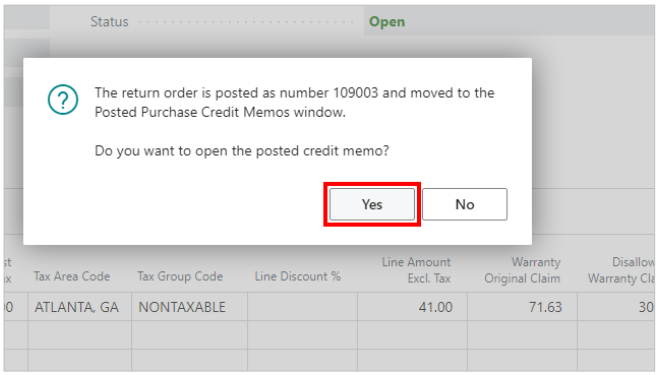
If the Auto Create Disallowed Warranty Claim Sales Invoice option was enabled, a notification will appear advising that an invoice was created for the disallowed amount



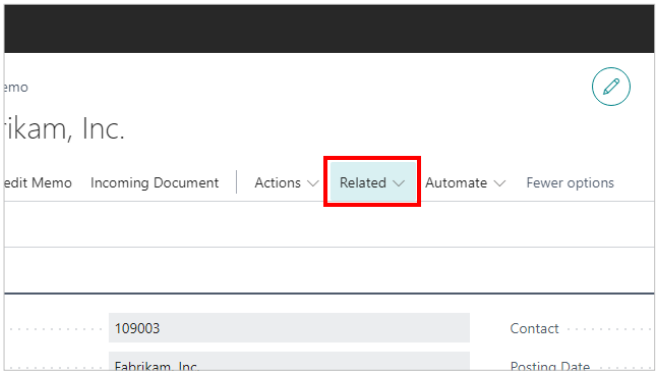
Click on the button **OK**



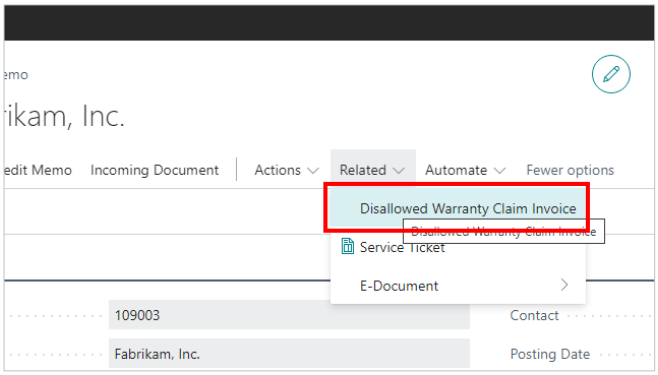
After posting, there will be a link to the disallowed warranty claim invoice on the posted document
Click on the button **Yes**



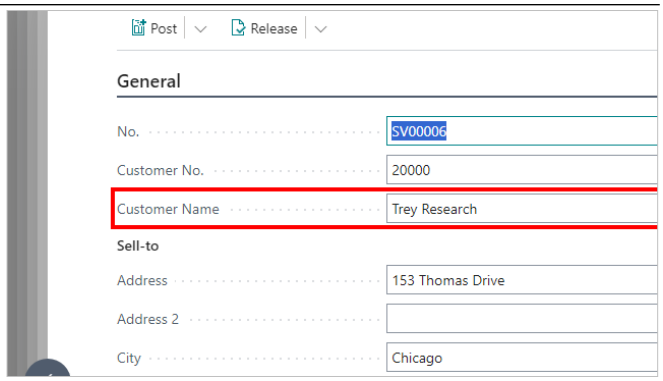
Click on the navigation menu item popup **Related**



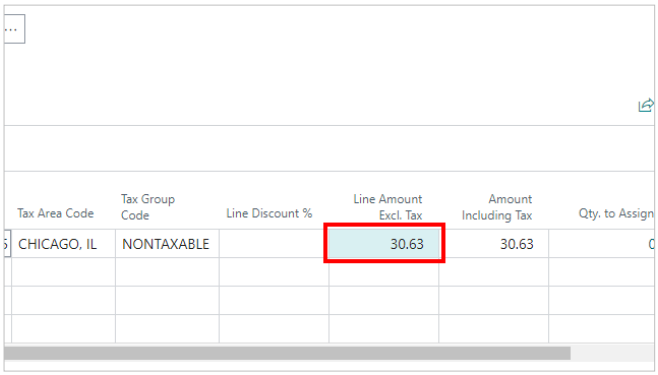
Click on the navigation menu item **Disallowed Warranty Claim Invoice**



Notice that the Customer Name is for the original customer specified on the Service Ticket

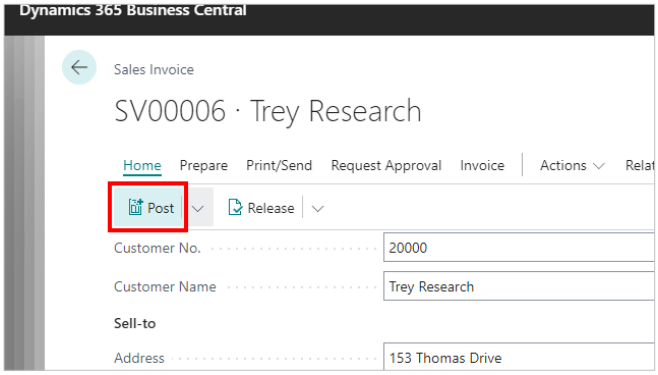


Notice that the Line Amount being charged is the same amount that was denied in the original RMA document

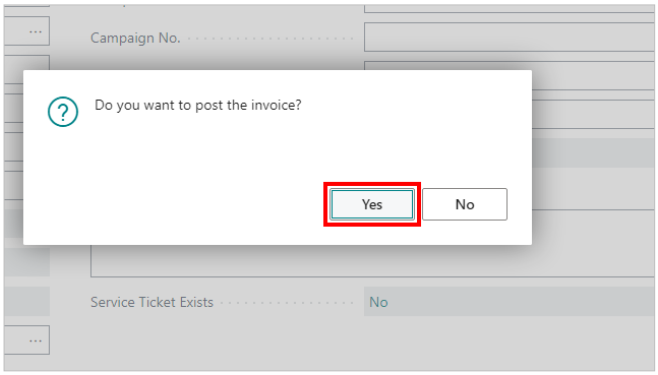


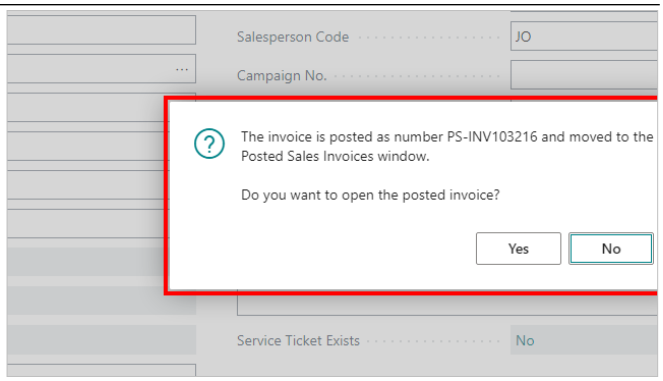
When everything is ready, the remaining amount can be charged back to the original customer

Click on the button **Post**



Click on the button **Yes**



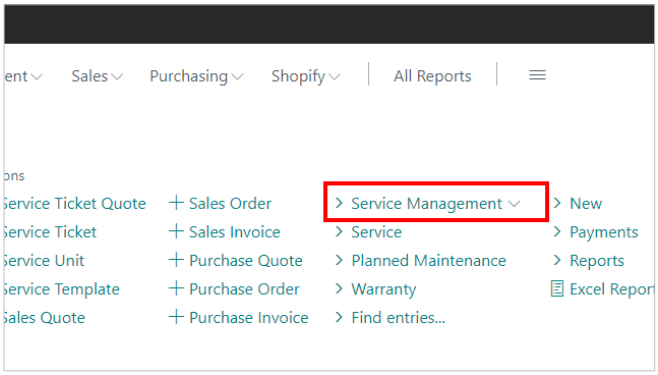


3.10.Service Notifications

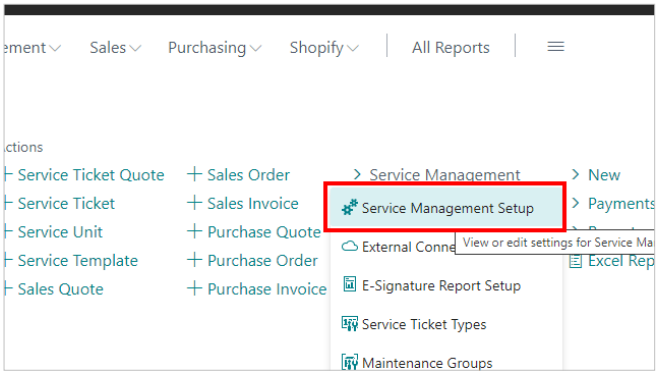
Notifications allow you to automatically send messages related to service activity

3.10.1. How to set up notifications

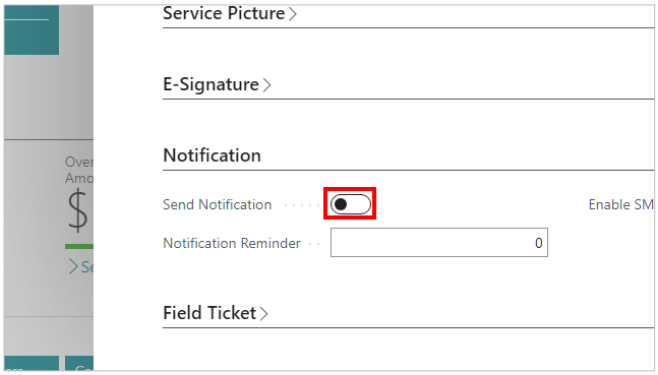
Click on the navigation menu item popup **Service Management**



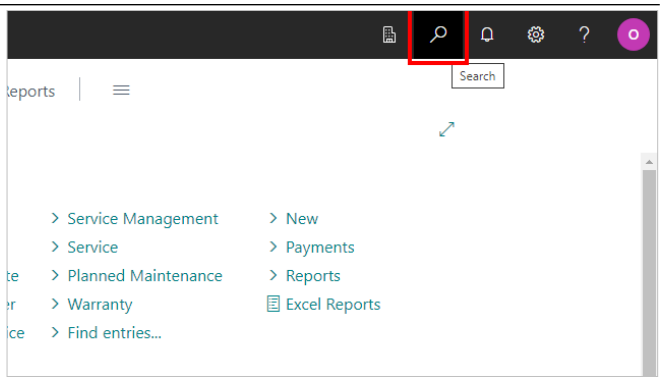
Click on the navigation menu item **Service Management Setup**



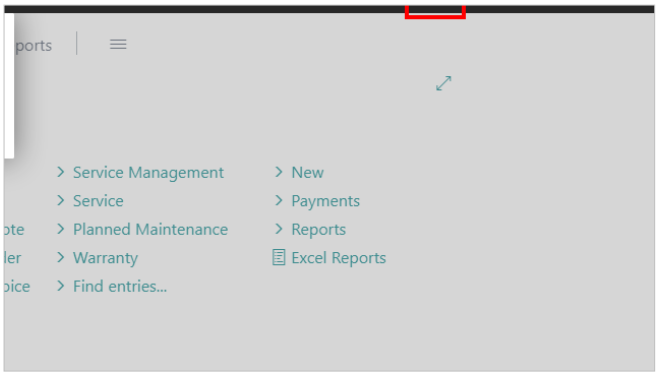
Click on the toggle field **Send Notification**



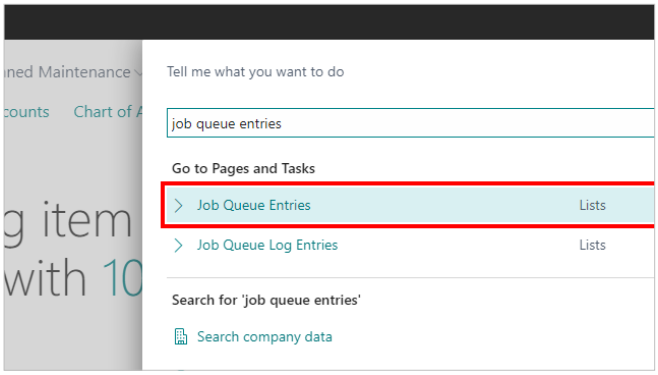
Click on the button **Search**



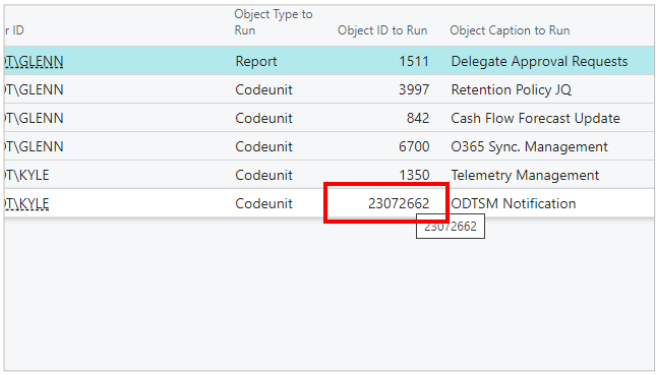
Enter the text **job queue entries**.



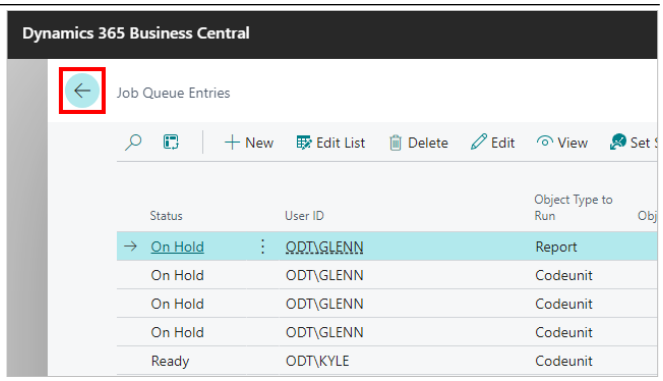
Click on **Job Queue Entries Lists**



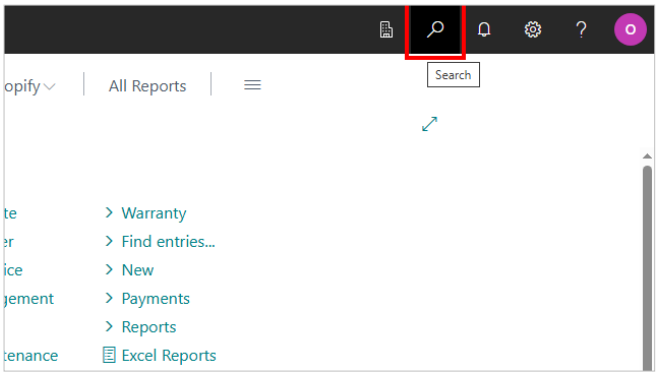
Ensure that codeunit 23072662 for ODT Notification has been added to Job Queue Entries



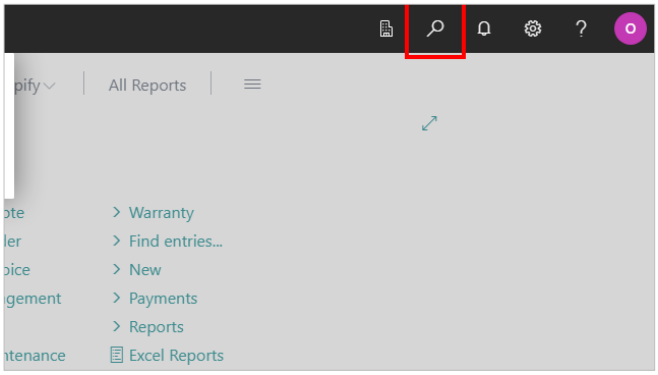
Click on the back button



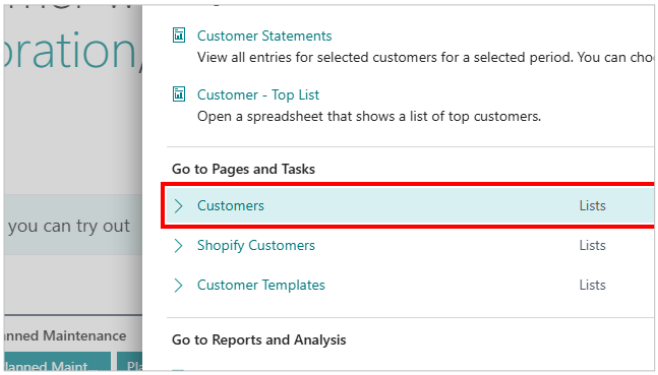
Click on the button **Search**

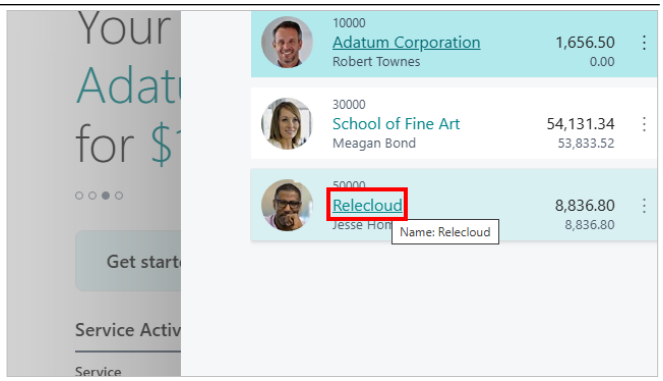


Enter the text **Customer**.

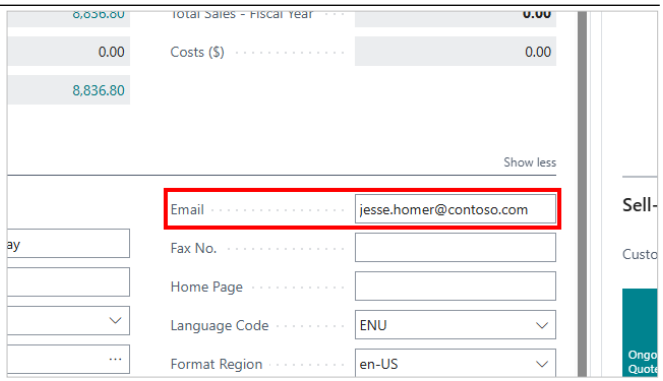


Click on **Customers Lists**

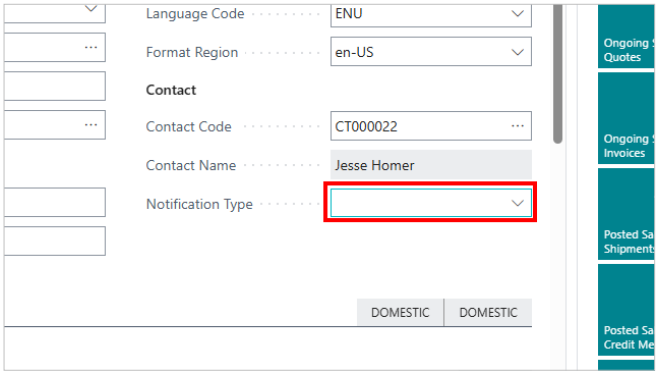




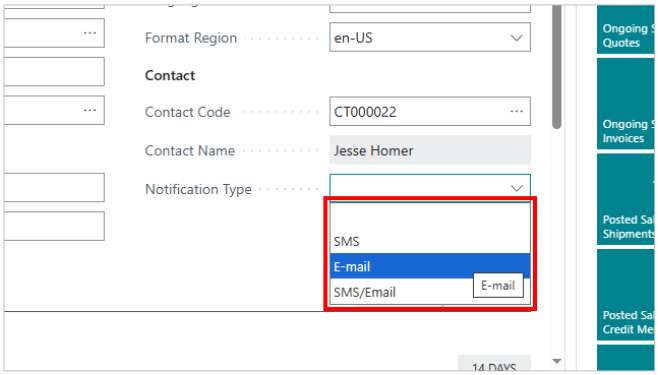
Ensure the customer email is populated



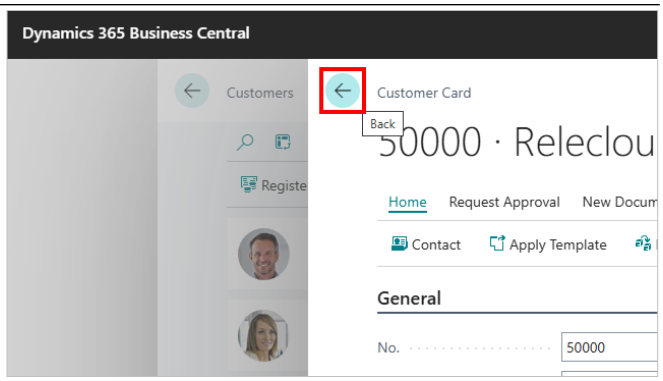
Click on the field **Notification Type**



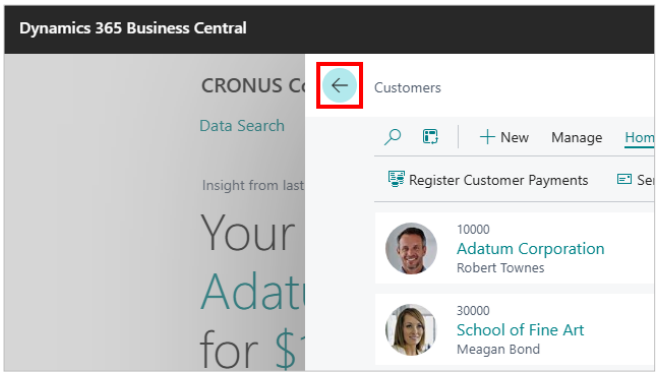
You can change the preferred notification type to Email, SMS, or both



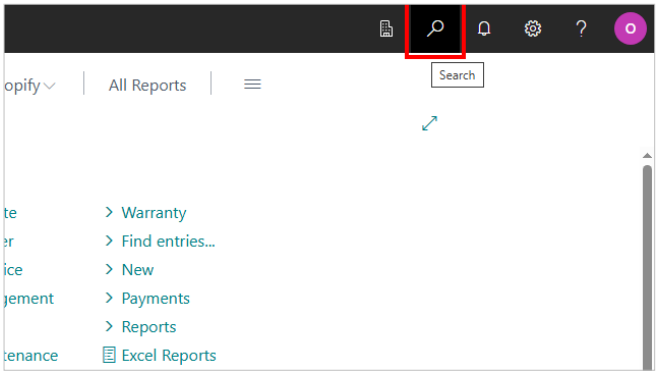
Click on the back button



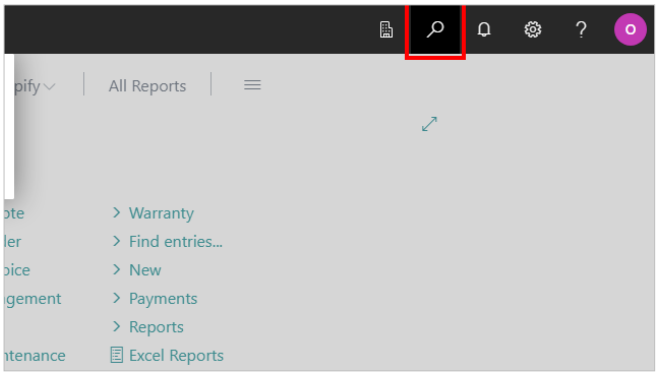
Click on the back button



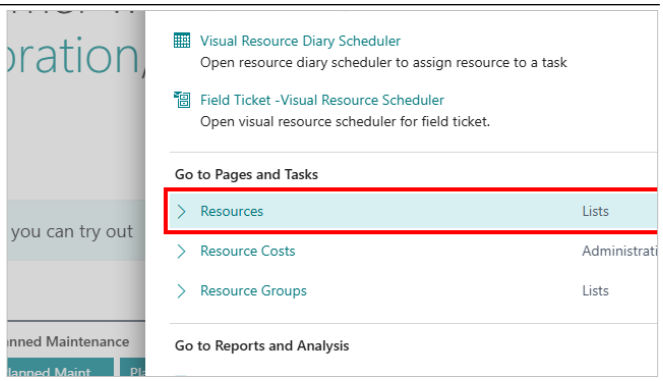
Click on the button **Search**



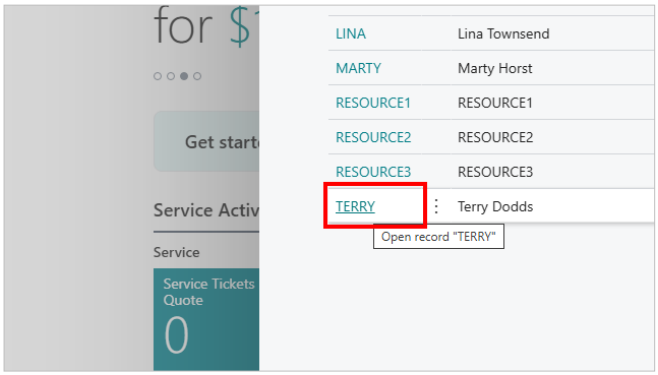
Enter the text **Resource**.



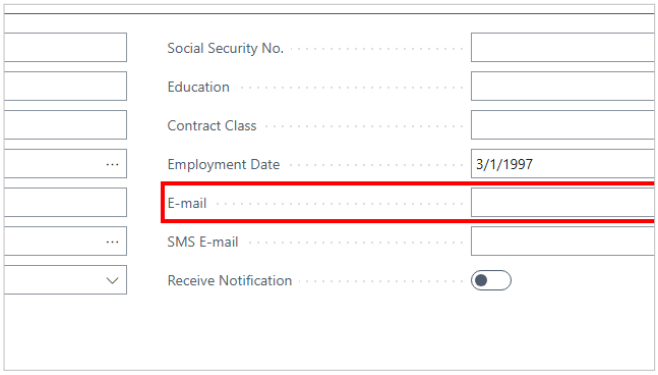
Click on **Resources Lists**



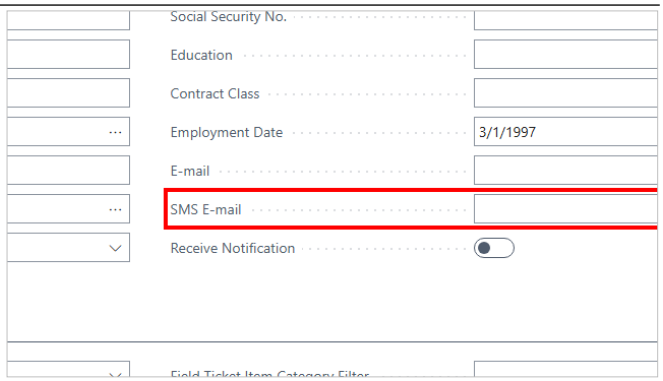
Click on the link in cell **No.** with the value **TERRY**



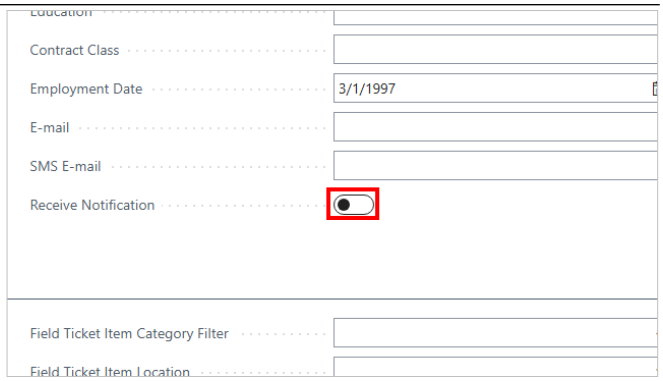
If using E-Mail for notifications, the populate the E-Mail field



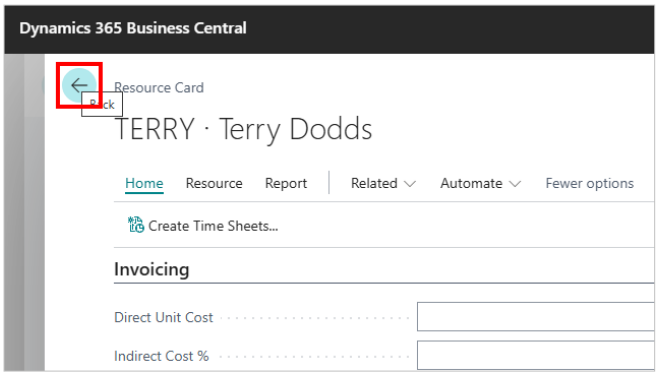
If using SMS E-Mail for notifications, the populate the SMS E-Mail field



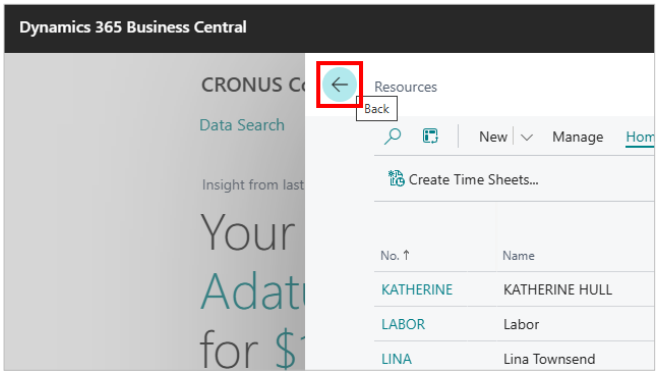
Click on the toggle field **Receive Notification**



Click on the back button

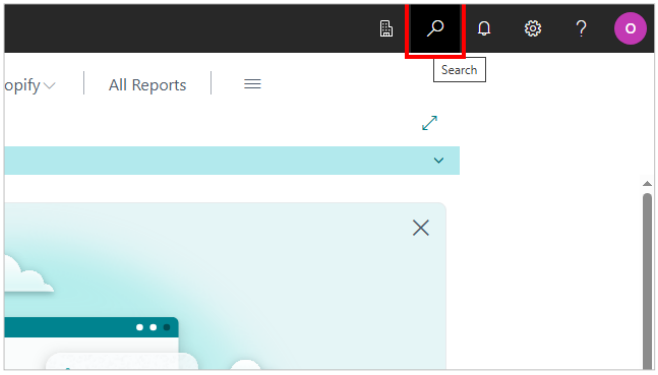


Click on the back button

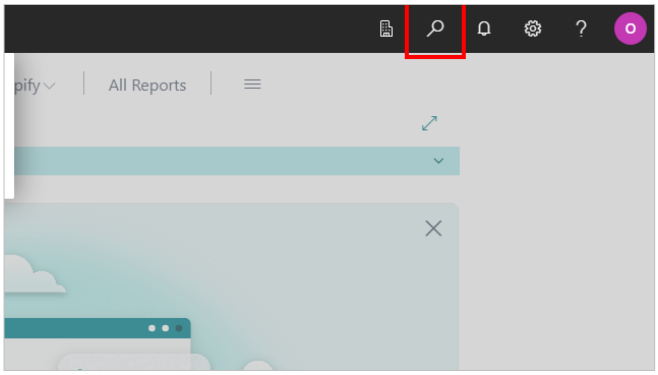


Next, you need to create templates for the notifications that will be sent.

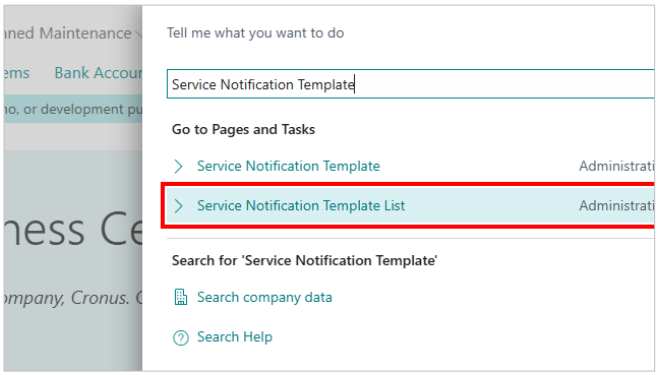
Click on the button **Search**



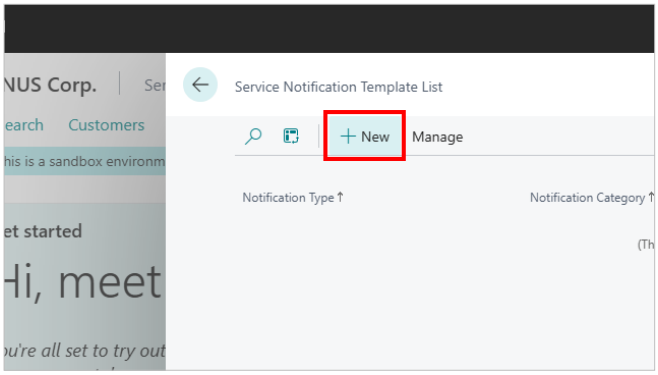
Enter the text **Service Notification Template**.



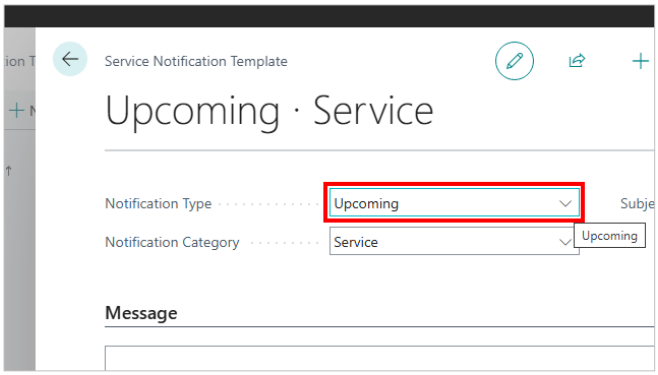
Click on **Service Notification Template List Administration**



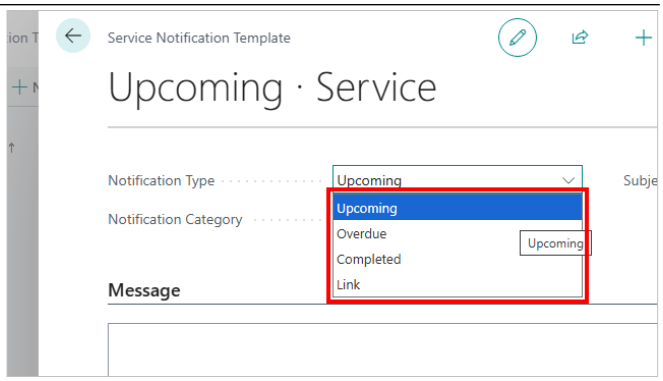
Click on the navigation menu item **New**



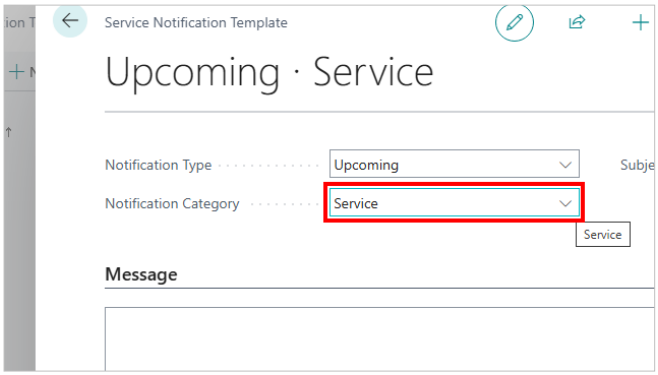
Click on the field **Notification Type**



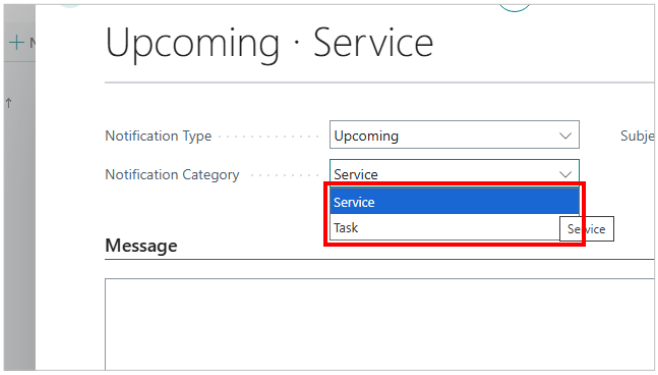
Notification Type determines what kind for notification this is for.



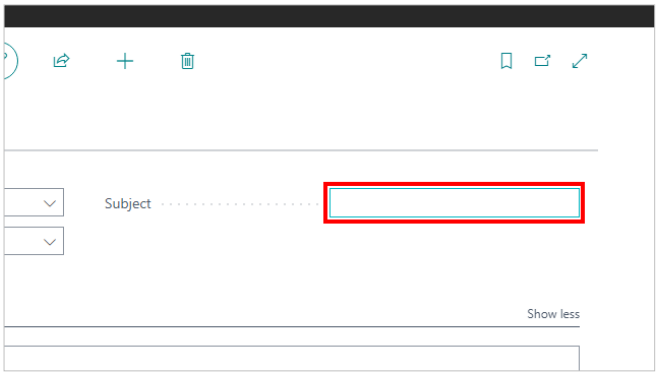
Click on the field **Notification Category**



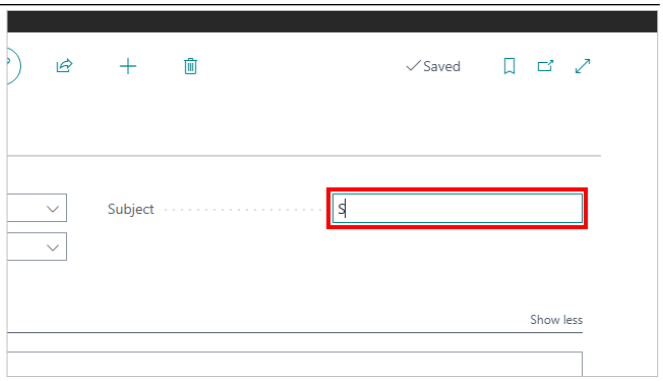
Notification Category determines if the notification is for Service Tickets or individual tasks. Note that some Notification Types limit which categories can be selected.



The Subject field will specify the subject line of the sent email.

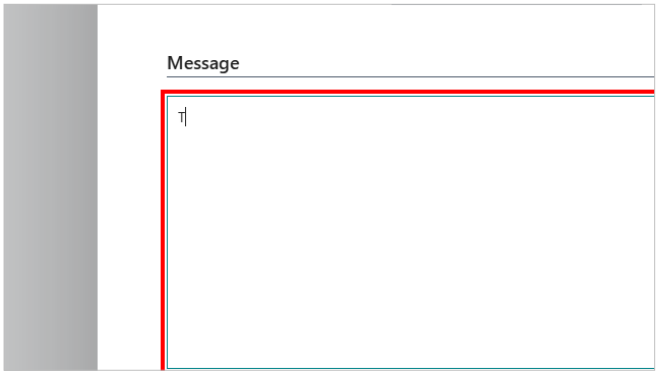


Enter the text **Service Notification**.



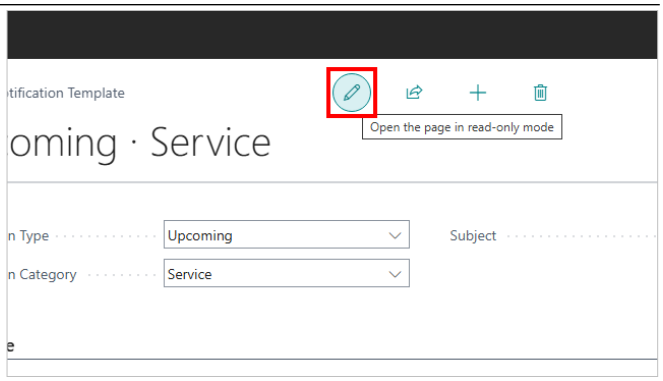
The Message field will specify content to be added to the body of the email.

Enter the text **This is a notification of a service update.**.

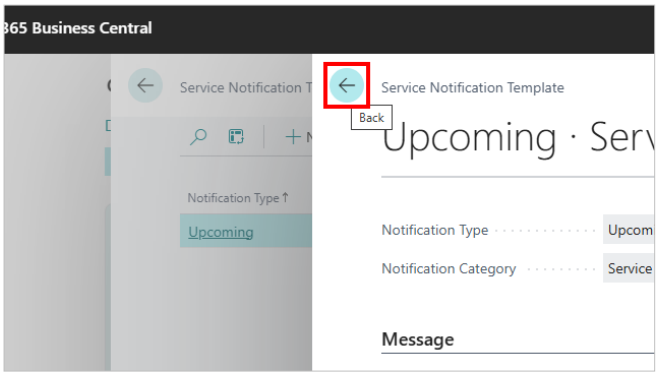


The Footer field specifies content to be added to the footer if the email

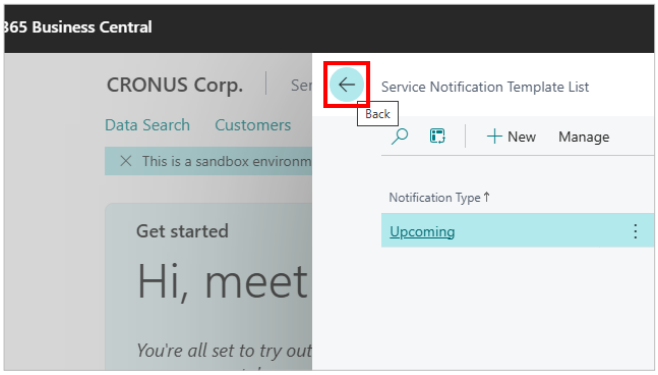
Click on the action toggle **edit/view**



Click on the back button



Click on the back button

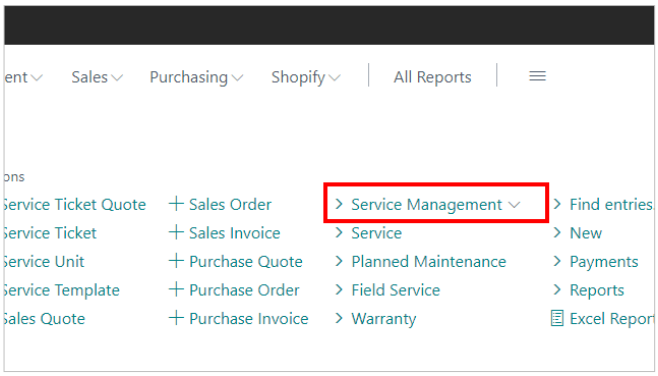


3.11.Field Service

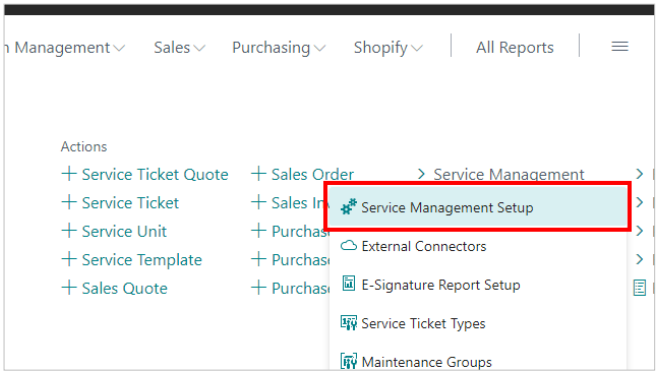
The following demonstrates how to setup and use Field Service Projects

3.11.1. Setup

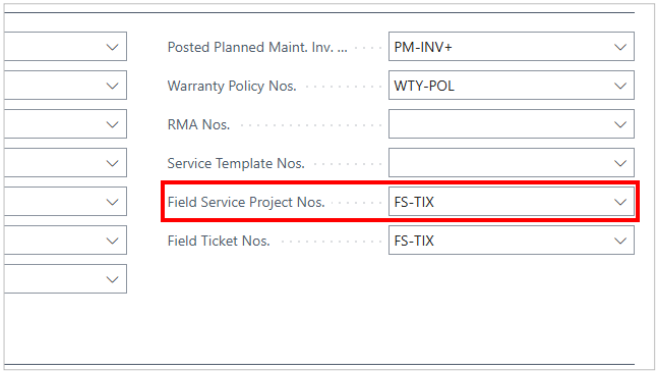
Click on the navigation menu item popup **Service Management**



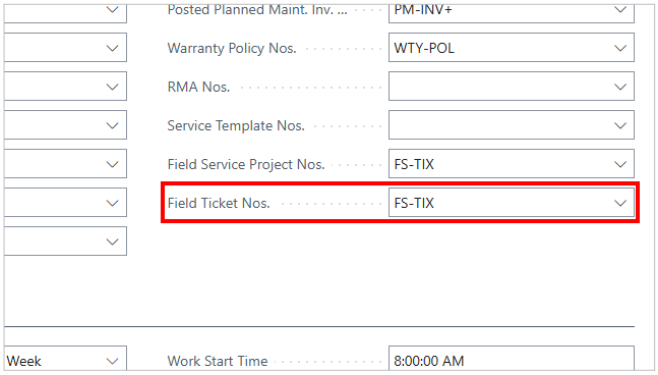
Click on the navigation menu item **Service Management Setup**



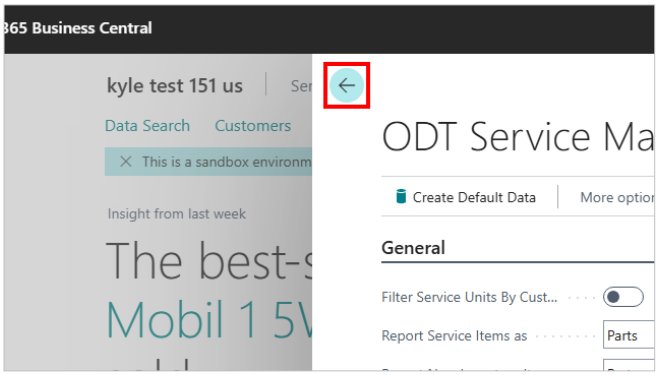
Ensure that the Field Service Project Nos. field is populated



Ensure that the Field Ticket Nos. field is populated

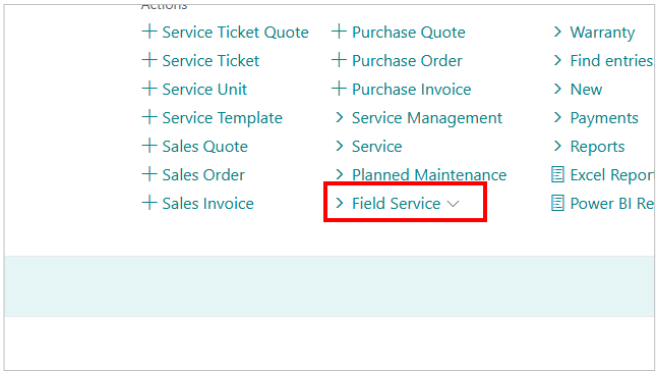


Click on the back button

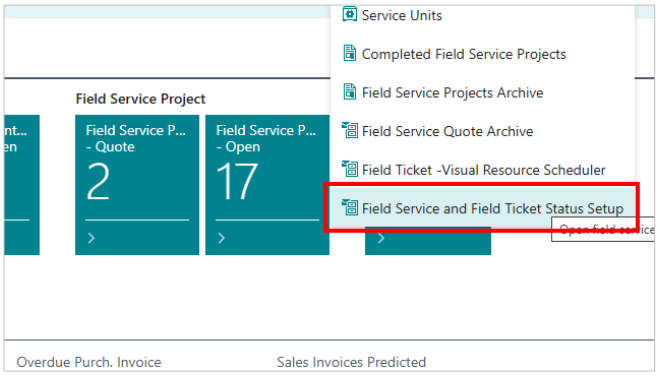


Statuses will also need to be set up for Field Service.

