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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.





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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:

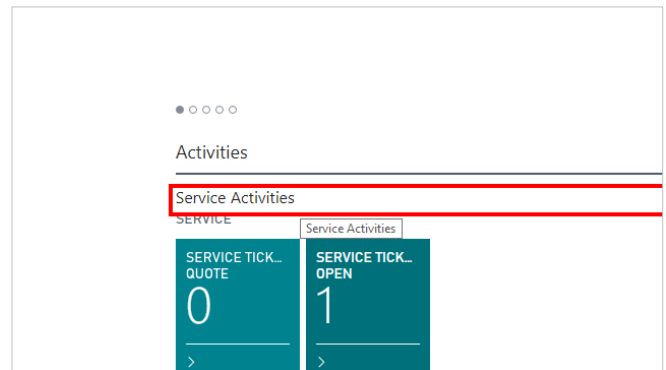
- Service units, which track service work performed on customer or internal units. Internal units, can optionally be linked to Items and Fixed Assets for informational purposes. From the Service Unit, the Service History and Service Ledger Entries are provided for tracking and analysis purposes.
- Service 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

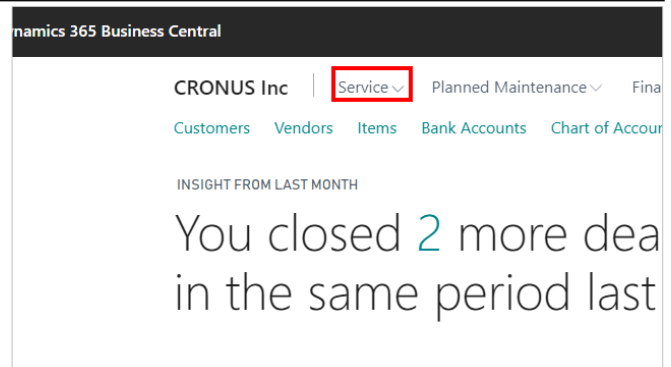
Click on the label **Service Activities**

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.

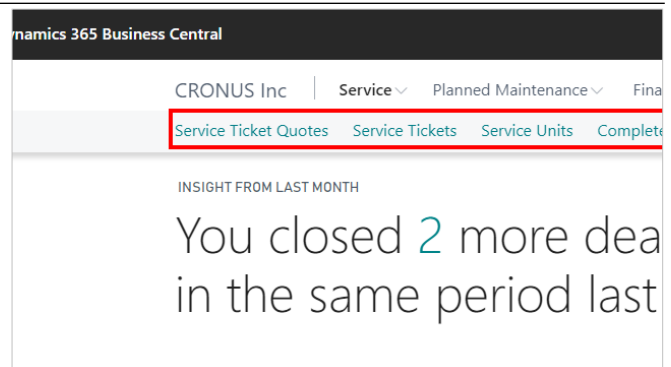


Click on the navigation menu item popup **Service**

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:

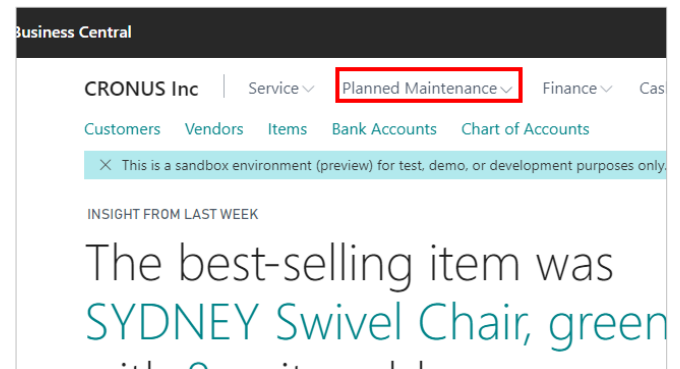
- Service Ticket Quotes, which opens a listing of open Service Ticket Quotes.
- Service Tickets, which opens a listing of open Service Tickets.
- Service Units, which opens a listing of Service Units.
- Completed Service Tickets, which opens a listing of Completed Service Tickets.



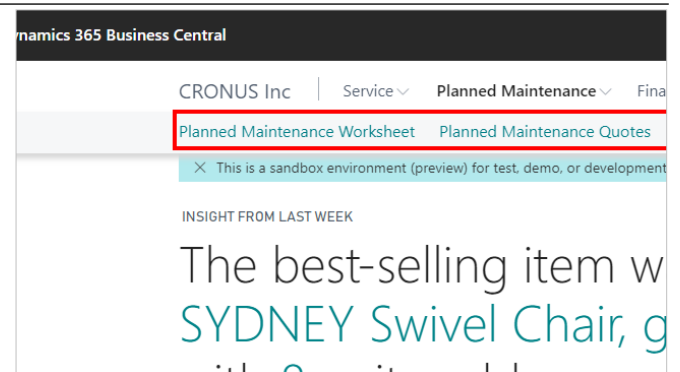
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## Click on the navigation menu item popup **Planned Maintenance**

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



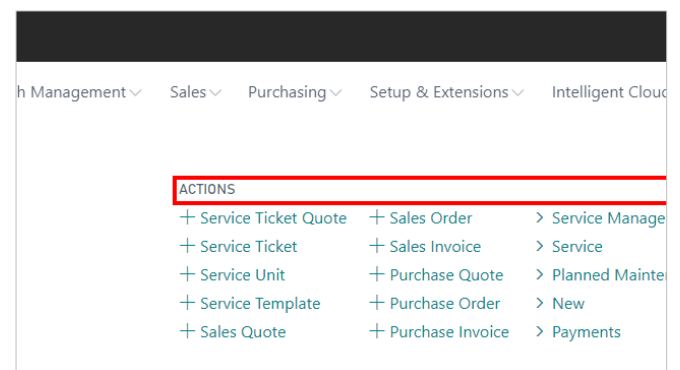
## Planned Maintenance sub-menu options



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**



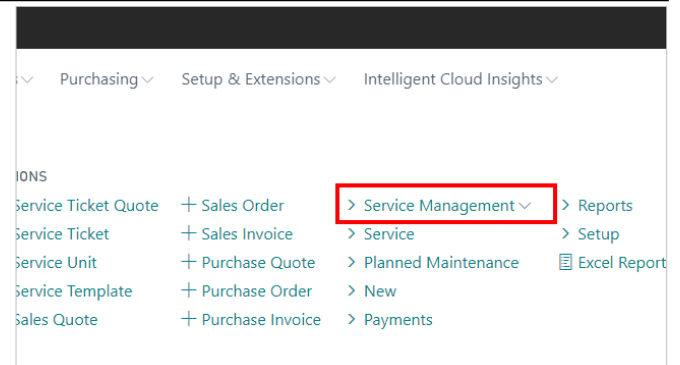
The Actions section of the profile contains the following options related to ODT Service:

### 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.

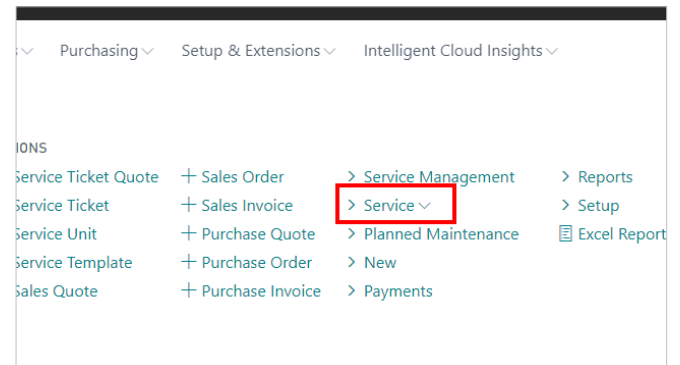
Click on the navigation menu item popup **Service Management**



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

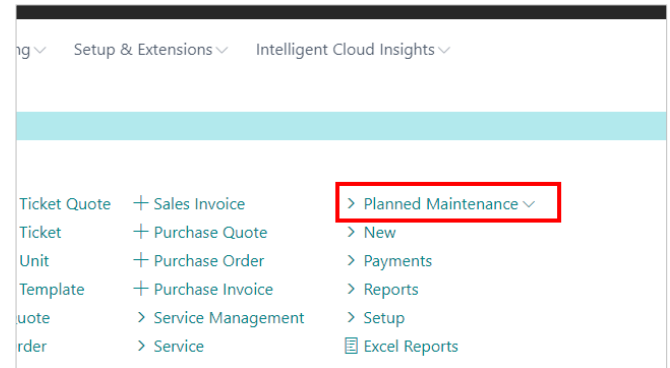
Click on the navigation menu item popup **Service**



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.



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- 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.

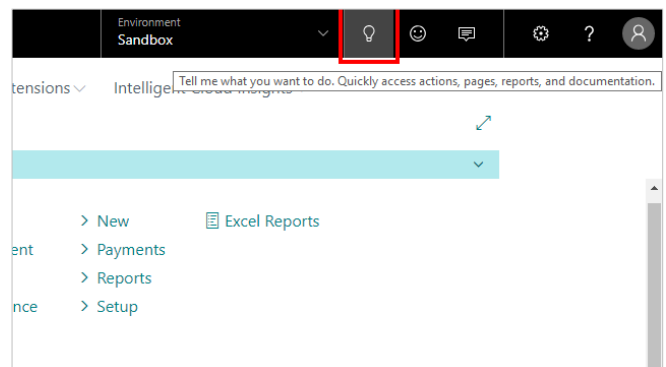
Subsequent to the setup of the No. Series, the No Series must be specified on the Service Management Setup.

#### 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.**







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

Finance ▾ Cash  
nts Chart of Acco  
review) for test, demo, o

TELL ME WHAT YOU WANT TO DO

+

ner was School  
ght for \$23,102

ACTIONS

- + Sales Quote
- + Sales Order
- + Sales Invoice
- + Purchase Order

Enter the text **No series.**

Finance ▾ Cash  
nts Chart of Acco  
review) for test, demo, o

TELL ME WHAT YOU WANT TO DO

No

ner was School  
ght for \$23,102

ACTIONS

- + Sales Quote
- + Sales Order
- + Sales Invoice
- + Purchase Order

Click on **No. Series Administration**

Finance ▾ Cash  
nts Chart of Acco  
review) for test, demo, o

TELL ME WHAT YOU WANT TO DO

No series

Go to Pages and Tasks

- > No. Series Adn
- > Notification Entries List
- > Notification Setup Adn

Go to Reports and Analysis

Click on the navigation menu item **New**

Service ▾ Plan  
dors Items Bank  
ox environment (preview)

← NO. SERIES | WORK DATE: 4/8/2019

Search + New Edit List Delete Navigate

Create a new entry.

CODE	DESCRIPTION	STARTIN NO.
BANK	BANK	B010
CAMP	Campaign	CP0001
CASHFLOW	Cash Flow Forecast	CF00000
CONT	Contact	CT00000
CT-MSG	Credit Transfer Msg. ID	1001
CUST	Customer	C00010



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Click on the cell **Code**

US Inc   Service   Plan		← NO. SERIES   WORK DATE: 4/8/2019	
ers Vendors Items Bank		Search + New Edit List Delete	
s is a sandbox environment (preview)			
FROM LAST WEEK			
e best-sellir			
obil 1 5W30			
d			
CODE	DESCRIPTION		
*			
BANK	BANK		
CAMP	Campaign		
CASHFLOW	Cash Flow Forecast		
CONT	Contact		
CT-MSG	Credit Transfer Msg. ID		
CUST	Customer		

Enter the text **serv-unit**.