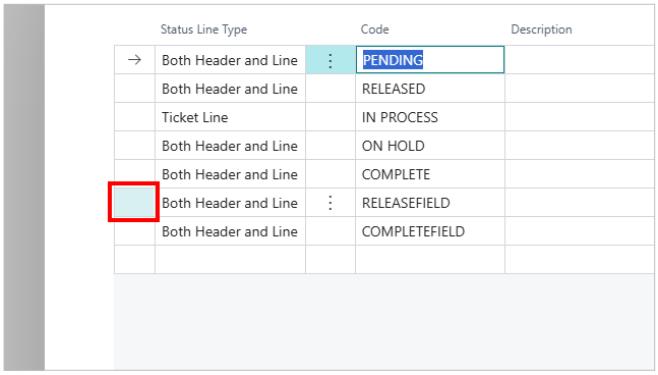
Click on the navigation menu item popup **Field Service**



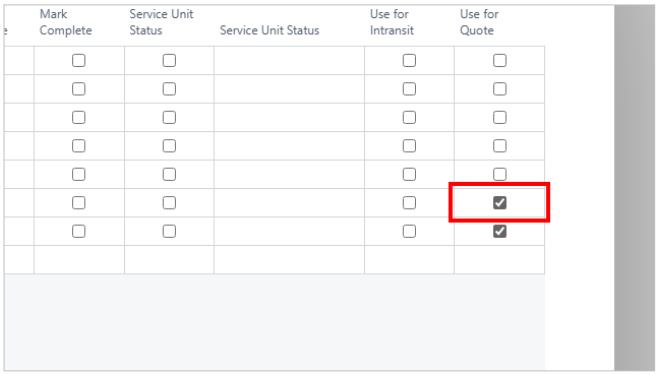
Click on the navigation menu item **Field Service and Field Ticket Status Setup**



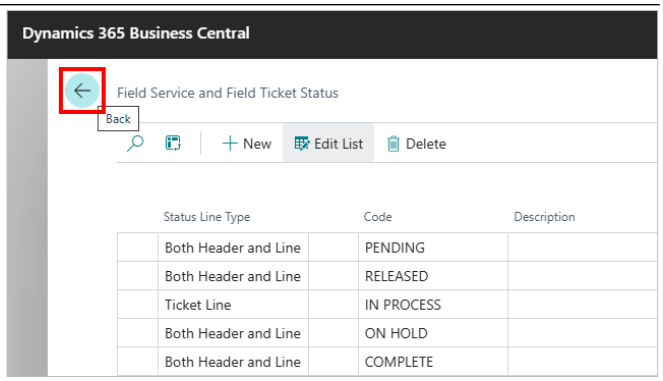
You can create the statuses that will be used for Field Service



Make sure to enable **Use for Quote** for statuses that will be used on Field Service quotes

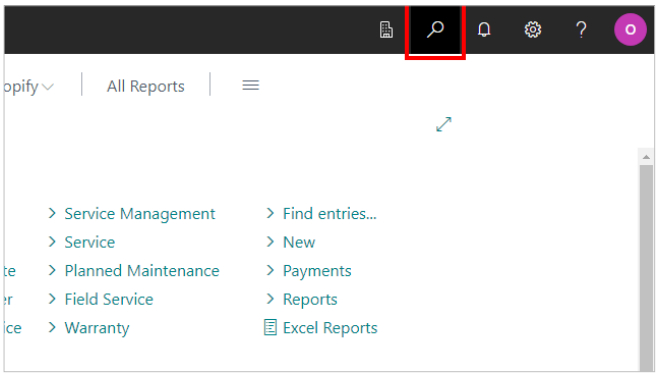


Click on the back button

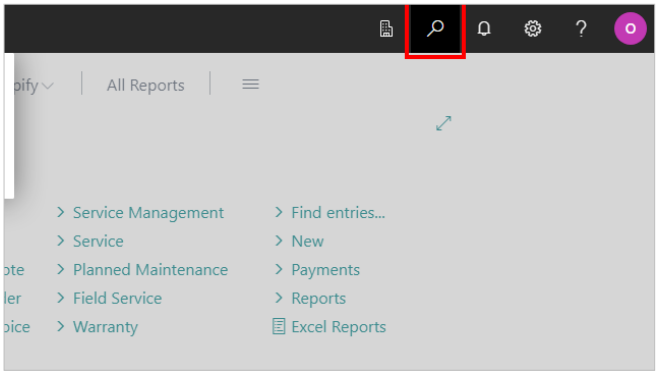


3.11.2. Setup Resources

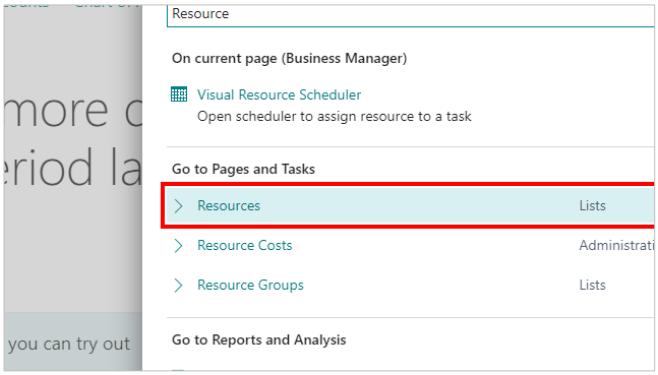
Click on the button **Search**



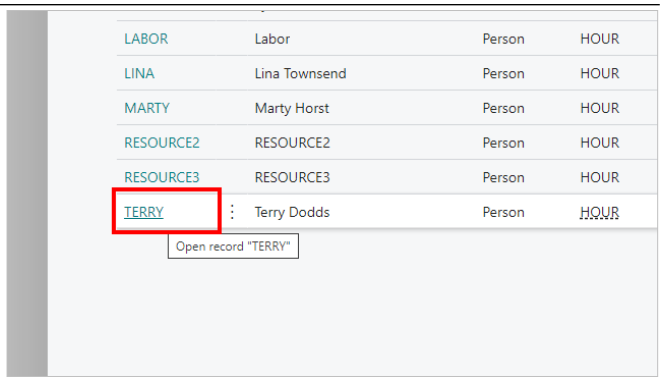
Enter the text **Resource**.



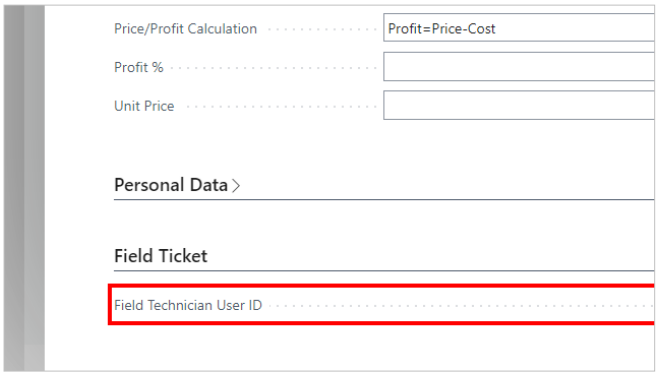
Click on **Resources Lists**



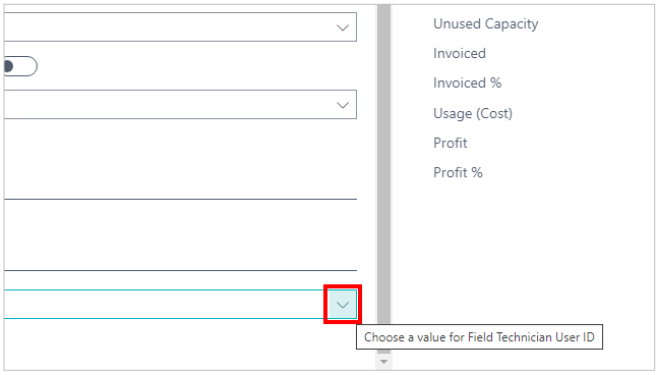
Click on the link in cell **No.** with the value **TERRY**



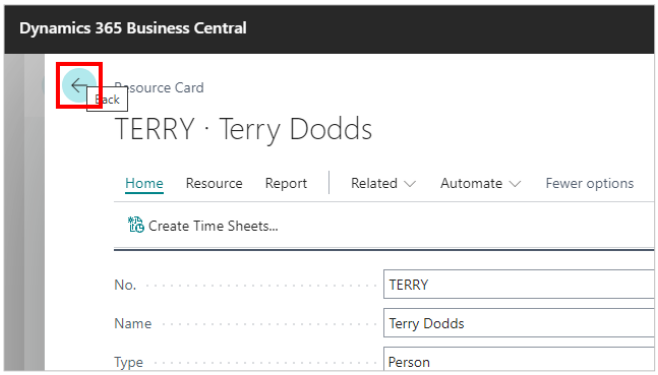
Click on **Field Technician User ID**



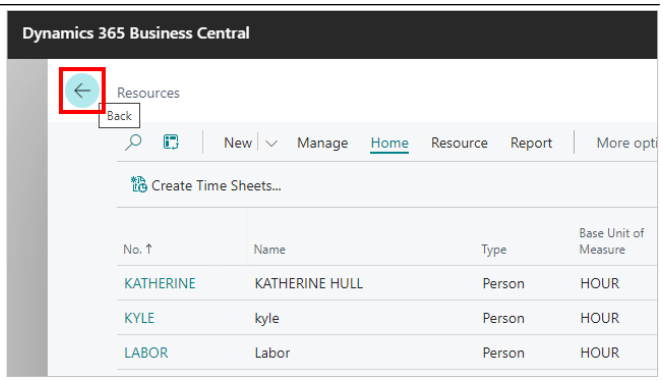
Click on the lookup button **Field Technician User ID**



Click on the back button

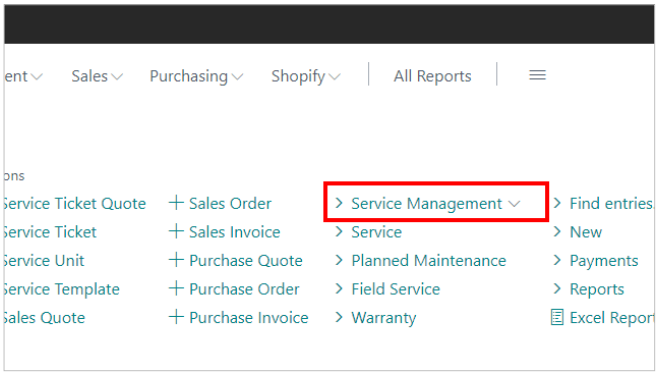


Click on the back button

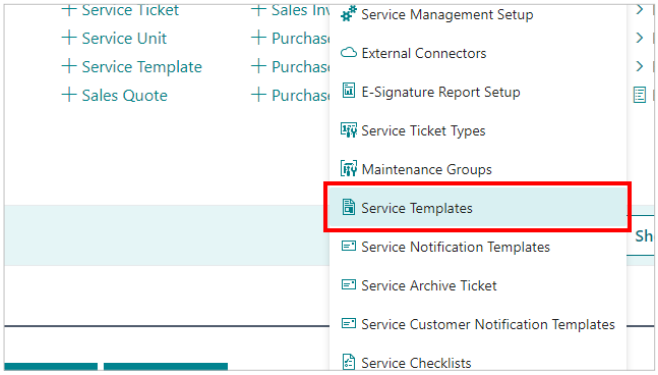


3.11.3. Setup Service Templates

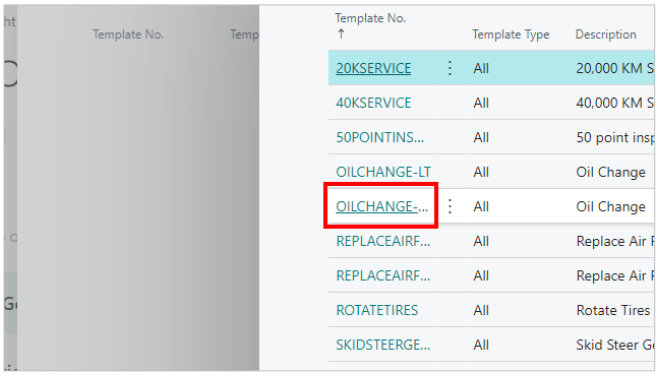
Click on the navigation menu item popup **Service Management**



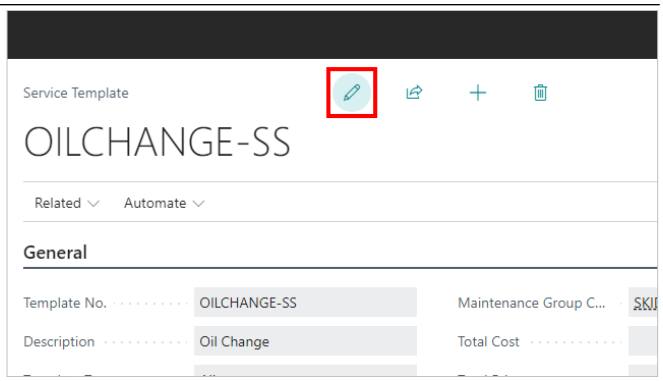
Click on the navigation menu item **Service Templates**



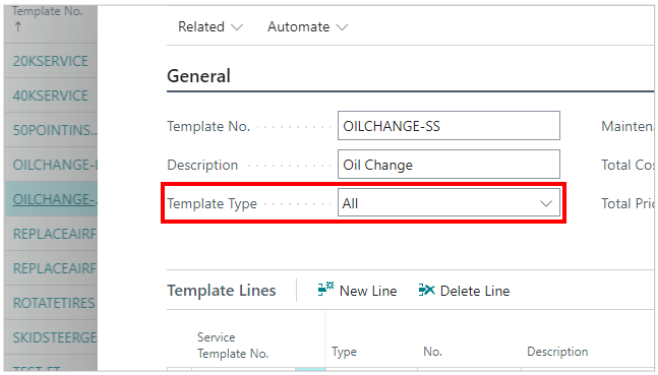
Click on the link in cell **Template No.** with the value **OILCHANGE-SS**



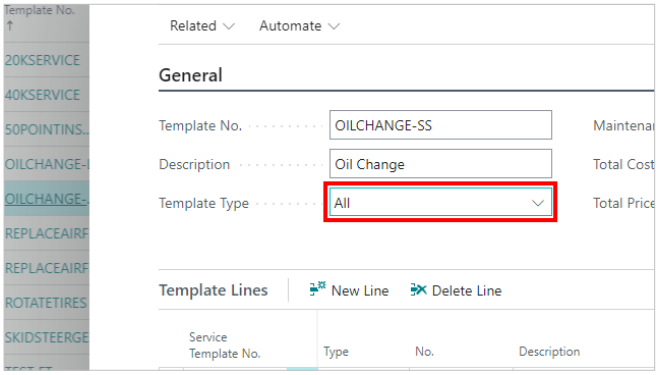
Click on the action toggle **edit/view**



The Template Type field can be used to determine if a template will only apply to field tickets or if it can be used on all tickets.



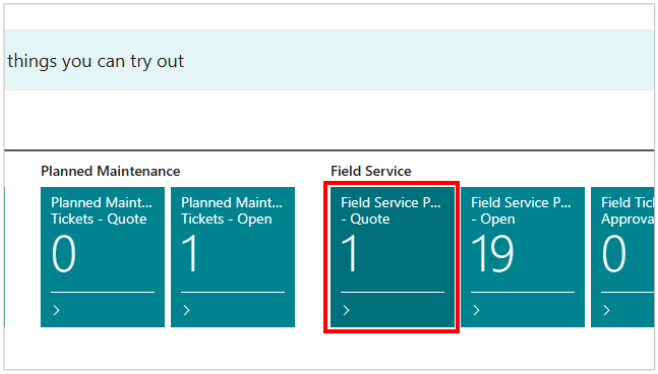
Click on the field **Template Type**



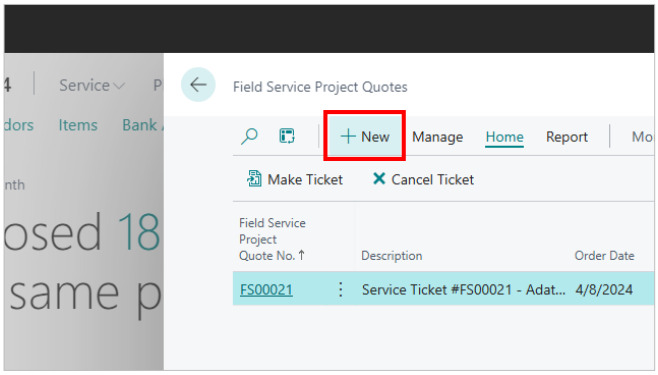
3.11.4. Create and Process Field Service Project

The following demonstrates how to setup and process a Field Service Project

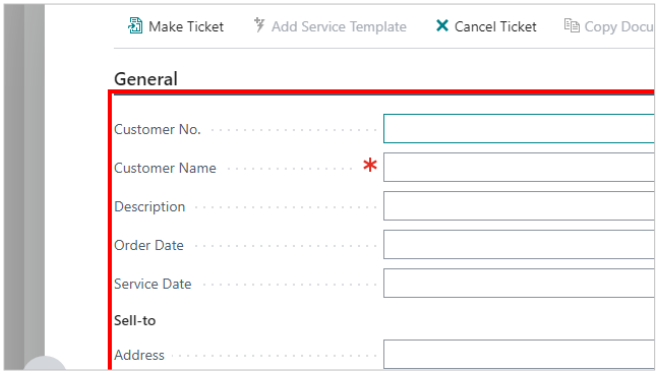
Click on the link **Field Service Projects - Quote Cue**



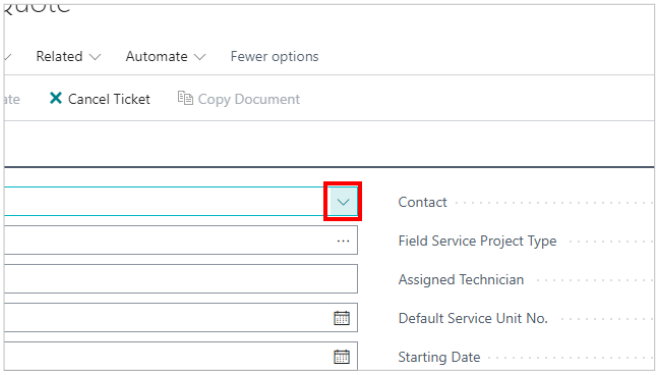
Click on the navigation menu item **New**



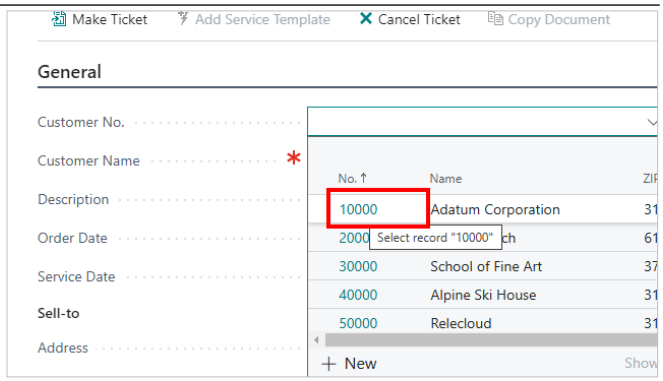
The setup of a Field Service Project Quote is similar to other ticket types



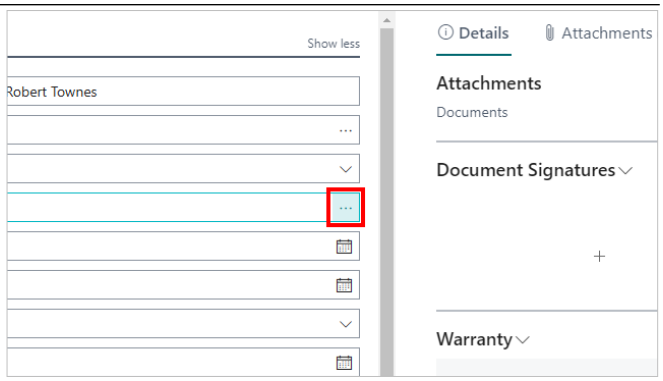
Click on the lookup button **Customer No.**



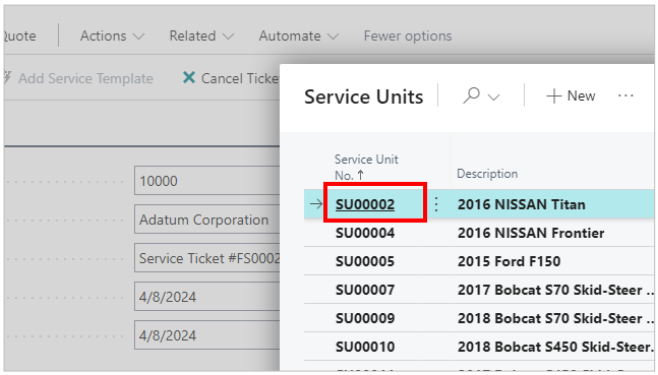
Click on the link in cell **No.** with the value **10000**



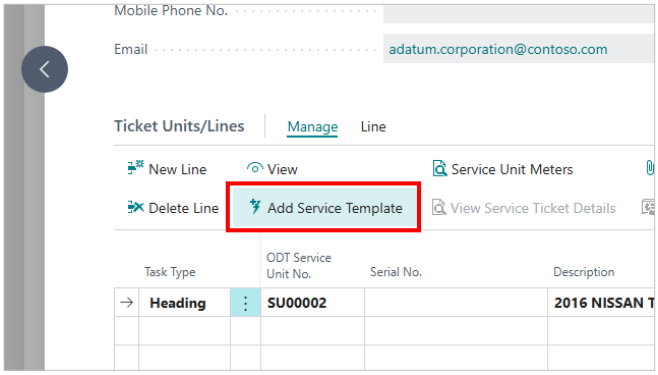
Click on the lookup button **Default Service Unit No.**



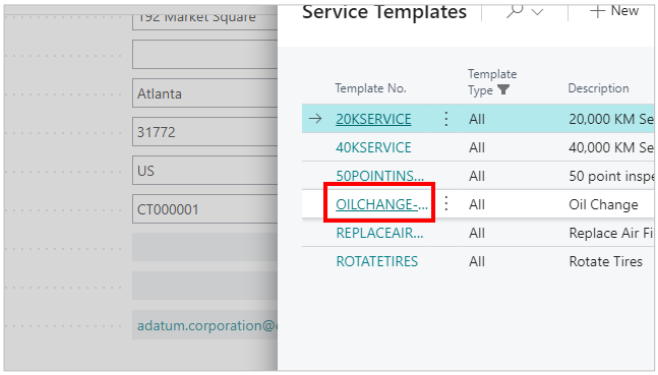
Click on the link in cell **Service Unit No.** with the value **SU00002**



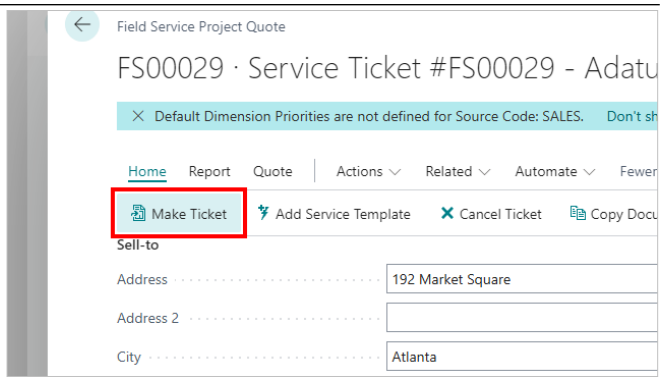
Click on the navigation menu item **Add Service Template**



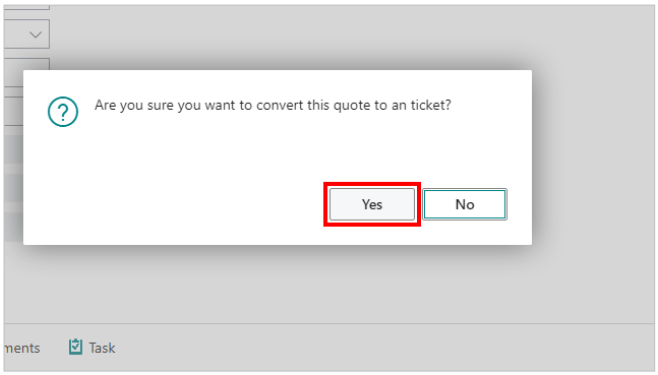
Click on the link in cell **Template No.** with the value **OILCHANGE-LT**



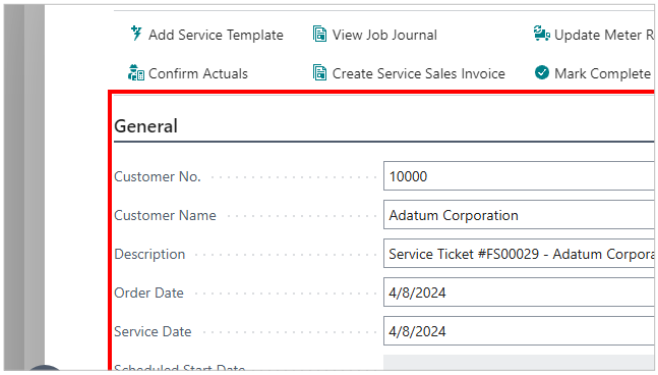
Click on the navigation menu item **Make Ticket**



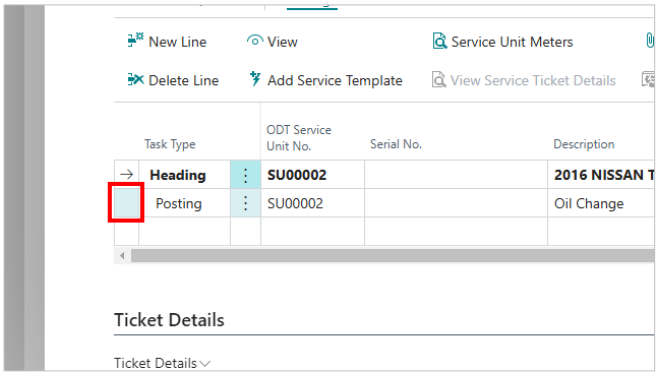
Click on the button **Yes**



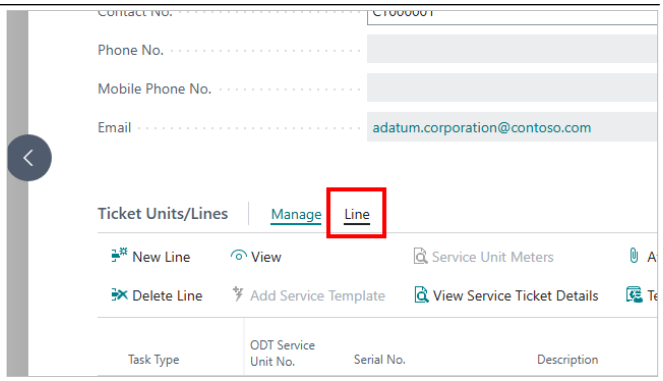
The information from the Field Service Project Quote will default to the new Field Service Project



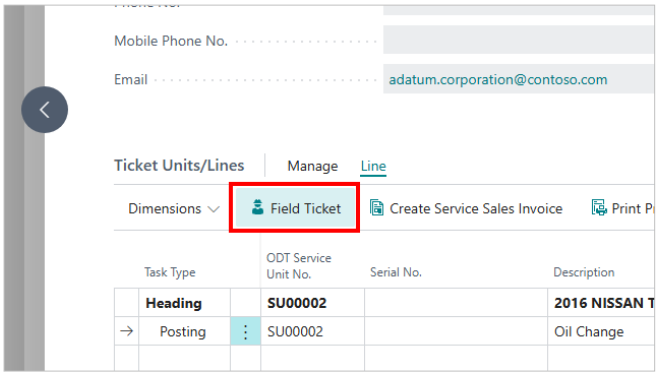
Select the line you want to create a Field Ticket for.



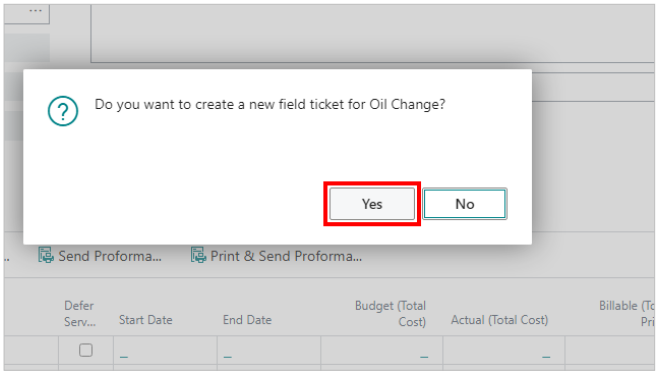
Click on the navigation menu item popup **Line**



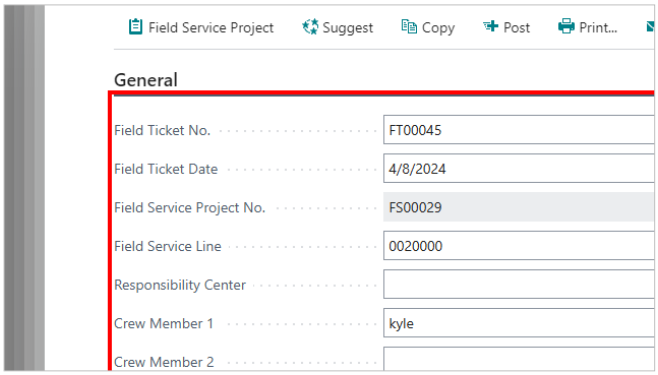
Click on the navigation menu item **Field Ticket**



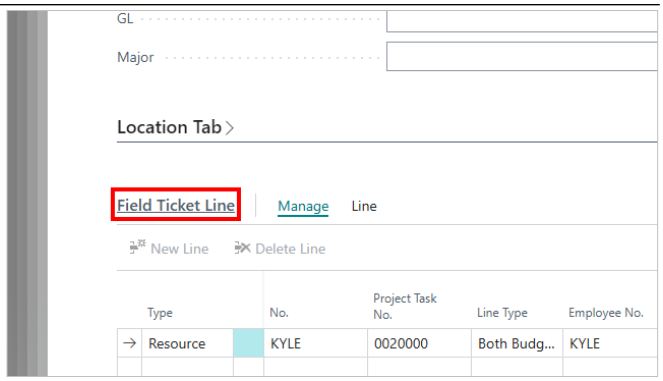
Click on the button **Yes**



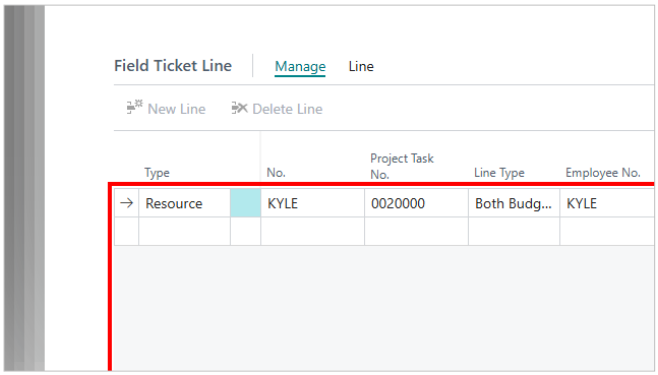
Notice that some of the Field Ticket information has already been filled in. You can adjust these fields as needed.



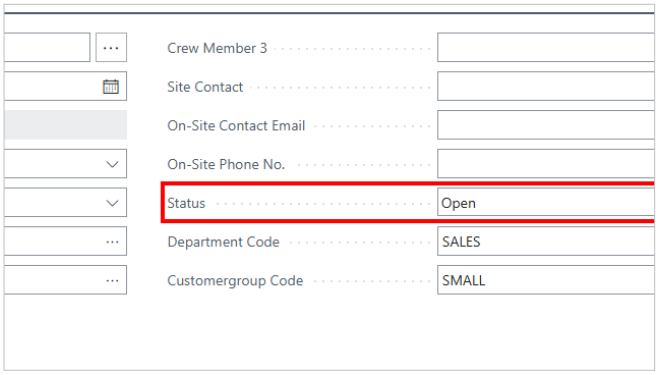
Click on **Field Ticket Line**



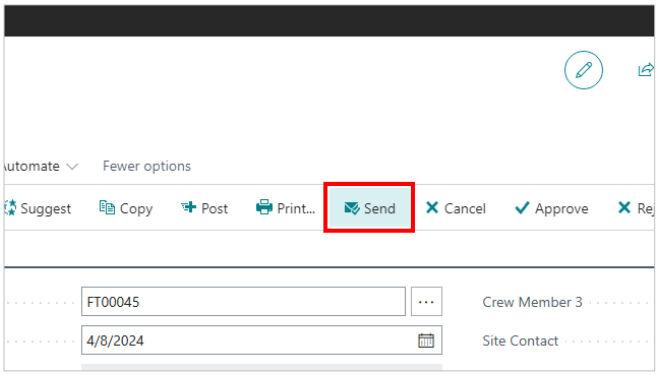
The Field Ticket Lines contains information about the items and resources being used. You can add more lines as needed



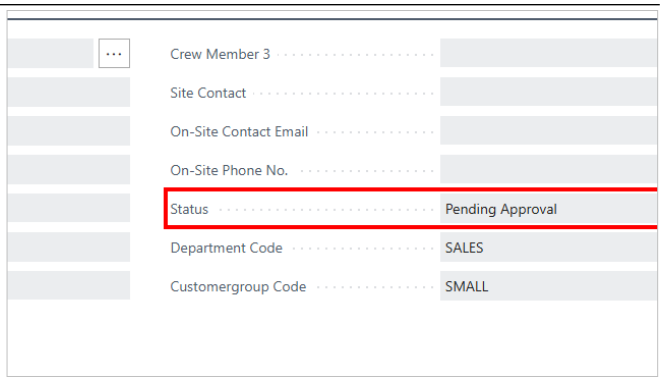
When using the Field Service approval process, notice that the status field says Open



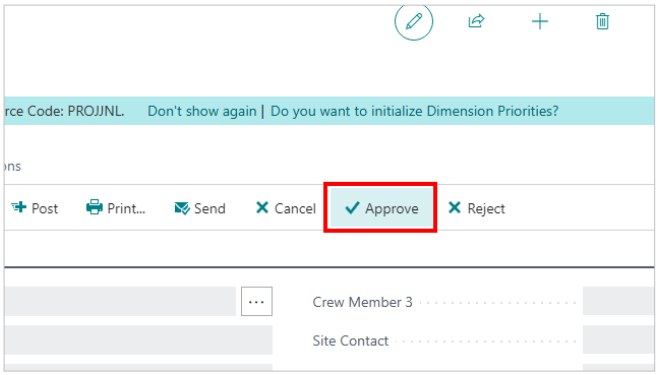
To begin the approval process, first the approval must be sent
Click on the navigation menu item **Send**



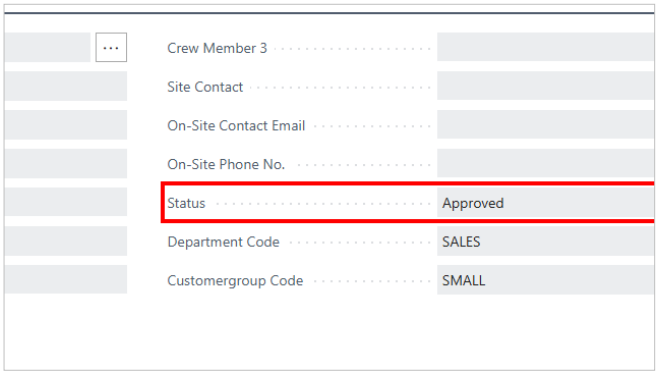
Notice that the status has changed to Pending Approval



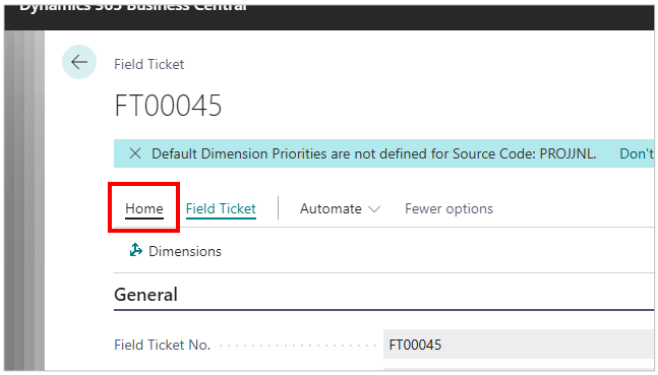
Click on the navigation menu item **Approve**



Notice that the status has changed to Approved

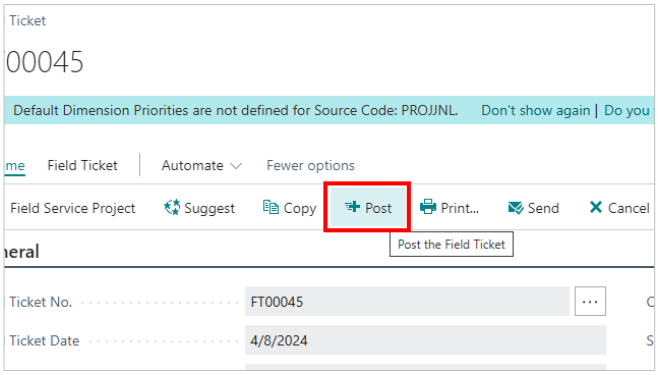


Click on the navigation menu item popup **Home**

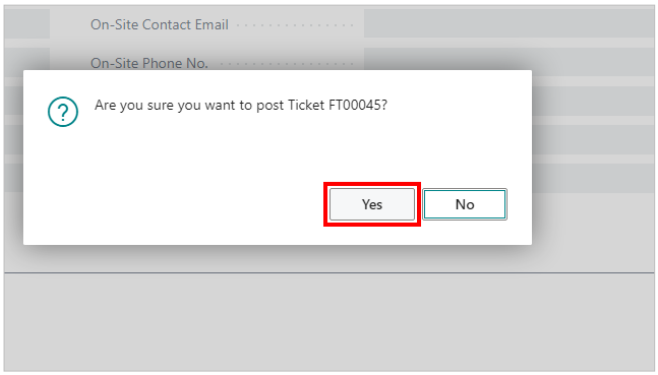


When you are done, the Field Ticket can be posted

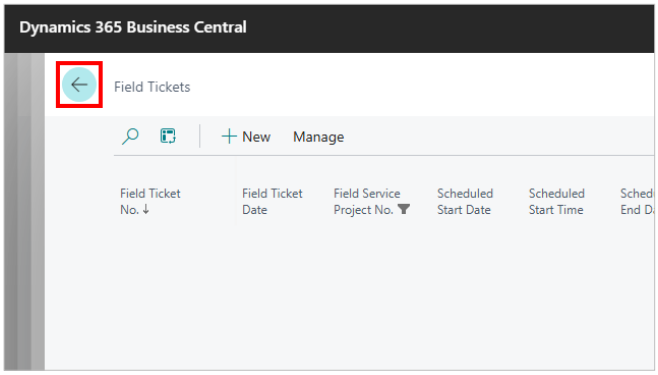
Click on the navigation menu item **Post**



Click on the button **Yes**



Click on the back button



When finished processing Field Tickets, you can process the rest of the Field Service Project the same as you would other ticket types

4. Planned Maintenance

4.1. Planned Maintenance Overview

4.1.1. Planned Maintenance Overview

ODT Service provides the ability to schedule and track maintenance that will be performed at a future date. This can be useful when it is known in advance that service will be required, such as service types that have reoccuring periods or that happen after a specific usage. It can also be useful if service needs to be delayed until a later date.

The Planned Maintenance Worksheet provides an easy way to manage planned maintenance entries. From the worksheet, a user can specify several criteria to filter the list of entries, such as Customer, Maintenance Group, and Service Unit. An entry can then be converted into a Planned Maintenance Ticket for easy processing, or deferred until a later date.

There are two things that must be set up to begin using Planned Maintenance features. Planned Maintenance Schedules must be assigned to Service Groups, and Service Unit Meters must be assigned to Service Units. Planned Maintenance Schedules identify the types of service to be planned and when they are triggered, and Service Unit Meters are used to track when specific Service Units are due for service.

4.2. How to Use the Planned Maintenance Worksheet

4.2.1. Overview

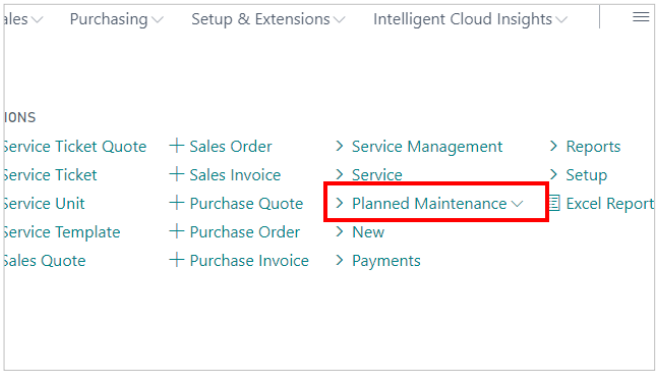
The Planned Maintenance Worksheet provides an easy way to manage Planned Maintenance related activities. Entries can be filtered using criteria such as Service Unit, Maintenance Group, and Customer. The worksheet will display all upcoming planned maintenance for entries fitting the specified criteria and can convert entries into Planned Maintenance Tickets when it is time for service.

4.2.2. How to use the Planned Maintenance Worksheet

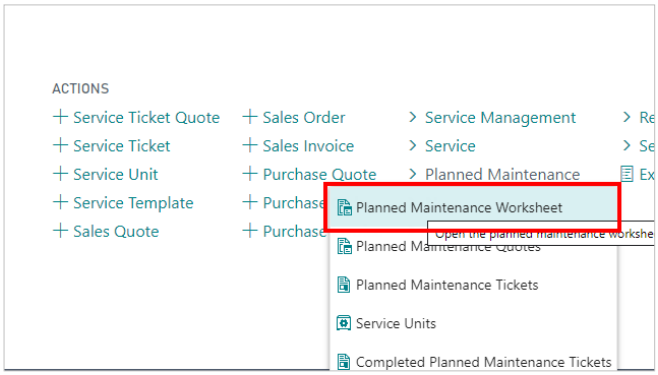
Business Manager Profile

Additional Planned Maintenance Schedules and Service Meters have been created prior to this example.

Click on the navigation menu item popup **Planned Maintenance**

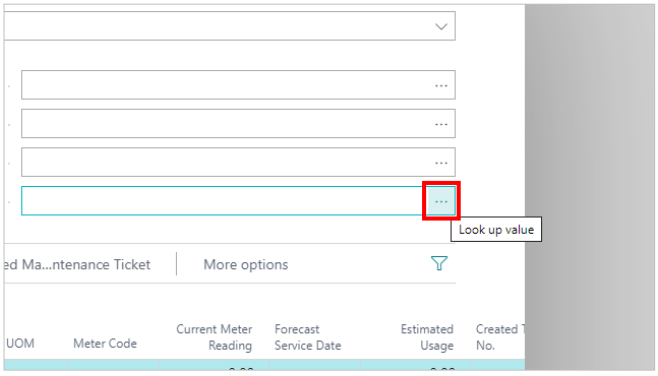


Click on the navigation menu item **Planned Maintenance Worksheet**

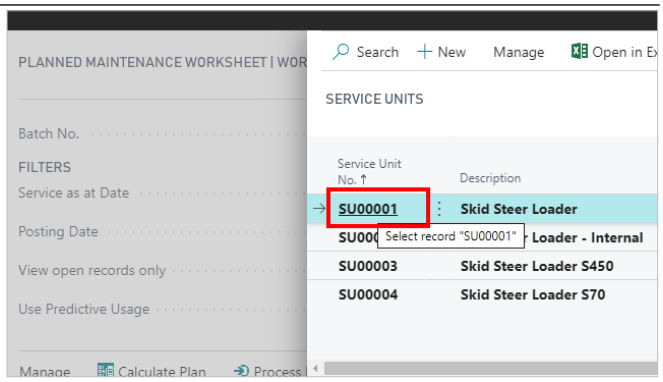


There are a variety of filters that can be used to idenitfy planned maintenance tickets. The following example will use the Service Unit filter.

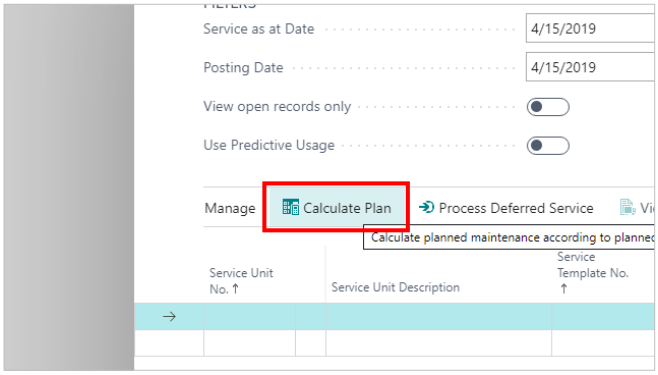
Click on the lookup button **Select Service Unit(s)**



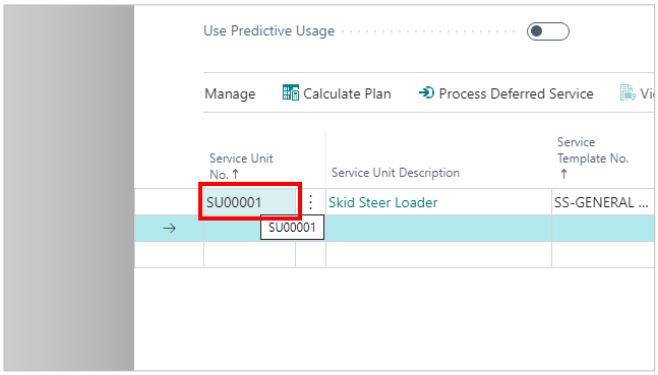
Click on the link in cell **Service Unit No.** with the value **SU00001**



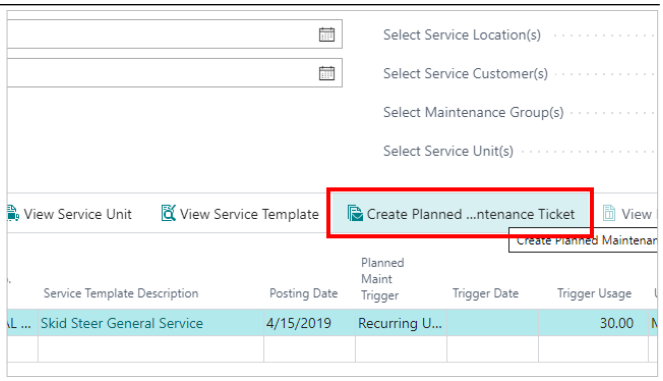
Click on the navigation menu item **Calculate Plan**
Calculate Plan will display all service units that have triggered planned maintenance. Entries will be displayed based on the filters selected.



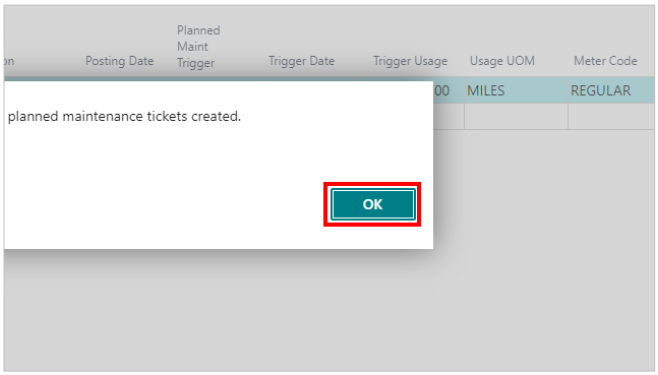
Click on the cell **Service Unit No.** with the value **SU00001**



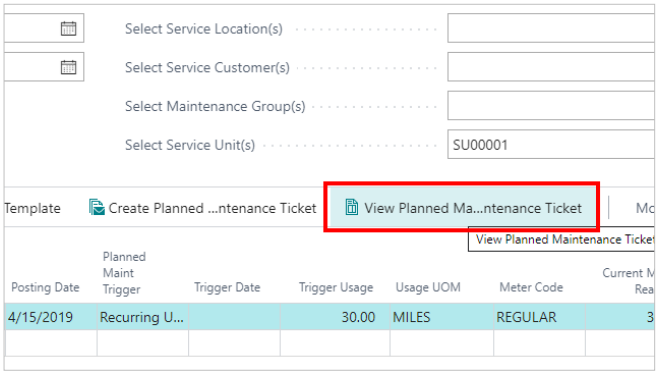
Click on the navigation menu item **Create Planned Maintenance Ticket**
If the selected service unit is already on another open service ticket, a message will be displayed to indicate this and confirm if you want to proceed.



Click on the button **OK**



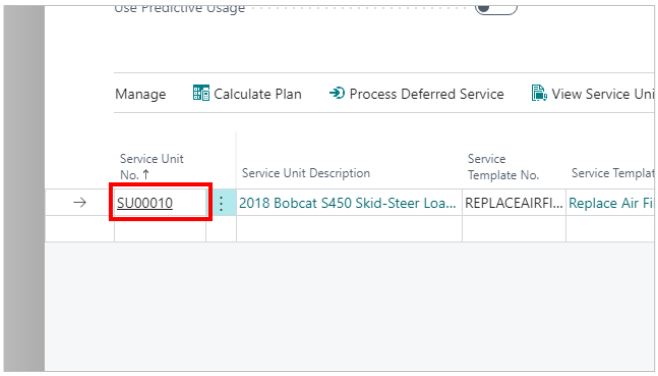
Click on the navigation menu item **View Planned Maintenance Ticket**



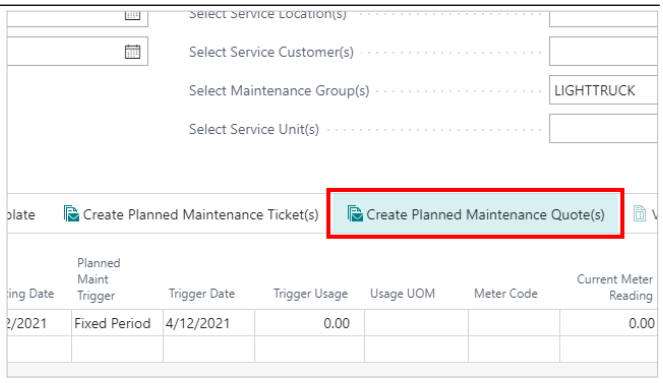
4.2.3. How to create a Planned Maintenance Quote

The following will demonstrate how to create a Planned Maintenance Quote using the Planned Maintenance Worksheet.