US Inc   Service   Plan		← NO. SERIES   WORK DATE: 4/8/2019	
ers Vendors Items Bank		Search + New Edit List Delete	
s is a sandbox environment (preview)			
FROM LAST WEEK			
e best-sellir			
obil 1 5W30			
d			
CODE	DESCRIPTION		
*			
BANK	BANK		
CAMP	Campaign		
CASHFLOW	Cash Flow Forecast		
CONT	Contact		
CT-MSG	Credit Transfer Msg. ID		
CUST	Customer		

Click on the cell **Description**

Service		← NO. SERIES	
s Bank Acco		Search + New Edit List Delete Navigate	
box environment			
CODE	DESCRIPTION	STARTING NO.	ENDI
* serv-unit			
BANK	BANK	B010	B990
CAMP	Campaign	CP0001	CP99
CASHFLOW	Cash Flow Forecast	CF000001	—
CONT	Contact	CT000001	CT10
CT-MSG	Credit Transfer Msg. ID	1001	2999
CUST	Customer	C00010	C999

Enter the text **Service Units**.

Service		← NO. SERIES	
s Bank Acco		Search + New Edit List Delete Navigate	
box environment			
CODE	DESCRIPTION	STARTING NO.	ENDI
SERV-UNIT			
BANK	BANK	B010	B990
CAMP	Campaign	CP0001	CP99
CASHFLOW	Cash Flow Forecast	CF000001	—
CONT	Contact	CT000001	CT10
CT-MSG	Credit Transfer Msg. ID	1001	2999
CUST	Customer	C00010	C999



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Click on **Default Nos.**

Sandbox				
Cloud Insights				
Excel Reports				
Open in Excel				
Navigate				
ENDING NO.	LAST DATE USED	LAST NO. USED	DE... NOS.	MA... NOS.
B990	-	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CP9999	-	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CT100000	-	CT000022	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2999	-	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
C99990	-	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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

IES					
New Edit List Delete Navigate Open in Excel					
DE	DESCRIPTION	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO. USED
V-UNIT	Service Units	-	-	-	-
BK	BANK	B010	B990	-	-
MP	Campaign	CP0001	CP9999	-	-
HFLOW	Cash Flow Forecast	CF000001	-	-	-
CT	Contact	CT000001	CT100000	-	CT000022
MSG	Credit Transfer Msg. ID	1001	2999	-	-

Click on the link **Lines**

ONUS Inc		Service	Plan
omers		Vendors	Items Bank
This is a sandbox environment (preview)		NO. SERIES   WORK DATE: 4/8/2019	
RIGHT FROM LAST WEEK		Search	+ New Edit List Delete
ne best-sellir		Lines	Relationships
obil 1 5W30		View or edit additional information about the number	
		DESCRIPTION	
		BANK	BANK
		CAMP	Campaign
		CASHFLOW	Cash Flow Forecast
		CONT	Contact
		CT-MSG	Credit Transfer Msg. ID

Click on the cell **Starting No.**

No. Series Lines				
Search + New Edit List Delete Open in Excel				
STARTING DATE	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO. USED



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Enter the text **SU00001**.

The screenshot shows the 'No. Series Lines' form with a table containing the following columns: STARTING DATE, STARTING NO., ENDING NO., LAST DATE USED, and LAST NO. USED. The 'STARTING NO.' field is highlighted with a red box and contains the text 'S'.

Click on the cell **Ending No.**

The screenshot shows the 'No. Series Lines' form with a table containing the following columns: STARTING DATE, STARTING NO., ENDING NO., LAST DATE USED, LAST NO. USED, and WARNING NO. The 'ENDING NO.' field is highlighted with a red box and is empty.

Enter the text **SU99999**.

The screenshot shows the 'No. Series Lines' form with a table containing the following columns: STARTING DATE, STARTING NO., ENDING NO., LAST DATE USED, LAST NO. USED, and WARNING NO. The 'ENDING NO.' field is highlighted with a red box and contains the text 'SU99999'.

Click on the back button

The screenshot shows the 'No. Series Lines' form with a table containing the following columns: STARTING DATE, STARTING NO., ENDING NO., LAST DATE USED, LAST NO. USED, and WARNING NO. The back button is highlighted with a red box.

Click on the navigation menu item **New**

Central No. Series		
Ltd. Service		
Items Bank Account		
a sandbox environment		
fternoon		
NO. SERIES		
Search + New Edit List Delete Naviga		
Create a new entry.		
CODE	DESCRIPTION	STARTING NO.
FA-JNL	Fixed Asset Journal	G05001
FAJNL-GL	Fixed Asset G/L Journal	F00001
FAJNL-GLR	Recurring Fixed Asset G/L ...	RF00001
GJNL-GEN	General Journal	G00001
GJNL-PMT	Payment Journal	G04001
GJNL-RCPT	Cash Receipts Journal	G02001

Click on the row menu button

P-RETORD Purchase Return Order 1001		
P-SHPT Posted Purchase Shipment 105001		
RES Resource R0010		
S-BLK Blanket Sales Order 1001		
S-CR Sales Credit Memo S-CR1001		
S-CR+ Posted Sales Credit Memo PS-CR104001		
SEGM Segment SM00001		
SERV-UNIT Service Units SU00001		
S-FIN Finance Charge Memo S-FIN1001		
S-FIN+ Issued Finance Charge Me... S-FIN106001		
S-INV Sales Invoice S-INV102001		
S-INV+ Posted Sales Invoice PS-INV103001		
SN1 SN Numbering SN00001		
SN2 SN Numbering XYZ00001		

Click on the menu item **New Line**

P-SHPT Posted Purchase Shipment 1		
RES Resource R		
S-BLK Blanket Sales Order 1		
S-CR Sales Credit Memo S		
S-CR+ Posted Sales Credit Memo P		
SEGM Segment S		
SERV-UNIT Service Units S		
New Line Finance Charge Memo S		
Delete Line Issued Finance Charge Me... S		
Select More Sales Invoice S		
SN1 SN Numbering S		
SN2 SN Numbering X		
S-ORD Sales Order S		

Click on the cell **Code**

P-RETORD Purchase Return Order 10		
P-SHPT Posted Purchase Shipment 10		
RES Resource R0		
S-BLK Blanket Sales Order 10		
S-CR Sales Credit Memo S-		
S-CR+ Posted Sales Credit Memo PS		
SEGM Segment SN		
* Service Units SU		
SERV-UNIT Finance Charge Memo S-		
S-FIN Issued Finance Charge Me... S-		
S-INV Sales Invoice S-		
S-INV+ Posted Sales Invoice PS		
SN1 SN Numbering SN		



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Enter the text **serv-tix**.

	P-RETORD	Purchase Return Order	10
	P-SHPT	Posted Purchase Shipment	10
	RES	Resource	R0
	S-BLK	Blanket Sales Order	10
	S-CR	Sales Credit Memo	S-
	S-CR+	Posted Sales Credit Memo	PS
	SEGM	Segment	SN
	* serv-tix		
	SERV-UNIT	Service Units	SL
	S-FIN	Finance Charge Memo	S-
	S-FIN+	Issued Finance Charge Me...	S-
	S-INV	Sales Invoice	PS
	S-INV+	Posted Sales Invoice	PS
	SN1	SN Numbering	SN

Click on the cell **Description**

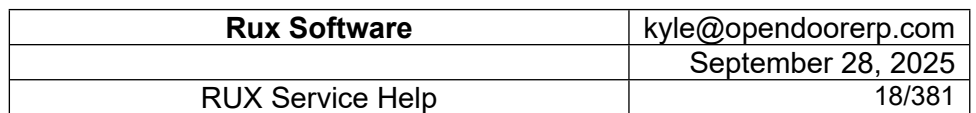
	P-RETORD	Purchase Return Order	1001	2999
	P-SHPT	Posted Purchase Shipment	105001	1069
	RES	Resource	R0010	R999
	S-BLK	Blanket Sales Order	1001	2999
	S-CR	Sales Credit Memo	S-CR1001	S-CR
	S-CR+	Posted Sales Credit Memo	PS-CR104001	PS-C
	SEGM	Segment	SM00001	SM99
	* serv-tix			
	SERV-UNIT	Service Units	SU00001	SU99
	S-FIN	Finance Charge Memo	S-FIN1001	S-FIN
	S-FIN+	Issued Finance Charge Me...	S-FIN106001	S-FIN
	S-INV	Sales Invoice	S-INV102001	S-INV
	S-INV+	Posted Sales Invoice	PS-INV103001	PS-IN
	SN1	SN Numbering	SN00001	SN99

Enter the text **Service Tickets**.

	P-RETORD	Purchase Return Order	1001	2999
	P-SHPT	Posted Purchase Shipment	105001	1069
	RES	Resource	R0010	R999
	S-BLK	Blanket Sales Order	1001	2999
	S-CR	Sales Credit Memo	S-CR1001	S-CR
	S-CR+	Posted Sales Credit Memo	PS-CR104001	PS-C
	SEGM	Segment	SM00001	SM99
	SERV-TIX			
	SERV-UNIT	Service Units	SU00001	SU99
	S-FIN	Finance Charge Memo	S-FIN1001	S-FIN
	S-FIN+	Issued Finance Charge Me...	S-FIN106001	S-FIN
	S-INV	Sales Invoice	S-INV102001	S-INV
	S-INV+	Posted Sales Invoice	PS-INV103001	PS-IN
	SN1	SN Numbering	SN00001	SN99

Click on **Default Nos.**

2999	—	—	<input checked="" type="checkbox"/>	<input type="checkbox"/>
106999	—	—	<input checked="" type="checkbox"/>	<input type="checkbox"/>
R9990	—	—	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2999	—	—	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S-CR2999	—	—	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PS-CR105999	—	—	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SM99999	—	—	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
—	—	—	<input type="checkbox"/>	<input type="checkbox"/>
SU99999	—	—	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S-FIN2999	—	—	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S-FIN107999	—	—	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S-INV103999	—	S-INV102221	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1 PS-INV104999	1/25/2019	PS-INV103214	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SN99999	—	—	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



ES					
<a href="#">arch</a> <a href="#">+ New</a> <a href="#">Edit List</a> <a href="#">Delete</a> <a href="#">Navigate</a> <a href="#">Open in Excel</a> <a href="#">Navigate</a>					
DE	DESCRIPTION	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO USED
RK	Purchase Order	1001	2999	-	-
R	Purchase Credit Memo	1001	2999	-	-
R+	Posted Purchase Credit M...	109001	1010999	-	-
IV	Purchase Invoice	107001	108999	-	107211
IV+	Posted Purchase Invoice	108001	109999	3/15/2019	108208
RD	Purchase Order	106001	107999	-	106004

al

ONUS Inc | Service ▾ Plan

omers Vendors Items Bank

This is a sandbox environment (preview)

HT FROM LAST WEEK

ne best-sellir

obil 1 5W30

← NO. SERIES | WORK DATE: 4/8/2019

Search + New Edit List Delete

**Lines** Relationships


View or edit additional information about the number

PHYS-INV+	Posted Phys. Invent. Order
P-INV	Purchase Invoice
P-INV+	Posted Purchase Invoice
PM-TIX	Planned Maintenance Ticket
P-ORD	Purchase Order
P-QUO	Purchase Quote

ch + New

## No. Series Lines

Search + New Edit List Delete Open in E

STARTING DATE	STARTING NO.	ENDING NO.	LAST DATE USED	LAST N USED
				

[illegible]





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Click on the cell **Ending No.**

No. Series Lines					
Search + New Edit List Delete Open in Excel					
STARTING DATE	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO. USED	WARNI NO.
	ST00001				

Enter the text **ST99999**.