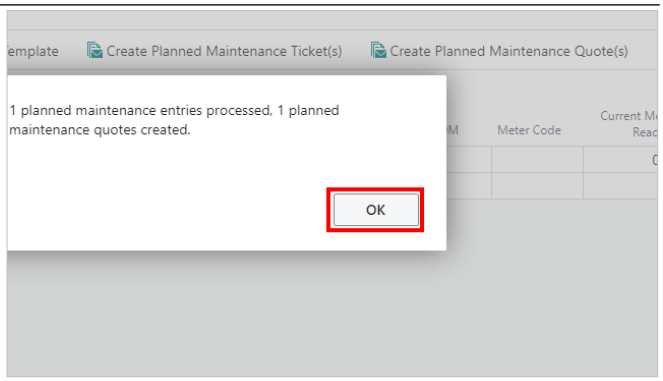
Click on the cell **Service Unit No.** with the value **SU00010**



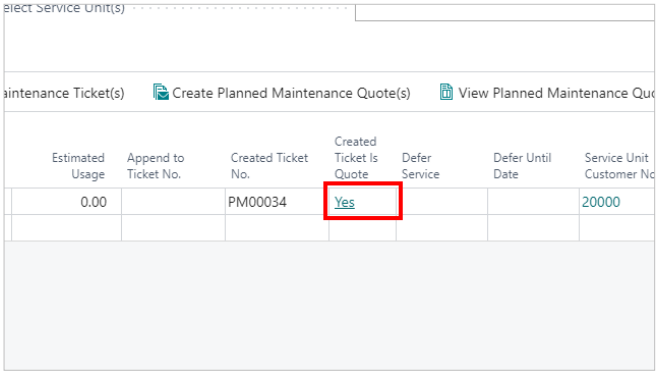
Click on the link **Create a planned maintenance quote for the selected line.**



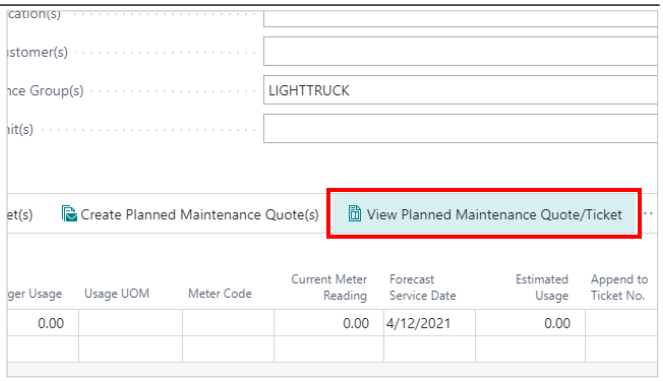
Click on the button **OK**



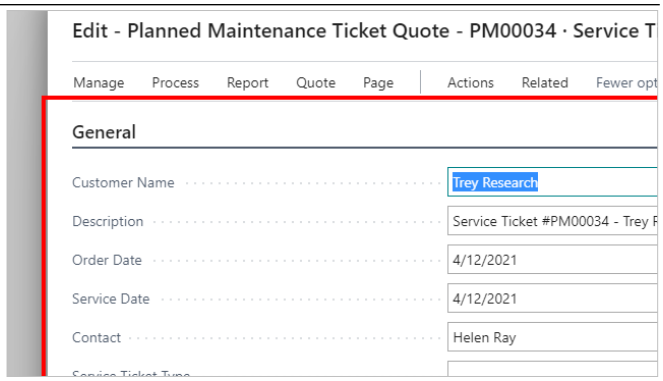
Click on the link in cell **Created Ticket Is Quote** with the value **Yes**
The Created Ticket is Quote field will be changed to indicate that the selected unit is now part of a Planned Maintenance Quote.



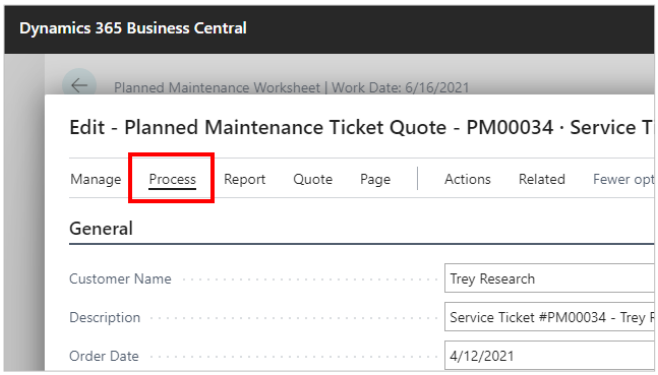
Click on the navigation menu item **View Planned Maintenance Quote/Ticket**



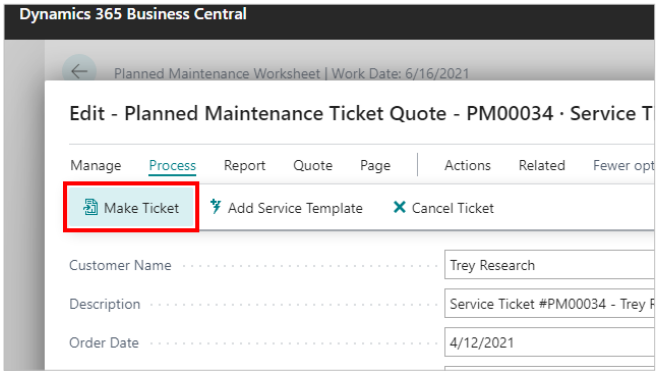
When you are finished reviewing the quote, it can be converted into a Planned Maintenance Ticket.



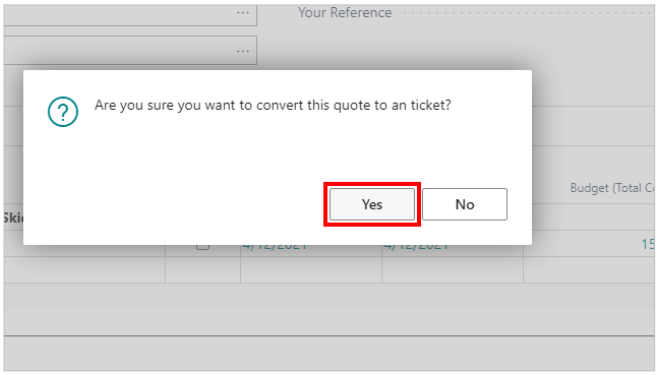
Click on the navigation menu item popup **Process**



Click on the navigation menu item **Make Ticket**



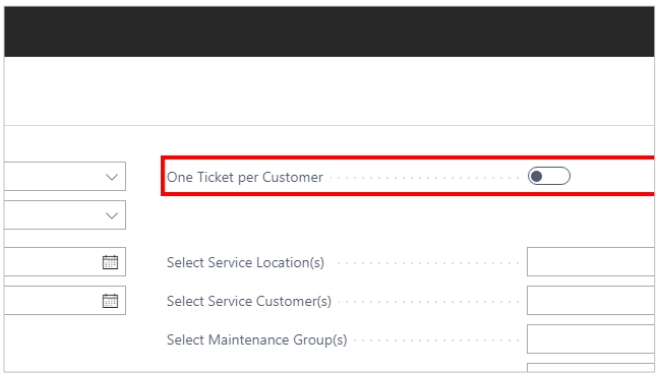
Click on the button **Yes**



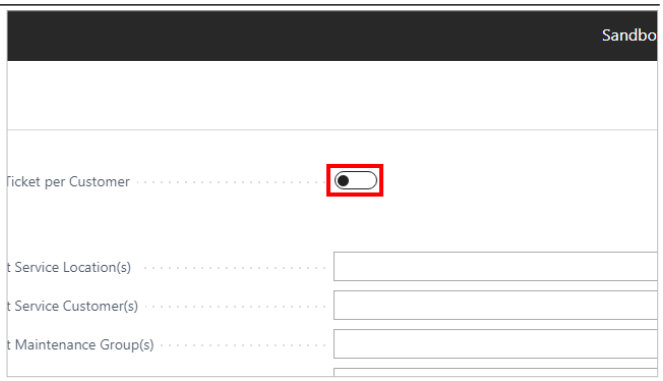
4.2.4. How to use One Ticket Per Customer

One Ticket Per Customer allows you to add multiple Planned Maintenance lines to a single ticket. The units selected must belong to the same customer.

Click on **One Ticket per Customer**



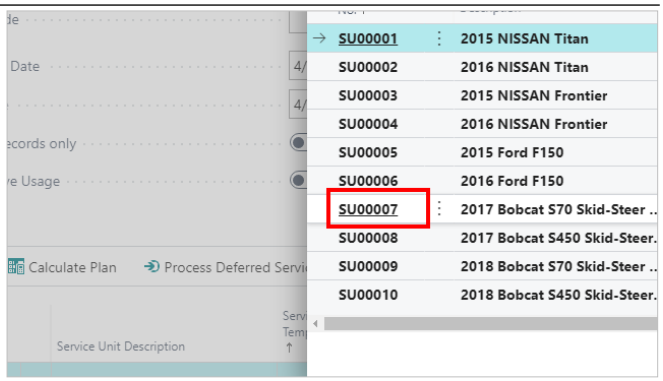
Click on the toggle field **One Ticket per Customer**



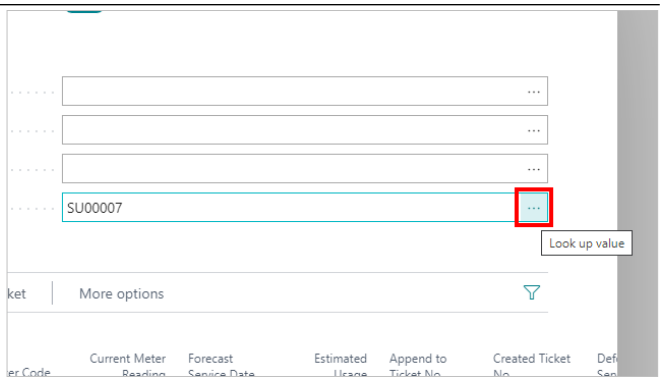
To demonstrate One Ticket Per Customer we must select two different Service Units.

Click on the lookup button **Select Service Unit(s)**

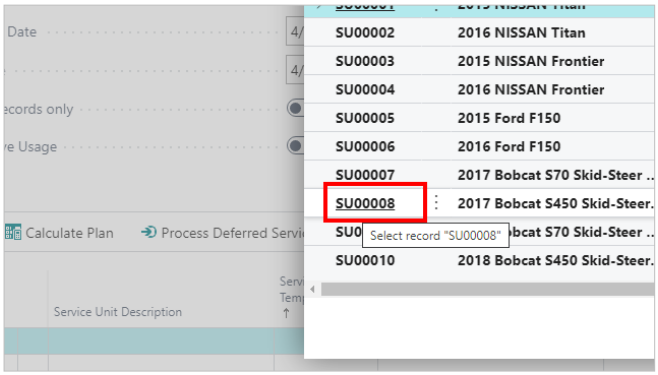
Click on the link in cell **Service Unit No.** with the value **SU00007**



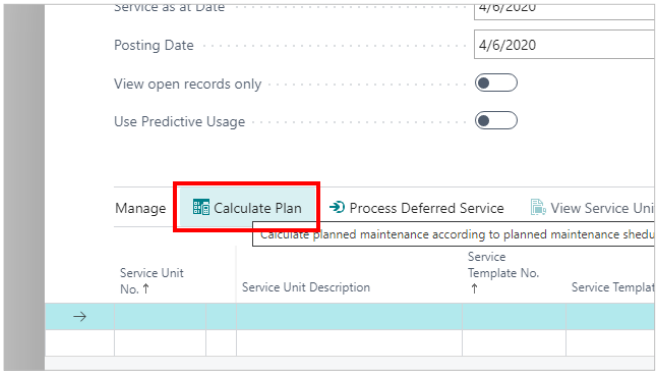
Click on the lookup button **Select Service Unit(s)**



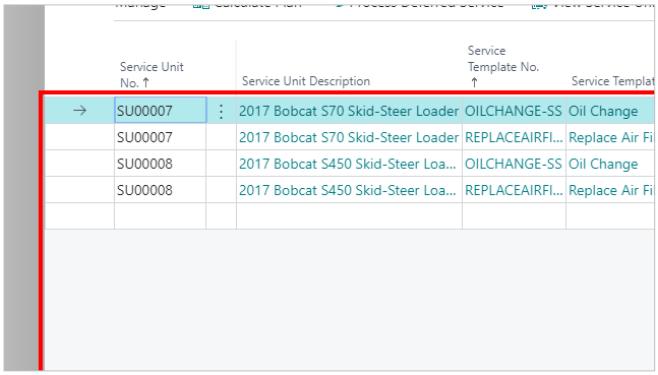
Click on the link in cell **Service Unit No.** with the value **SU00008**



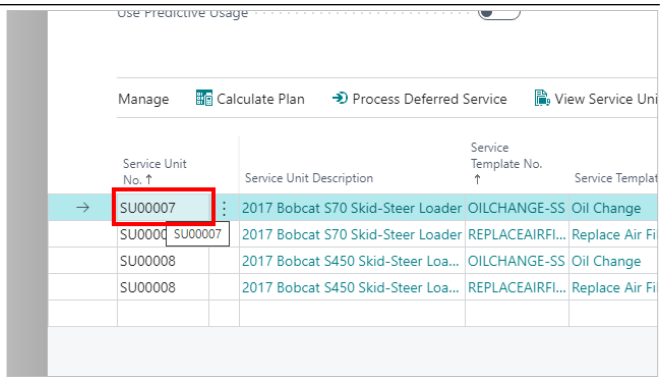
Click on the navigation menu item **Calculate Plan**



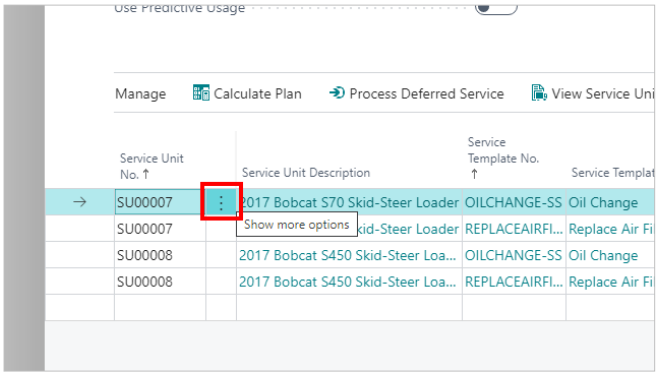
The selected units both belong to the same customer. Since they are both due for an oil change, we will select the two service lines for oil change.



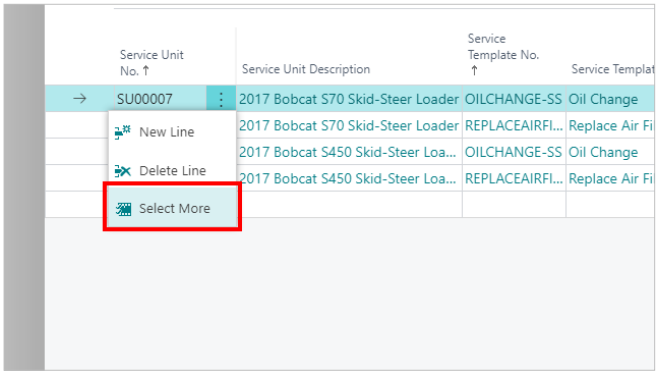
Click on the cell **Service Unit No.** with the value **SU00007**



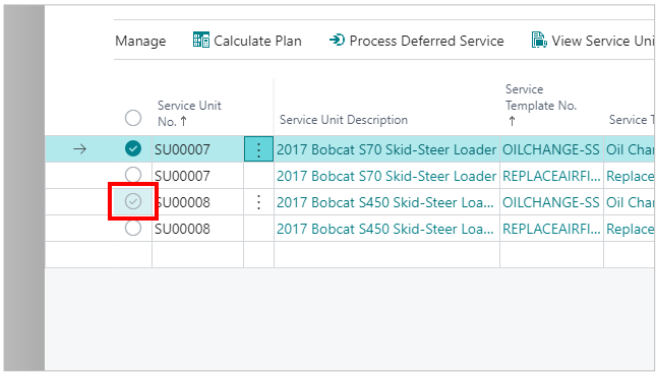
Click on the row menu button



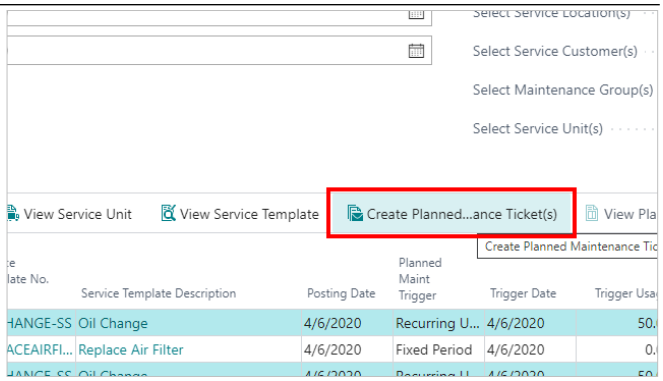
Click on the menu item **Select More**



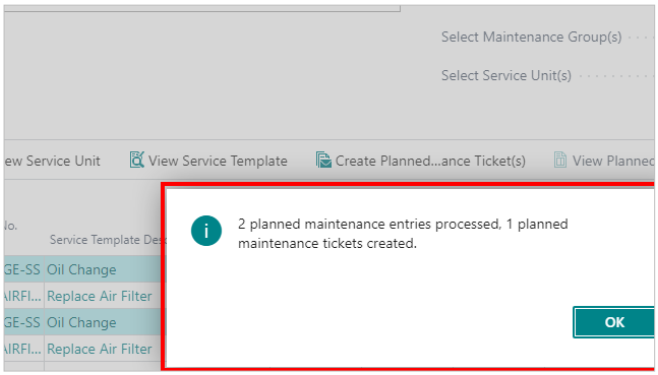
Select the service line for Oil Change for both units.



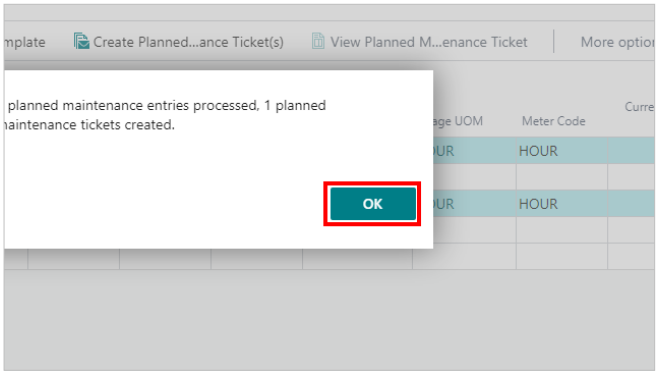
Click on the navigation menu item **Create Planned Maintenance Ticket(s)**



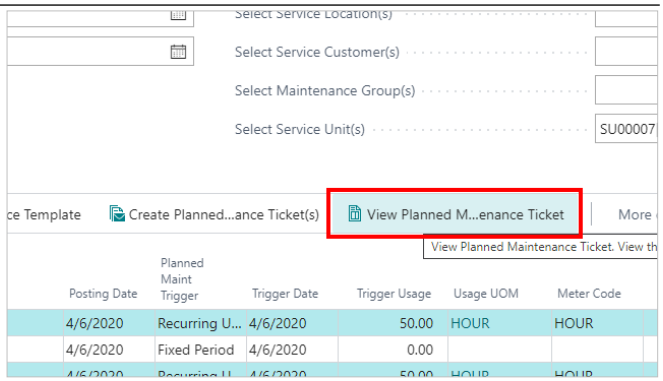
Notice that only 1 ticket has been created after selecting both lines.



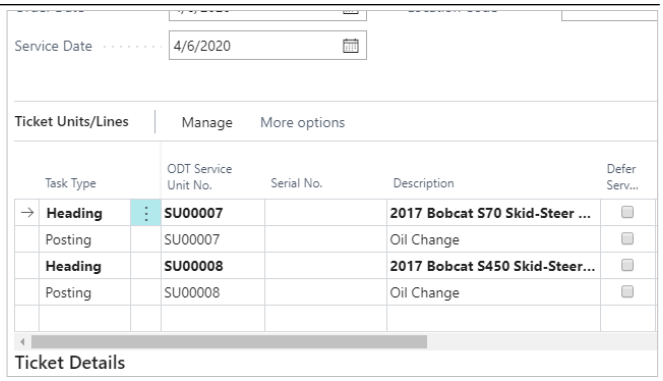
Click on the button **OK**



Click on the navigation menu item **View Planned Maintenance Ticket**



Notice that the ticket that was created now has lines for both of the selected Service Units.



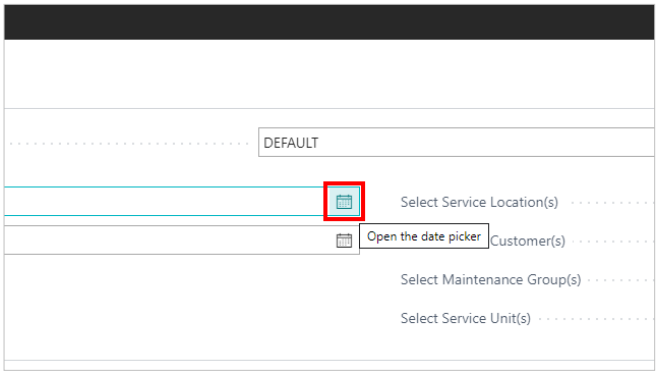
4.2.5. How to use Predictive Usage

Predictive usage provides a way to plan service by predicting when a Service Meter on a Service Unit is expected to trigger. This allows a user to anticipate future service activities and plan accordingly.

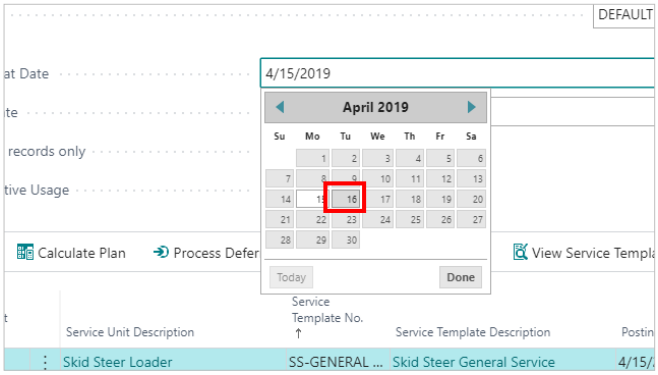
The following demonstrates using Predictive Usage.

Business Manager Profile

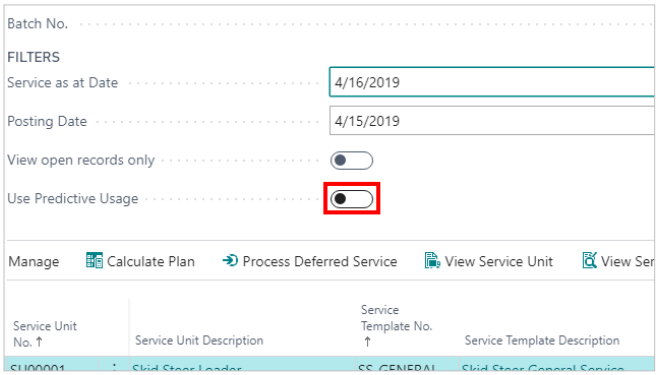
Click on the link **Open the date picker**



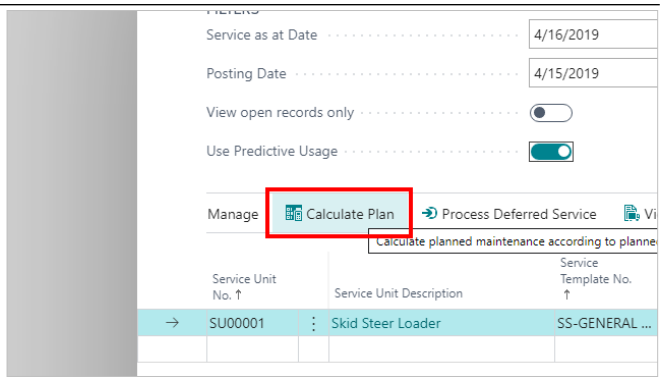
Change the date to April 16, 2019.



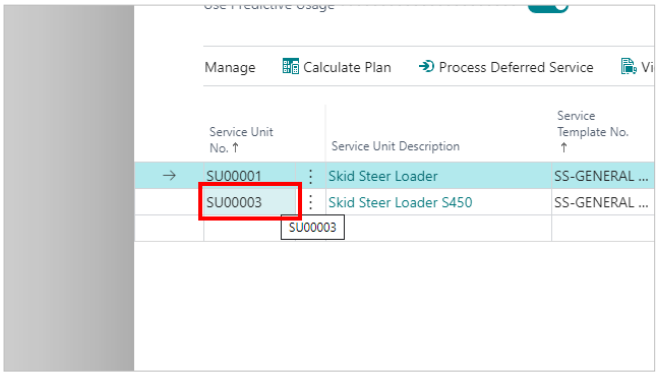
Click on the toggle field **Use Predictive Usage**



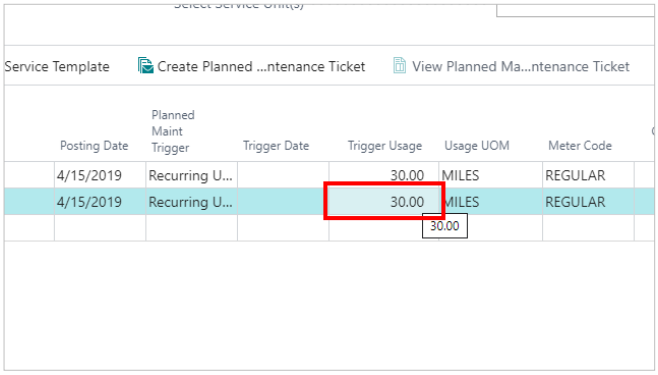
Click on the navigation menu item **Calculate Plan**



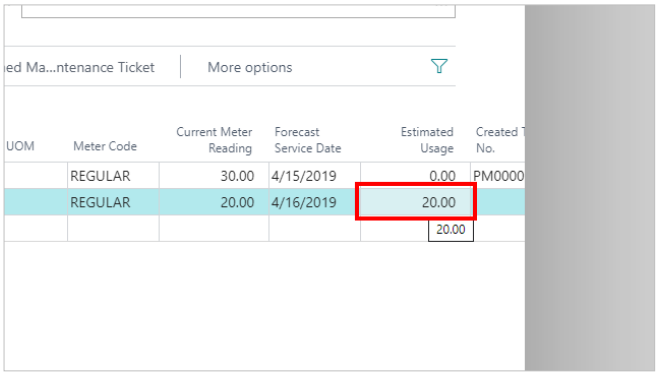
In addition to the entry from the previous example, a second entry now appears for Skid Steer General Service. Predictive Usage has determined that this will trigger during the specified time period.



Trigger usage displays the amount of usage required to trigger the Service Meter. In this example, the amount is 30 hours.



Estimated Usage displays the amount of usage that is predicted to occur in the specified time period. In this example, the Service Unit will accrue 20 hours during the time period.



Since the predicted usage during the time period is estimated to be more than what is required to trigger the Service Meter, an entry for the required service is displayed.

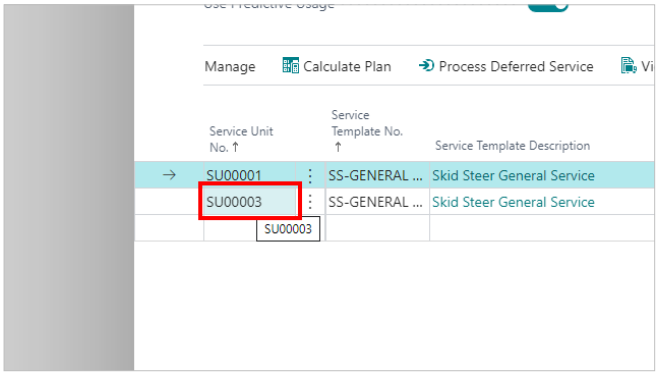
At this point you may create a Planned Maintenance Ticket in the same way as you would for any entry on the Planned Maintenance Worksheet.

4.2.6. How to Defer Service

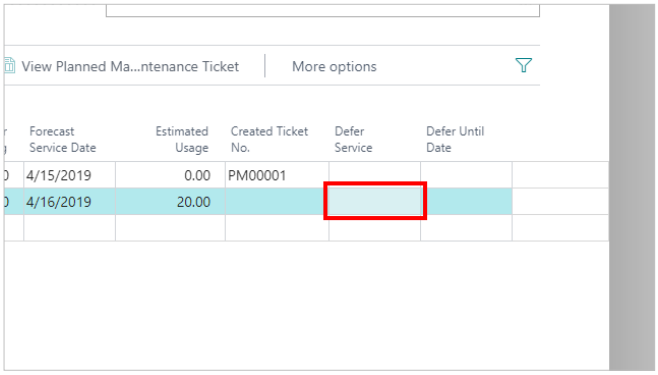
The following demonstrates how to defer service for a Planned Maintenance entry.

Business Manager Profile

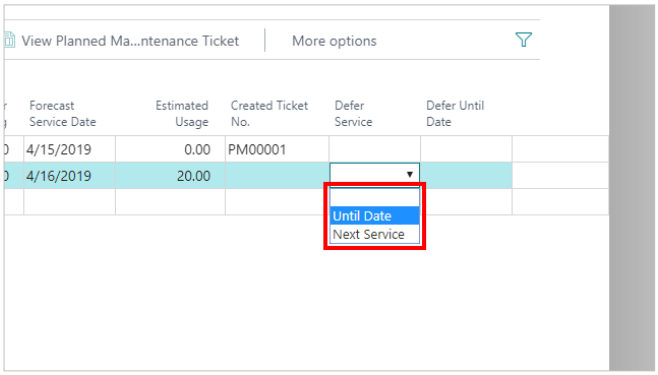
Click on the cell **Service Unit No.** with the value **SU00003**



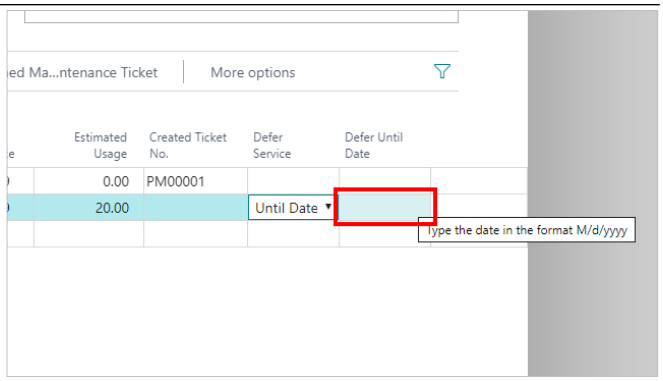
Click on the cell **Defer Service** with the value **Until Date Next Service**



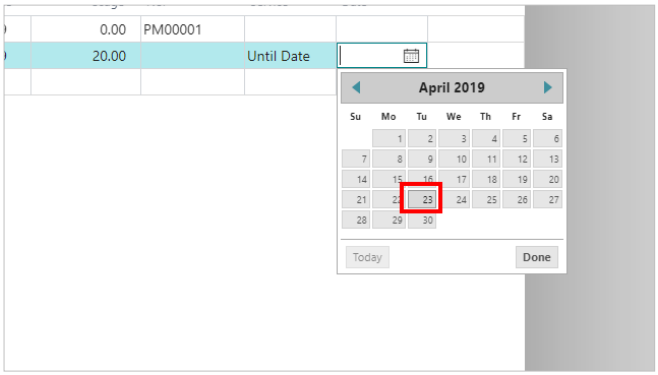
Click on the item **Until Date** in the list



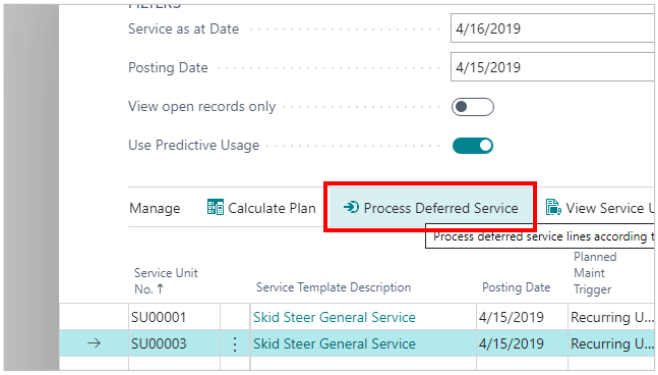
Click on the cell **Defer Until Date**



Select the date to April 23, 2019

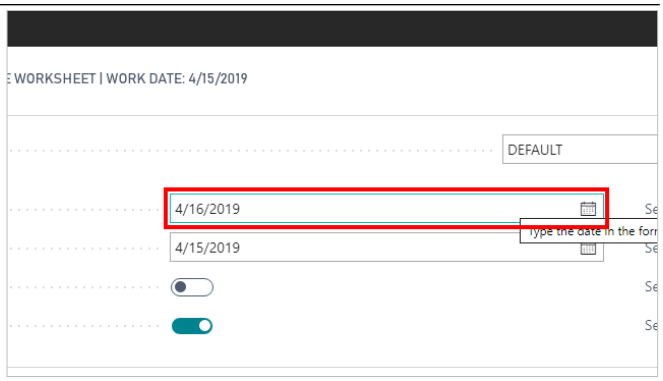


Click on the navigation menu item **Process Deferred Service**

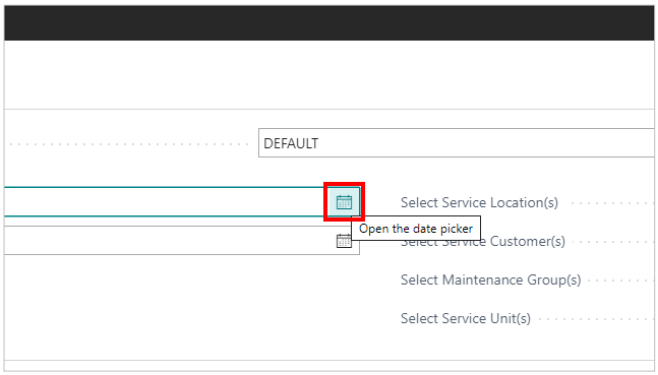


After clicking Process Deferred Service, the selected entry is removed from the current batch.

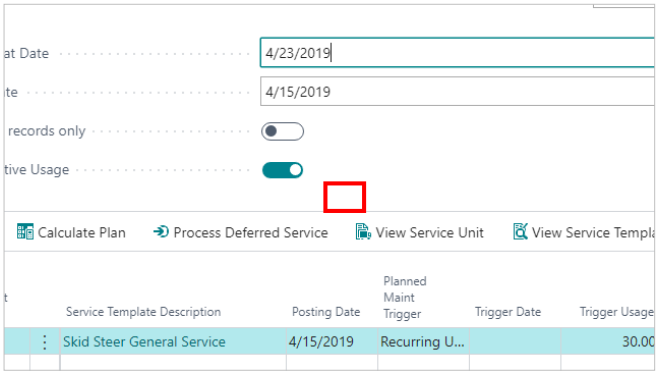
To view the deferred entry, simply change the Service Date to the date of deferal.
Click on the field **Service as at Date**



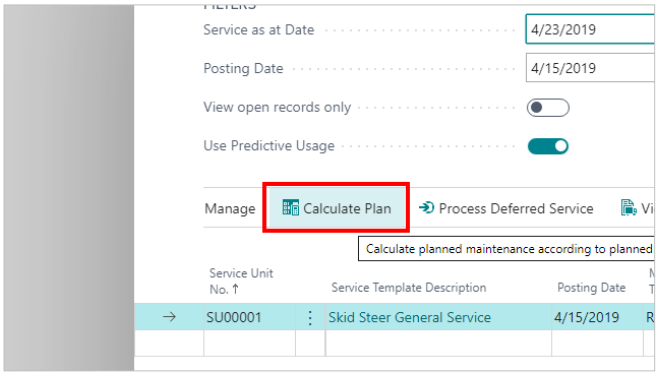
Click on the link **Open the date picker**



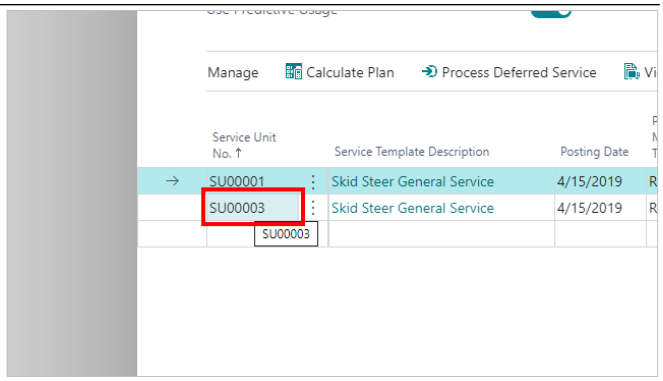
Change the date to April 23, 2019



Click on the link **Calculate planned maintenance according to planned maintenance shedules that have been set up.**



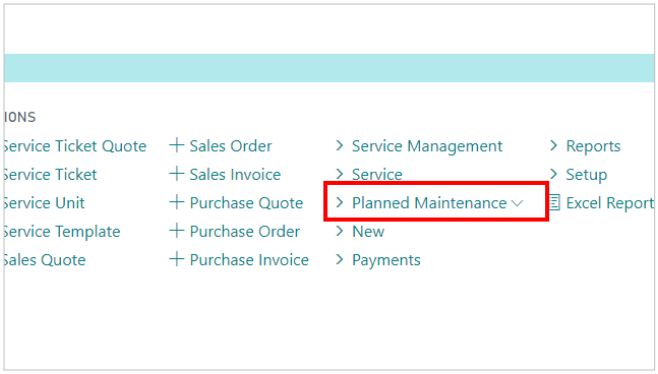
Since the service date has been changed, Calculate Plan will now display the deferred entry.



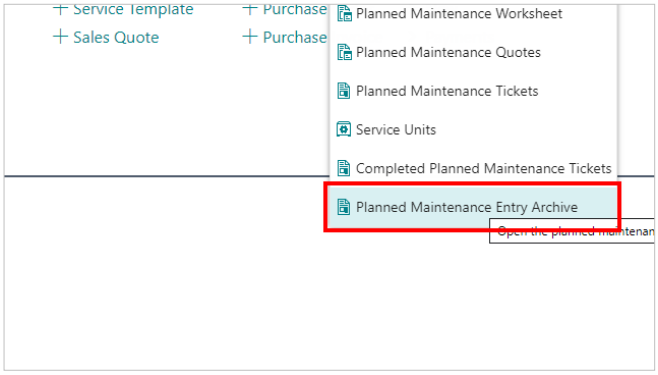
4.2.7. How to View the Planned Maintenance Entry Archive

Business Manager Profile

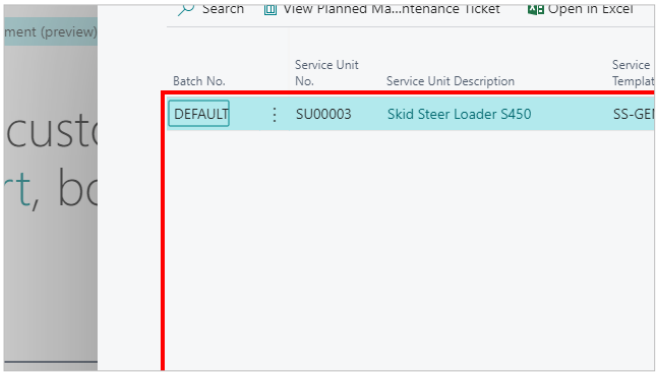
Click on the navigation menu item popup **Planned Maintenance**



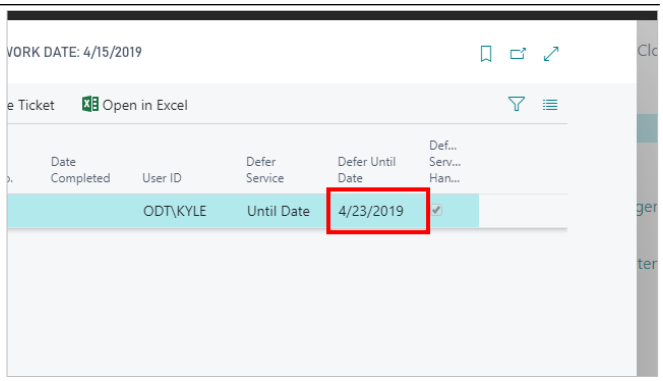
Click on the navigation menu item **Planned Maintenance Entry Archive**



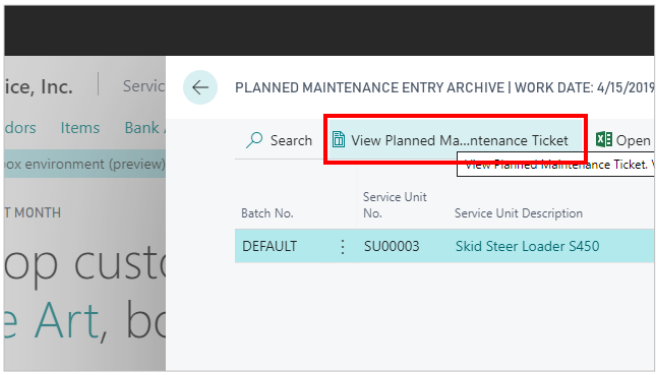
The archive will display a list of all tickets that have been processed using the Planned Maintenance Worksheet.



Click on the cell **Defer Until Date** with the value **4/23/2019**



Click on the navigation menu item **View Planned Maintenance Ticket**
If an entry has a Planned Maintenance Ticket assigned to it, you can view it by clicking the View Completed Planned Maintenance Ticket button.



4.3. How to Process Planned Maintenance Quotes

4.3.1. Overview

A Planned Maintenance Quote can be created:

• From the main menu option, Planned Maintenance, by selecting Planned Maintenance Quotes, which opens the Planned Maintenance Quote list where New can be selected.
• From the Actions section of the profile, select Planned Maintenance, then Planned Maintenance Quote.

• From the Activities Cue, Planned Maintenance Quote, then select New.

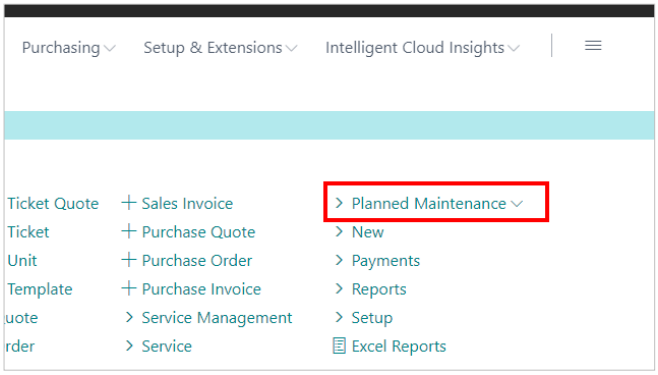
Upon approval from the customer, the Planned Maintenance Quote should be converted into a Planned Maintenance Ticket.

4.3.2. How to create a Planned Maintenance Quote

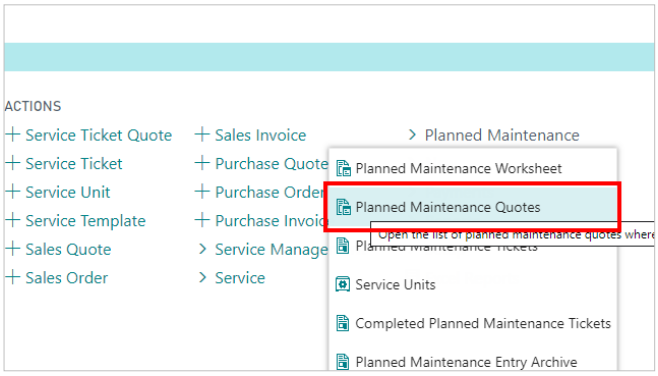
The following demonstrates the creation of a Planned Maintenance Quote.

Business Manager Profile

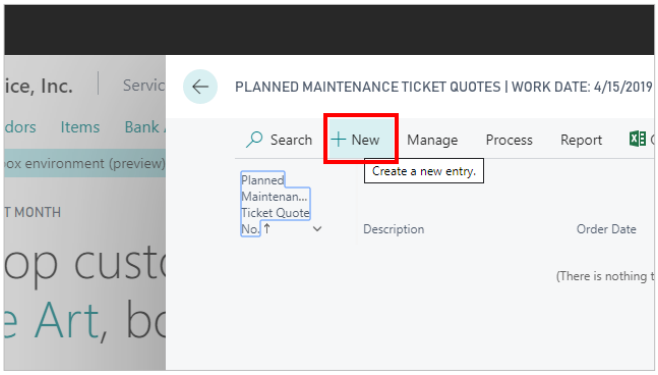
Click on the navigation menu item popup **Planned Maintenance**



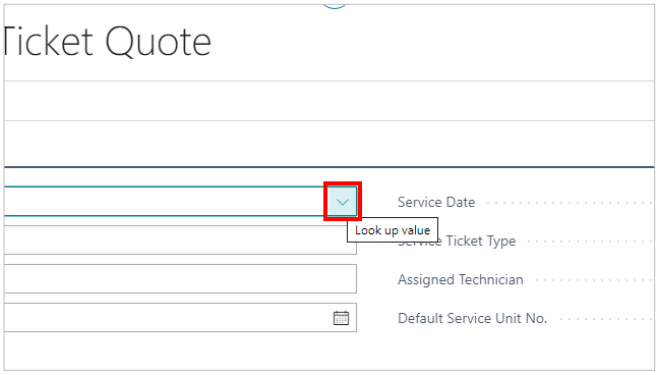
Click on the navigation menu item **Planned Maintenance Quotes**



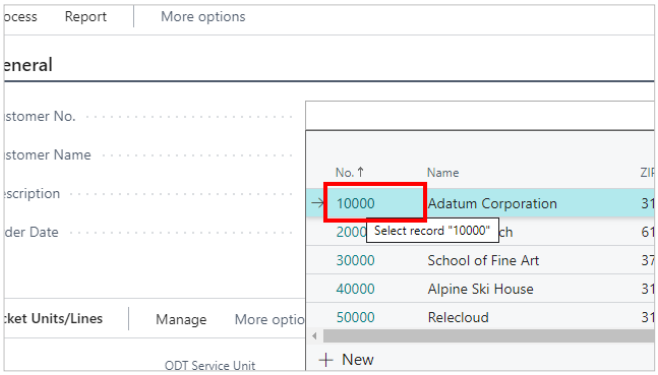
Click on the navigation menu item **New**



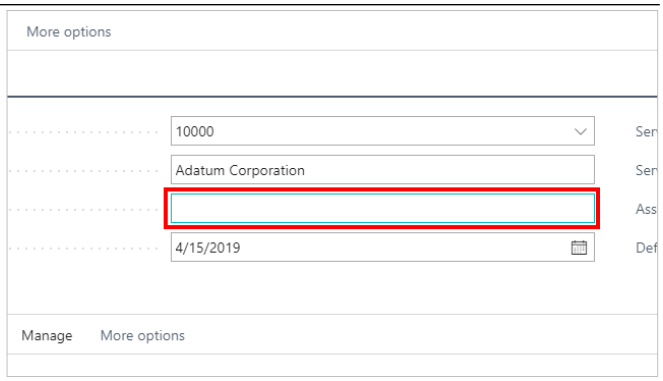
Click on the lookup button **Customer No.**



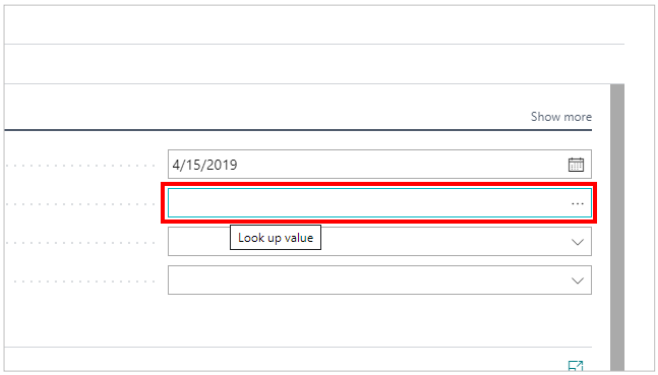
Click on the link in cell **No.** with the value **10000**
Select the applicable customer



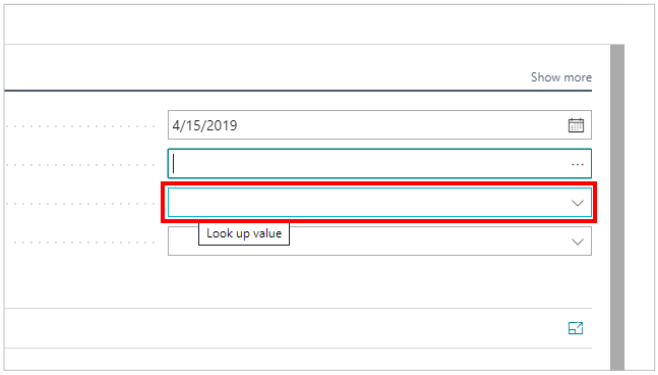
Click on the field **Description**
You may specify a description for the ticket. If no description is given, a description using the ticket number will be automatically created.



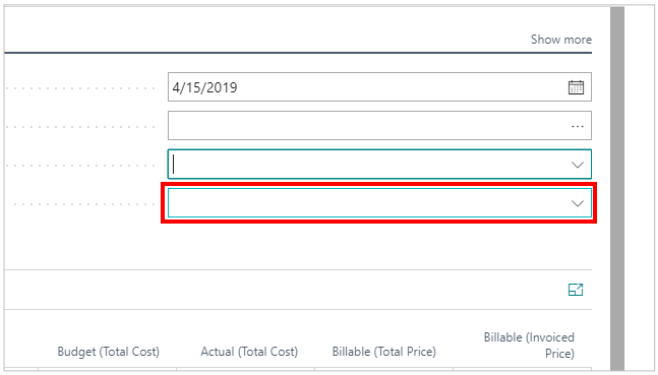
Click on the field **Service Ticket Type**
This field is optional.



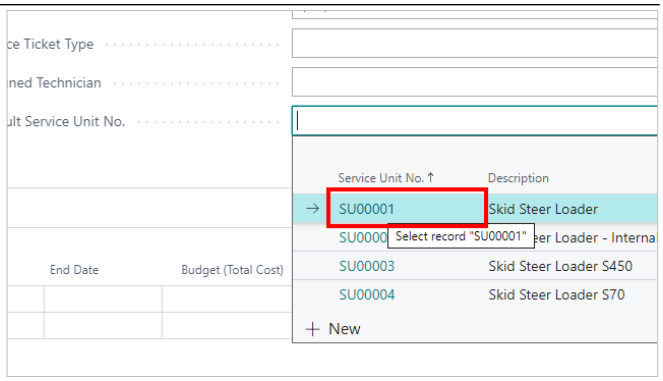
Click on the field **Assigned Technician**
This field is optional.



Click on the field **Default Service Unit No.**
If the selected service unit is already on another open service ticket, a message will be displayed to indicate this and confirm if you want to proceed.



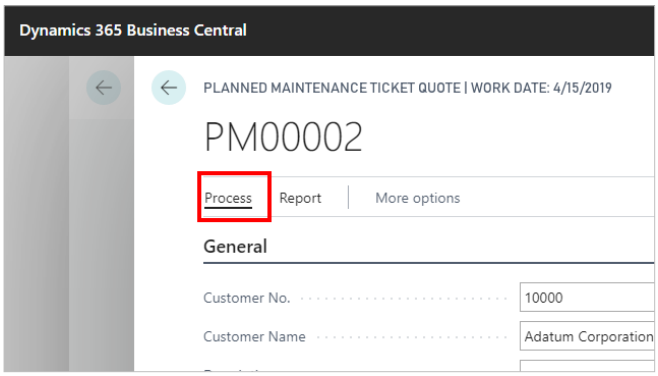
Click on the link in cell **Service Unit No.** with the value **SU00001**
Select the applicable Service Unit. The selected Service Unit will be automatically added to the ticket lines.



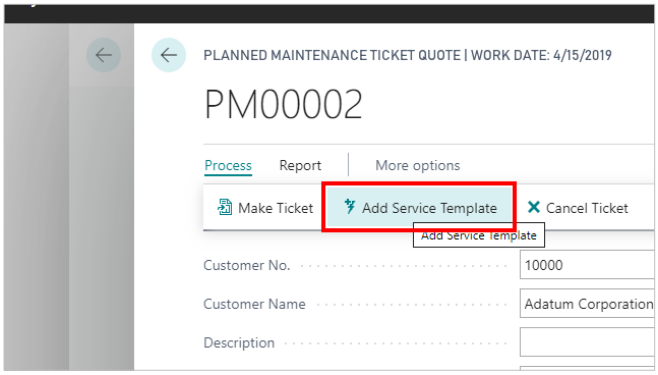
4.3.3. How to add a Service Template

A Service Template can be added using the Process option in the header, or the Manage option in the ticket lines. When a Service Template is selected, the template lines are automatically added to the ticket lines.

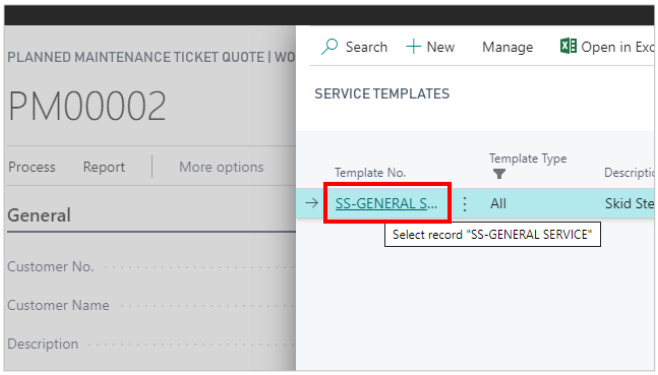
Click on the navigation menu item popup **Process**



Click on the navigation menu item **Add Service Template**



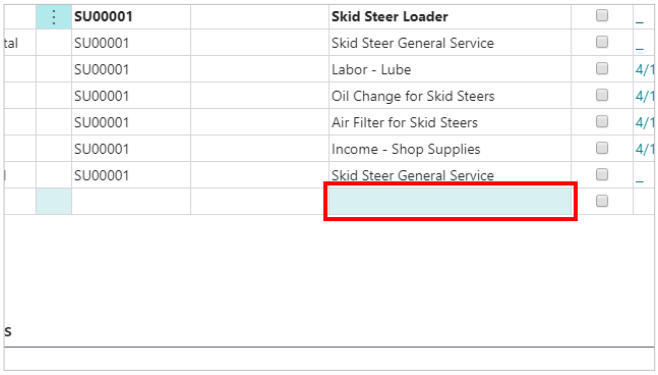
Click on the link in cell **Template No.** with the value **SS-GENERAL SERVICE**



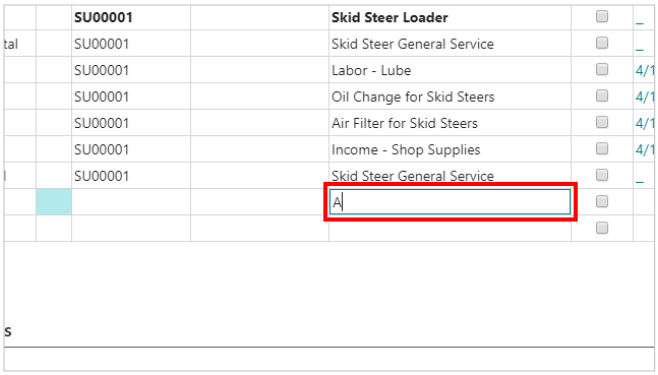
4.3.4. How to Manually Add a Line to a Planned Maintenance Quote

The following demonstrates manually entering a ticket line on a Planned Maintenance Quote.

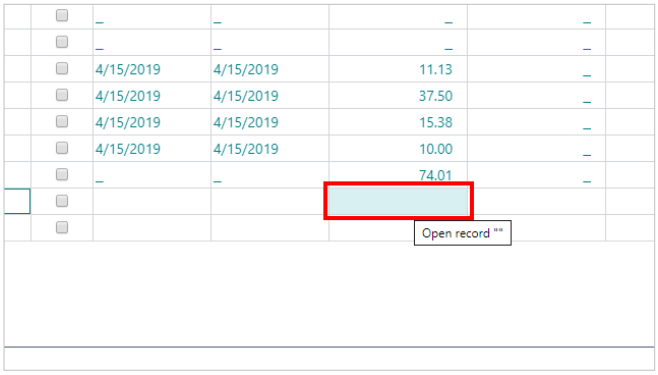
Click on the cell **Description**



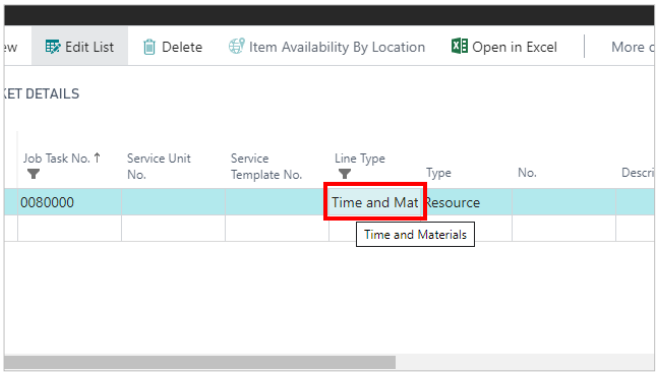
Enter the text **Additional Labor**.
When creating a new line, Task Type will automatically default to Posting, and Service Unit No. will automatically default to the current Service Unit.



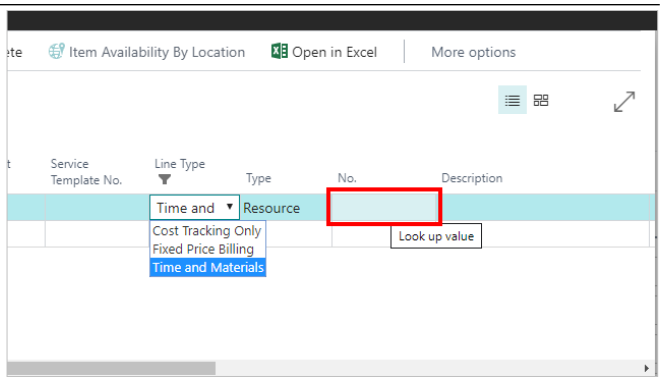
Click on the link in the cell Budget (Total Cost)



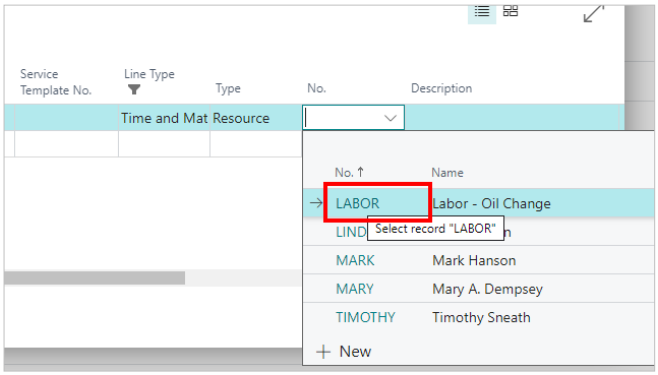
Note that the field Line Type defaults to Time and Materials, and Type defaults to Resource. These values may be changed if necessary. The following example uses the Resource Type.



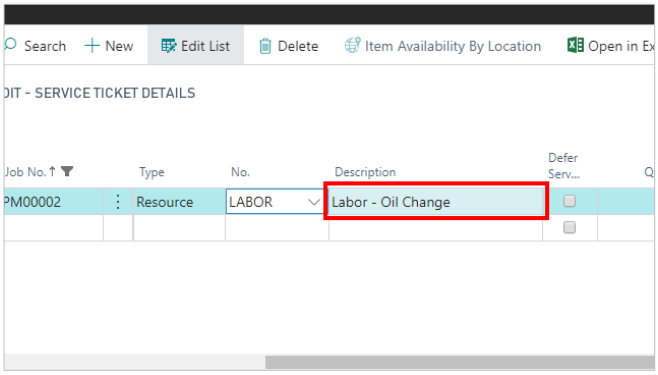
Click on the cell **No.**



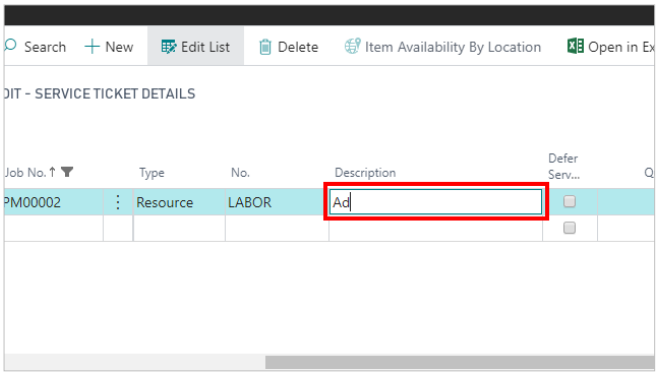
Click on the link in cell **No.** with the value **LABOR**



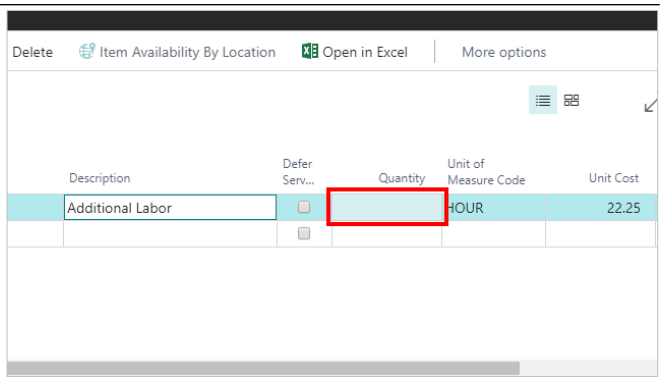
Click on the cell **Description** with the value **Labor - Oil Change**
Description will be automatically filled based on the Resource card selected. This value can be overriden to more accurately describe the task being performed.



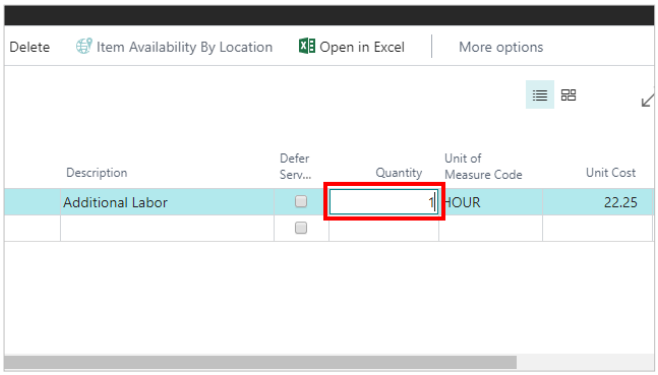
Enter the text **additional Labor**.



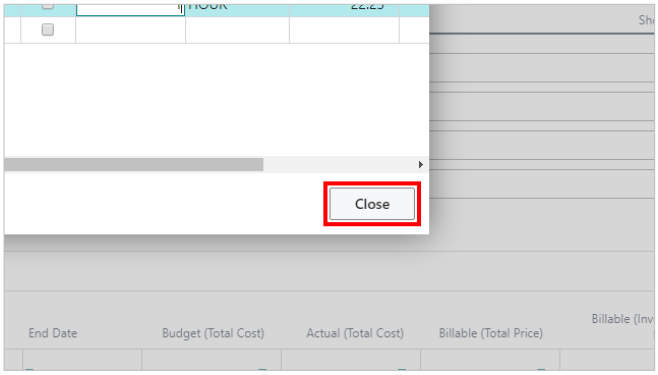
Click on the cell **Quantity**



Enter the text **1**.



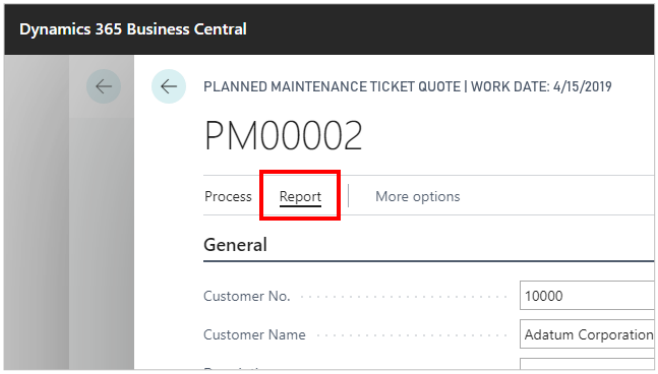
Click on the button **Close**



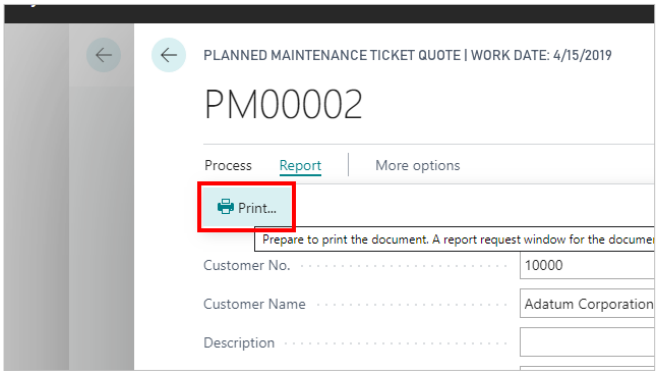
4.3.5. How to Print the Planned Maintenance Quote

The following demonstrates how to print a Planned Maintenance Quote.

Click on the navigation menu item popup **Report**

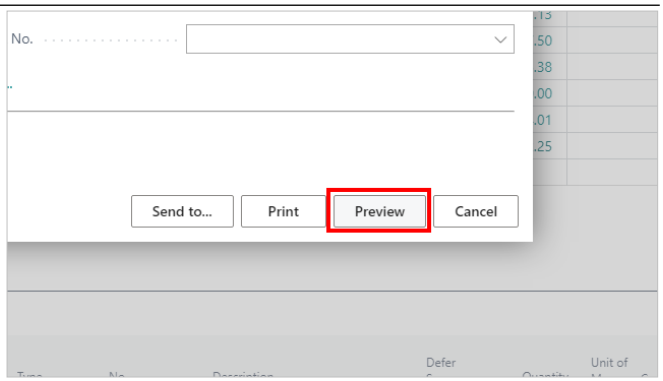


Click on the navigation menu item **Print...**



The standard Microsoft Dynamics 365 Business Central, printing options are available to select from.

In this example Preview will be used to view the ticket. Click on the button **Preview**



4.4. How to Process Planned Maintenance Tickets

4.4.1. Overview

A Planned Maintenance Ticket can be created:

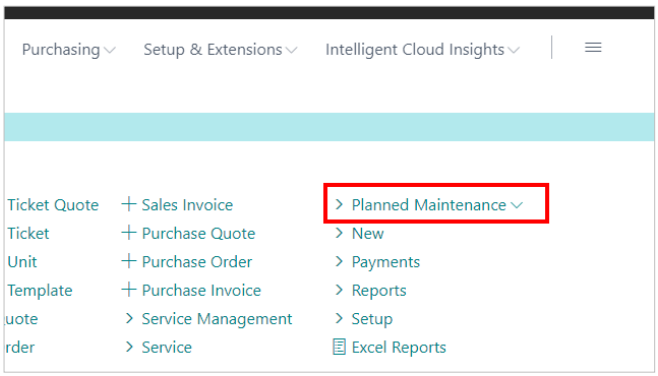
• From the main menu option, Planned Maintenance, by selecting Planned Maintenance Tickets, which opens the Planned Maintenance Ticket list where New can be selected.
• From the Actions part of the profile by selecting, Planned Maintenance, then Planned Maintenance Tickets.
• From the Activities Cue, Planned Maintenance Tickets Open and then selecting New.
• From the Planned Maintenance Worksheet. See ODT Service Help, Service Planned Maintenance Worksheet for more details.

4.4.2. How to Create a Planned Maintenance Ticket

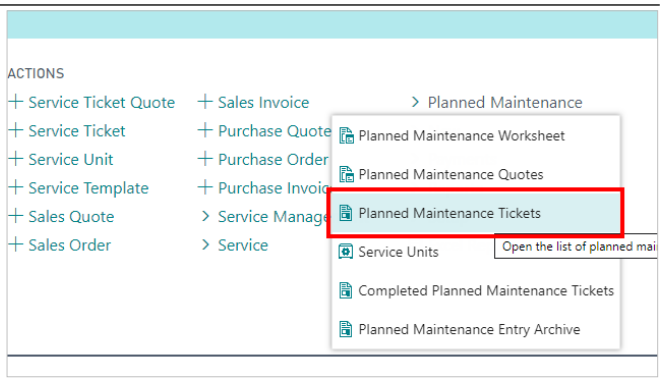
Planned Maintenance Tickets can be created manually, or they can be created using the Planned Maintenance Worksheet. Tickets created using the Planned Maintenance Worksheet will have all required fields filled in automatically.

The following demonstrates how to create a new Planned Maintenance Ticket.

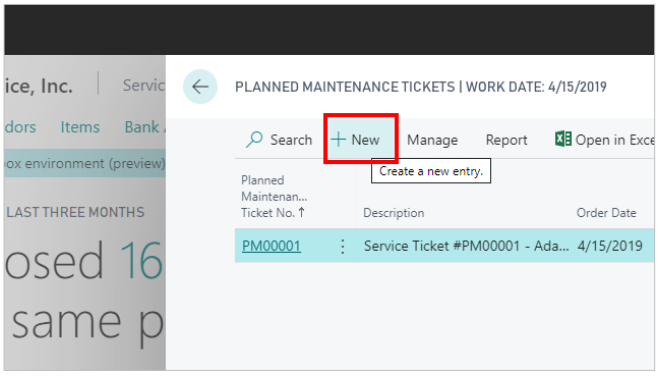
Click on the navigation menu item popup **Planned Maintenance**



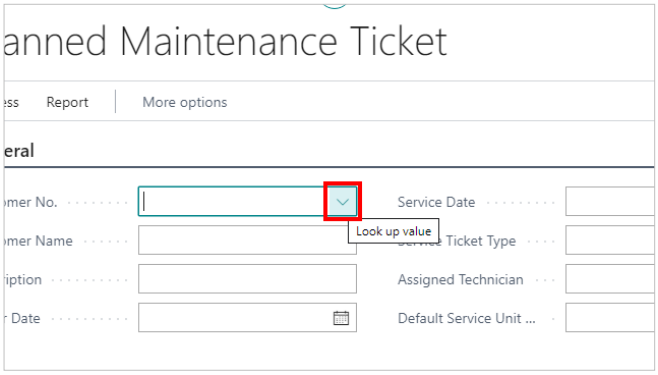
Click on the navigation menu item **Planned Maintenance Tickets**



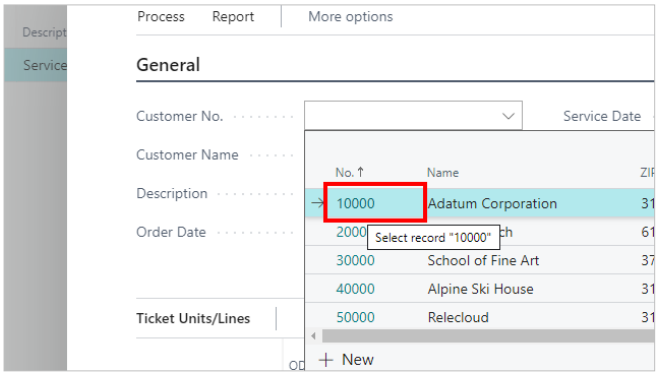
Click on the navigation menu item **New**



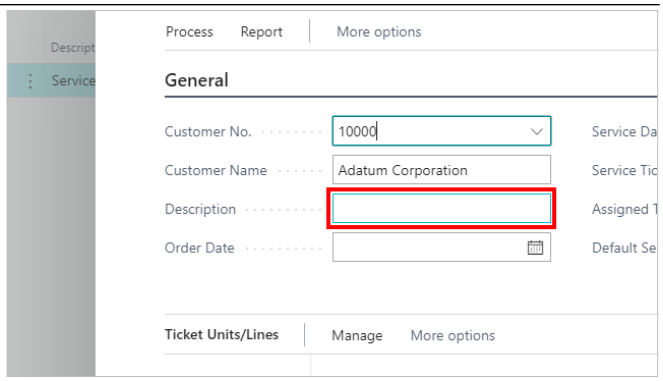
Click on the lookup button **Customer No.**



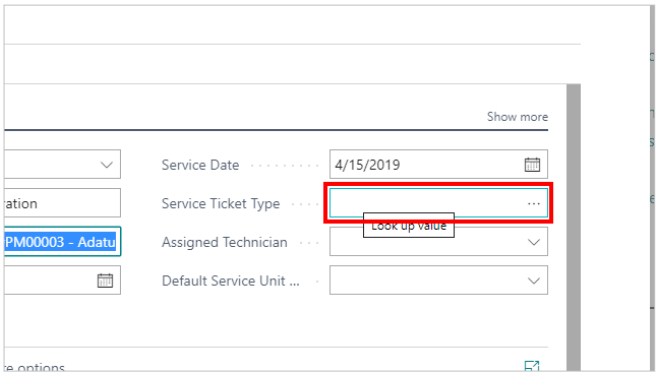
Click on the link in cell **No.** with the value **10000**
Select the applicable customer.



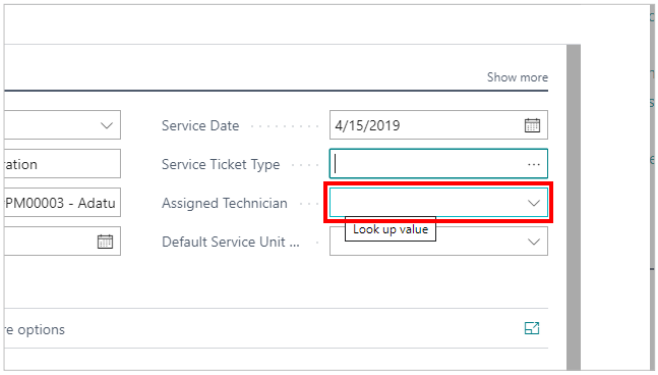
Click on the field **Description**
You may specify a description for the ticket. If no description is given, a description using the ticket number will be automatically created.



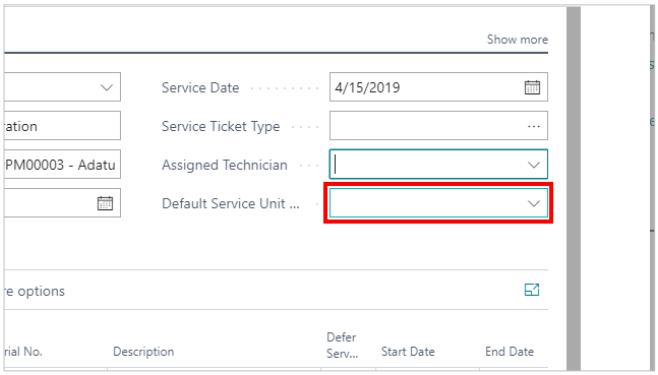
Click on the field **Service Ticket Type**
This field is optional.



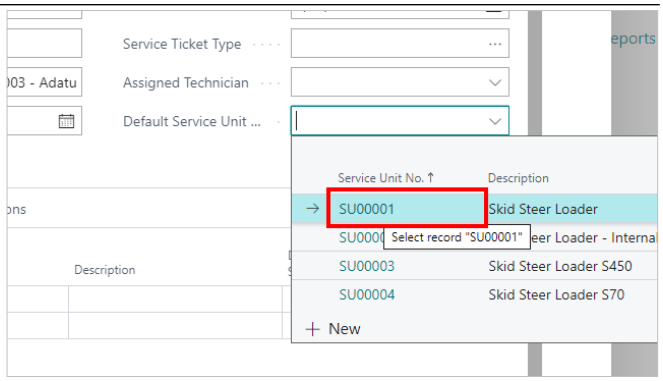
Click on the field **Assigned Technician**
This field is optional.



Click on the field **Default Service Unit No.**
If the selected service unit is already on another open service ticket, a message will be displayed to indicate this and confirm if you want to proceed.



Click on the link in cell **Service Unit No.** with the value **SU00001**



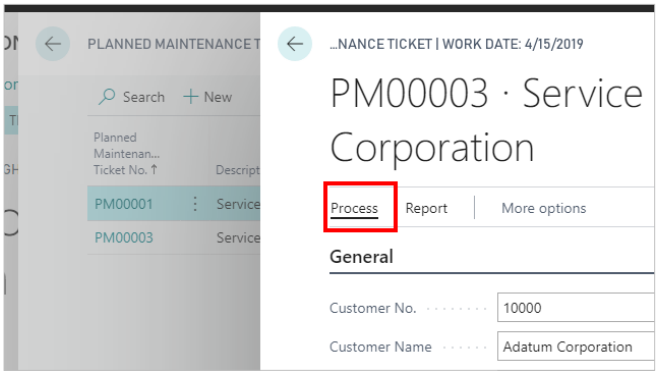
4.4.3. How to add a Service Template

A Service Template can be added using the Process option in the header, or the Manage option in the ticket lines. When a Service Template is selected, the template lines are automatically added to the ticket lines.

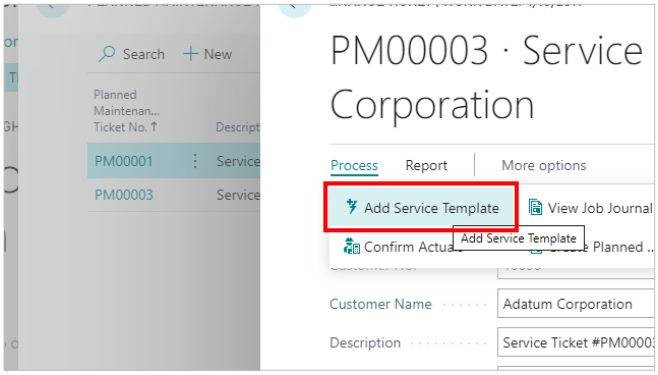
The following demonstrates how to add a Service Template to a Planned Maintenance Ticket.

Business Manager Profile

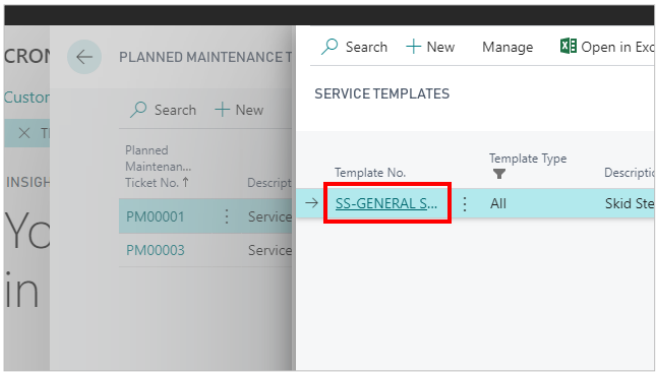
Click on the navigation menu item popup **Process**



Click on the navigation menu item **Add Service Template**

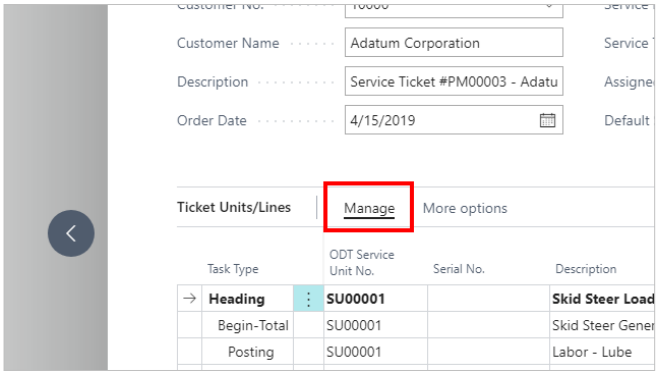


Click on the link in cell **Template No.** with the value **SS-GENERAL SERVICE**

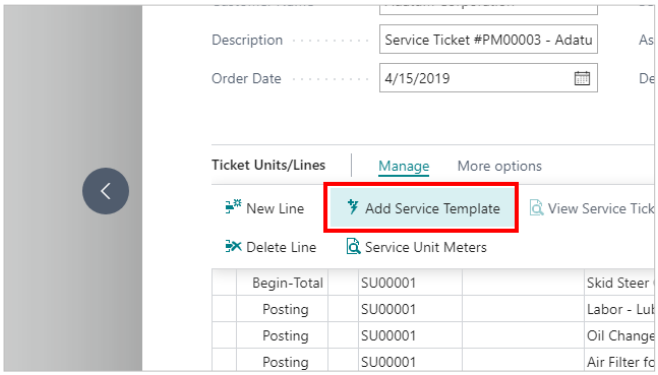


A Service Template can also be added from the ticket lines.

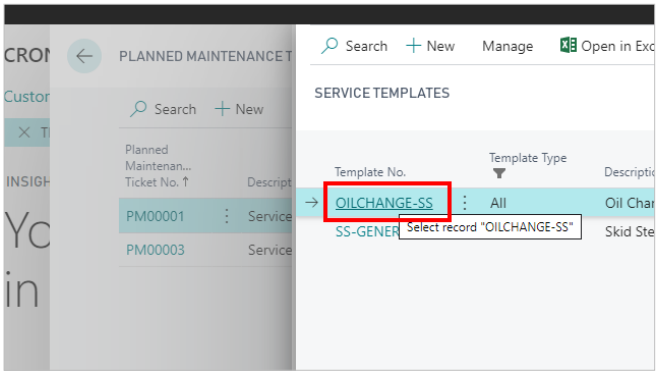
Click on the navigation menu item popup **Manage**



Click on the navigation menu item **Add Service Template**



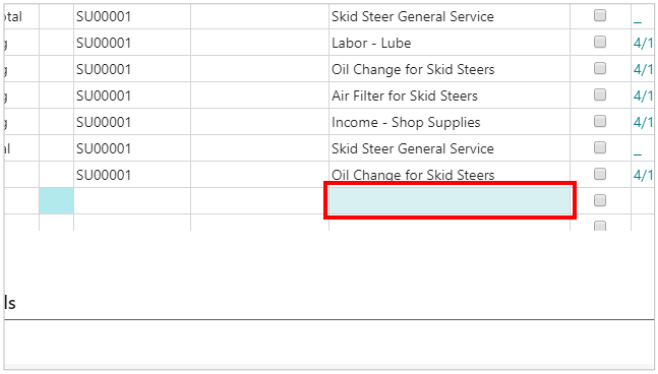
Click on the link in cell **Template No.** with the value **OILCHANGE-SS**



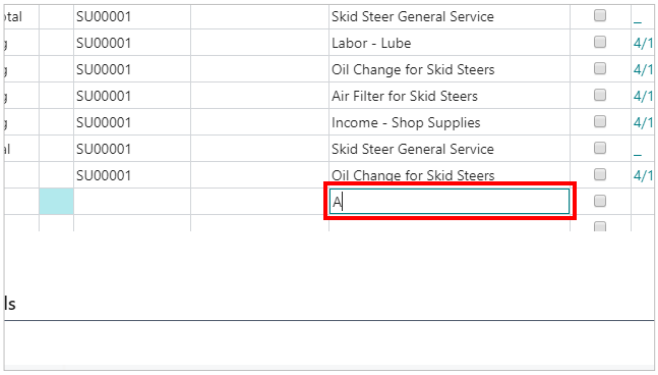
4.4.4. How to Manually add a Service Line

The following demonstrates manually entering a ticket line on a Planned Maintenance Ticket.

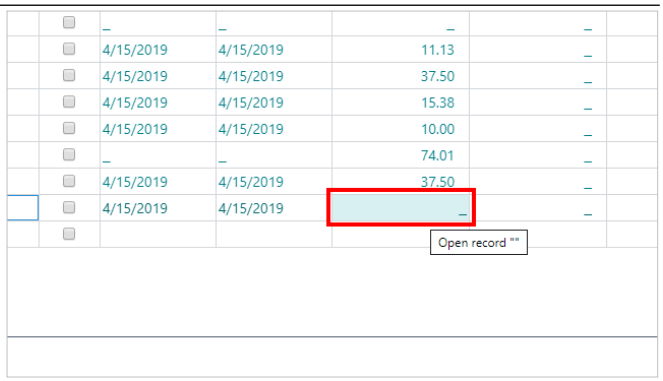
Click on the cell **Description**



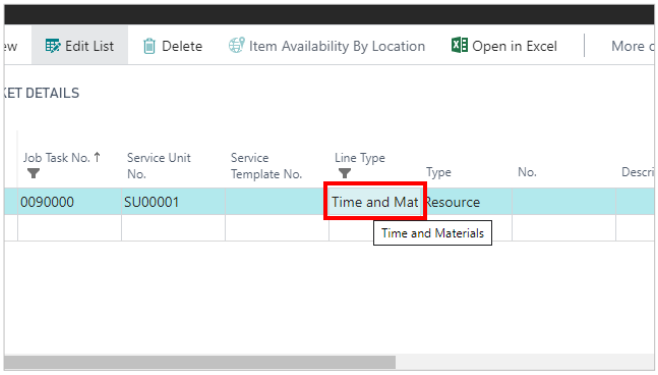
Enter the text **Additional Labor**.
When creating a new line, Task Type will automatically default to Posting, and Service Unit No. will automatically default to the current Service Unit.



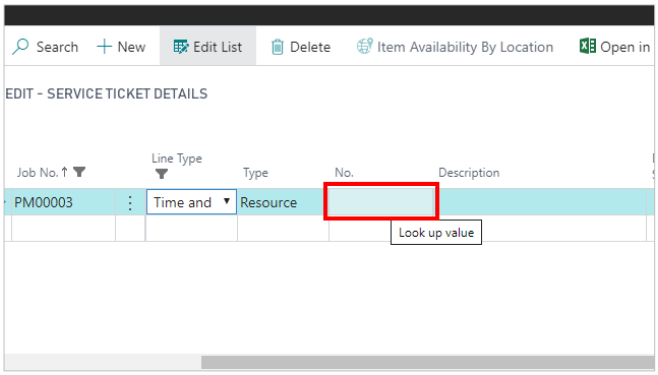
Click on the link in cell Budget (Total Cost).



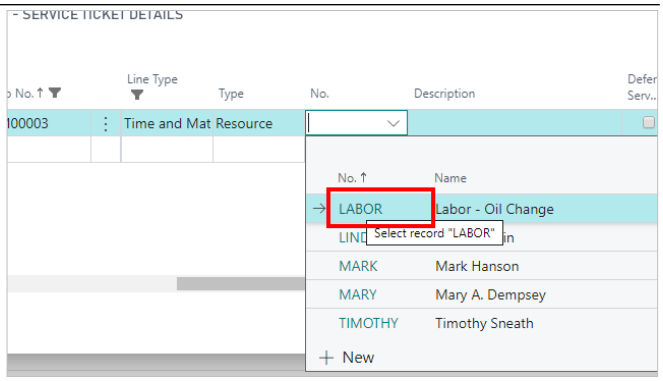
Note that the field Line Type defaults to Time and Materials, and Type defaults to Resource. These values may be changed if necessary. The following example uses the Resource Type.



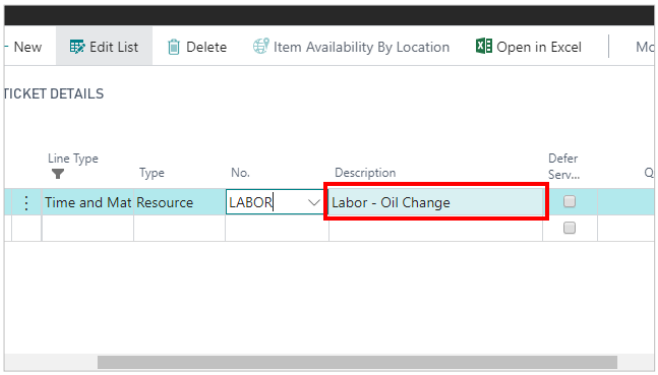
Click on the cell **No.**



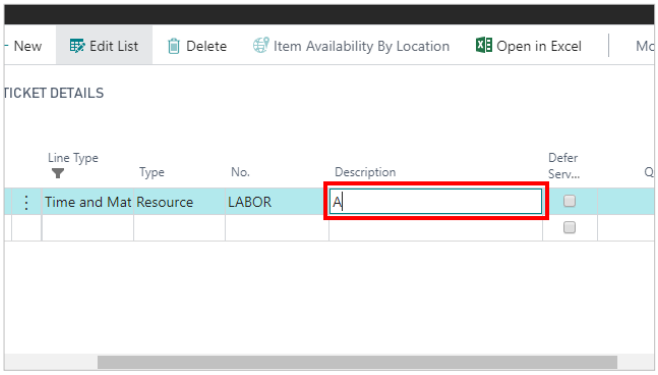
Click on the link in cell **No.** with the value **LABOR**



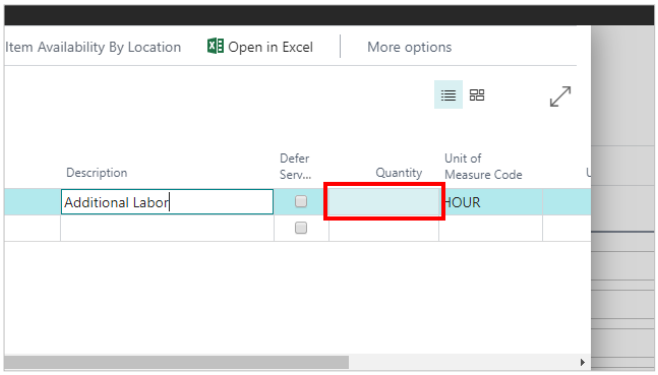
Click on the cell **Description** with the value **Labor - Oil Change**
Description will be automatically filled based on the Resource card selected. This value can be overriden to more accurately describe the task being performed.



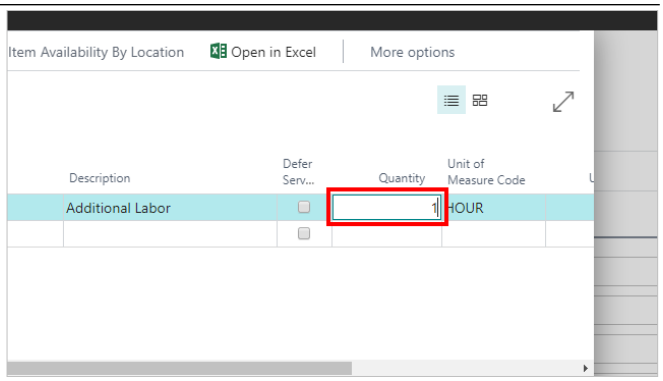
Enter the text **additional Labor**.



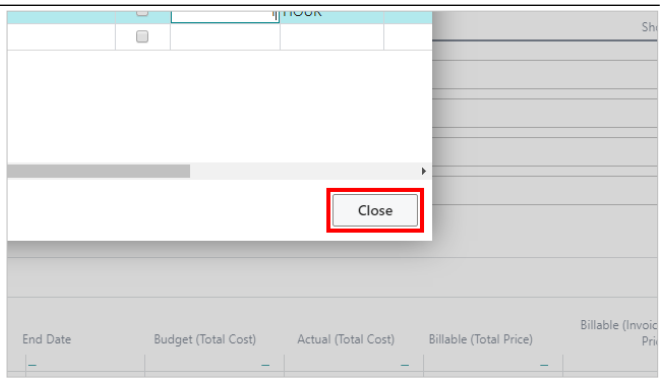
Click on the cell **Quantity**



Enter the text **1**.



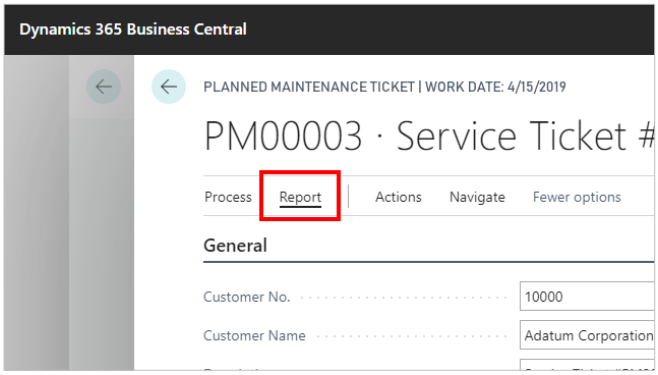
Click on the button **Close**



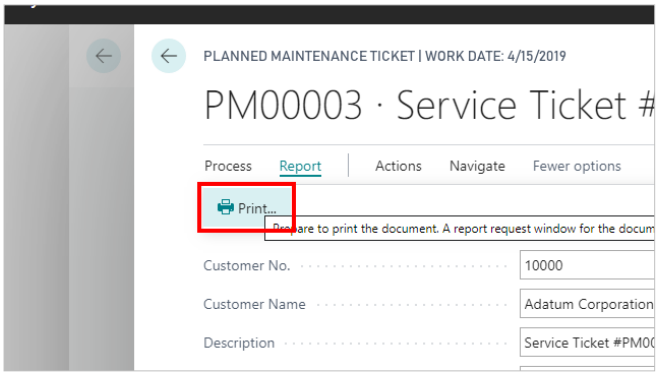
4.4.5. How to Print a Planned Maintenance Ticket

The following demonstrates how to print a Planned Maintenance Ticket.

Click on the navigation menu item popup **Report**

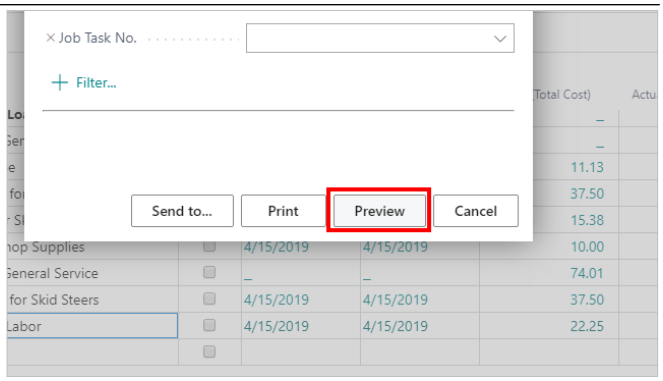


Click on the navigation menu item **Print...**



The standard Microsoft Dynamics 365 Business Central, printing options are available to select from.

In this example Preview will be used to view the ticket. Click on the button **Preview**



4.4.6. How to Confirm Usage Actuals

The following demonstrates the confirmation of usage actuals for Planned Maintenance Ticket Lines.

The following example is for when the actuals are the same as the estimated quantities.

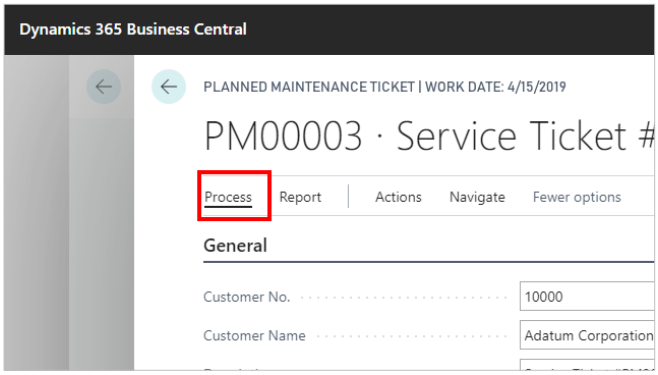
Should the actuals be different from the budgeted quantities, then on the Ticket Detail Lines, the quantity should be revised to reflect the actual quantities prior to running the Confirm Actuals.

Alternatively, the quantity can be revised on the Job Journal records prior to posting the journal when only a portion of the usage is to be posted at the specified posting date.

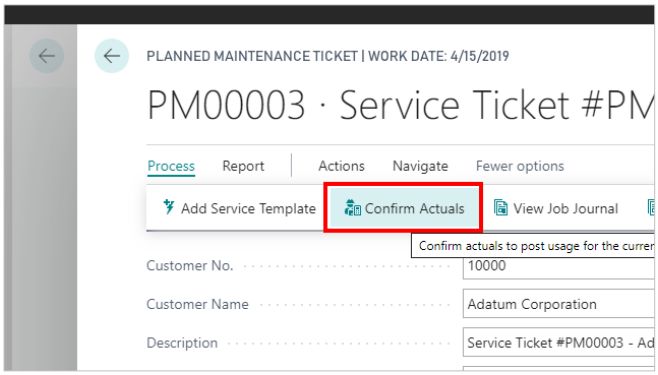
This process automatically creates records in a Job Journal, which automatically opens and must be posted to record the usage on the ticket and job.

NOTE:
The first time a user completes the following steps a Job Journal Batch will automatically be created for the user.