No. Series Lines					
Search + New Edit List Delete Open in Excel					
STARTING DATE	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO. USED	WARNI NO.
	ST00001	ST99999			

Click on the back button

Business Central No. Series > SERV-TIX - Service Tickets					
RONUS NO. SERIES SERV-TIX - SERVICE TICKETS					
Search + New Edit List					
STARTING DATE	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO. USED	WARNI NO.
	ST00001	ST99999			

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

Click on the navigation menu item **New**

Central

No. Series

Ltd.

Service

Items

Bank Account

a sandbox environment

afternoon

NO. SERIES

Search

New

Create a new entry.

Edit List

Delete

Navigation

CODE	DESCRIPTION	STARTING NO.
P-INV+	Posted Purchase Invoice	108001
P-ORD	Purchase Order	106001
P-QUO	Purchase Quote	1001
P-RCPT	Purchase Receipt	107001
P-RETORD	Purchase Return Order	1001
P-SHPT	Posted Purchase Shipment	105001



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Click on the cell **Code**

<div><div></div><div>activities</div><div><div>CK...</div><div>SERVICE TICK... OPEN</div><div>SERVICE COMPLE...</div></div></div>	P-RETORD	Purchase Return Order	10
	P-SHPT	Posted Purchase Shipment	10
	RES	Resource	R0
	S-BLK	Blanket Sales Order	10
	S-CR	Sales Credit Memo	S-
	S-CR+	Posted Sales Credit Memo	PS
	SEGM	Segment	SM
	* P		
	SERV-TIX	Service Tickets	ST
	SERV-UNIT	Service Units	SU
	S-FIN	Finance Charge Memo	S-
	S-FIN+	Issued Finance Charge Me...	S-
	S-INV	Sales Invoice	S-
	S-INV+	Posted Sales Invoice	PS

Enter the text **PM-TIX**.

<div><div></div><div>activities</div><div><div>CK...</div><div>SERVICE TICK... OPEN</div><div>SERVICE COMPLE...</div></div></div>	P-RETORD	Purchase Return Order	10
	P-SHPT	Posted Purchase Shipment	10
	RES	Resource	R0
	S-BLK	Blanket Sales Order	10
	S-CR	Sales Credit Memo	S-
	S-CR+	Posted Sales Credit Memo	PS
	SEGM	Segment	SM
	* P		
	SERV-TIX	Service Tickets	ST
	SERV-UNIT	Service Units	SU
	S-FIN	Finance Charge Memo	S-
	S-FIN+	Issued Finance Charge Me...	S-
	S-INV	Sales Invoice	S-
	S-INV+	Posted Sales Invoice	PS

Click on the cell **Description**

<div><div></div><div></div><div><div>CK...</div><div>SERVICE COMPLE...</div></div></div>	P-RETORD	Purchase Return Order	1001	2999
	P-SHPT	Posted Purchase Shipment	105001	1069
	RES	Resource	R0010	R999
	S-BLK	Blanket Sales Order	1001	2999
	S-CR	Sales Credit Memo	S-CR1001	S-CR
	S-CR+	Posted Sales Credit Memo	PS-CR104001	PS-C
	SEGM	Segment	SM00001	SM99
	* PM-TIX			
	SERV-TIX	Service Tickets	ST00001	ST99
	SERV-UNIT	Service Units	SU00001	SU99
	S-FIN	Finance Charge Memo	S-FIN1001	S-FIN
	S-FIN+	Issued Finance Charge Me...	S-FIN106001	S-FIN
	S-INV	Sales Invoice	S-INV102001	S-INV
	S-INV+	Posted Sales Invoice	PS-INV103001	PS-IN

Enter the text **Planned Maintenance Tickets**.

<div><div></div><div></div><div><div>CK...</div><div>SERVICE COMPLE...</div></div></div>	P-RETORD	Purchase Return Order	1001	2999
	P-SHPT	Posted Purchase Shipment	105001	1069
	RES	Resource	R0010	R999
	S-BLK	Blanket Sales Order	1001	2999
	S-CR	Sales Credit Memo	S-CR1001	S-CR
	S-CR+	Posted Sales Credit Memo	PS-CR104001	PS-C
	SEGM	Segment	SM00001	SM99
	PM-TIX			
	SERV-TIX	Service Tickets	ST00001	ST99
	SERV-UNIT	Service Units	SU00001	SU99
	S-FIN	Finance Charge Memo	S-FIN1001	S-FIN
	S-FIN+	Issued Finance Charge Me...	S-FIN106001	S-FIN
	S-INV	Sales Invoice	S-INV102001	S-INV
	S-INV+	Posted Sales Invoice	PS-INV103001	PS-IN



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Click on **Default Nos.**

2999	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
106999	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
R9990	-	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2999	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S-CR2999	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PS-CR105999	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SM99999	-	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
-	-	-	<input type="checkbox"/>	<input type="checkbox"/>
ST99999	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SU99999	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S-FIN2999	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S-FIN107999	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S-INV103999	-	S-INV102221	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PS-INV104999	1/25/2019	PS-INV103214	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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

IES					
Search	+ New	Edit List	Delete	Navigate	Open in Excel
NO.	DESCRIPTION	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO USED
ORD	Purchase Order	106001	107999	-	106004
QUO	Purchase Quote	1001	2999	-	-
RCPT	Purchase Receipt	107001	108999	3/15/2019	107208
RETORD	Purchase Return Order	1001	2999	-	-
SHPT	Posted Purchase Shipment	105001	106999	-	-
RES	Resource	R0010	R9990	-	-

Click on the navigation menu item **Lines**

ONUS Inc		Service	Plan	NO. SERIES   WORK DATE: 4/8/2019	
Search	+ New	Edit List	Delete	Lines	Relationships
View or edit additional information about the number					
P-ORD	Purchase Order				
P-QUO	Purchase Quote				
P-RCPT	Purchase Receipt				
P-RETORD	Purchase Return Order				
P-SHPT	Posted Purchase Shipment				
RES	Resource				

Click on the cell **Starting No.**

EDIT - NO. SERIES LINES - PM-TIX - PLANNED MAINTENANCE TICKLETS				
STARTING DATE	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO USED



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Enter the text **PM00001**.