Click on the navigation menu item popup **Process**



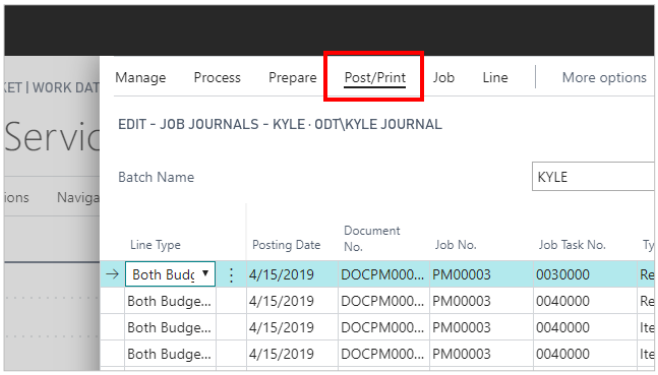
Click on the link **Confirm actuals to post usage for the current planned maintenance ticket.**



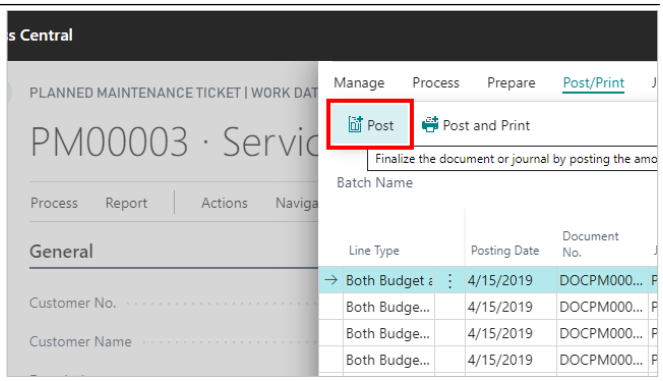
At this point the journal entries may be modified if necessary.

NOTE: If you wish to change the Line Type field, you must first clear the Job Planning Line No. field.

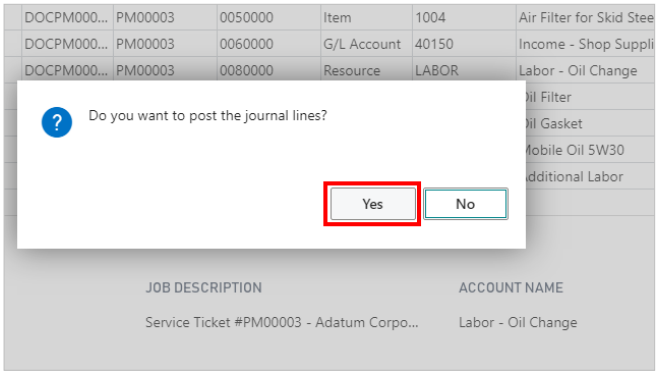
Click on the navigation menu item popup **Post/Print**



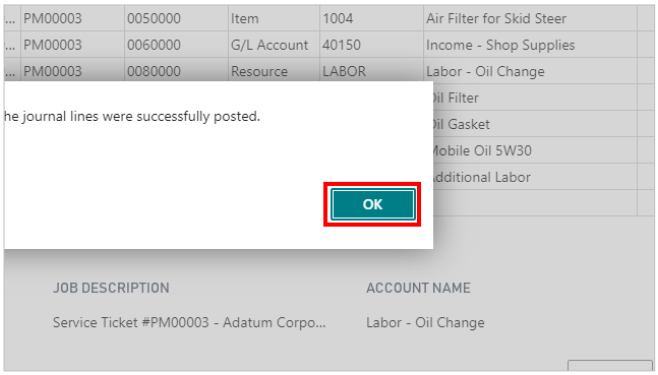
Click on the navigation menu item **Post**



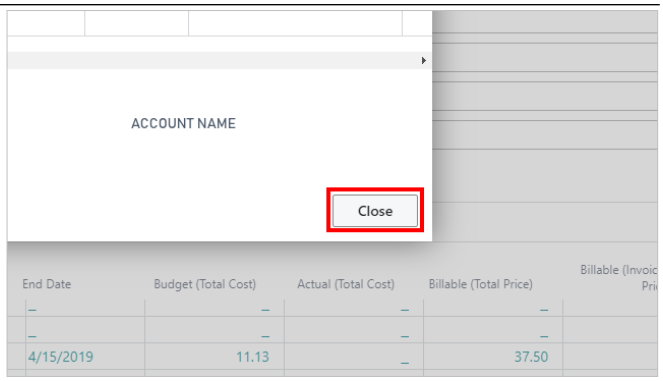
Click on the button **Yes**



Click on the button **OK**



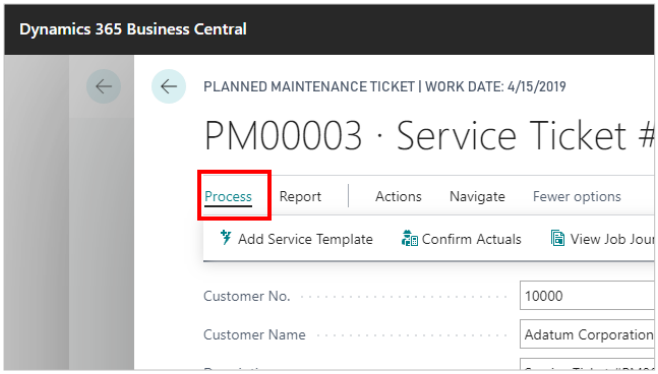
Click on the button **Close**



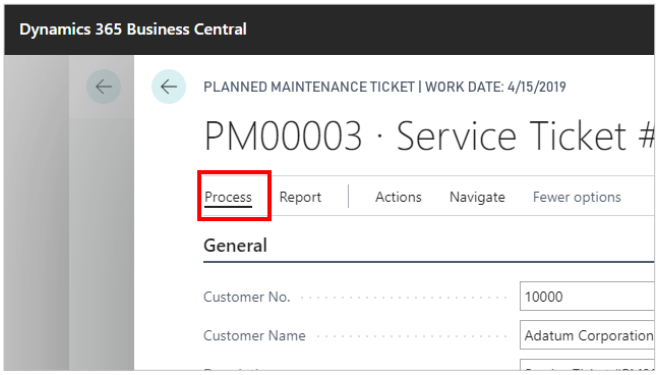
4.4.7. How to Invoice a Planned Maintenance Ticket

The following demonstrates how to invoice a Planned Maintenance Ticket.

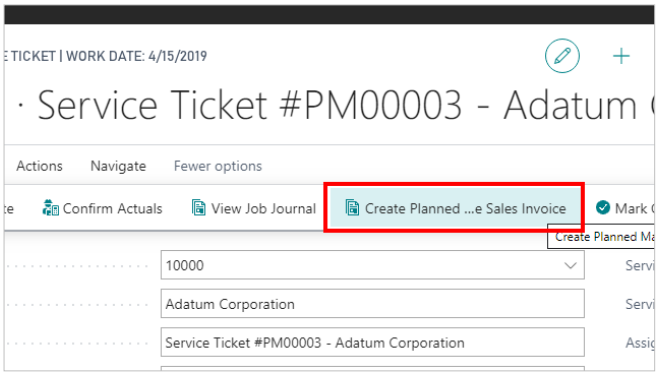
Click on the navigation menu item popup **Process**



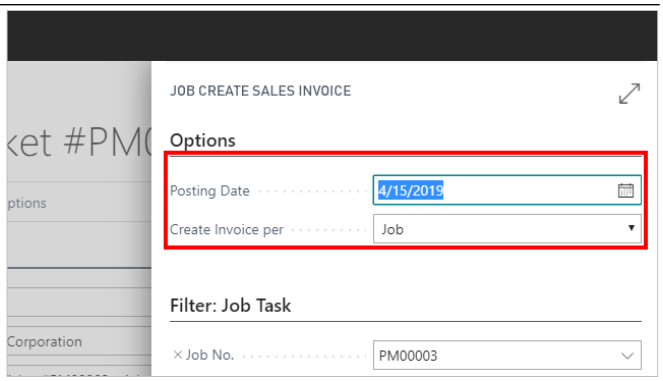
Click on the navigation menu item popup **Process**



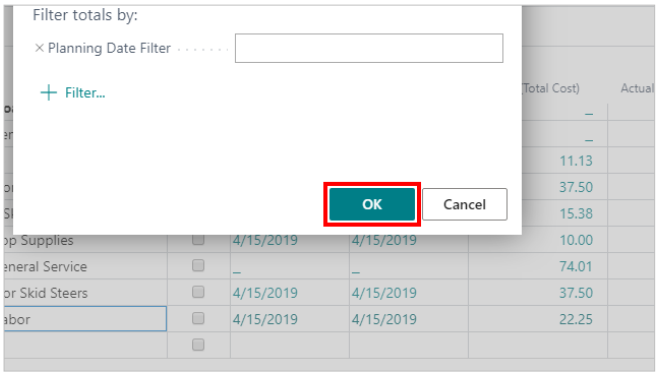
Click on the navigation menu item **Create Planned Maintenance Sales Invoice**



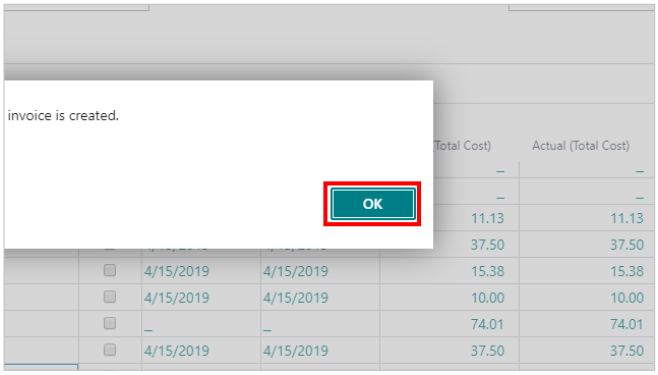
Verify that the Posting Date is correct.



Click on the button **OK**

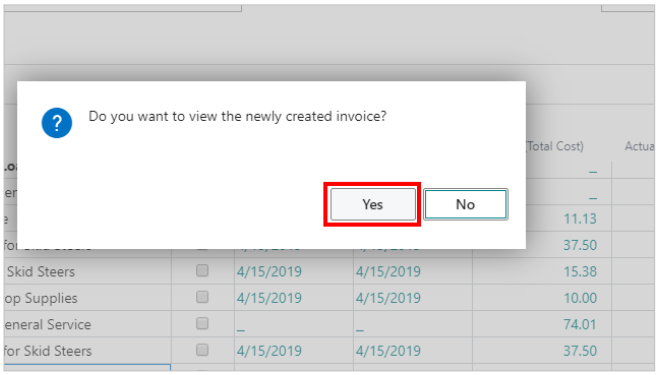


Click on the button **OK**



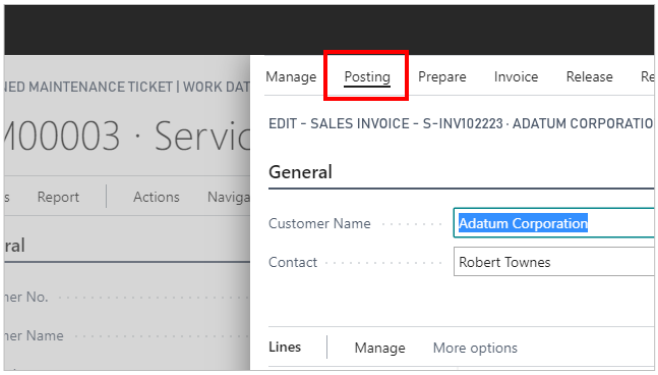
After creating the invoice, you will be given the option to view it. Selecting Yes will display the invoice, and selecting No will go back to viewing the Planned Maintenance Ticket.

The following example will select Yes.
Click on the button **Yes**

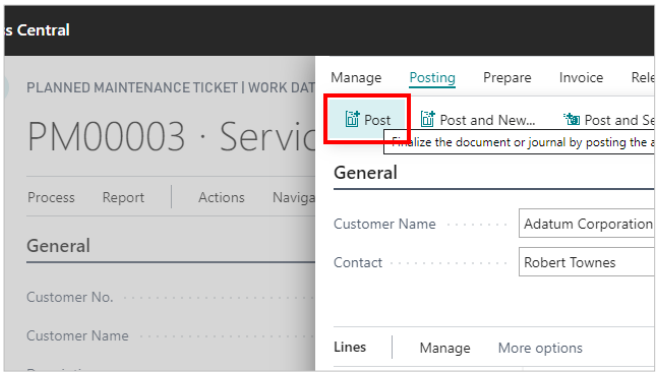


The following demonstrates how to post the invoice.

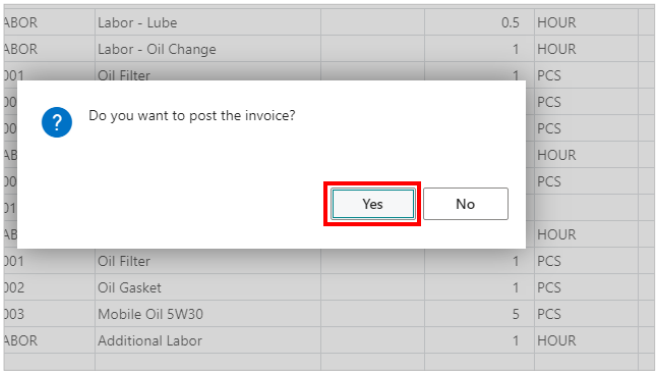
Click on the navigation menu item popup **Posting**



Click on the navigation menu item **Post**

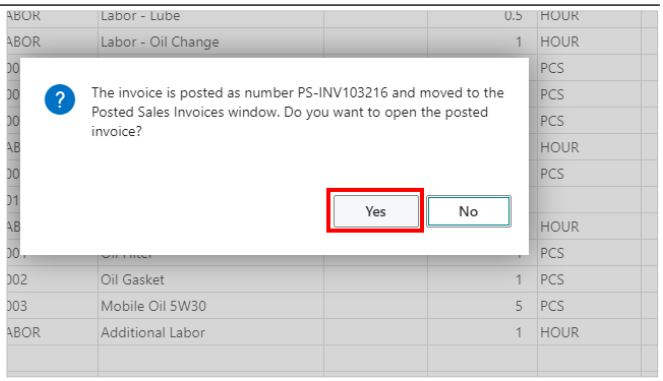


Click on the button **Yes**



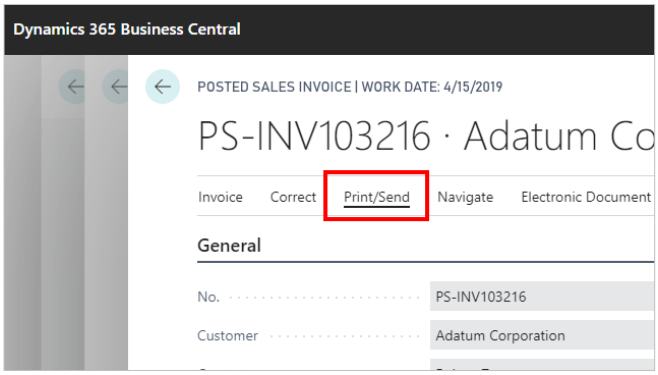
After the posting is finished you will be given the option to view the posted invoice.

This example will select Yes and view the posted invoice.
Click on the button **Yes**

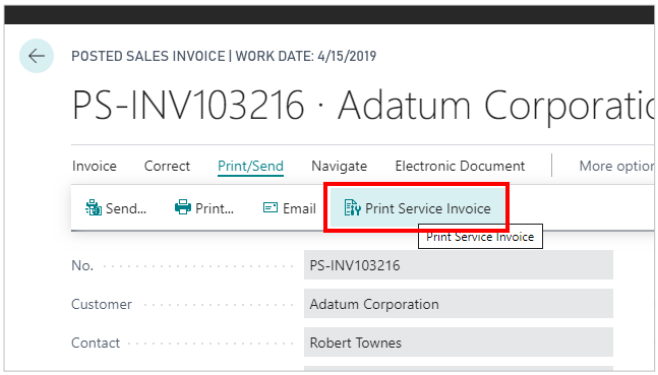


The following demonstrates how to print the posted invoice.

Click on the navigation menu item popup **Print/Send**

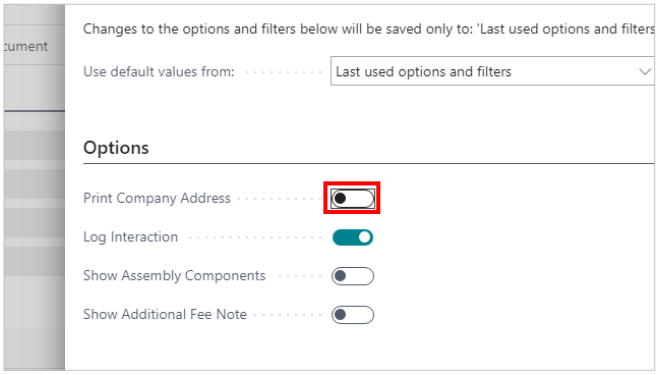


Click on the navigation menu item **Print Service Invoice**

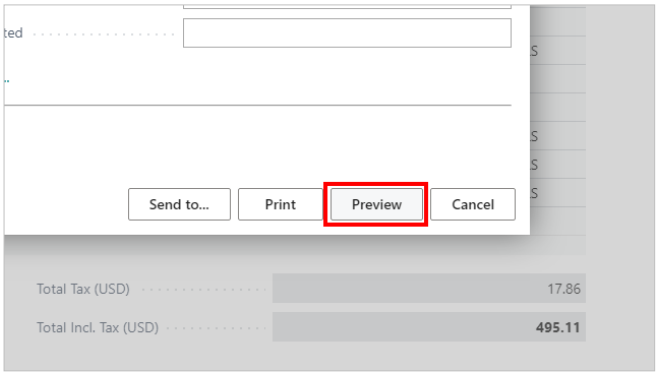


Click on the toggle field **Print Company Address**

By default the first time Print Service Invoice is ran the Print Company Information is by default disabled. Therefore, to print company information, this field must be enabled.



Click on the button **Preview**



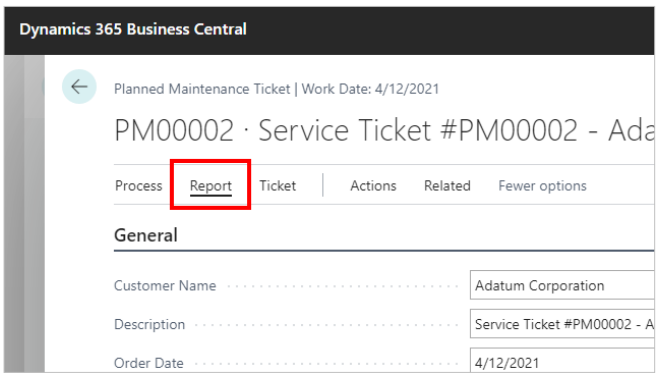
NOTE:

When processing a ticket, the posting of the invoice and confirming of actuals are not limited to, confirming actuals, then invoicing.
Invoicing can be done first, then confirmation of the actuals.

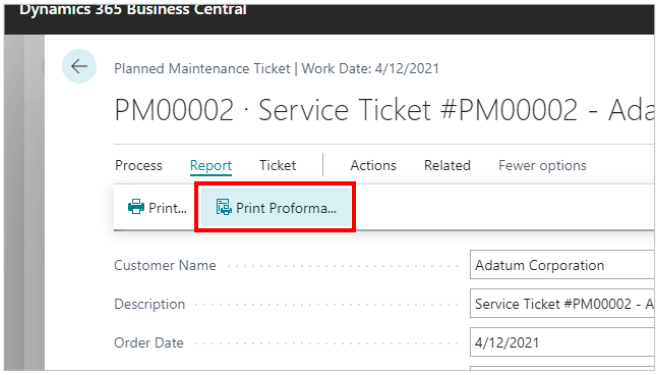
4.4.8. How to Print the Proforma Invoice

The following demonstrates printing the proforma invoice from a Planned Maintenance Ticket.

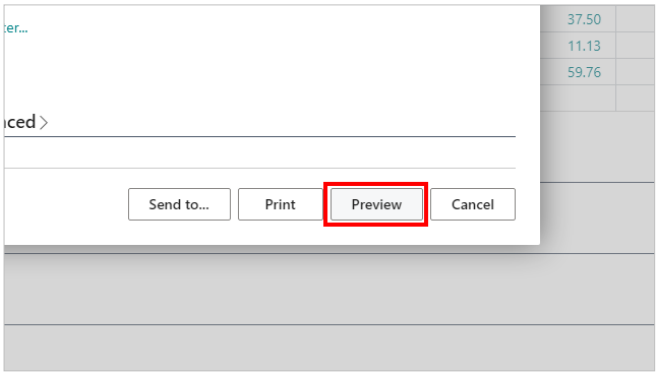
Click on the navigation menu item popup **Report**



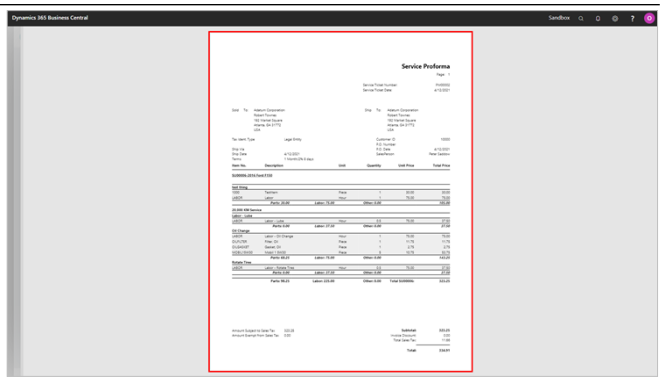
Click on the navigation menu item **Print Proforma...**



Click on the button **Preview**



The following shows an example of a printed proforma invoice.



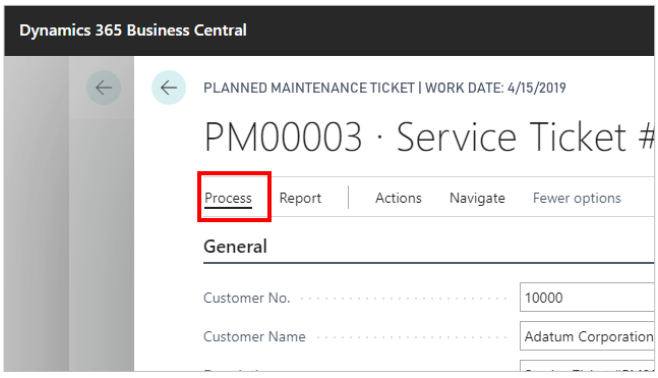
4.4.9. How to Close the Ticket

The final step is to mark the ticket as completed once all usage has been posted and the ticket has been fully invoiced.

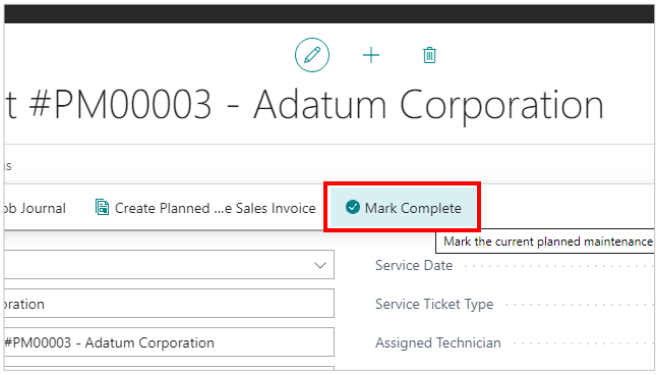
This will set the Status on the Job card to Completed.

The following demonstrates this process.

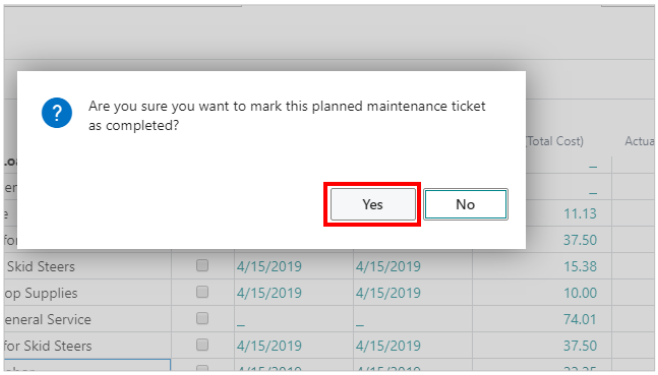
Click on the navigation menu item popup **Process**



Click on the navigation menu item **Mark Complete**



Click on the button **Yes**



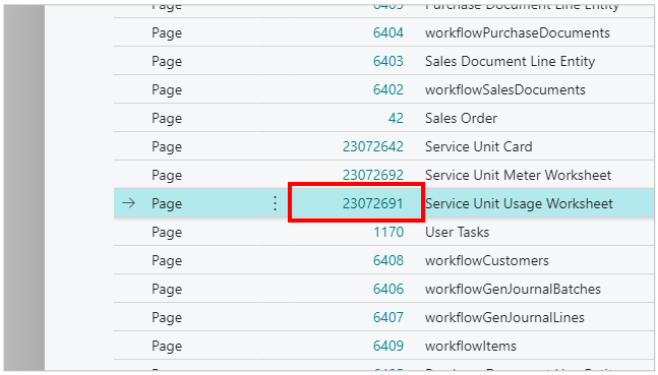
Upon selecting Yes, the related Job Card, Status field will be set to Completed.

4.5. How to use the Service Meter Web Service

4.5.1. How to use the Service Meter Web Service

ODT Service provides a web service that can be used to update service meters. You may update one at a time or many at once. This web service can be set up using the web services page in Business Central.

When setting up the web service, you must use the object ID for the Service Unit Usage Worksheet.



When using the web service, there are a few important points to know. When updating a meter this way, you must provide the ID of the service unit (ex: SU00001), the meter code (ex: ODOM), the new meter reading, and an optional Date-Time value.

Date-Time should be entered in the format yyyy-mm-ddT00:00:00Z. For example, a date of May 20th, 2025 at 7:30PM would be entered as 2025-05-20T19:30Z. All times entered are interpreted as UTC time by Business Central, and then changed into local time. So the previous example would be read as 19:30 UTC time.

If a date is not entered, then it will default to the current system date (not the work date). If a time is not entered, then it will default to 00:00:00 UTC time.

5. Reviewing Service

5.1. How to Review Service Ledger Entries

5.1.1. Overview

Service Ledger Entries are created and posted to the Service Unit when:

- The Confirm Actuals is ran and the Job Journal is posted.
- A Sales Invoice is created and posted.

The Service Ledger Entries can be viewed from the Service Unit.

From the Service Ledger Entries, when an invoice line is selected, the standard Navigate feature is available.

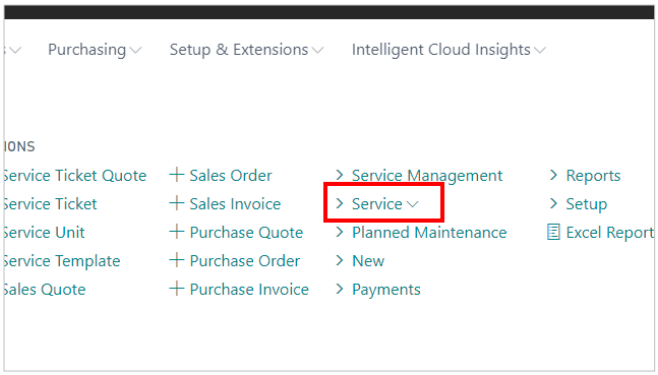
5.1.2. How to Review Service Ledger Entries

Business Manager Profile

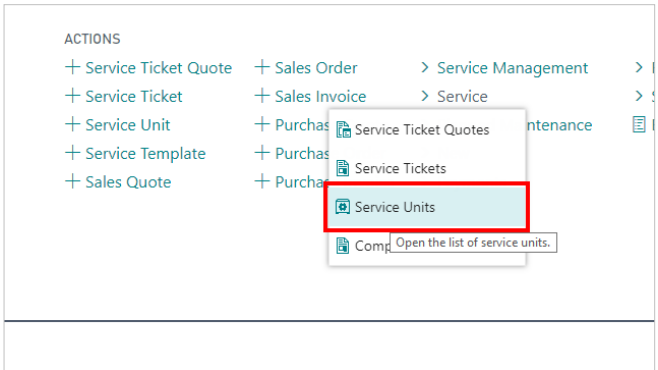
Users with the Sales Order Processor Profile can use the same steps to view Service Ledger Entries from the Service Unit.

The following demonstrates how to access the Service Ledger Entries from a Service Unit.

Click on the navigation menu item popup **Service**

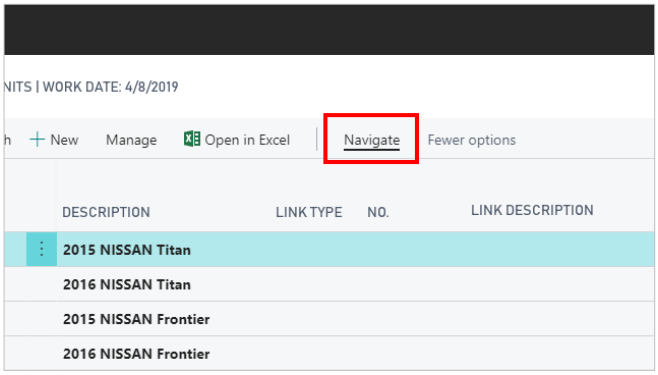


Click on the navigation menu item **Service Units**

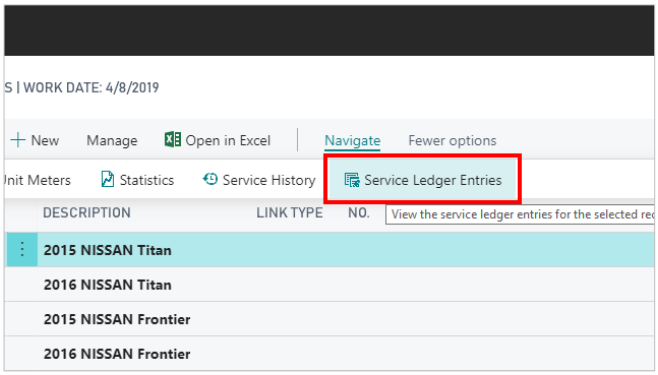


Select a Service Unit record in the list.

Click on the navigation menu item popup **Navigate**



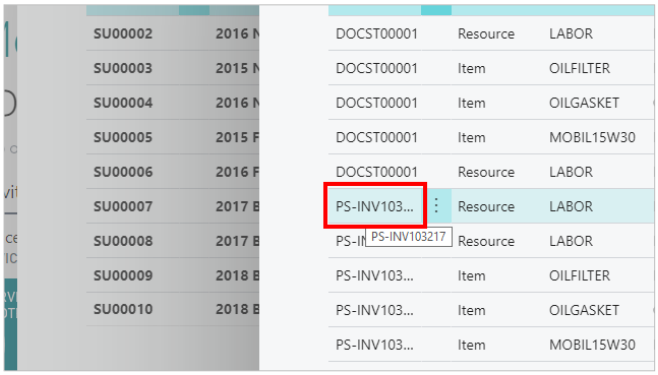
Click on the navigation menu item **Service Ledger Entries**



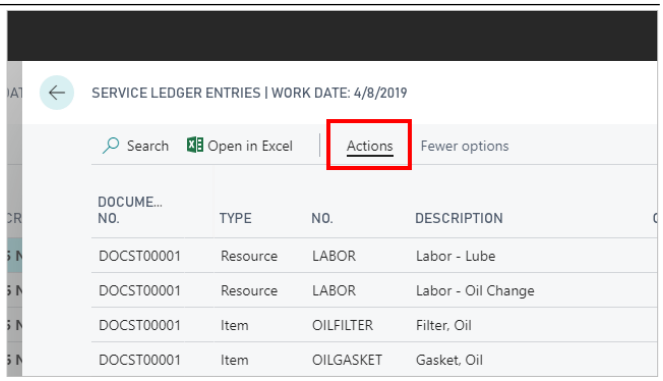
The Service Ledger Entries contain both the usage posted records and the Posted Sales Invoice records.

The following demonstrates how to navigate on a Posted Sales Invoice record.

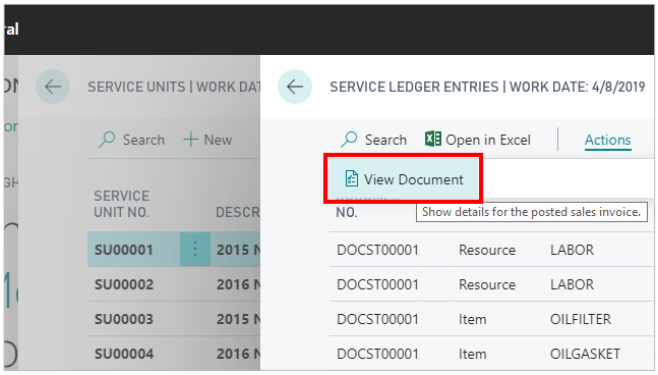
Click on the cell **Document No.** with the value **PS-INV103217**



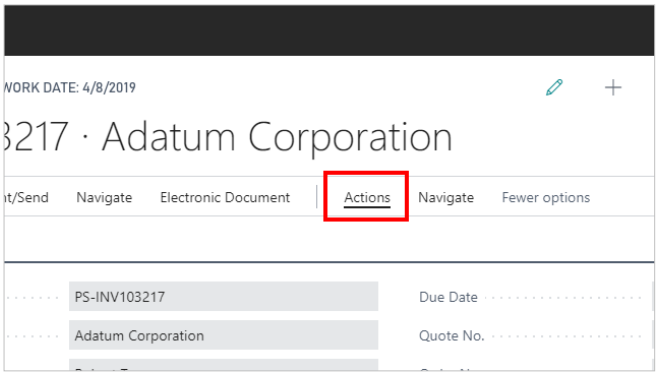
Click on the navigation menu item popup **Actions**



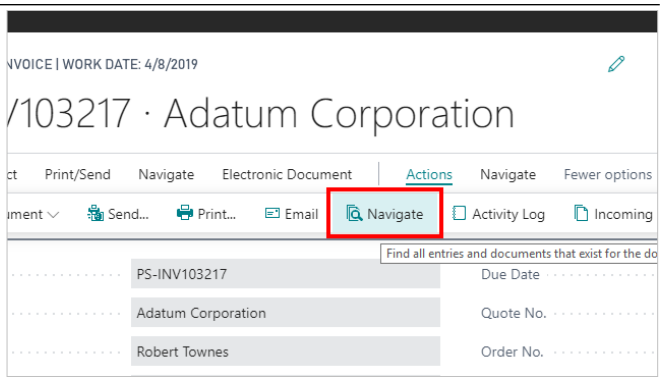
Click on the navigation menu item **View Document**



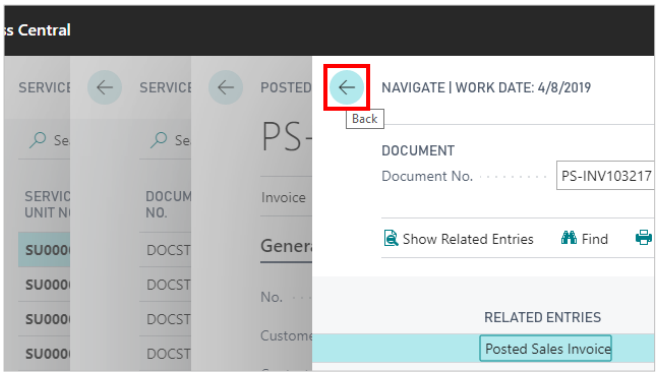
Click on the navigation menu item popup **Actions**



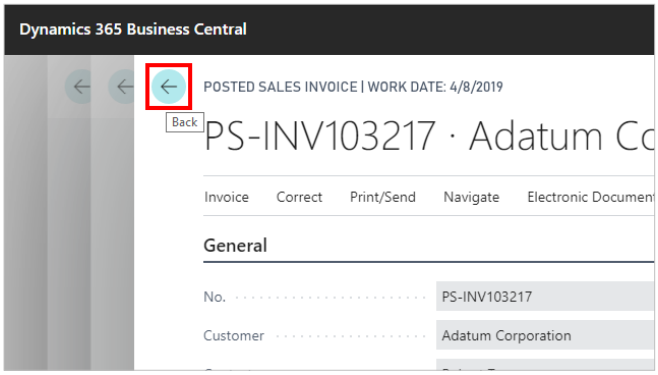
Click on the navigation menu item **Navigate**



Click on the back button



Click on the back button



5.2. How to Review Service History

5.2.1. Overview

The history of all servicing performed on a Service Unit is available from the Service Unit.

The Service History displays a listing of Service Tickets, which the unit was on.
From the listing the Service Ticket can be opened and reviewed.

Additionally the Completed Service Ticket can be opened and reviewed from the Service History List or from an opened Service Ticket.

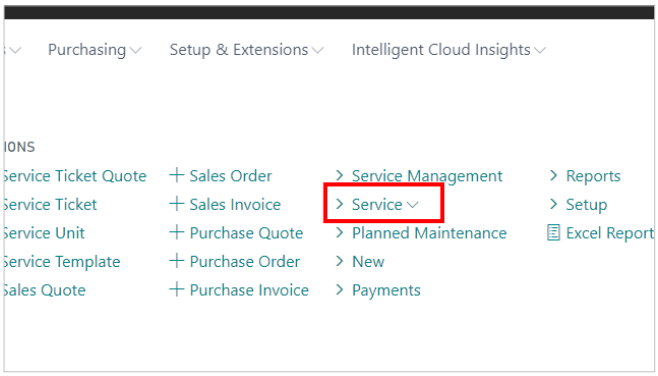
5.2.2. How to Review Service Unit Servicing History

Business Manager Profile

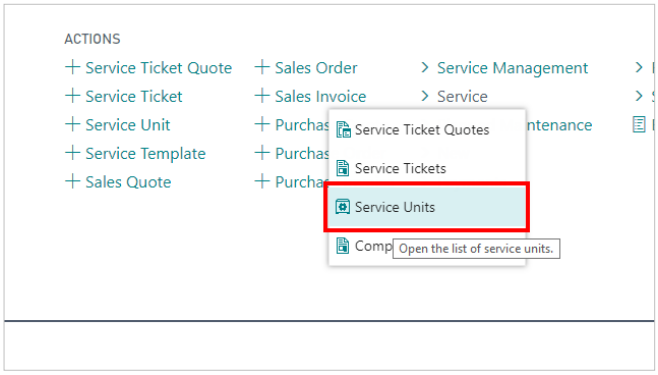
The same steps can be used by a user having the Sales Order Processor Profile.

The following demonstrates the viewing of the Service History List, opening the Service Ticket and opening the Completed Service Ticket.

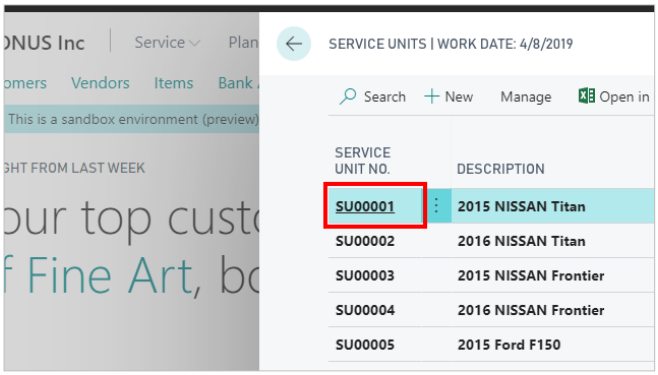
Click on the link **Service**



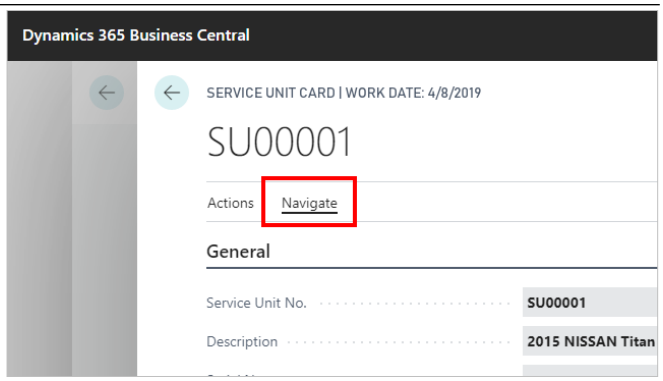
Click on the navigation menu item **Service Units**



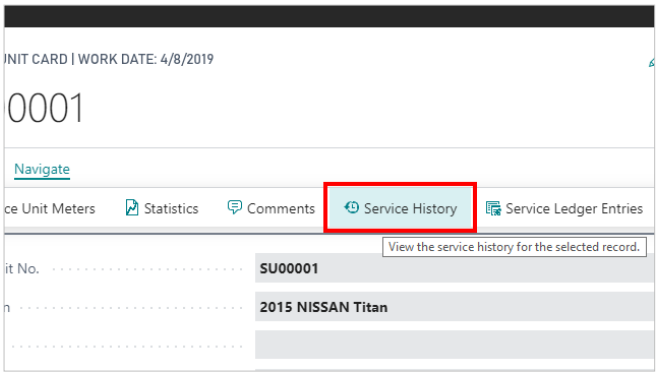
Click on the link in cell **Service Unit No.** with the value **SU00001**



Click on the navigation menu item popup **Navigate**

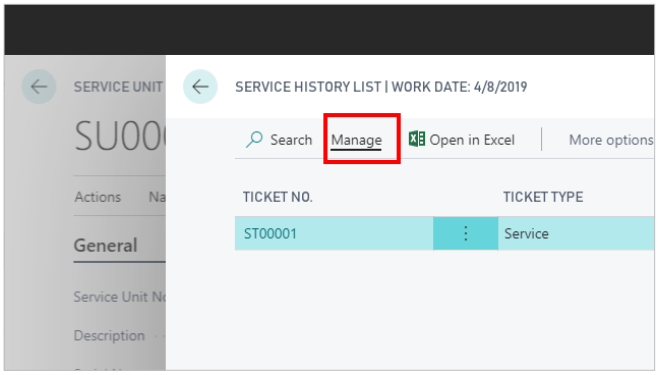


Click on the navigation menu item **Service History**

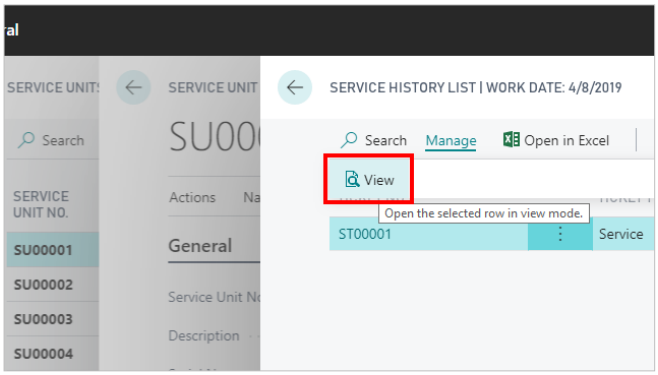


Select the ticket record to be viewed.

Click on the navigation menu item popup **Manage**

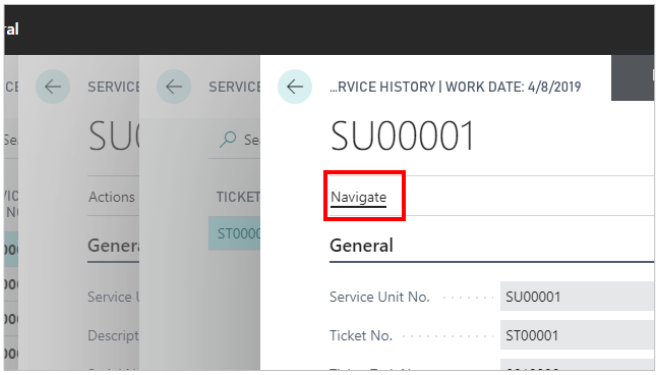


Click on the navigation menu item **View**

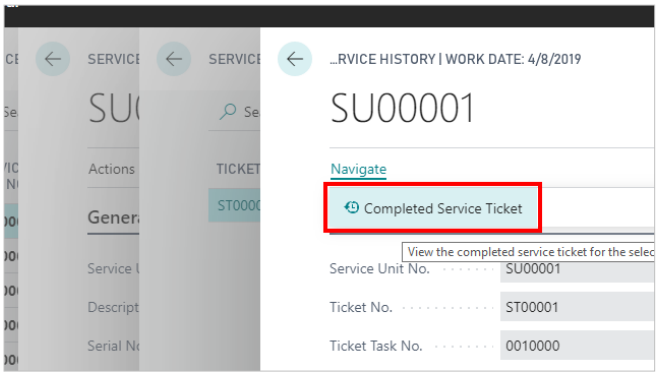


The following demonstrates the opening of the Completed Service Ticket from the Service Ticket.

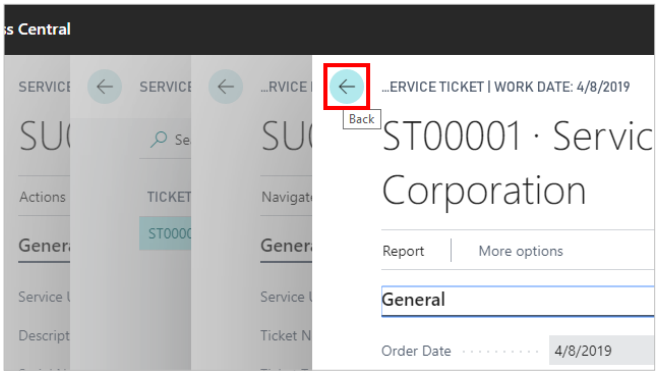
Click on the navigation menu item popup **Navigate**



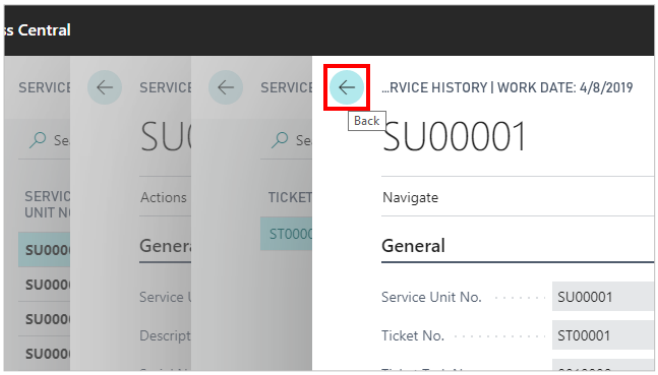
Click on the navigation menu item **Completed Service Ticket**



Click on the back button

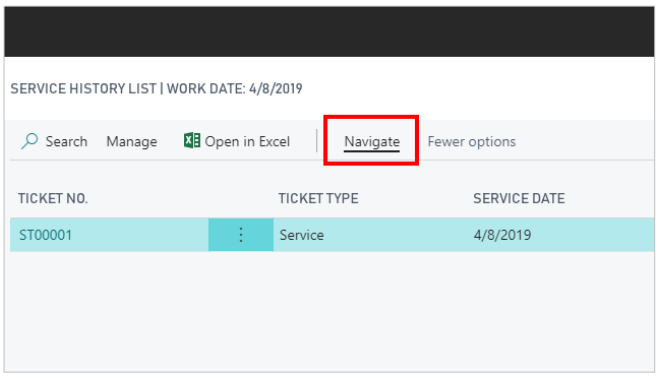


Click on the back button

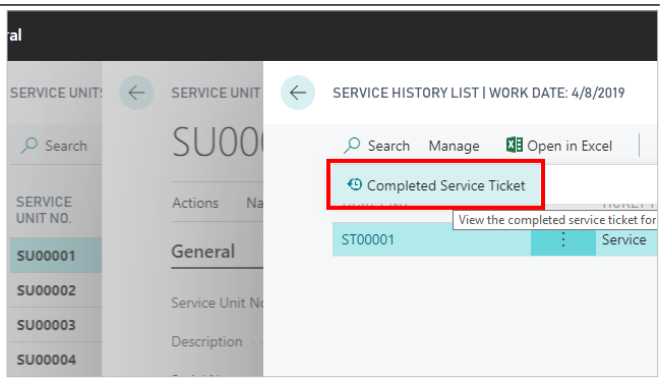


Alternatively the Completed Service Ticket can be opened from the Service History List using the following steps.