EDIT - NO. SERIES LINES - PM-TIX - PLANNED MAINTENANCE TICKLETS

STARTING DATE	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO. USED
	P			

Click on the cell **Ending No.**

EDIT - NO. SERIES LINES - PM-TIX - PLANNED MAINTENANCE TICKLETS + New

STARTING DATE	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO. USED	WARNI NO.
	PM00001				

Enter the text **PM99999**.

EDIT - NO. SERIES LINES - PM-TIX - PLANNED MAINTENANCE TICKLETS + New

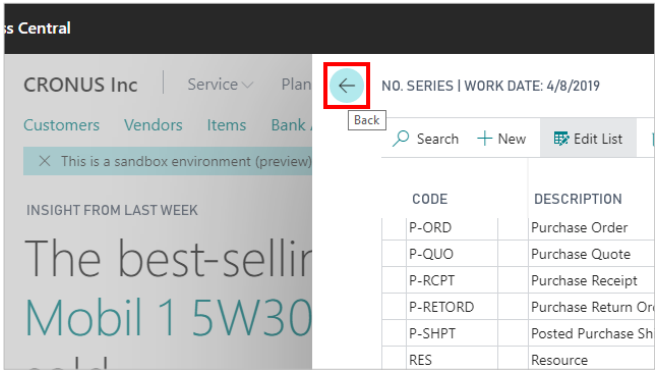
STARTING DATE	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO. USED	WARNI NO.
	PM00001	P			

Click on the button **Close**

Close

99999	-	-	✓	
99	-	107211	✓	
99	3/15/2019	108208	✓	
99	-	106004	✓	
-	-	-	✓	

Click on the back button

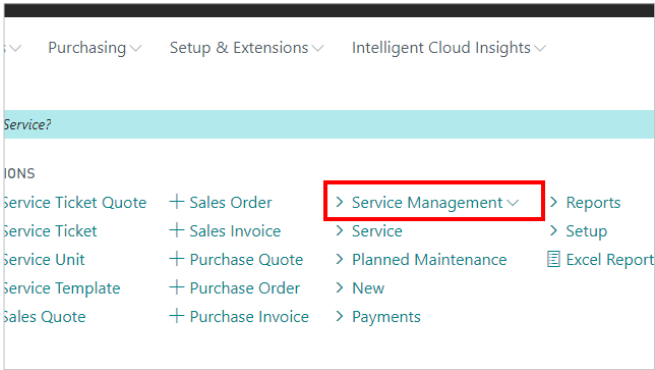


2.2.1.3. How to Set Up Service Management Setup

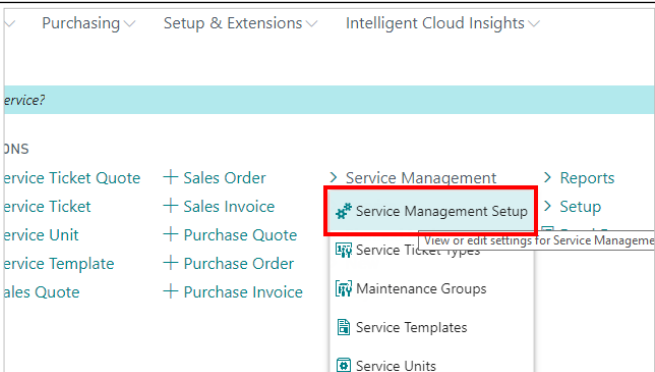
Business Manager Profile

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

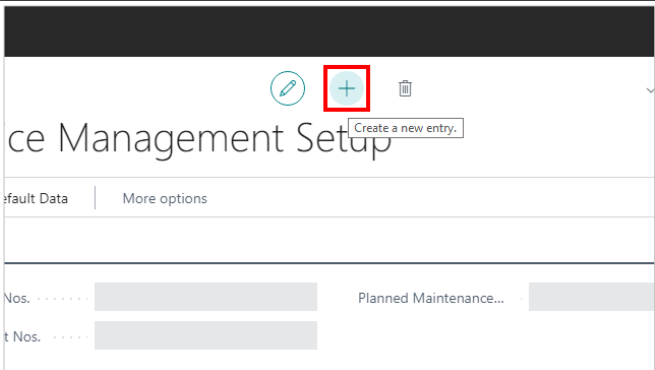
Click on the navigation menu item popup **Service Management**



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



Click on the action **New**





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

Service Management Setup

Create Default Data | More options

General

Service Unit Nos. ....

Service Ticket Nos. ....

Planned Maintenance

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

Service Unit Nos. ....

Service Ticket Nos. ....

CODE	DESCRIPTION
S-CR+	Posted Sales Credit Memo
SEGM	Segment
SERV-TIX	Service Tickets
SERV-UNIT	Service Units
S-F	Select record "SERV-UNIT" Price Charge Memo

+ New

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

Service Management Setup

Create Default Data | More options

General

Service Unit Nos. ....

Service Ticket Nos. ....

Planned Maintenance

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

Service Ticket Nos. ....

CODE	DESCRIPTION
S-CR	Sales Credit Memo
S-CR+	Posted Sales Credit Memo
SEGM	Segment
SERV-TIX	Service Tickets
SERV	Select record "SERV-TIX" Price Units

+ New

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

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

CODE	DESCRIPTION
GJNL-RCPT	Cash Receipts Journal
JJNL-GEN	Item Journal
ITEM	Items
JJNL-GEN	Job Journal
JJNL-REC	Recurring Job Journal
+ New	

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.