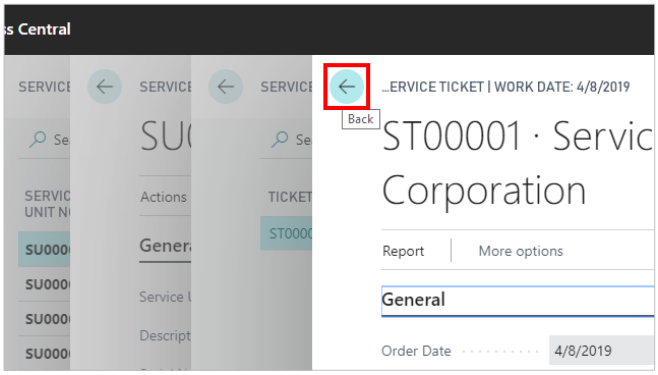
Click on the navigation menu item popup **Navigate**



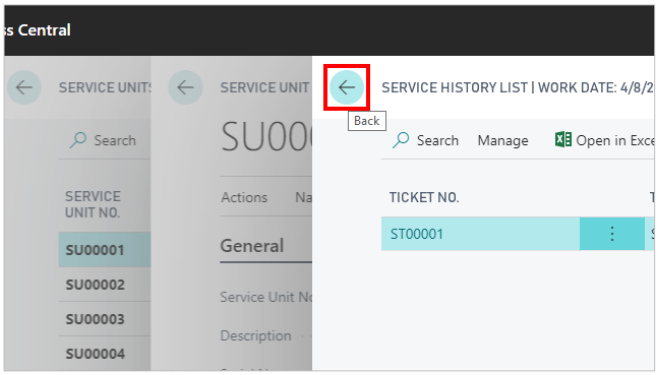
Click on the navigation menu item **Completed Service Ticket**



Click on the back button



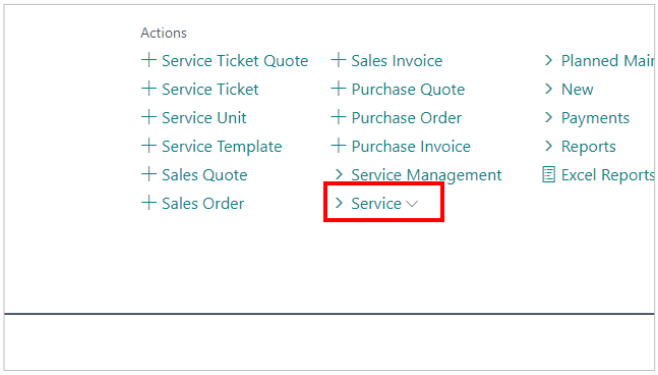
Click on the back button



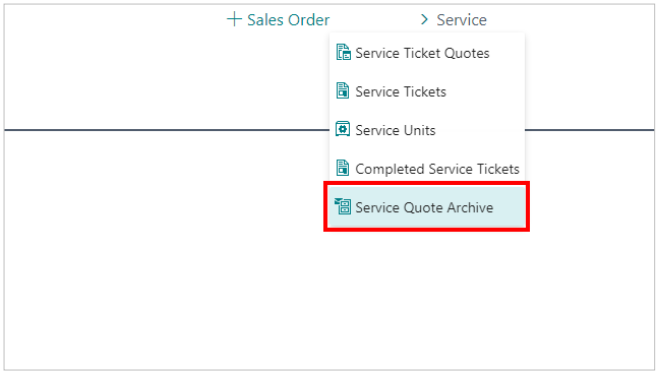
5.2.3. How to view the Service Quote Archive

The following demonstrates how to view a history of completed service checklists.

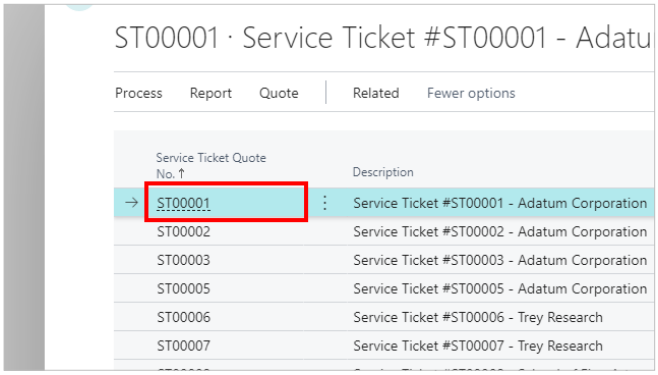
Click on the navigation menu item popup **Service**



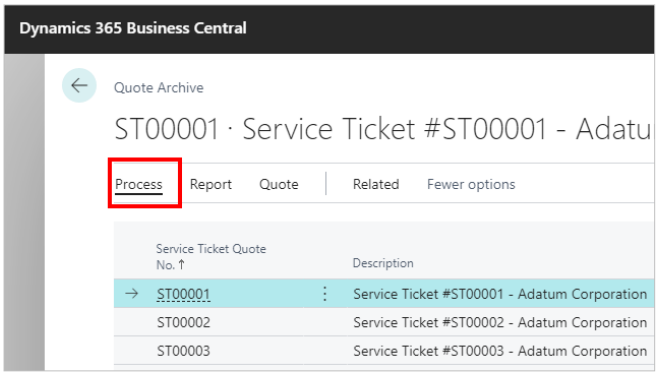
Click on the navigation menu item **Service Quote Archive**



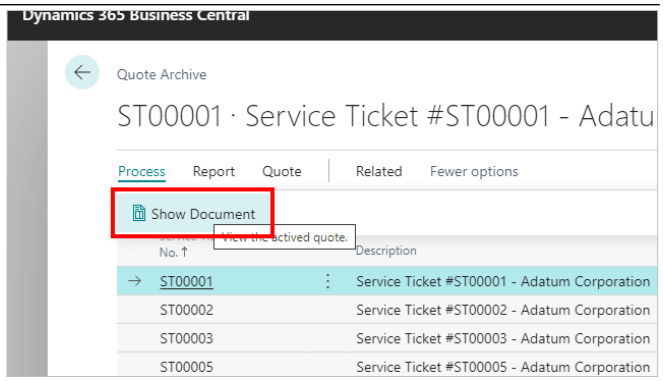
Select the quote that you wish to view
Click on the cell **Service Ticket Quote No.** with the value **ST00001**



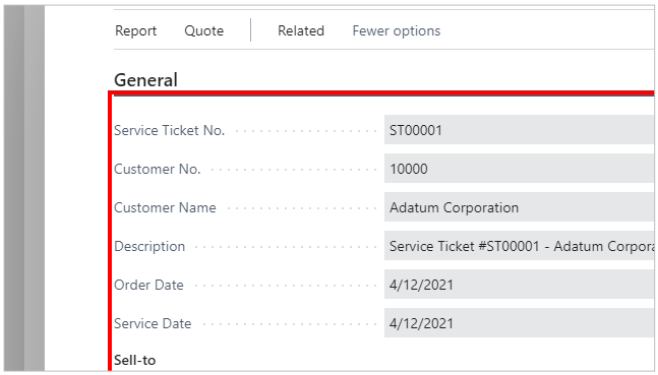
Click on the navigation menu item popup **Process**



Click on the navigation menu item **Show Document**



You can now view information about the completed Service Ticket Quote.

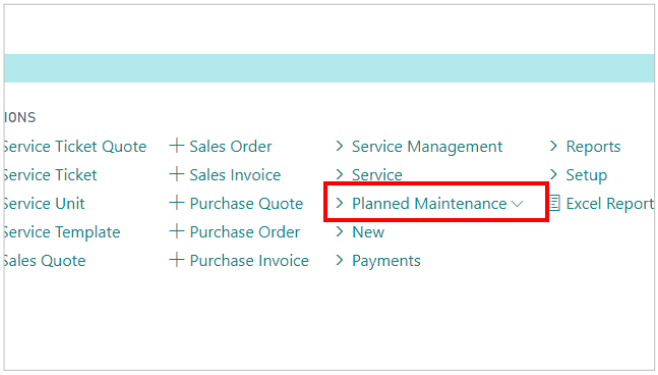


5.3. How to Review Planned Maintenance History

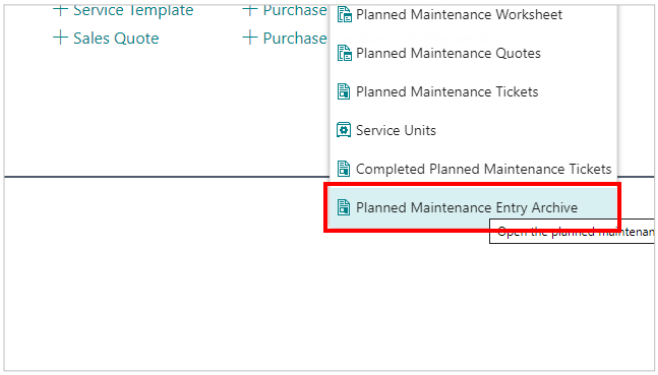
5.3.1. How to view the Planned Maintenance Entry Archive

Business Manager Profile

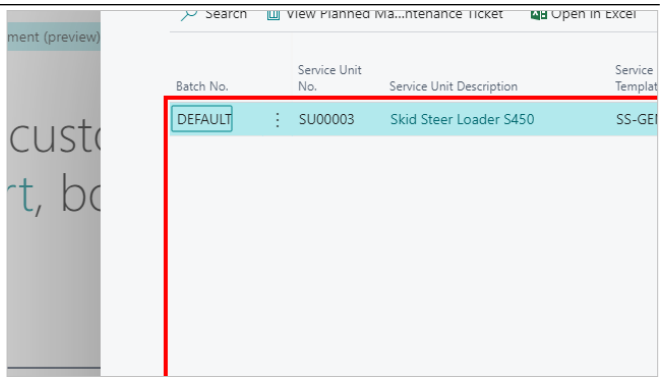
Click on the navigation menu item popup **Planned Maintenance**



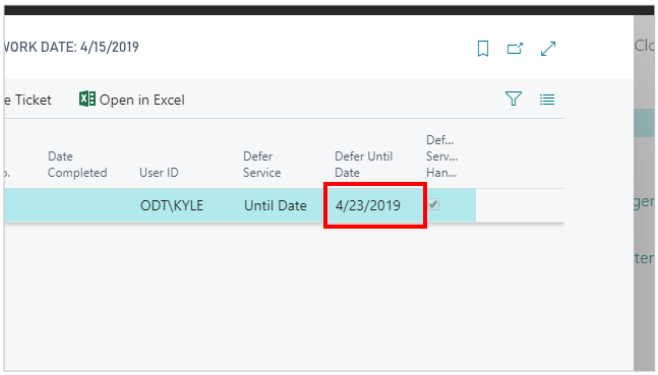
Click on the navigation menu item **Planned Maintenance Entry Archive**



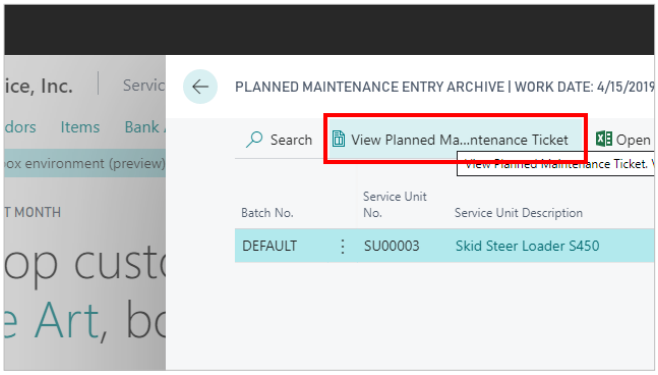
The archive will display a list of all tickets that have been processed using the Planned Maintenance Worksheet.



Click on the cell **Defer Until Date** with the value **4/23/2019**



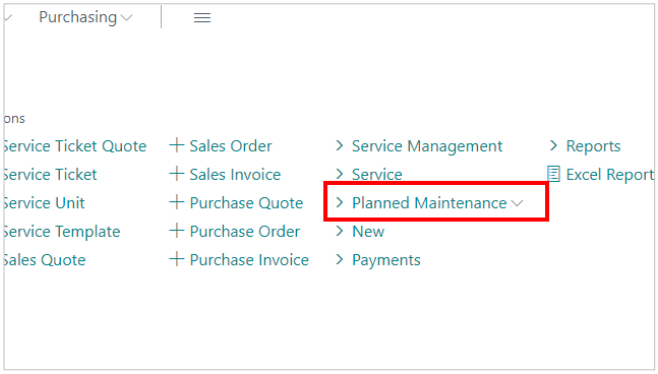
Click on the navigation menu item **View Planned Maintenance Ticket**
If an entry has a Planned Maintenance Ticket assigned to it, you can view it by clicking the View Completed Planned Maintenance Ticket button.



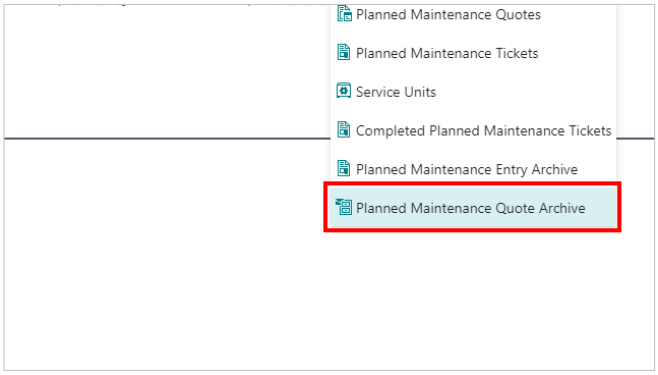
5.3.2. How to view Planned Maintenance Quote Archive

The following demonstrates how to view the Planned Maintenance Quote Archive.

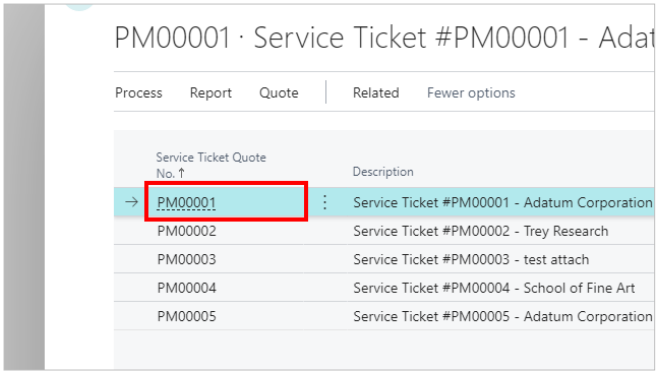
Click on the navigation menu item popup **Planned Maintenance**



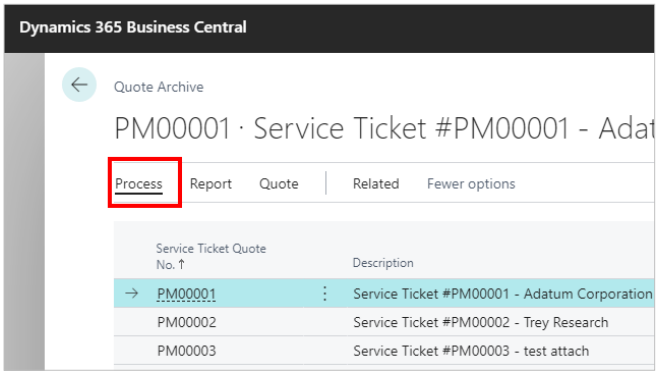
Click on the navigation menu item **Planned Maintenance Quote Archive**



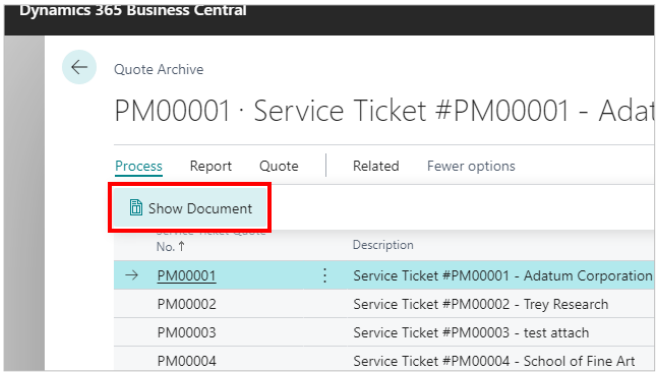
Select the quote you wish to view.
Click on the cell **Service Ticket Quote No.** with the value **PM00001**



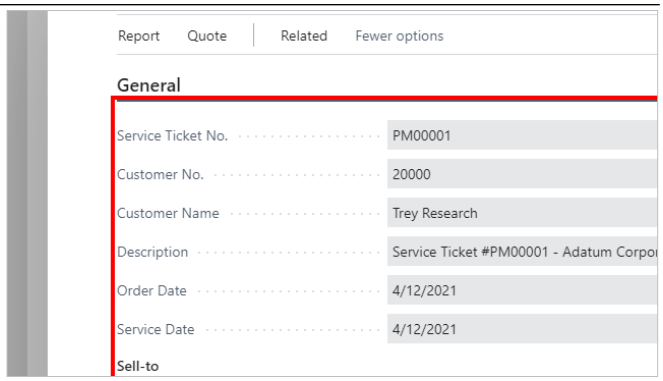
Click on the navigation menu item popup **Process**



Click on the navigation menu item **Show Document**



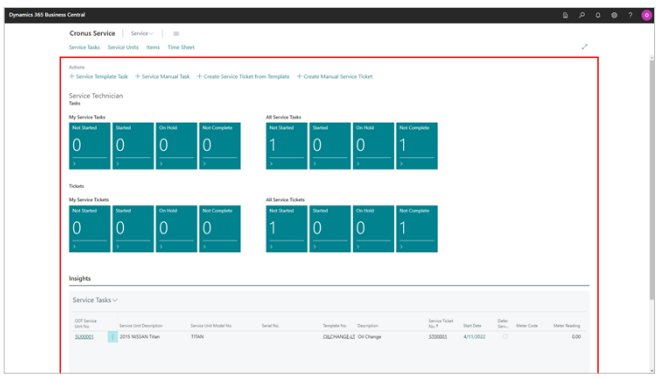
You can now view details of the complete Planned Maintenance Quote



6. Technician Role Center

6.1. Technician Role Center Overview

The Service Technician Role Center provides a more simplified and streamlined view of service information needed for technicians. Technicians can view a list of service tasks that have been assigned to them, and can easily view and update information related to the task, such as task status, parts and items used, and time spent. There are also options to quickly create additional tasks if needed.



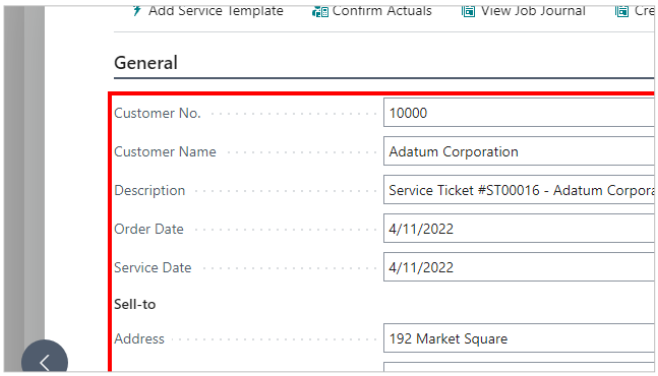
6.2. Service Ticket Task

The following demonstrates how to release and process service tasks using the Technician role center.

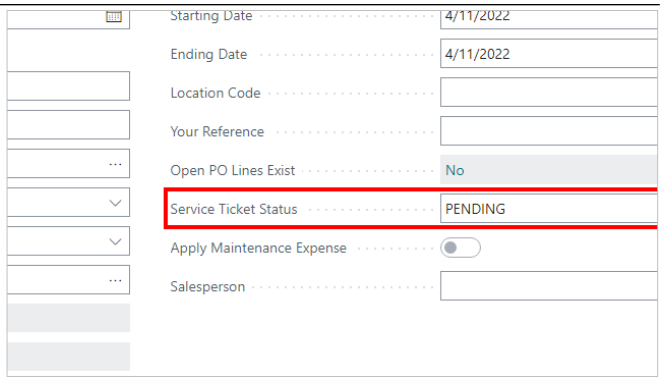
Note that this demonstration assumes that relevant Service Statuses have already been created. Please refer to the documentation for Service Status for steps on how to do this.

6.2.1. How to Release a Ticket for Service

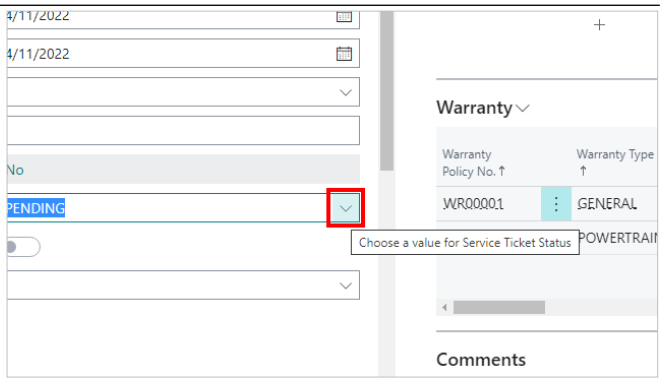
Service Tickets must first be released by a Technician Manager using the Business Manager role center.



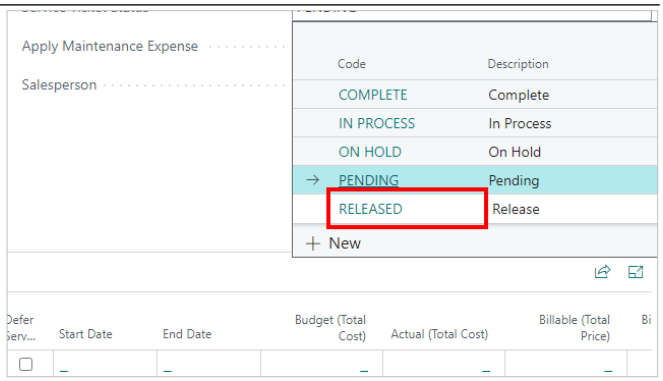
To release the ticket, the status must be changed to a status with the Released type



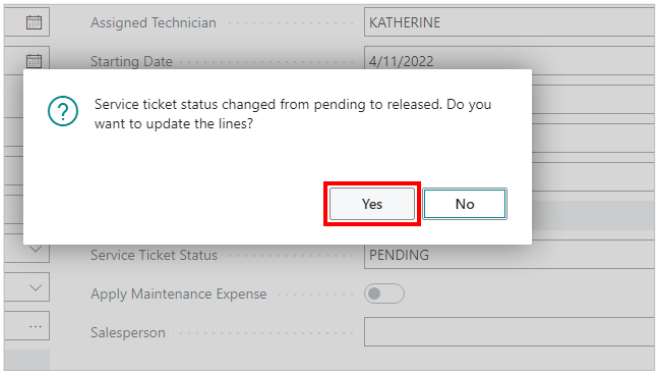
Click on the lookup button **Service Ticket Status**



Click on the link in cell **Code** with the value **RELEASED**

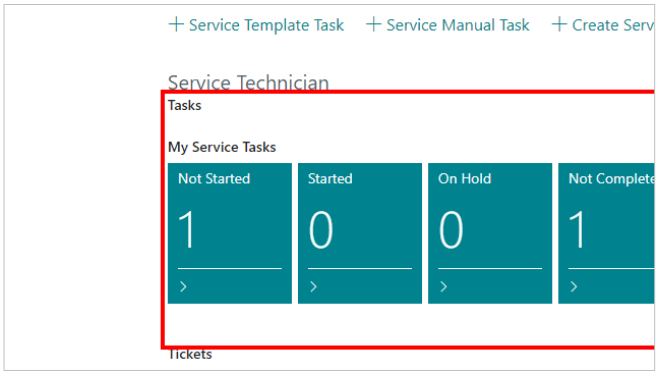


Click on the button **Yes**

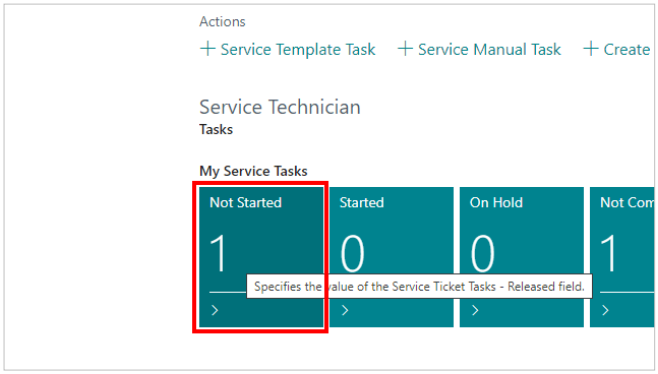


6.2.2. How to Process a Service Ticket Task

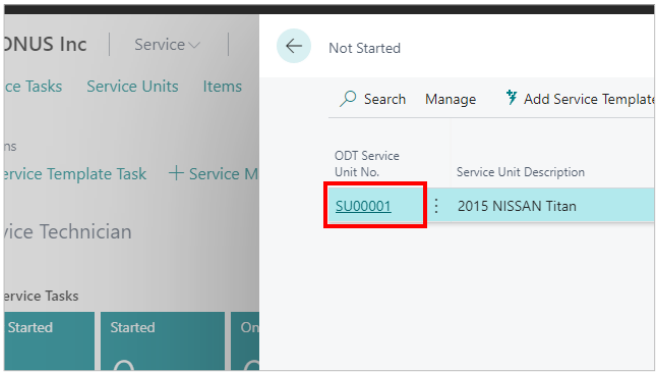
Service Tasks in the Technician role center are sorted based on their status.



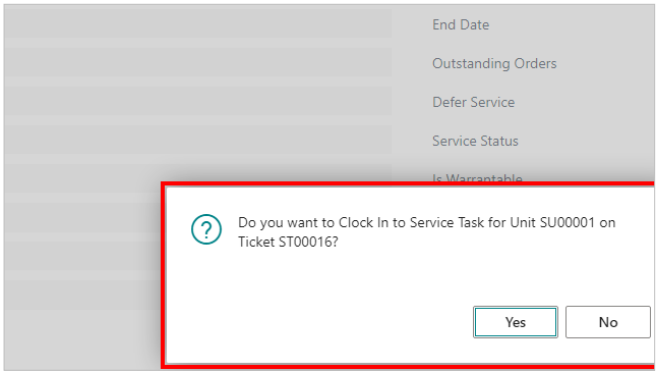
Click on the link Not Started



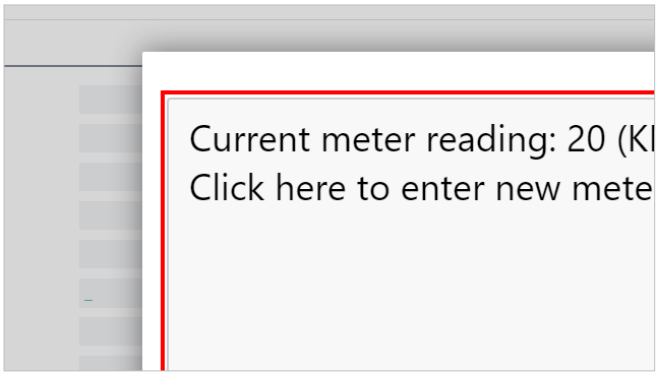
A list of Service Tasks will be displayed
Click on the link in cell **ODT Service Unit No.** with the value **SU00001**



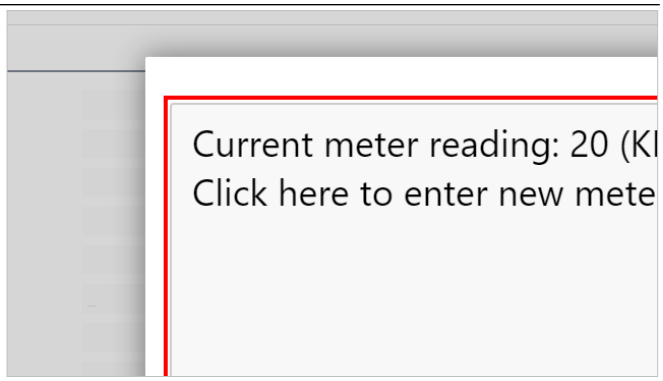
There will be an option to clock in if you wish to use time tracking. Please refer to the Time Tracking documentation for additional information on this feature.



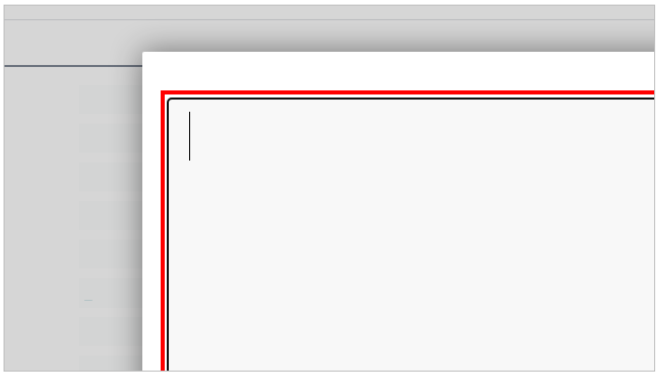
If the unit has a Service Meter, you will prompted to update the meter reading.



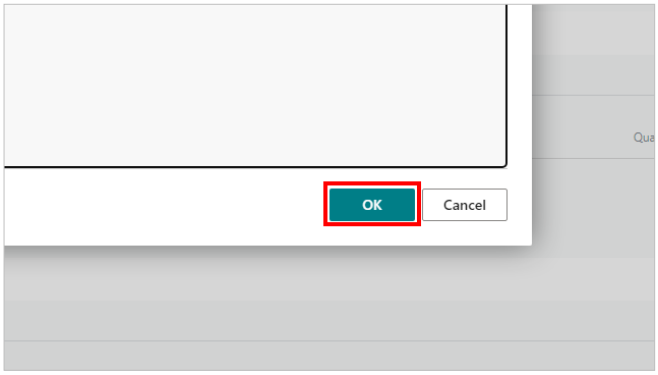
Click on the textarea



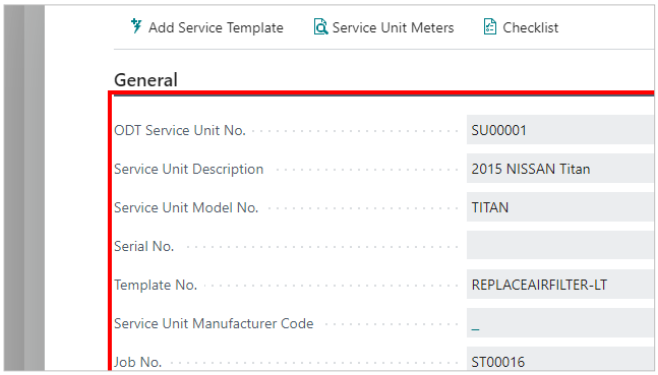
Enter the text **50**.



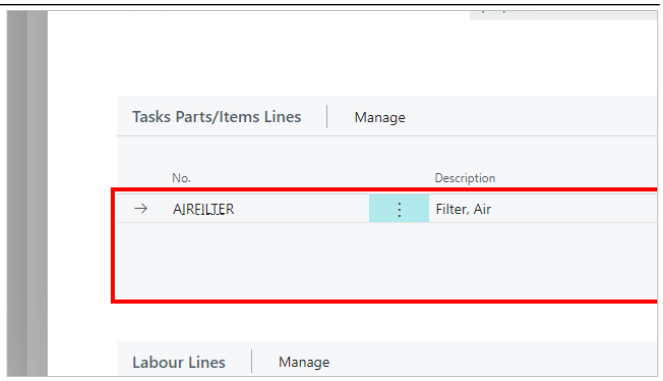
Click on the button **OK**



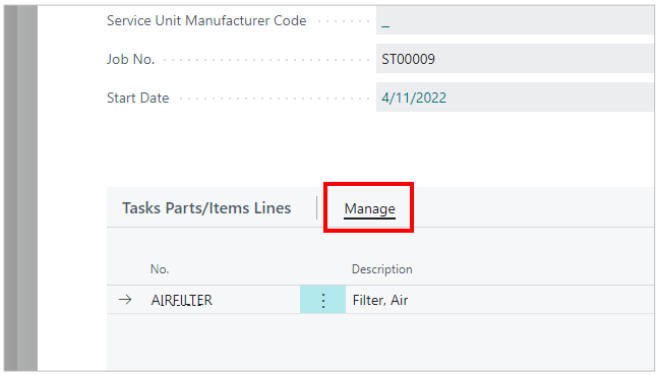
The General Tab displays details about the Service Unit and Service Ticket the task is related to.



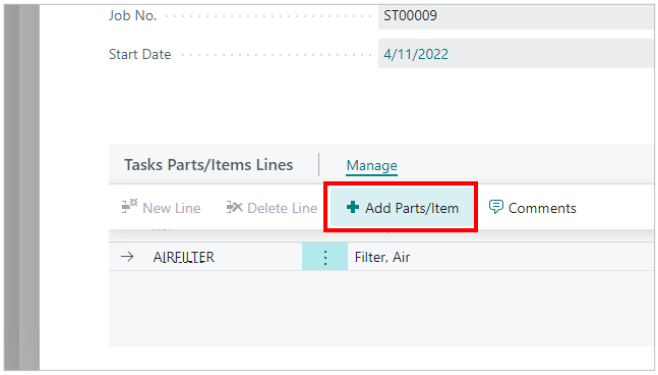
The Task Parts/Items Lines display the list of Parts and Items being used for the service task. Additional Parts and Items can be added as needed.



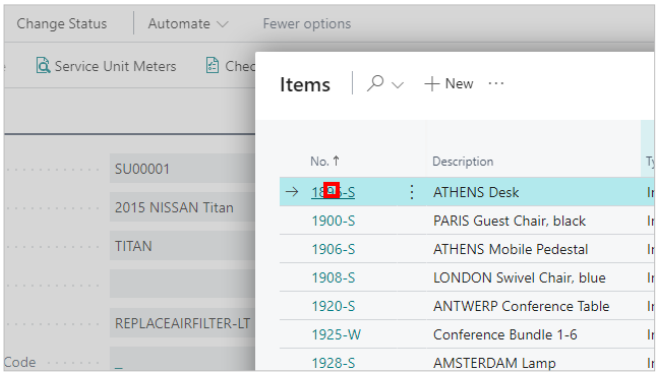
Click on the navigation menu item popup **Manage**



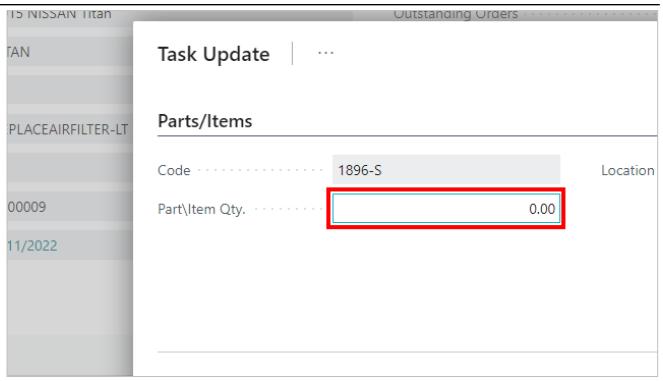
Click on the navigation menu item **Add Parts/Item**



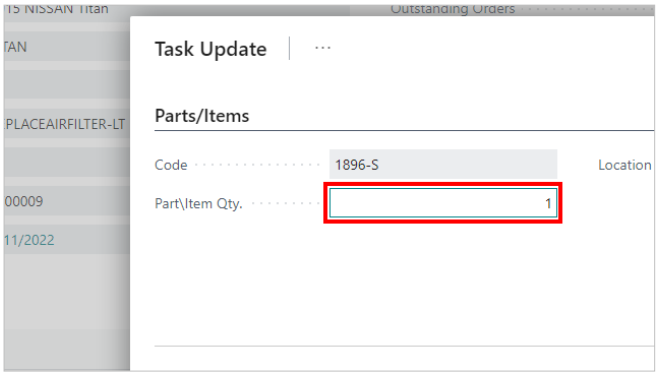
Select the Part or Item you want to add to the task



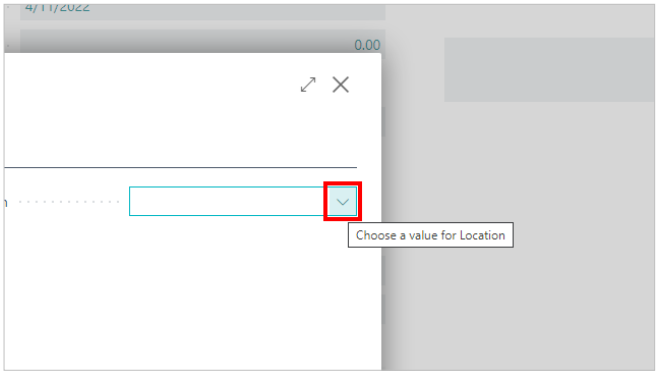
Click on the field **Part\Item Qty.**



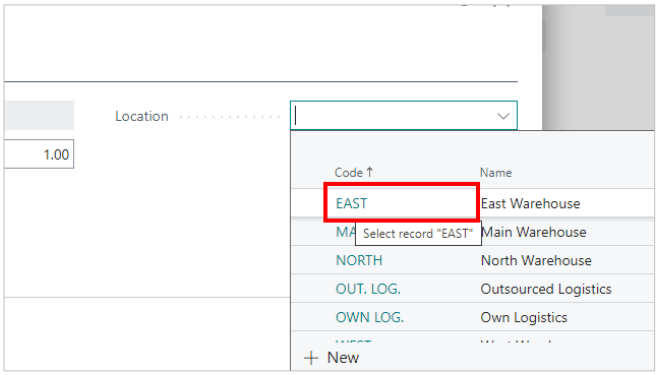
Enter the text **1**.



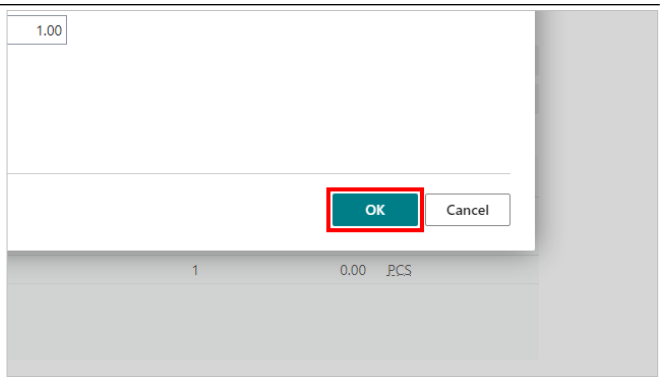
Click on the lookup button **Location**



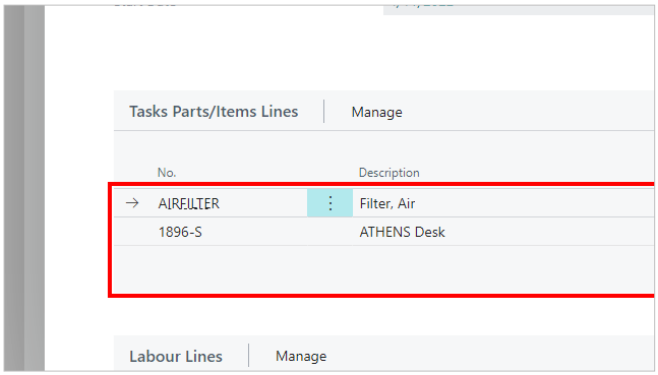
Click on the link in cell **Code** with the value **EAST**



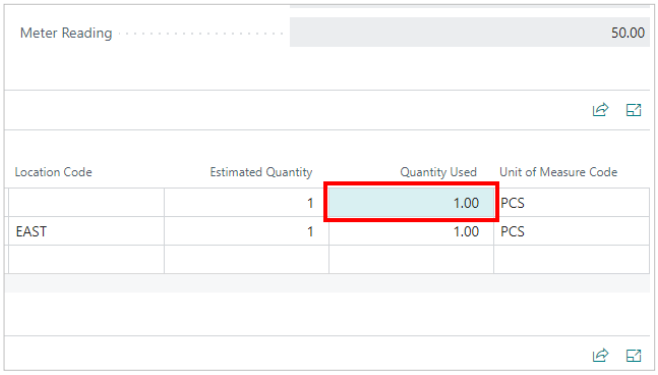
Click on the button **OK**



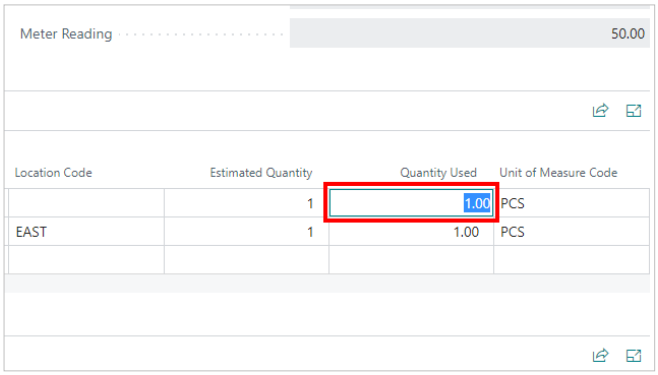
Notice that the selected part or item has now been added to the task lines



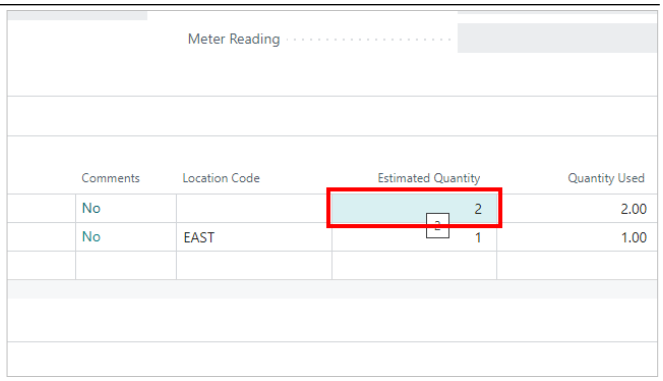
You can also adjust the quantity of parts and items used for the task as needed.
Click on the cell **Quantity Used** with the value **1.00**



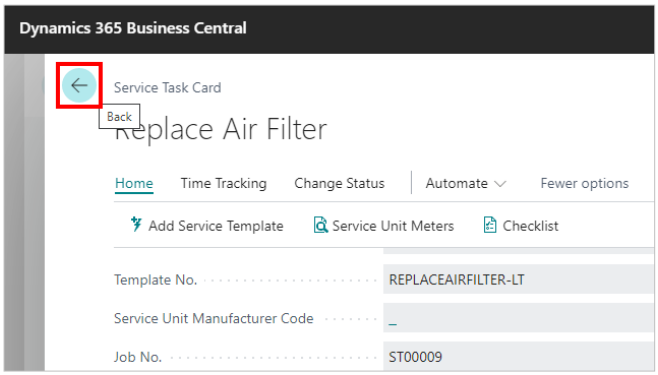
Enter the text **2**.



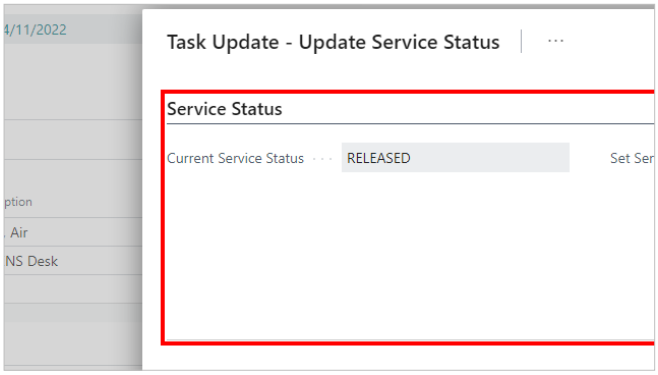
Click on the cell **Estimated Quantity** with the value **2**



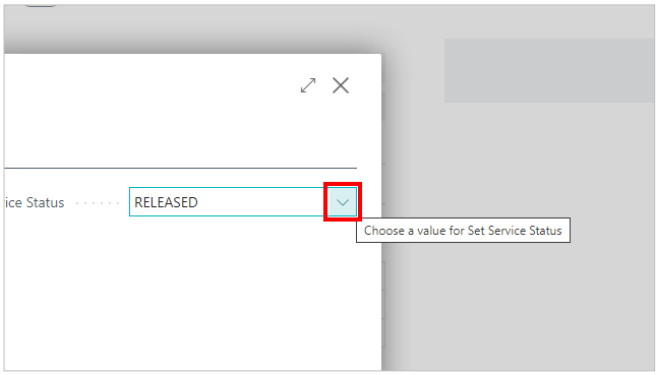
When you are finished working on the task, you can close the task card.
Click on the back button



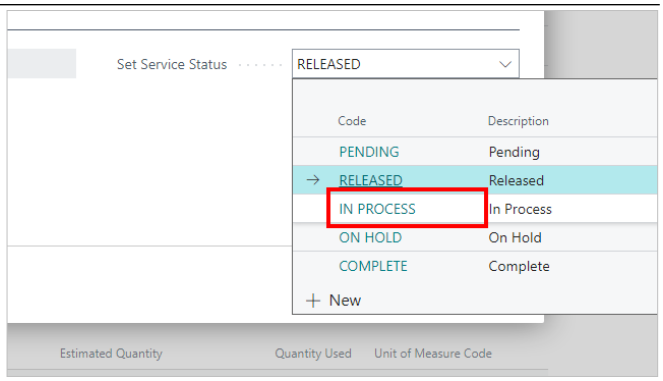
If the status of the task has changed, you can update it when closing the task card.



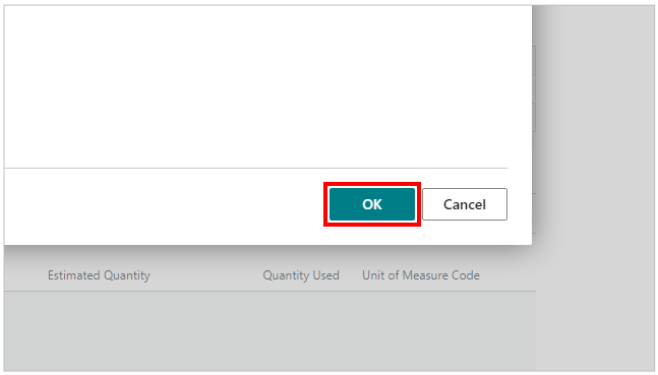
Click on the lookup button **Set Service Status**



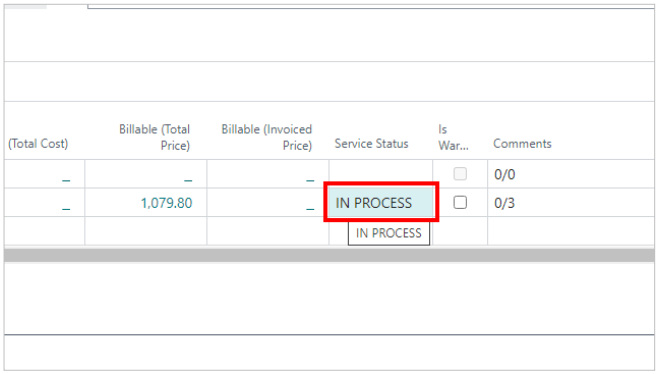
Click on the link in cell **Code** with the value **IN PROCESS**



Click on the button **OK**



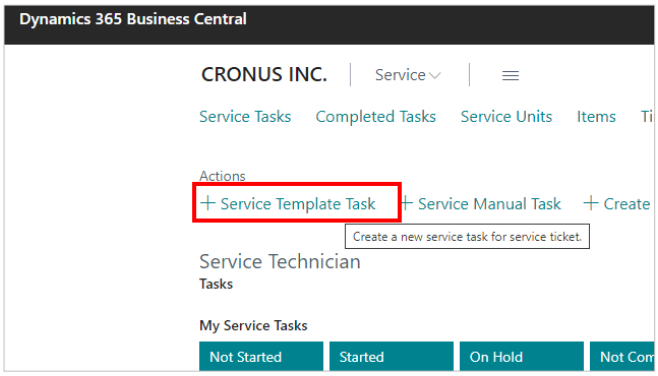
When viewing the service ticket from the Business Manager role center, notice that the status of the task has been updated to match what was specified when closing the task card



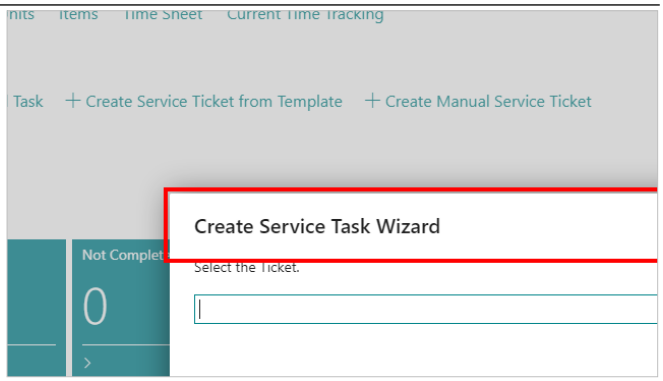
6.2.3. How to Create a New Task

New tasks can be created by manually entering a task description or by using an existing Service Template. The following demonstrates how to create a new Service Task using Service Template Task, however a similar process can be used for Service Manual Task.

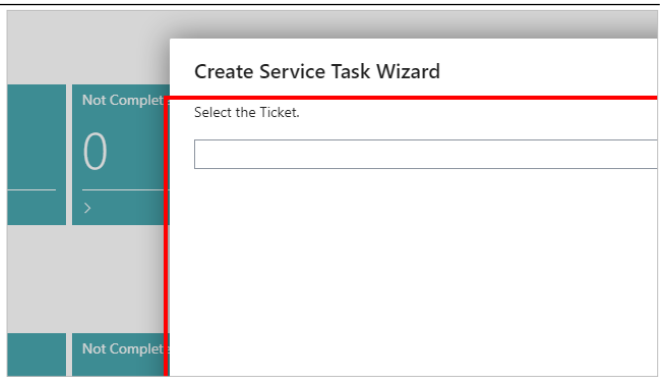
Click on the navigation menu item **Service Template Task**



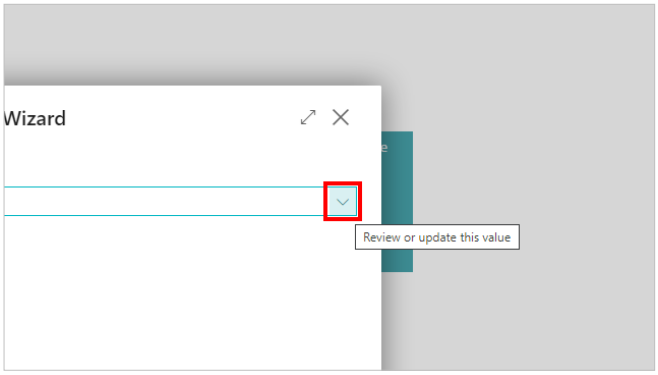
The Task Creation Wizard will open and guide you through the steps to create a new task.