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

Actions

+ Service Ticket Quote

+ Service Ticket

+ Service Unit

+ Service Template

+ Sales Quote

+ Sales Order

+ Sales Invoice

+ Purchase Quote

+ Purchase Order

+ Purchase Invoice

> Service Management

> Service

> Planned Maintenance

> New

> Payments

> Reports

> Setup

> CAL Test To

Excel Report

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

Actions

+ Service Ticket Quote

+ Service Ticket

+ Service Unit

+ Service Template

+ Sales Quote

+ Sales Order

+ Sales Invoice

+ Purchase Quote

+ Purchase Order

+ Purchase Invoice

> Service Management

\* Service Management Setup

Service Ticket Types

Maintenance Groups

Service Templates

Service Units

> Payments

> Reports

> Setup

> CAL Test To

Excel Report

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

▼

Posted Service Inv. Nos.

SV-INV+

▼

▼

Planned Maint. Invoic...

PM-INV

▼

▼

Posted Planned Maint...

PM-INV+

▼

▼

Filter Service Units By ...

☒

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

▼

Posted Service Inv. Nos.

SV-INV+

▼

▼

Planned Maint. Invoic...

PM-INV

▼

▼

Posted Planned Maint...

PM-INV+

▼

▼

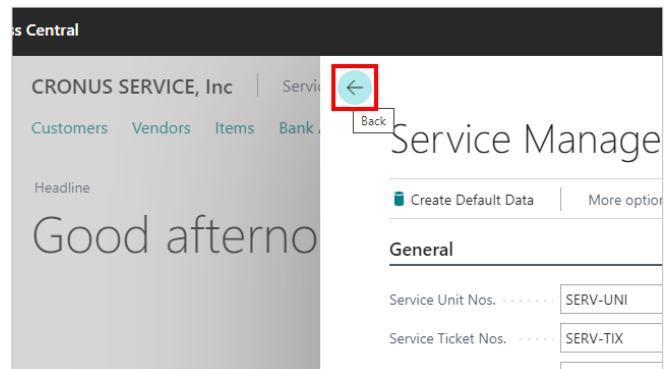
Filter Service Units By ...

☒



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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 Details 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.

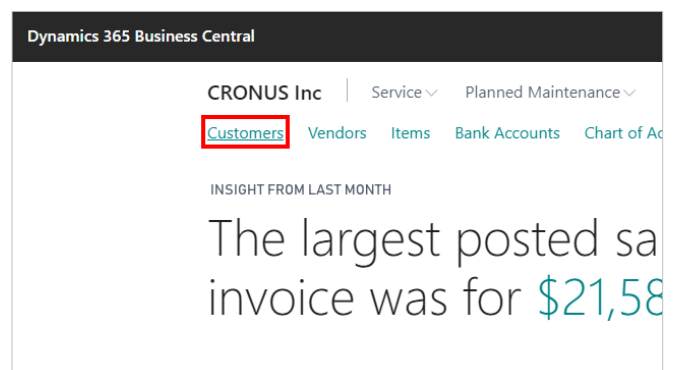
The field called Internal, must be enabled on the customer(s) to be used when servicing company owned equipmen.

### 2.2.2.2. How to Setup an Internal Customer

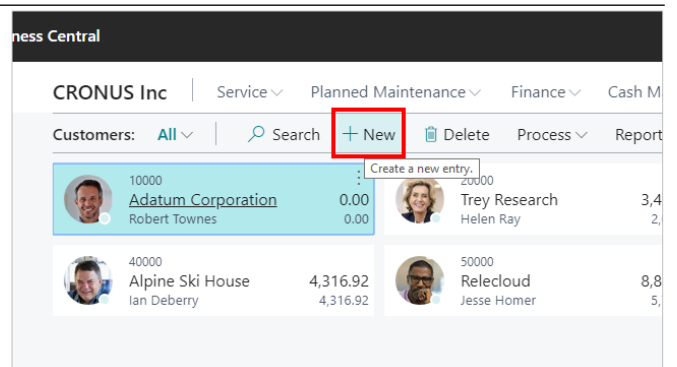
Business Manager Profile

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

Click on the navigation menu item **Customers**



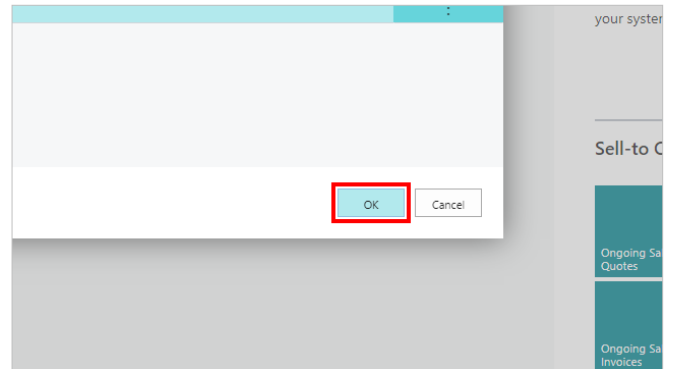
Click on the navigation menu item **New**





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Click on the button **OK**



Click on the field **Name**

C00010

New Document Request Approval Navigate Customer More options

**General**

No. .... C00010 ...

Name ..... \*

Balance (\$) ..... 0.00

Balance Due (\$) ..... 0.00

Credit Limit (\$) ..... 0.00

Enter the text **Internal Servicing Customer**.

C00010

New Document Request Approval Navigate Customer More options

**General**

No. .... C00010 ...

Name ..... \*

Balance (\$) ..... 0.00

Balance Due (\$) ..... 0.00

Credit Limit (\$) ..... 0.00

Click on **Tax Liable, Yes**

**Address & Contact >**

**Invoicing**

Copy Sell-to Addr. to Qte From ... Company

Tax Liable ..... \*

Tax Area Code ..... \*

Tax Identification Type ..... Legal Entity

Tax Exemption No. ....