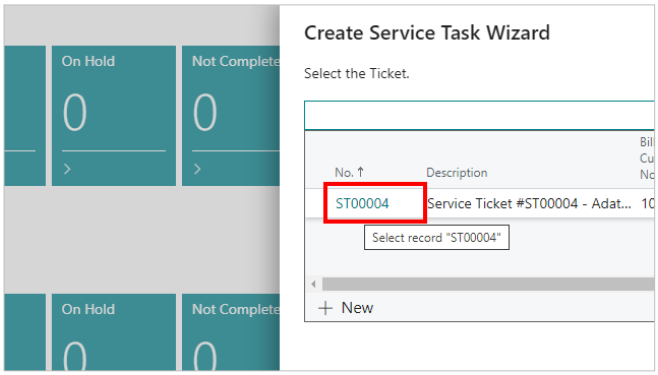
First, select the Service Ticket that will include this task.



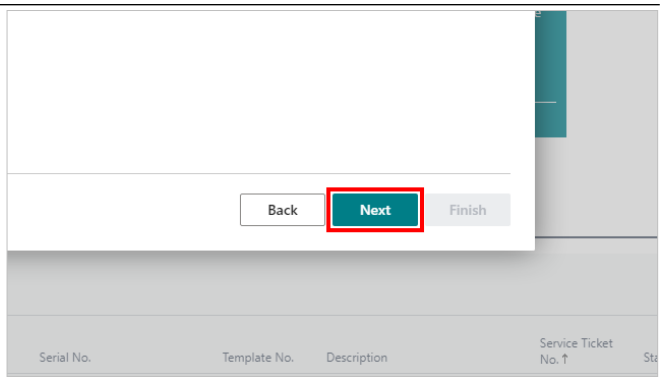
Click on the lookup button **Review or update this value**



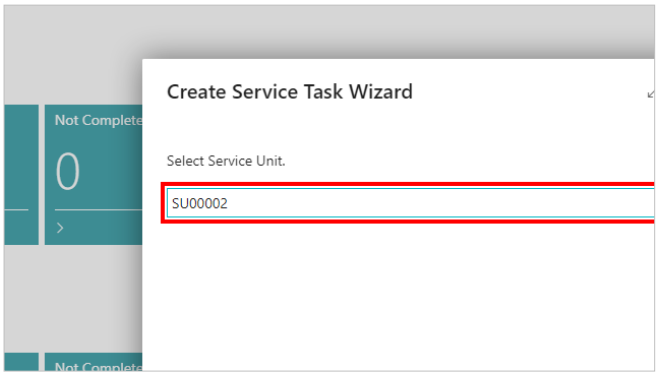
Click on **No.**



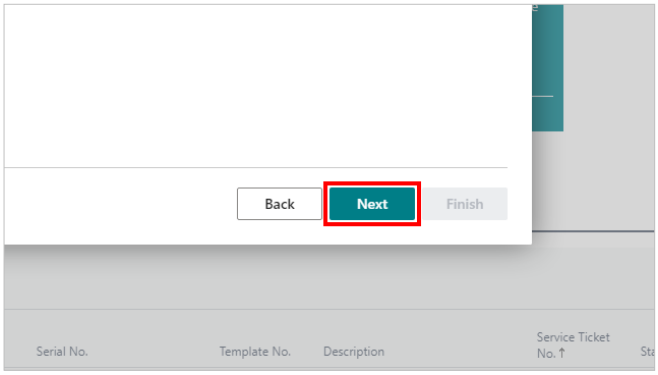
Click on the button **Next**



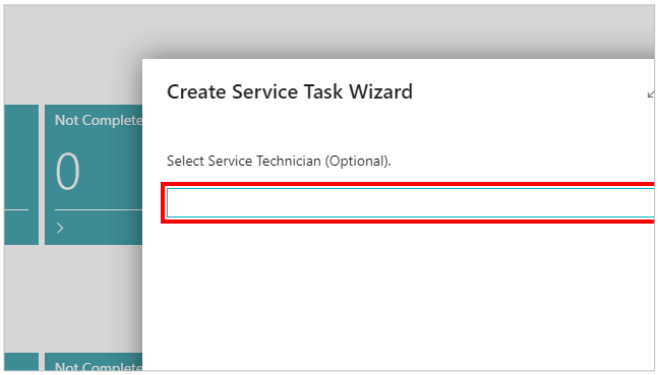
The wizard will default to the unit specified on the ticket. If there is more than one unit on the ticket you will be able to change the one that is selected.



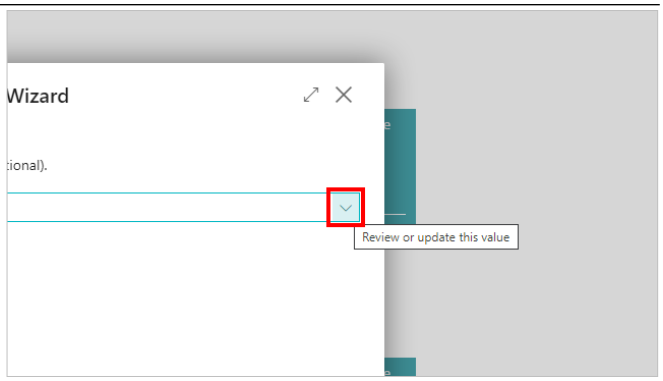
Click on the button **Next**



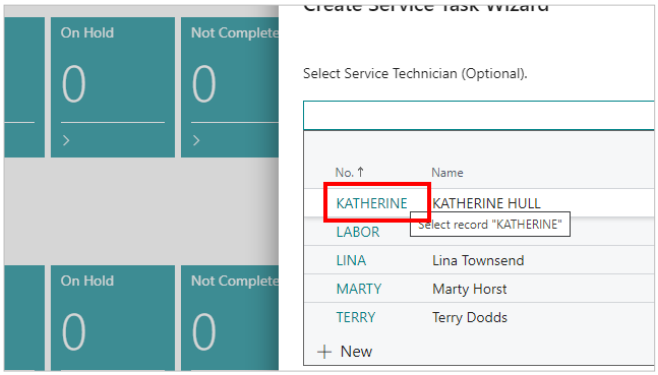
You may choose to select a Technician to be assigned to the task.



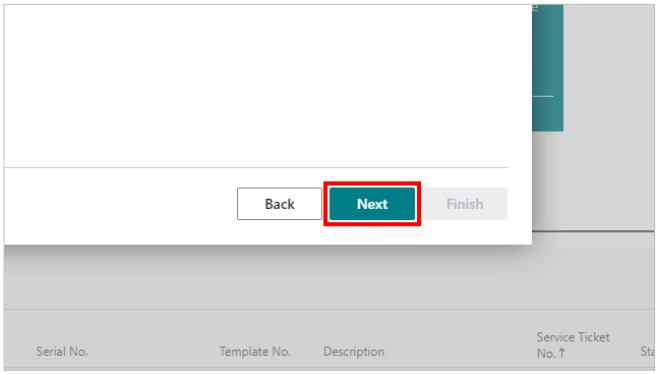
Click on the lookup button **Review or update this value**



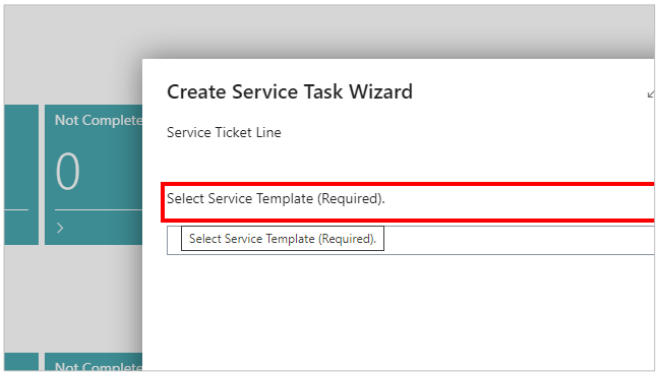
Click on **No.**



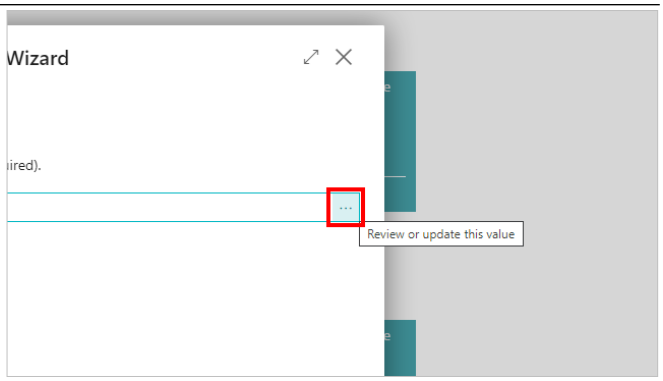
Click on the button **Next**



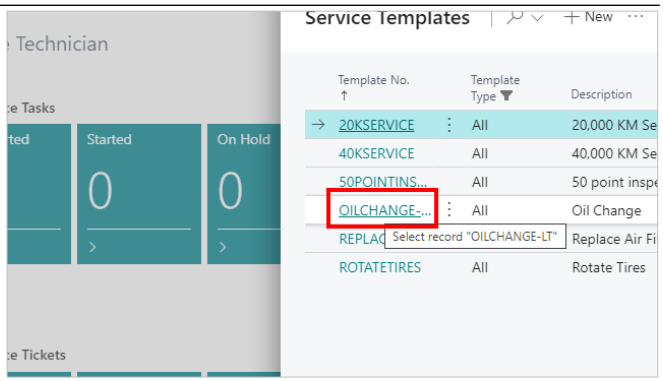
Select the Service Template you want to use to create the task.



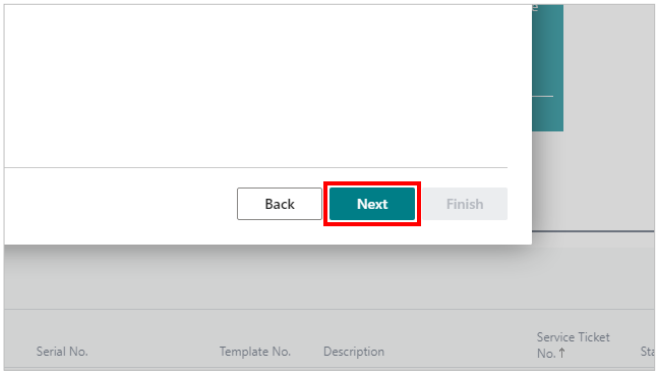
Click on the lookup button **Review or update this value**



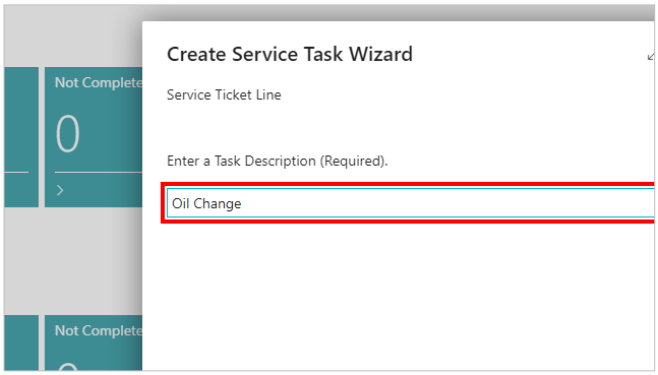
Click on **Template No.**



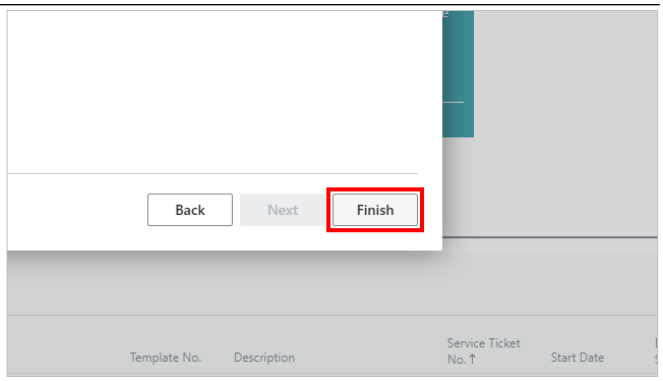
Click on the button **Next**



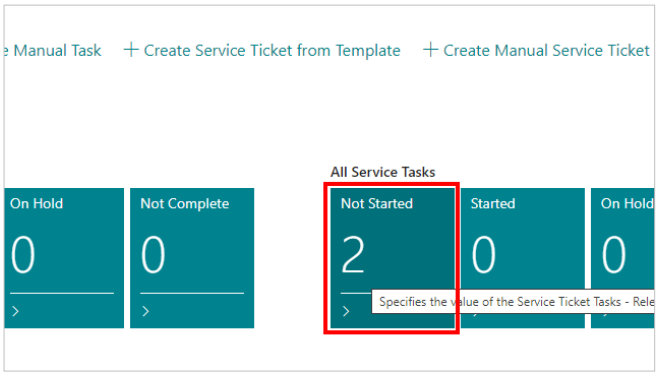
The Task Description will default from the selected Service Template. You will be given the option to change the description if you wish.



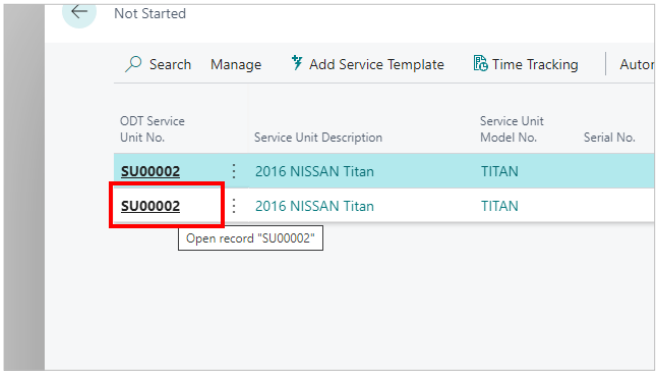
Click on the button **Finish**



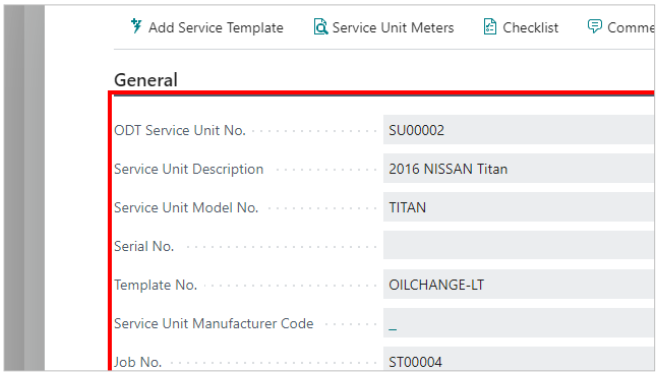
When the wizard is finished the new task will now be displayed in the Service Task Cue



Click on **ODT Service Unit No.**



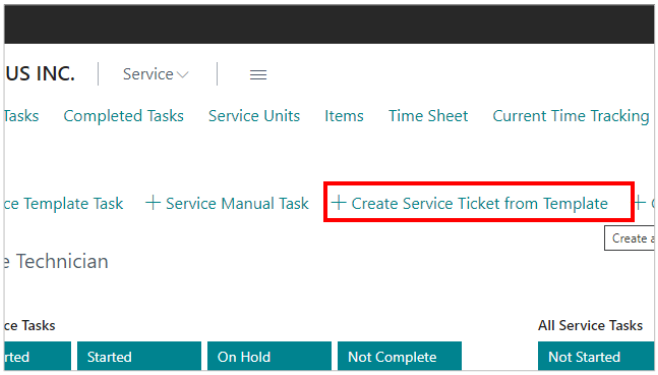
Notice that the new task has all the details that were specified in the creation wizard



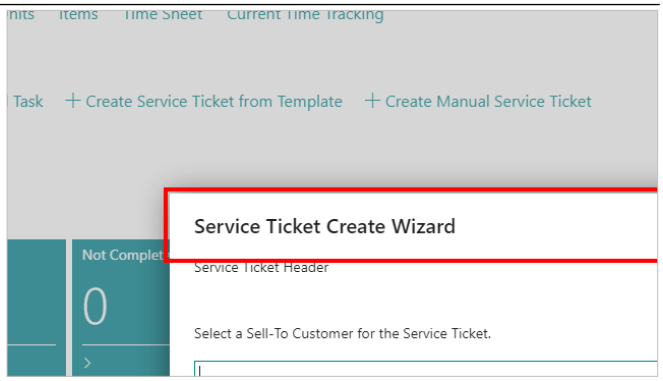
6.2.4. How to create a new Service Ticket

New tickets can be created by manually entering a ticket description or by using an existing Service Template. The following demonstrates how to create a new Service Ticket using Service Ticket from Template, however a similar process can be used for Manual Service Ticket.

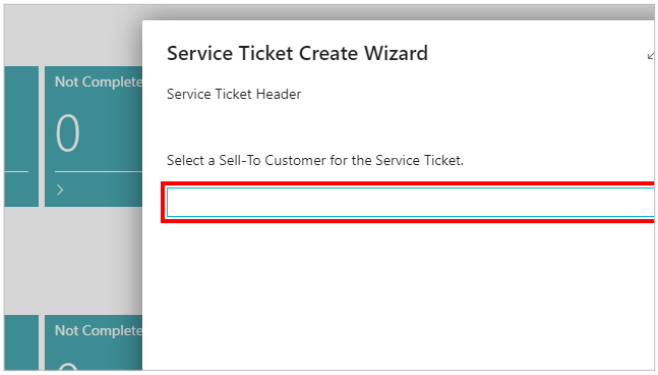
Click on the navigation menu item **Create Service Ticket from Template**



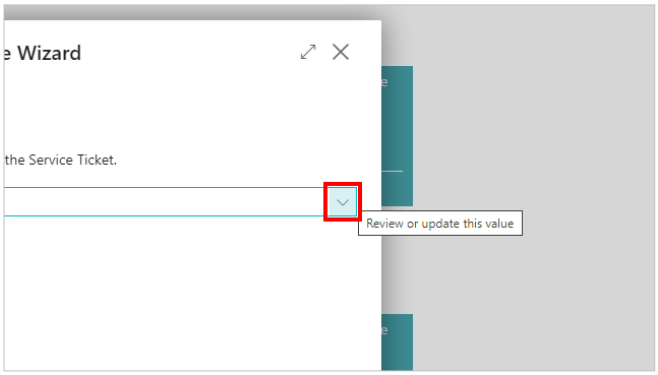
This will open the Service Ticket Create Wizard



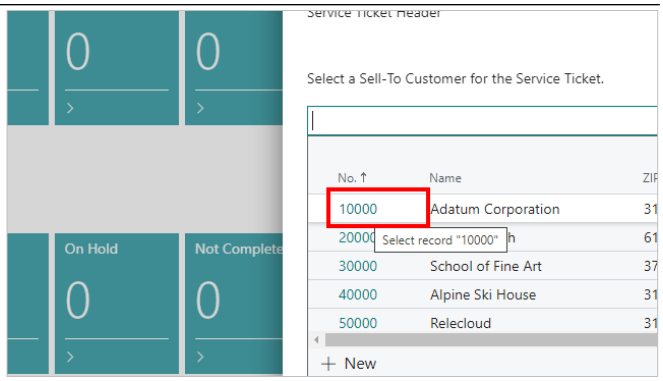
You must first select the Sell-To Customer for this Service Ticket



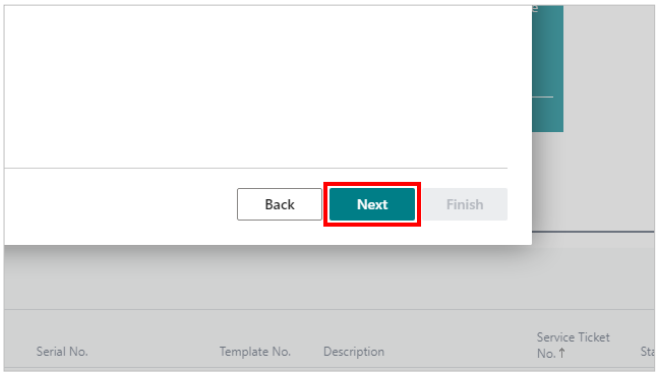
Click on the lookup button **Review or update this value**



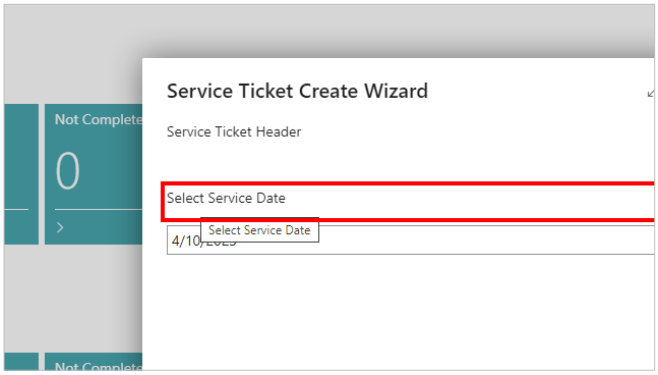
Click on **No.**



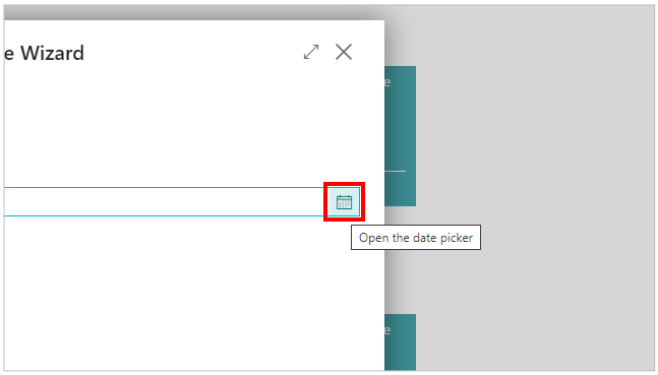
Click on the button **Next**



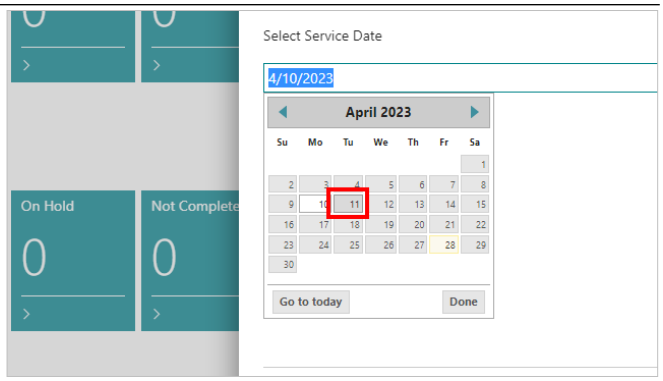
Select the Service Date to be used for the ticket



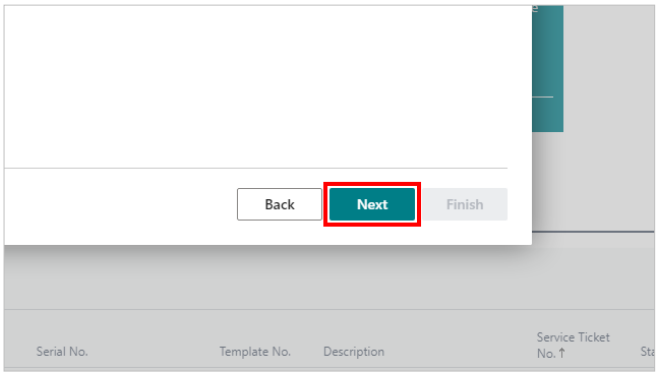
Click on the link **Open the date picker**



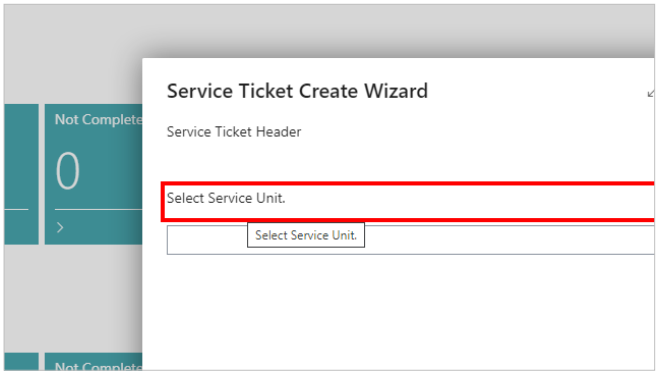
Click on a date in the calendar



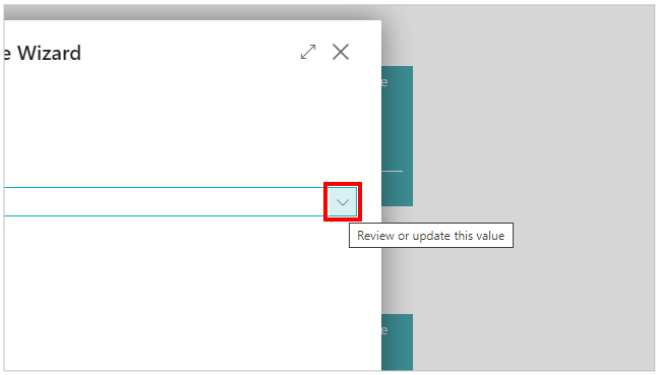
Click on the button **Next**



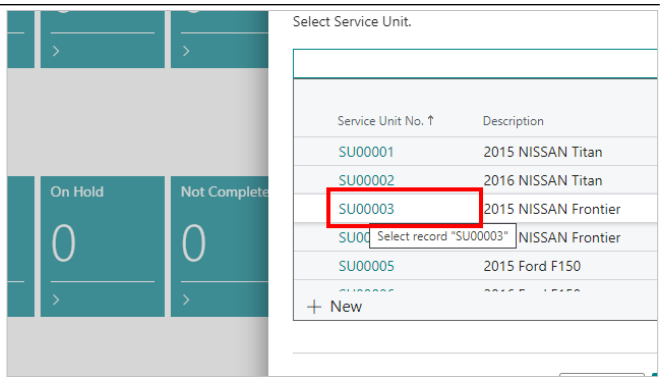
Select the Service Unit that will be used to perform service



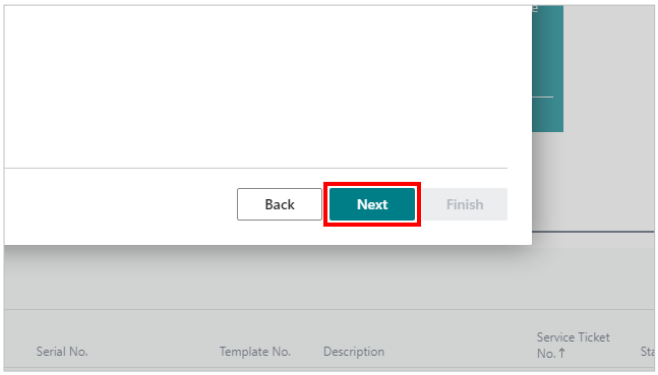
Click on the lookup button **Review or update this value**



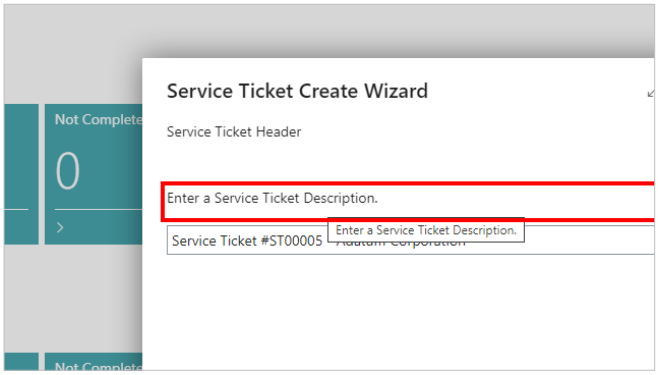
Click on **Service Unit No.**



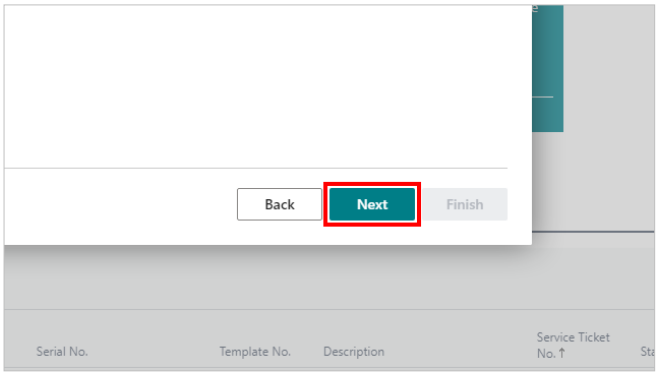
Click on the button **Next**



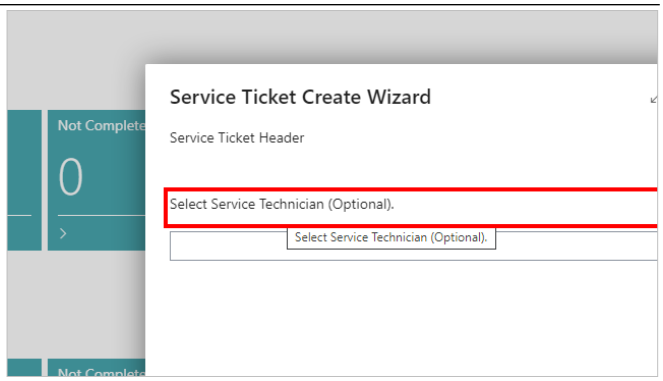
The Service Ticket Description will default from the selected template. If you wish to change the description, you will be given the option to do so.



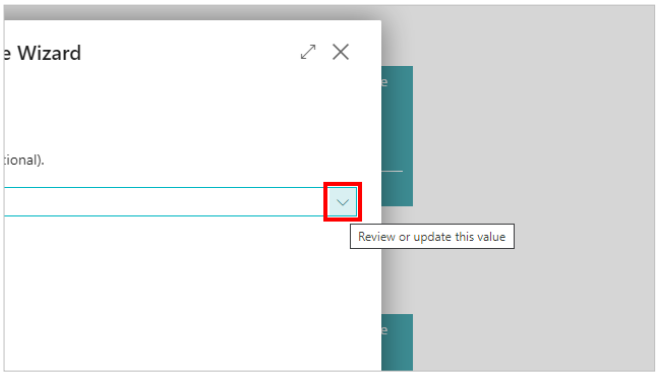
Click on the button **Next**



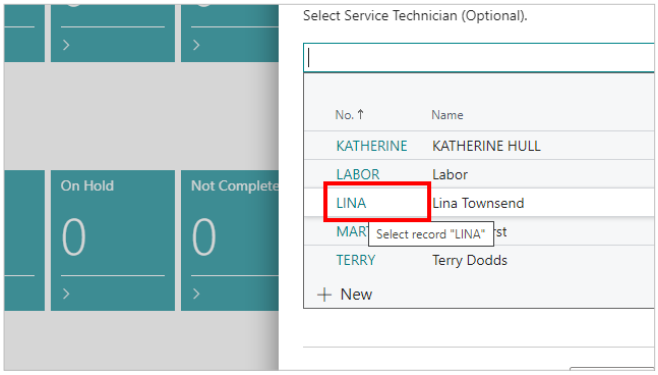
You may select a Technician to be assigned to this ticket.



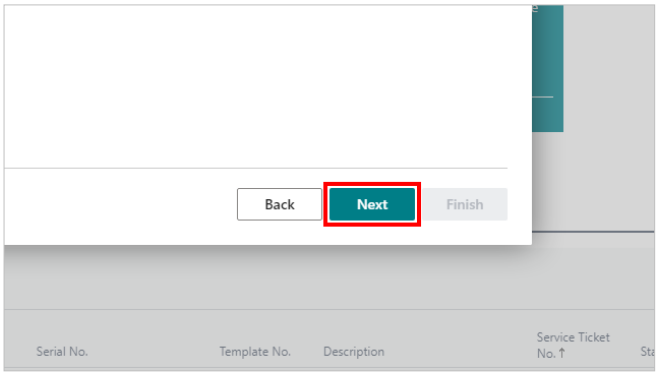
Click on the lookup button **Review or update this value**



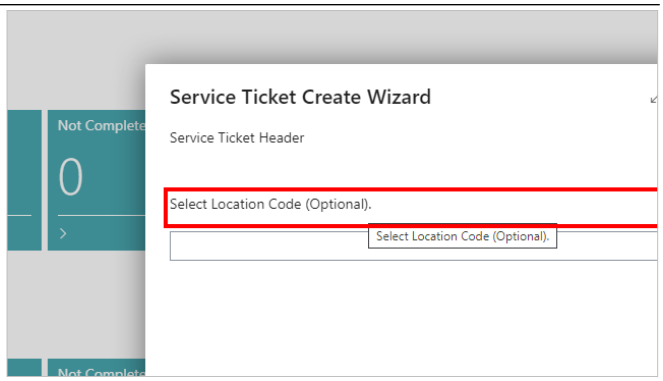
Click on **No.**



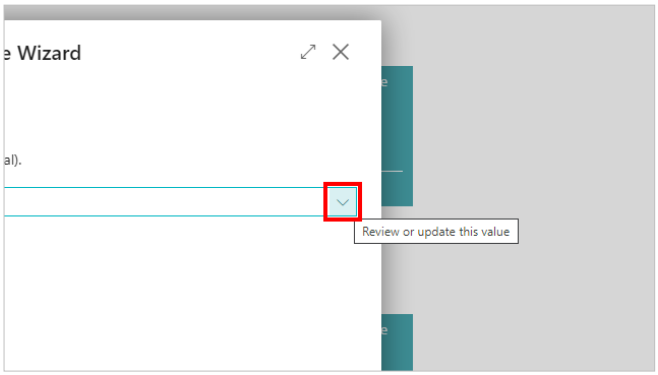
Click on the button **Next**



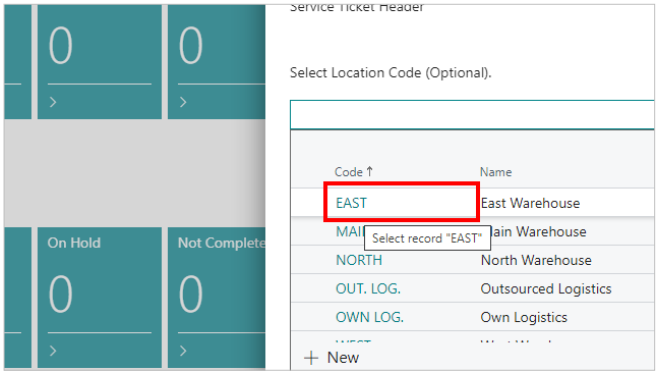
You may select a Location Code for this ticket.



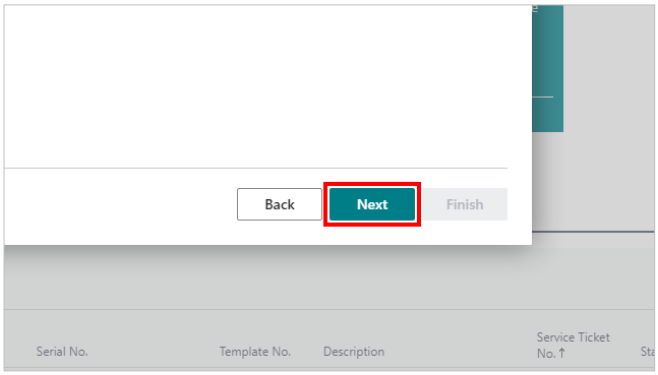
Click on the lookup button **Review or update this value**



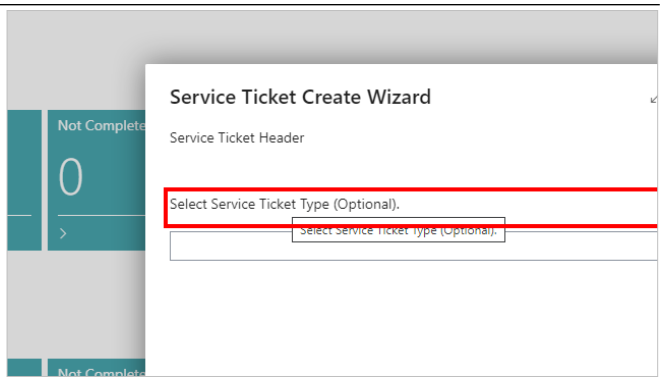
Click on East



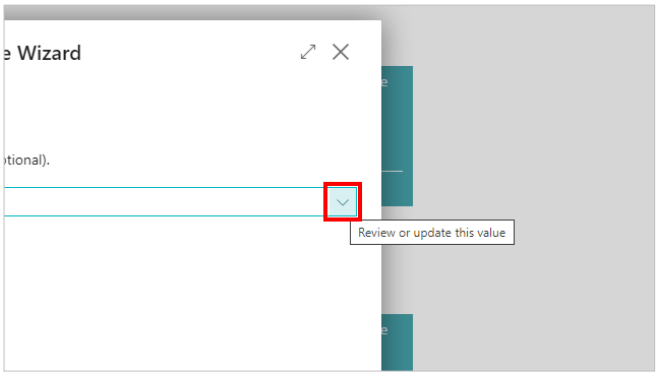
Click on the button **Next**



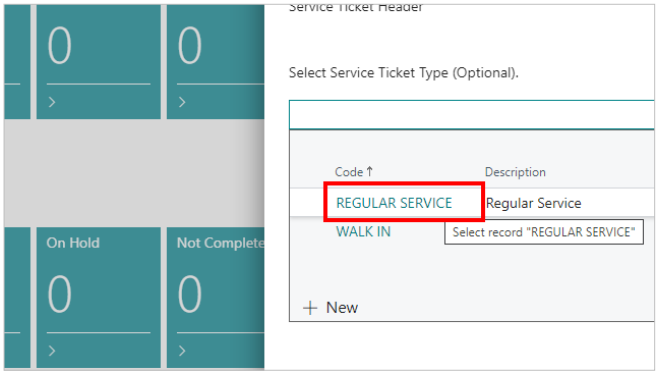
You may select a Service Ticket Type



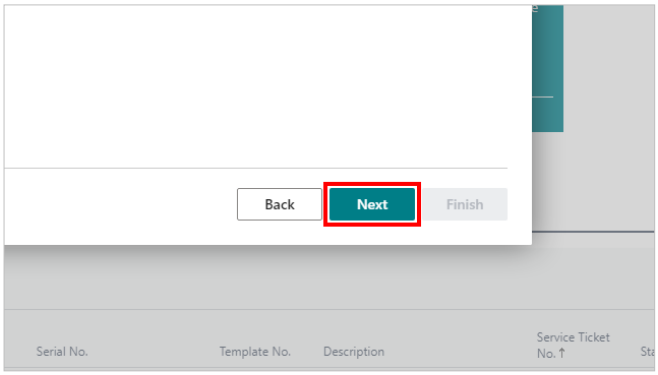
Click on the lookup button **Review or update this value**



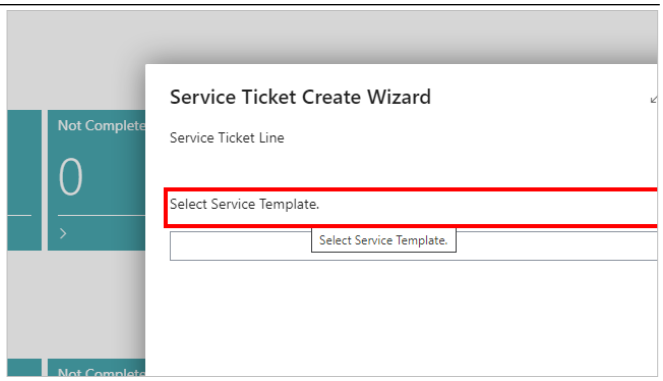
Click on **Code**



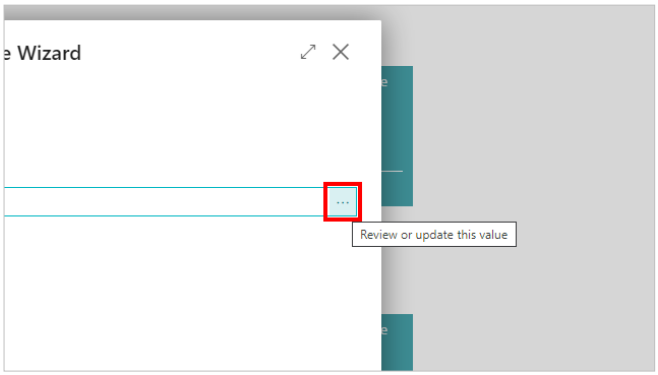
Click on the button **Next**



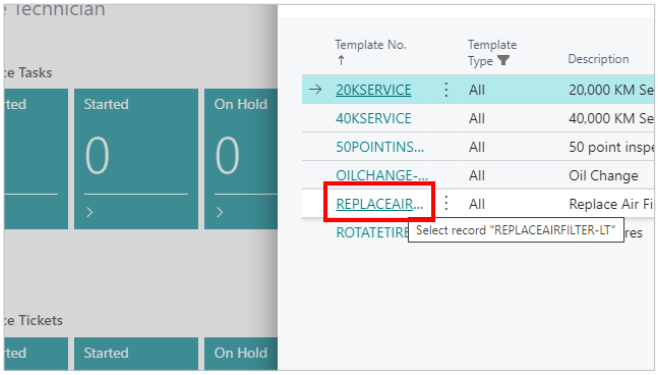
Next, select the Service Template that will be used for the ticket



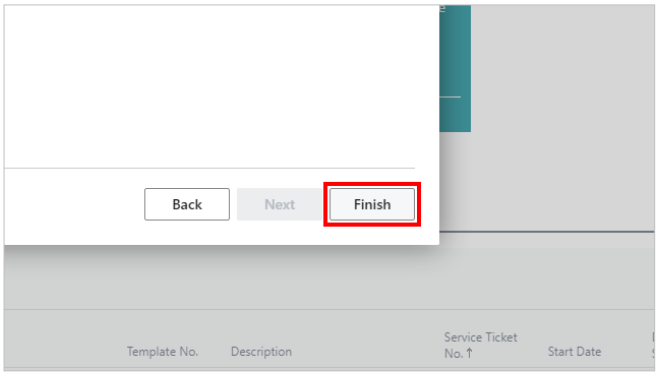
Click on the lookup button **Review or update this value**



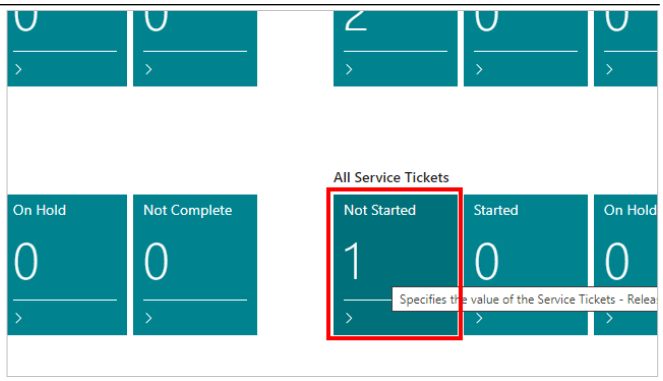
Click on **Template No.**



Click on the button **Finish**



Notice that the new ticket has now been added to the Service Ticket Queue



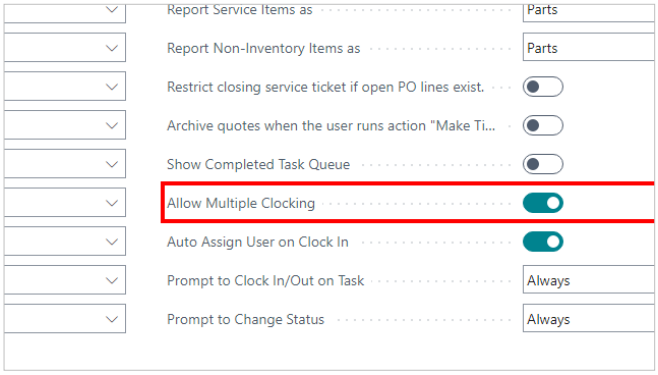
6.3. Time Tracking

The Service Technician role center provides Time Tracking functionality so technicians can track the time spent on service tasks. Time can be tracked through ODT Service, or there is the option to integrate time tracking with standard BC time sheets.

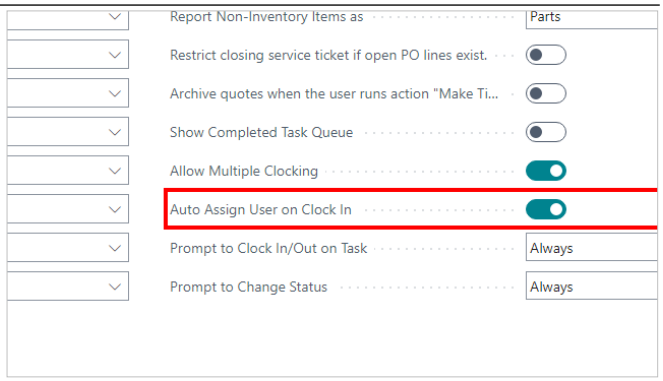
6.3.1. How to Configure Time Tracking

The Time Tracking feature has a number of additional options that can be configured if you wish. These options can be found in Service Management Setup.

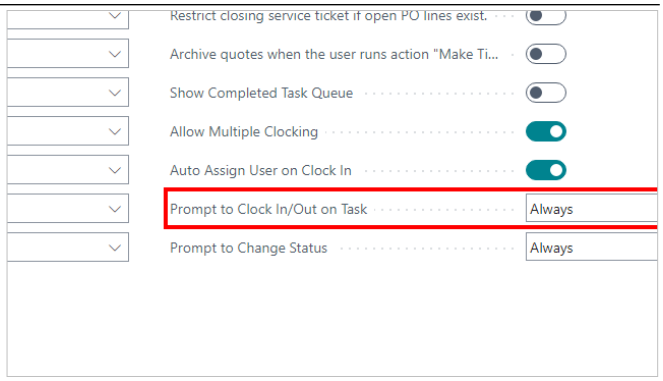
By default, time tracking only allows a user to be clocked in to one task at a time. If you wish to allow clocking in to multiple tasks at the same time, this can be enabled in Service Management Setup



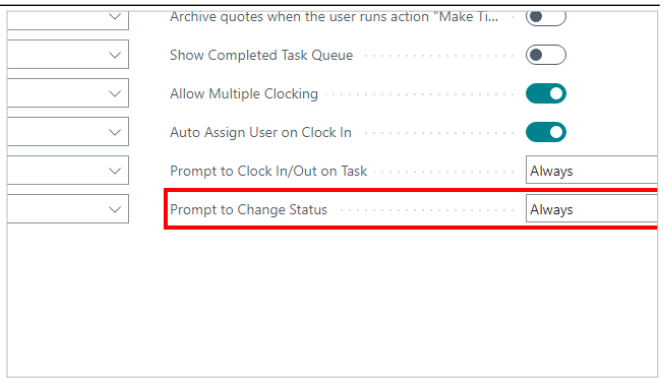
By default, users will need to be assigned to tasks manually. This toggle will enable users to be automatically assigned to a task upon Clocking In to the Task Card.



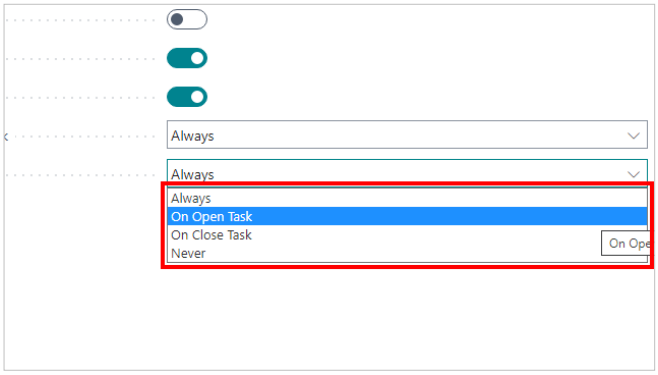
When opening and closing a Task Card, a prompt is displayed asking if the uses wishes to Clock In or Out. This option can control how frequently this prompt is displayed.



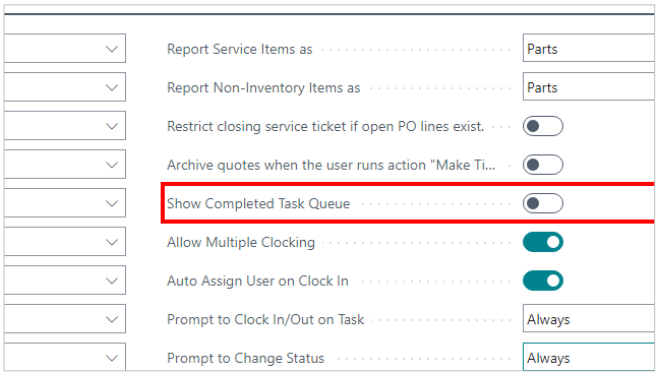
When opening and closing a Task Card, a prompt will be displayed asking the user if they want to update the task status. This option can control how frequently this prompt is displayed.



Both of the above prompts will always occur by default, but can be changed to display only when opening or only when closing a task, or they can set to never display at all.



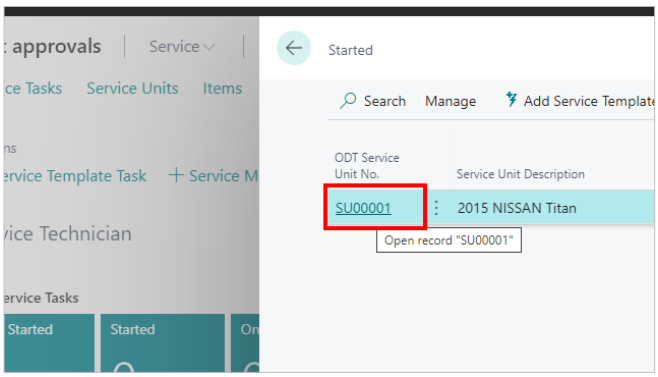
When this option is enabled, additional Queues will be displayed in the Technician Role Center that will show a list of all completed tasks and tickets.



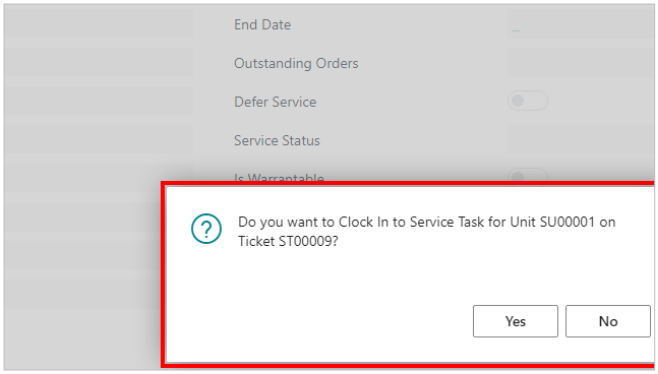
6.3.2. How to Track Time

The following demonstrates how to use the Time Tracking feature of the Technician Role Center

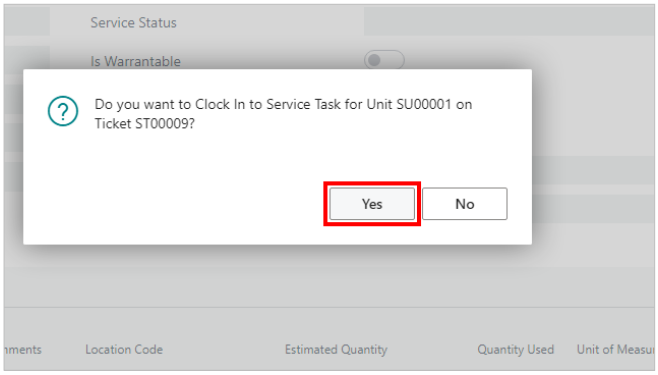
Click on the link in cell **ODT Service Unit No.** with the value **SU00001**



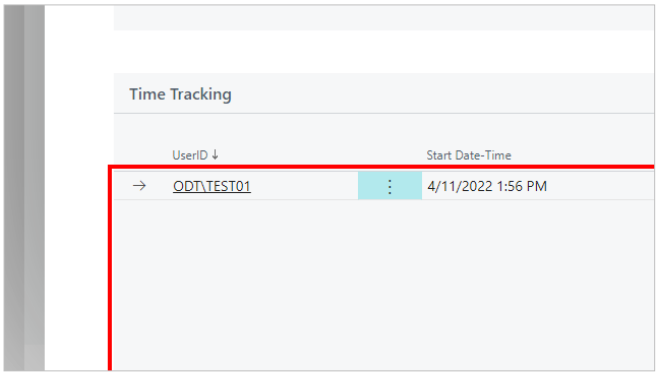
When opening the Service Ticket Task, you will be prompted to Clock In.



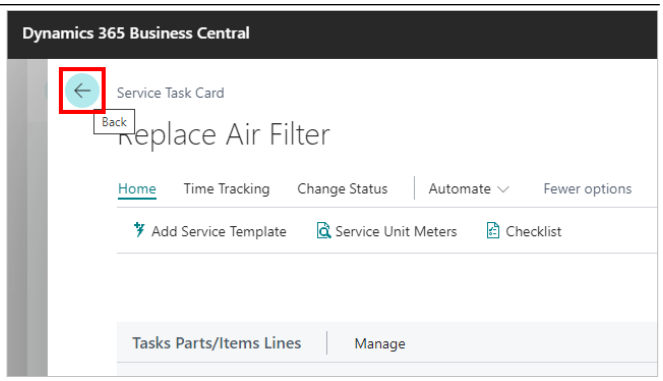
Click on the button **Yes**



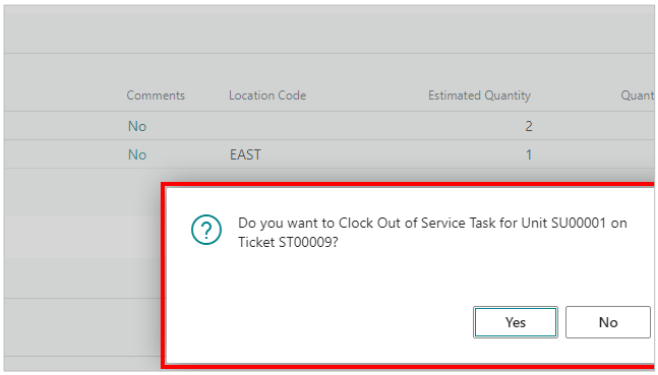
The Time Tracking tab on the Task Card will display the list of time tracking entries



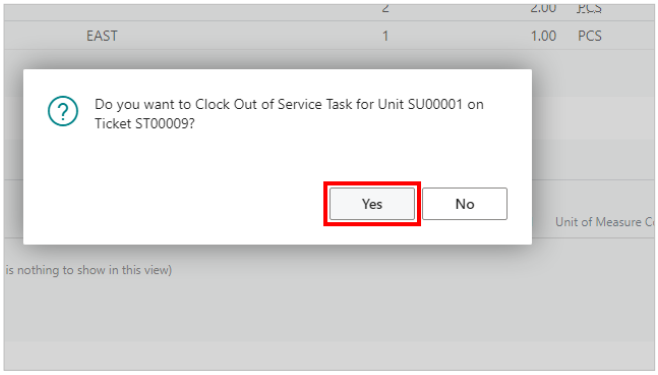
Click on the back button



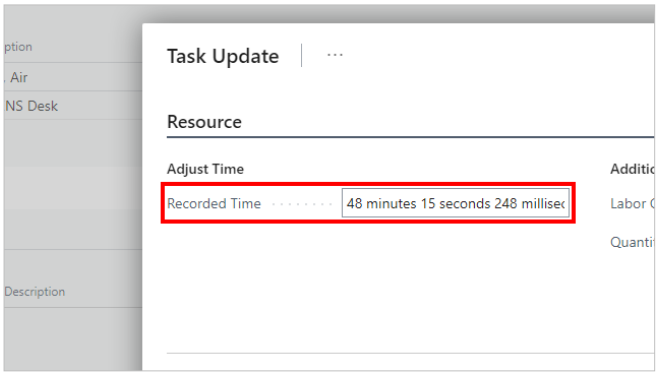
When closing the Task Card, you will be prompted if you want to Clock Out.



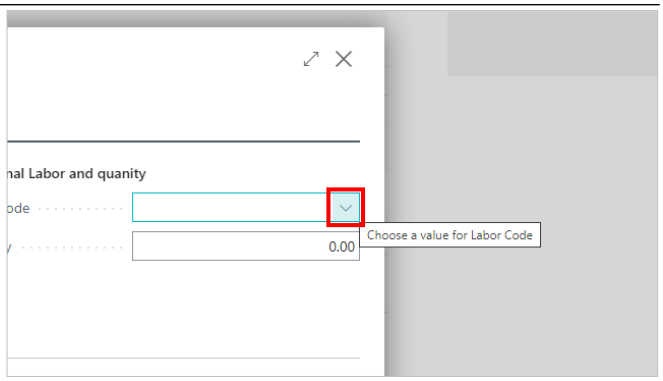
Click on the button **Yes**



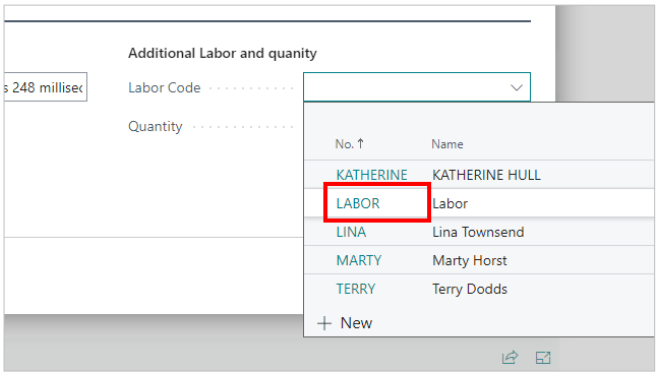
When clocking out, you will be given the option to adjust the time that is recorded.



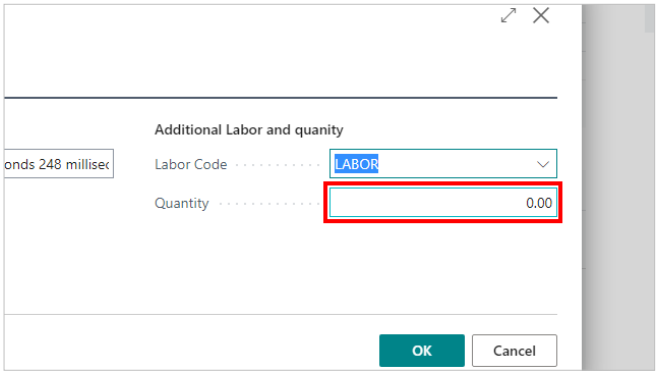
You will also be given the option to record any additional labor, if necessary.
Click on the lookup button **Labor Code**



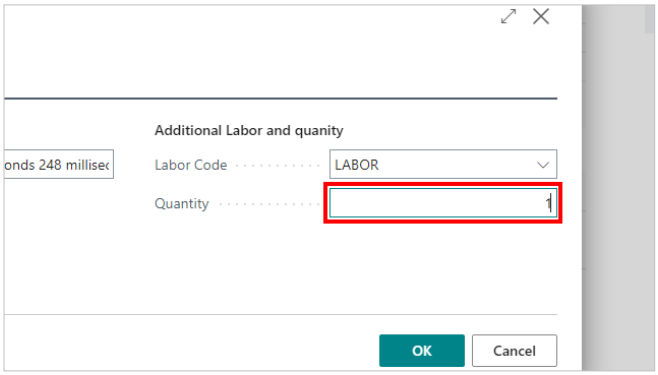
Click on the link in cell **No.** with the value **LABOR**



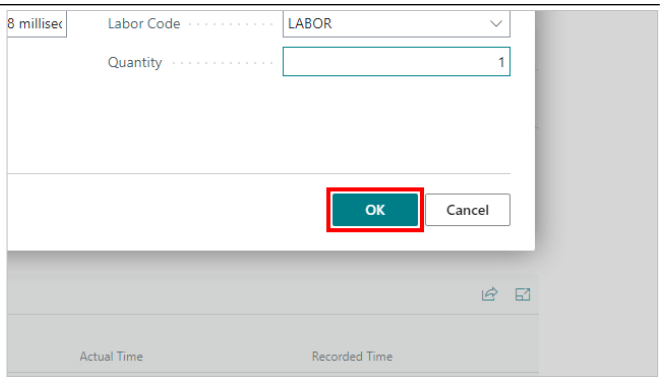
Click on the field **Quantity**



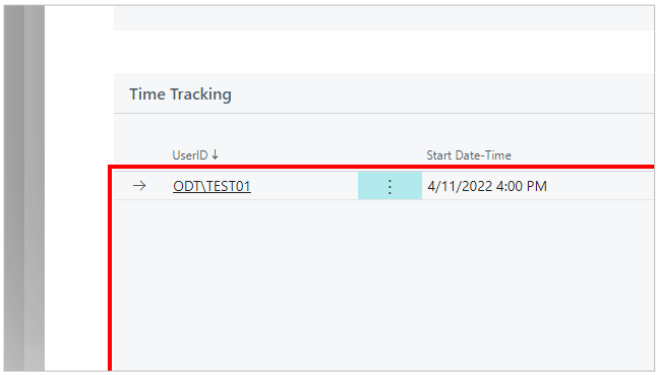
Enter the text **1**.



Click on the button **OK**



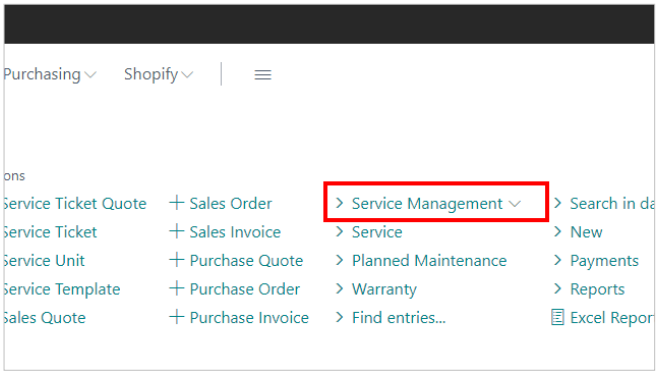
When reopening the Task Card, notice that the Time Tracking tab has been updated to show the previous time recorded.



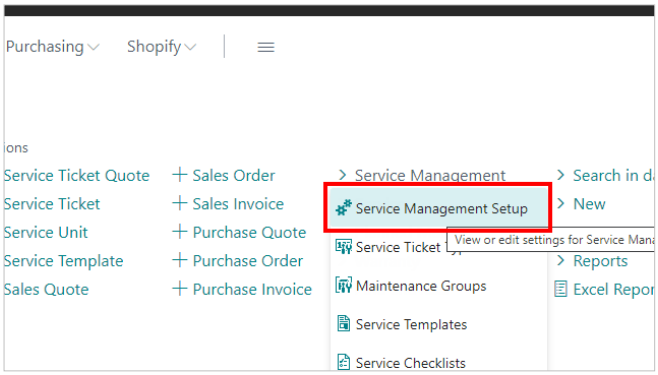
6.3.3. How to use Time Sheet Integration

The following demonstrates how to use the Time Sheet Integration feature.

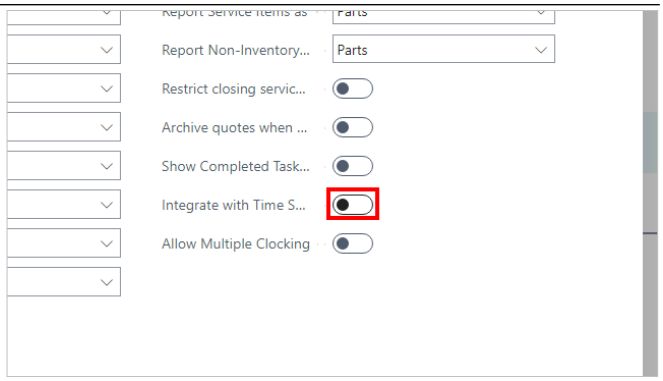
To use Time Sheet Integration, it must first be enabled in Service Management Setup.
Click on the navigation menu item popup **Service Management**



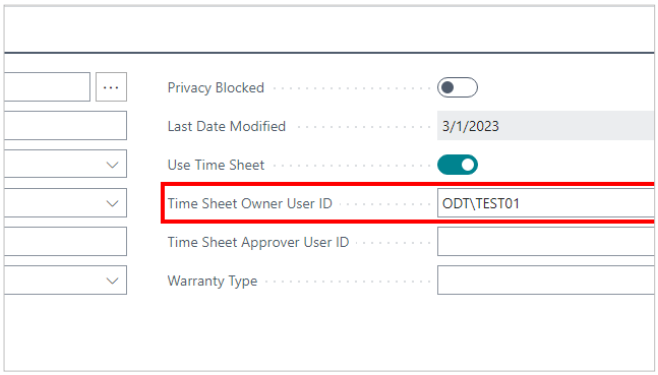
Click on the navigation menu item **Service Management Setup**



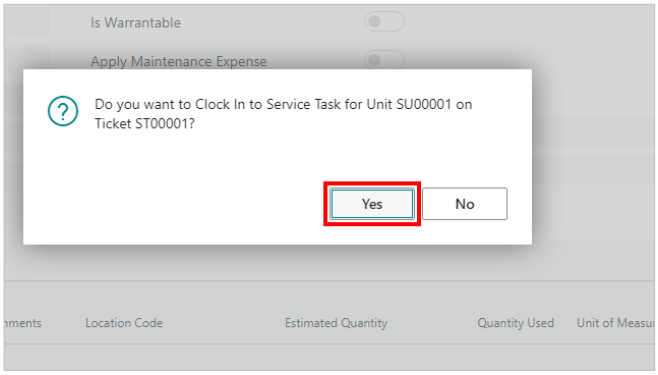
Click on the toggle field **Integrate with Time Sheets**



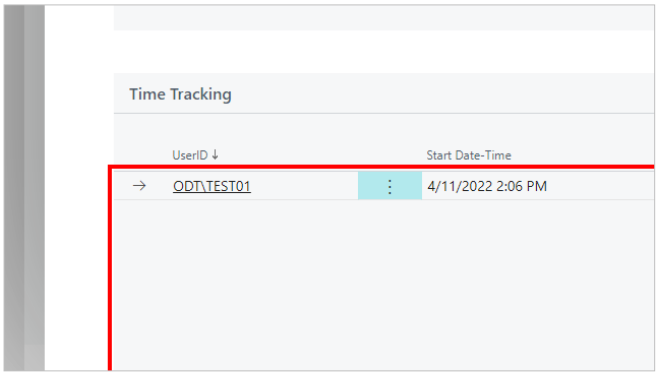
You must also ensure you have a Resource of type Person set up to use standard BC Time Sheets



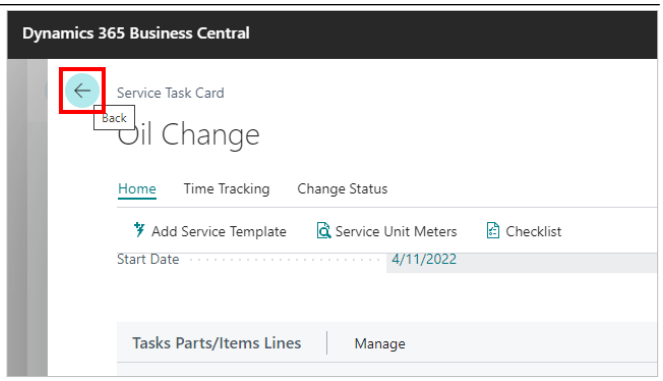
Click on the button **Yes**



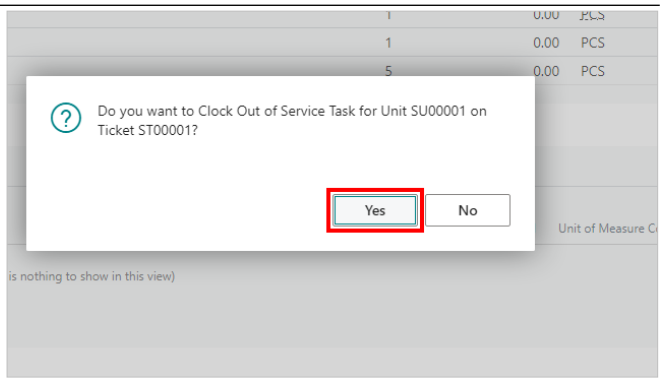
Notice that a Time Tracking line has been started for the user that has Clocked In



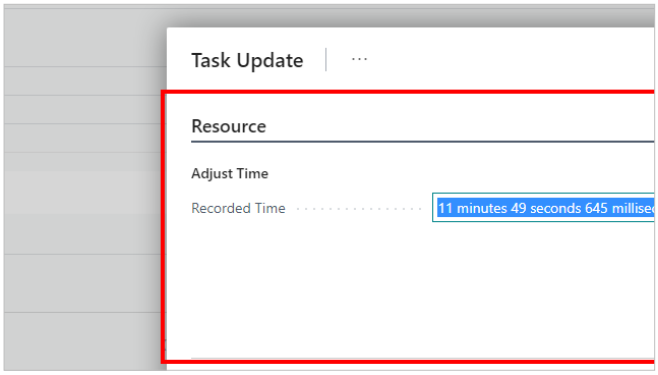
Click on the back button



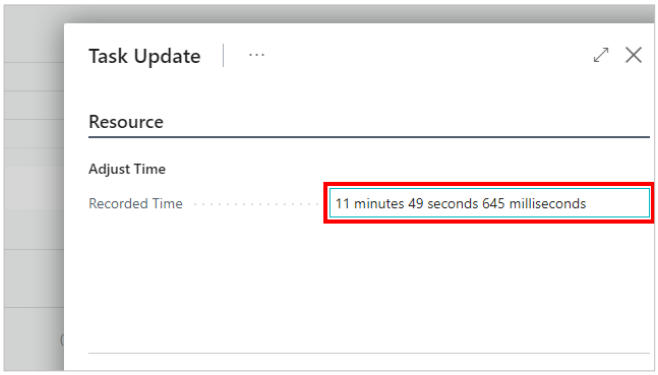
Click on the button **Yes**



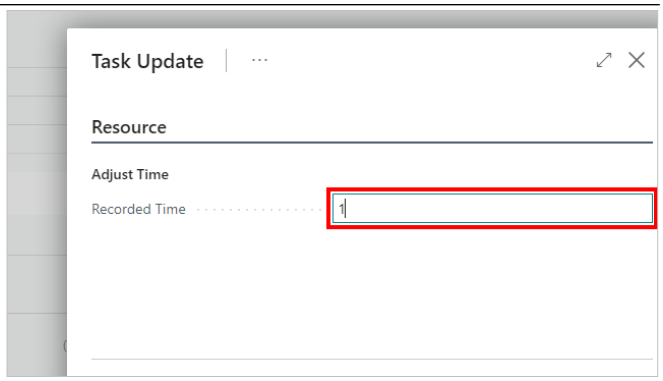
You will be given an option to adjust the recorded time.



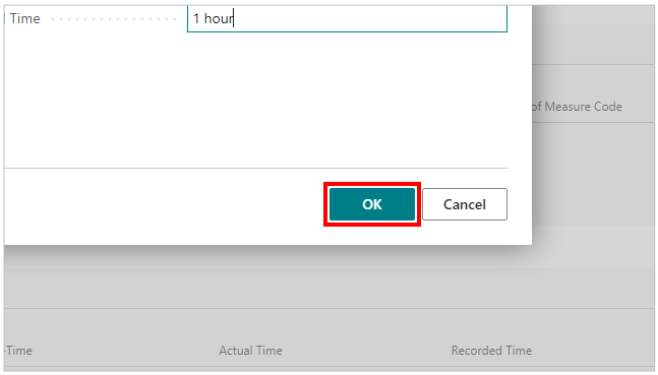
Click on the field **Recorded Time**



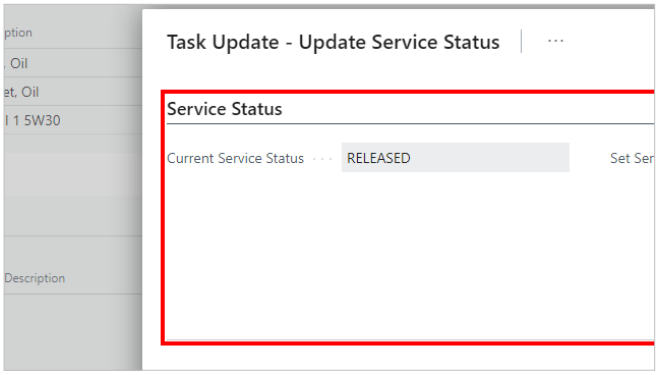
Enter the text **1 hour**.



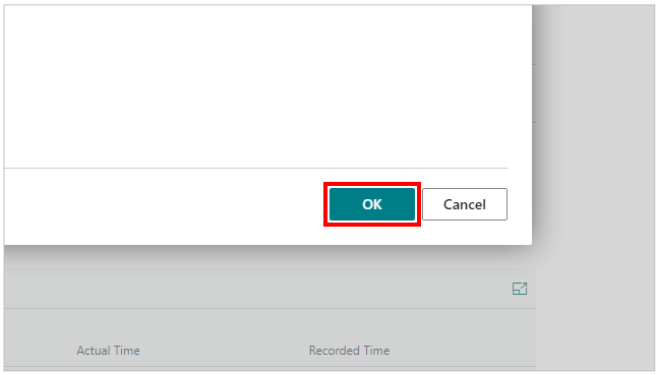
Click on the button **OK**



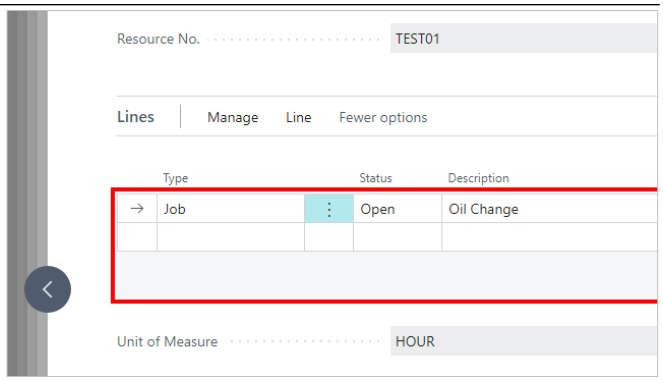
You will be given the option to update the task status if needed.



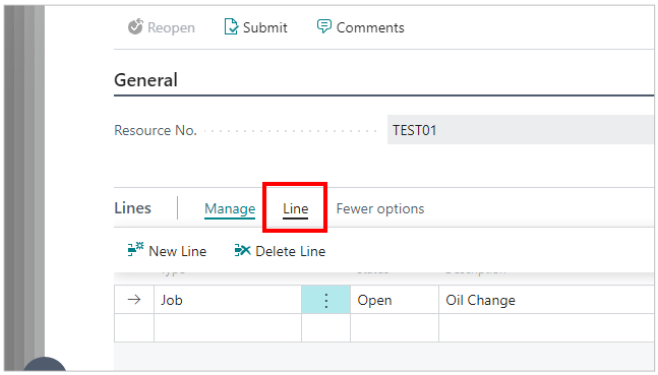
Click on the button **OK**



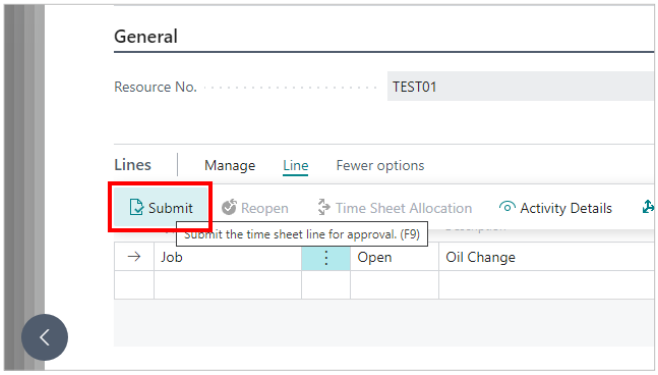
When viewing the standard BC timesheet, notice that an entry has been created for the service performed.



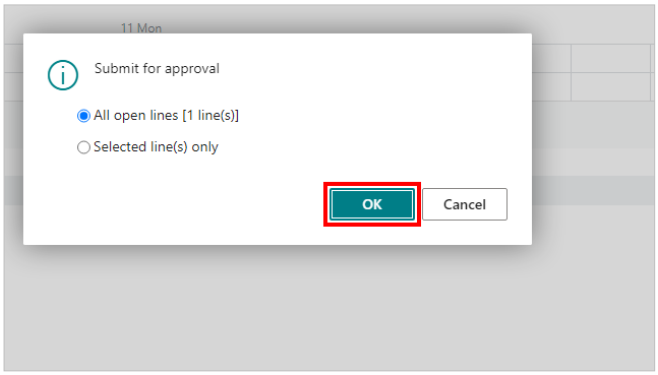
Click on the navigation menu item popup **Line**



Click on the navigation menu item **Submit**

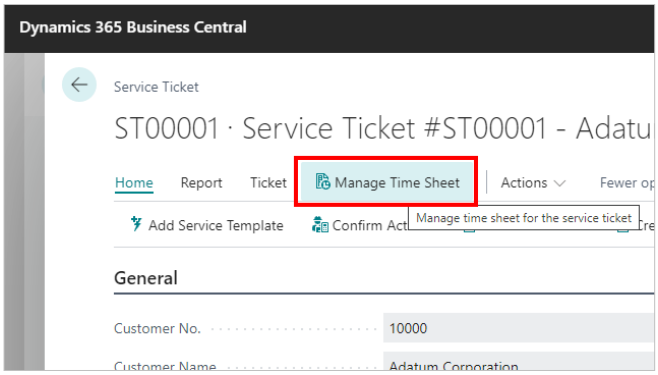


Click on the button **OK**

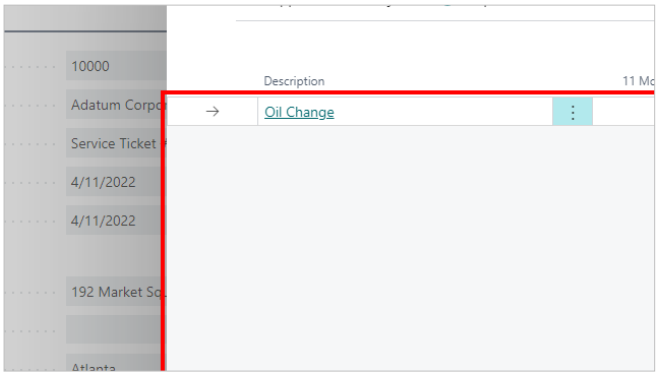


When approving a timesheet that has been submitted, it is possible to view it through the Service Ticket.

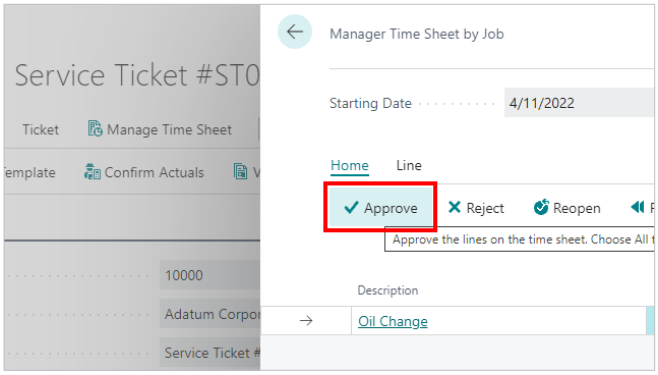
Click on the navigation menu item **Manage Time Sheet**



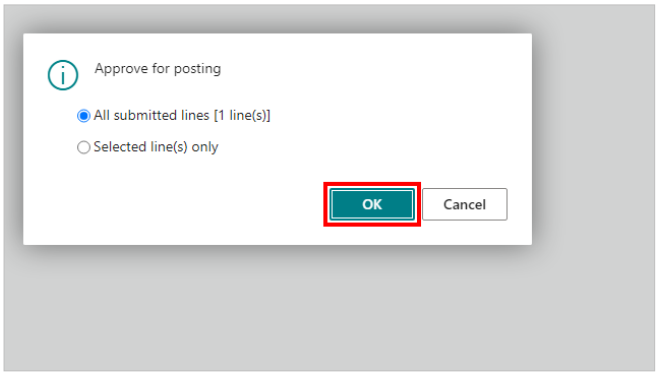
Notice that there is an entry for the time that was recorded on the timesheet, as well as options to approve or deny.



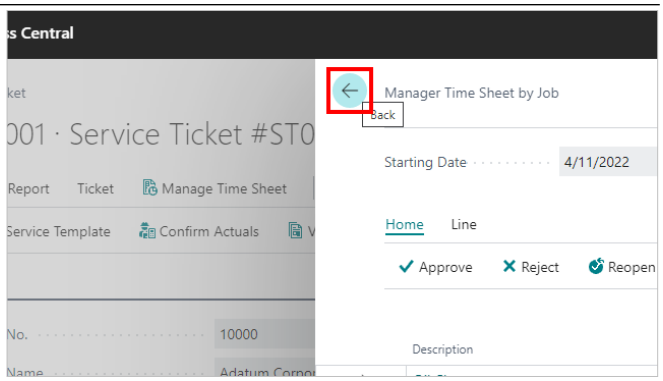
Click on the navigation menu item **Approve**



Click on the button **OK**

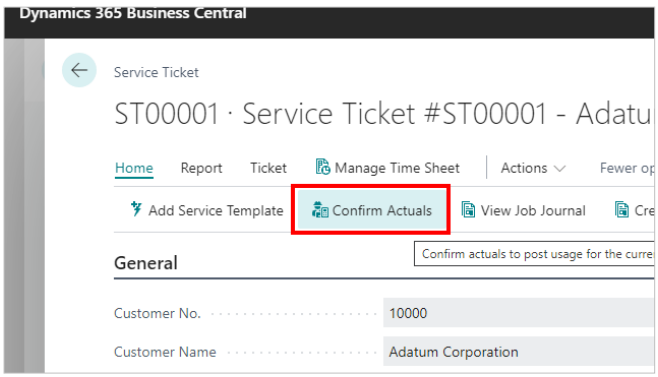


Click on the back button

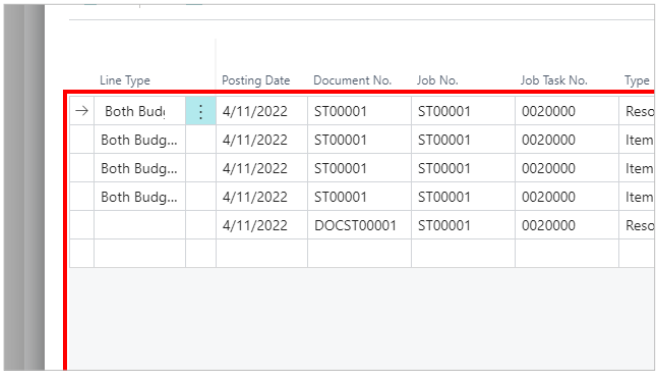


Now that the time has been approved, an entry will be created for it when running Confirm Actuals

Click on the navigation menu item **Confirm Actuals**



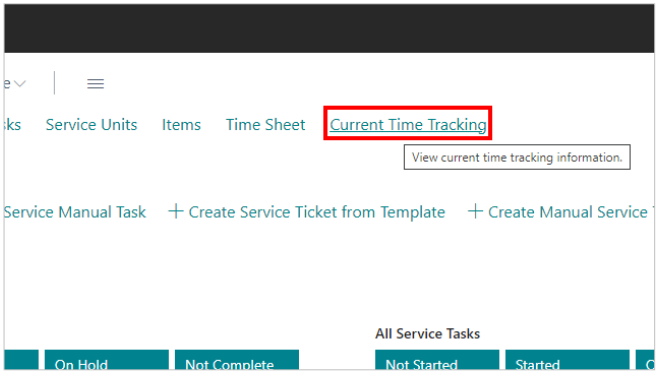
Notice that in addition to entries related to the service performed, there is an entry for the time that was approved.



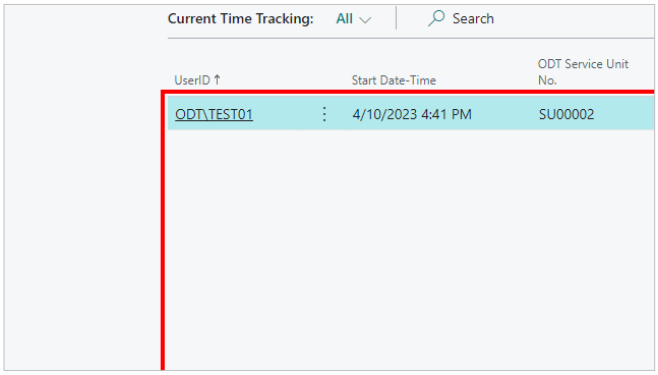
6.3.4. How to view the Time Tracking Menu

The following demonstrates how to view the Time Tracking Menu.

Click on the navigation menu item **Current Time Tracking**



The Time Tracking Menu will display a list of users who are Clocked In and information on the task they are working on.



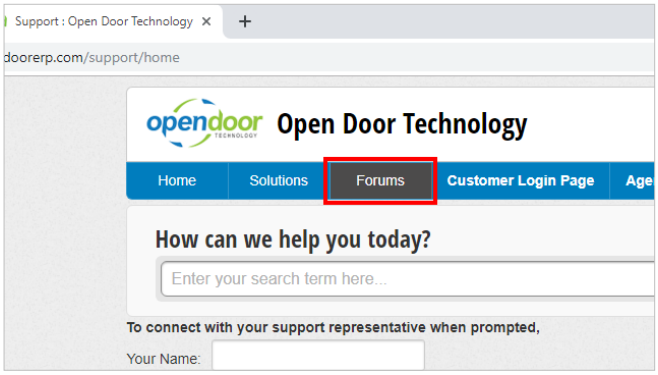
7. Support and ODT Service Help Information

7.1. How to Access ODT Service Release Notes

Release Notes are provided with each release of the ODT Service App. The Release Notes can be accessed via the following internet address: https://support.opendoorerp.com

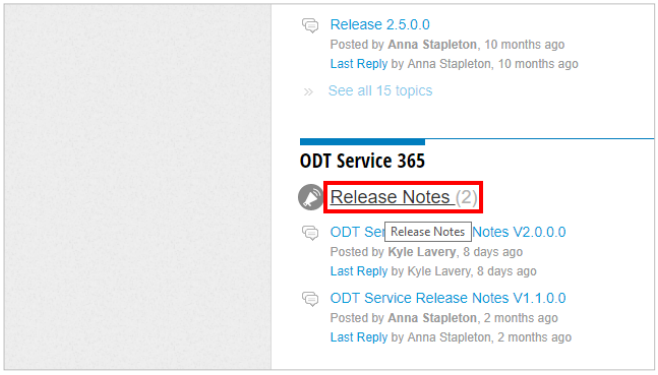
The following demonstrates the accessing of the release note documents. First, copy/paste the internet address into an internet browser.

Click on the link **Forums**

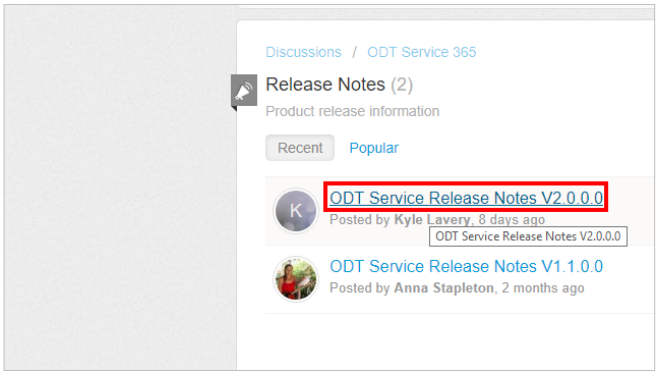


Scroll down to locate the forum on ODT Service.

Click on the link **Release Notes**

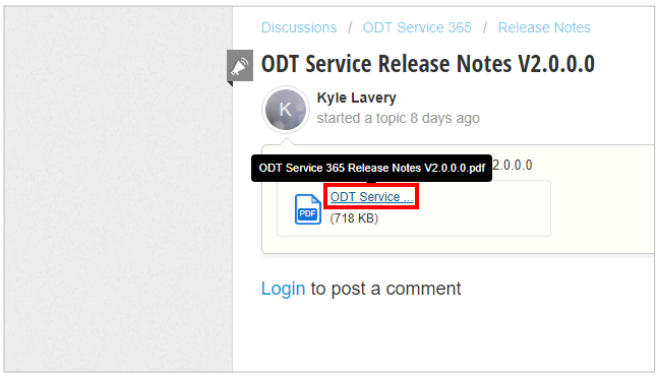


Click on the link **ODT Service Release Notes V2.0.0.0**



The Release Notes document(s) can be viewed directly from the website, or can be downloaded.

Click on the link **ODT Service ...**



The Release document contains sections for What's New, Issues Resolved, Known Issues and Upcoming Releases - Planned Modifications and New Features.

7.2. How to Access ODT Service Online Help

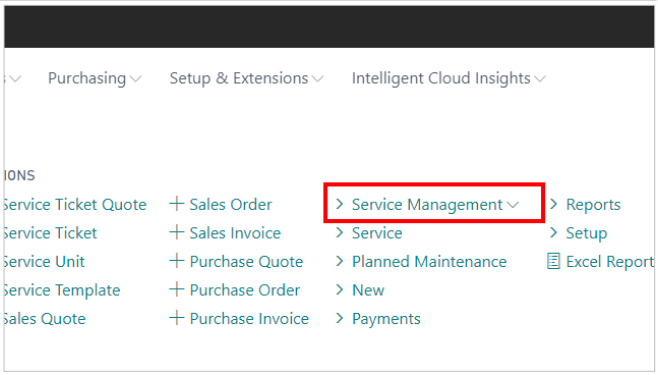
ODT Service Online Help can be directly accessed from an internet browser using the following address:

http://odtservice365help.opendoorerp.com/

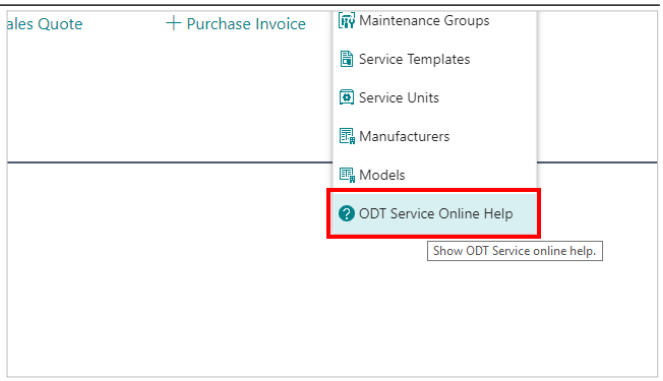
The following steps demonstrate how to access the ODT Service Online Help from the Business Manager Profile.

The same steps are available from the Sales Order Processor Profile.

Click on the navigation menu item popup **Service Management**



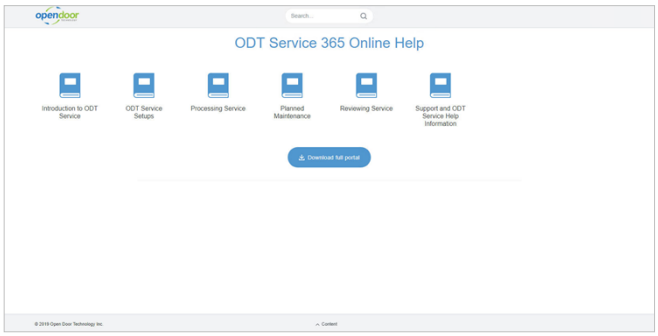
Click on the navigation menu item **ODT Service Online Help**



The following provides information on the ODT Service help site.

The picture provided here is the initial wondow for the ODT Service Online Help.

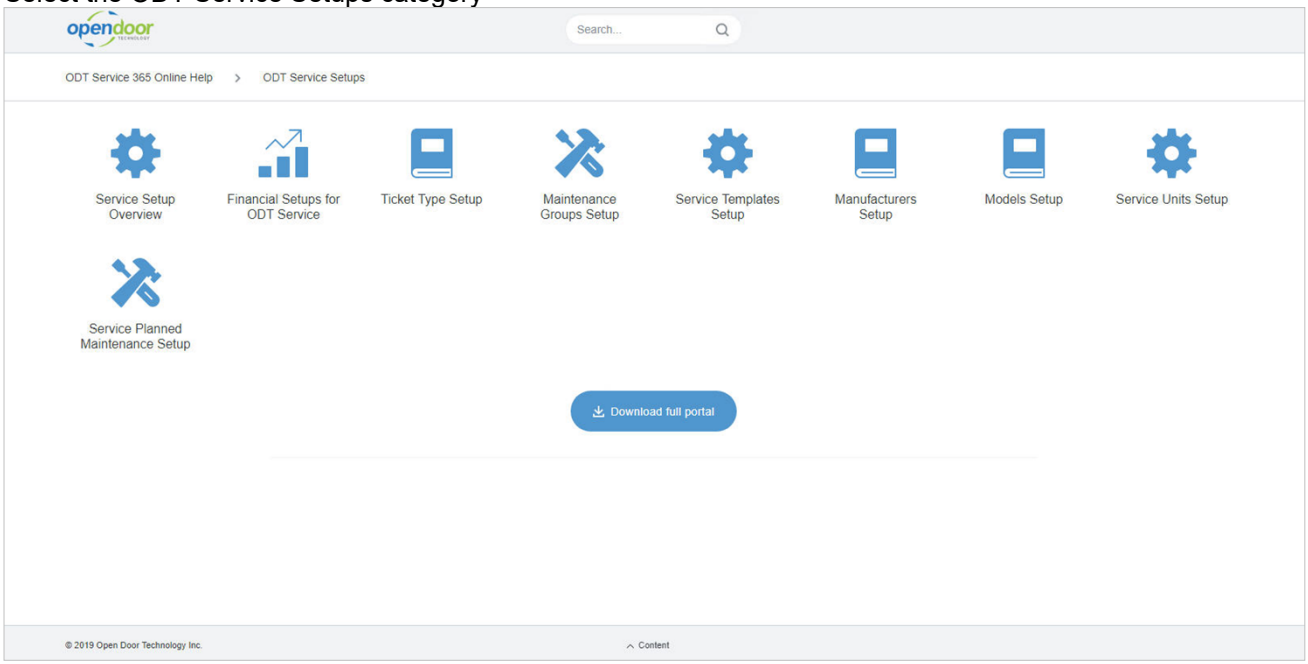
There are various categories which group the help to aide users in locating the help needed.
In additon a user can use the Search at the top of the window to locate the help they are looking for.



A Table of Contents can be viewed by clicking on the Content option at the bottom of the the window.

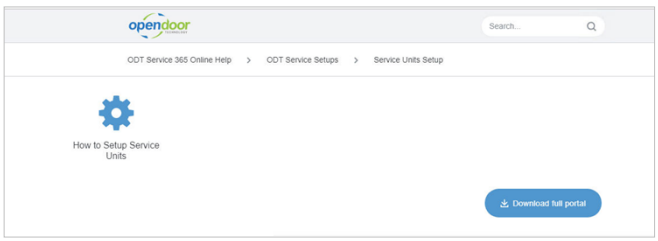
Select the category in which the information you are seeking would logically be located.

Select the ODT Service Setups category



Click on Service Units Setup, then How to Setup Service Units.

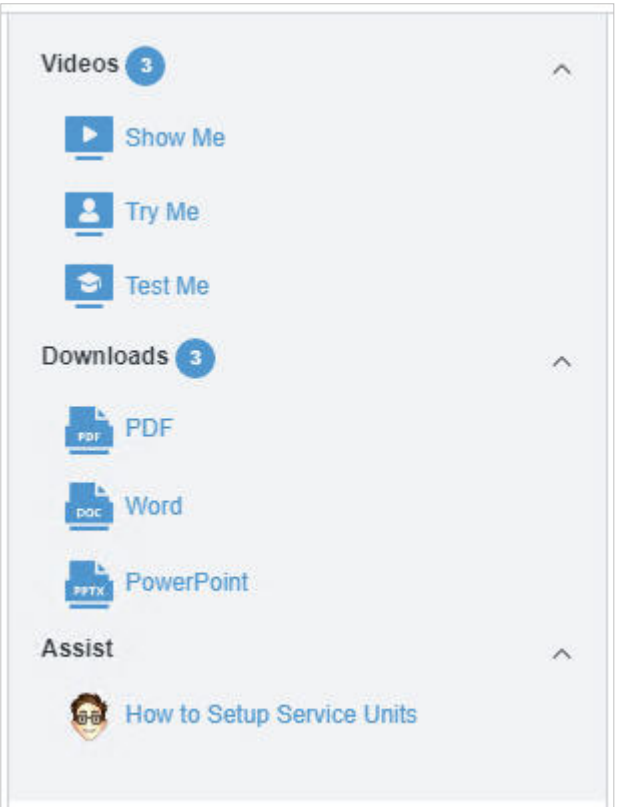
Select the category in which the information you are seeking would logically be located.



When a category is selected, the documentation will open in the Process Description format.

Other formats available include the following, which are accessed at the right as shown in the picture.

• A PDF Document
• Power Point Slides
• A Show Me Video
• A Teach Me Video
• A Test Me Video



In the Process Description format:

To move from one document to a different document included in the category selected, at the right and left of the screen, indicators are provided that enable you to move forwards and backwards through the documentation.