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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.



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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.

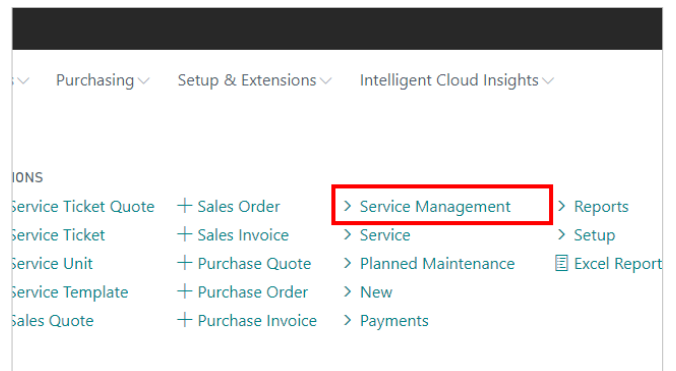
## 2.3.2. How to Setup Service Ticket Types

### Business Manager Profile

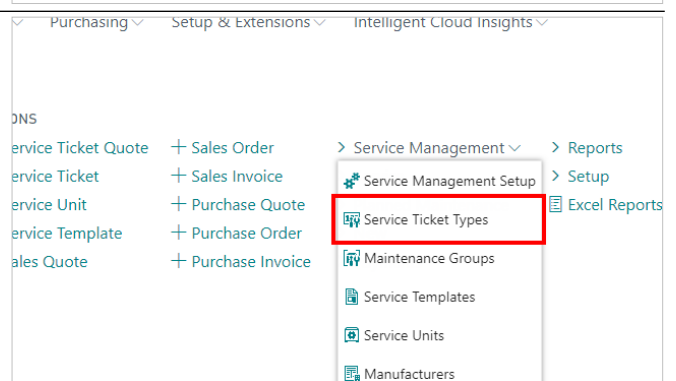
The following demonstrates how to setup a Service Ticket Type.

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

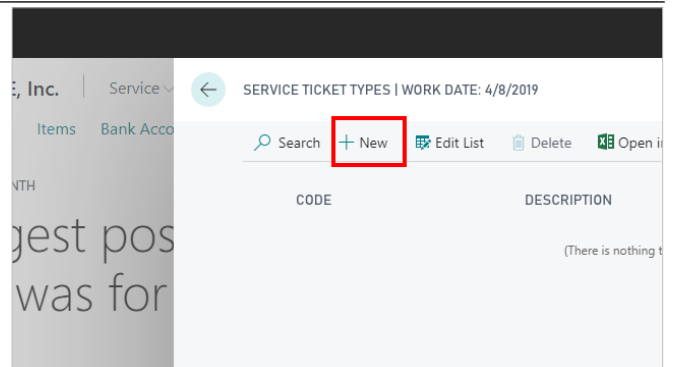
Click on the navigation menu item popup **Service Management**



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



Click on the navigation menu item **New**





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Click on the cell **Code**

Inc | Service | Plan

Vendors | Items | Bank

a sandbox environment (preview)

DM LAST MONTH

largest po  
oice was fo

SERVICE TICKET TYPES | WORK DATE: 4/8/2019

Press

Search + New Edit List Delete

CODE	DESCRIPTION
*	
REGUALR SERVICE	Regular Service
WALK IN	Walk In

Enter the text **Regular Service**.

Inc | Service | Plan

Vendors | Items | Bank

a sandbox environment (preview)

DM LAST MONTH

largest po  
oice was fo

SERVICE TICKET TYPES | WORK DATE: 4/8/2019

✓ SAV

Search + New Edit List Delete

CODE	DESCRIPTION
* R	
REGUALR SERVICE	Regular Service
WALK IN	Walk In

Click on the cell **Description**

SERVICE TICKET TYPES | WORK DATE: 4/8/2019

✓ SAV

New Edit List Delete Open in Excel

DESCRIPTION	APPLIES TO TYPE
	Service

Enter the text **Regular Service**.

SERVICE TICKET TYPES | WORK DATE: 4/8/2019

✓ SAV

New Edit List Delete Open in Excel

DESCRIPTION	APPLIES TO TYPE
R	Service

Click on the cell Applies to Ticket Type

The screenshot shows a dropdown menu titled 'APPLIES TO TICKET TYPE'. The 'Service' option is selected and highlighted with a red rectangular box. Other options like 'Maintenance' are visible but not highlighted.

Click on Service

The screenshot shows the 'APPLIES TO TICKET TYPE' dropdown menu. The 'Service' option is highlighted with a red rectangular box. The text 'There is nothing to show in this view' is visible in the background.

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

Click on the back button

The screenshot shows the 'SERVICE TICKET TYPES' page. A back button, represented by a left-pointing arrow, is highlighted with a red rectangular box. The page title is 'SERVICE TICKET TYPES | WORK DATE: 4/8/2025'.

## 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

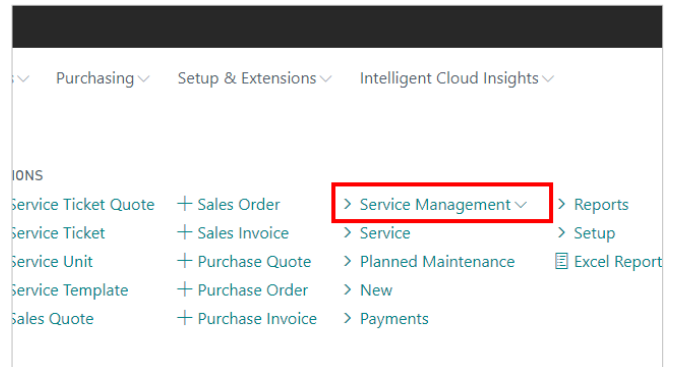
Business Manager Profile

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

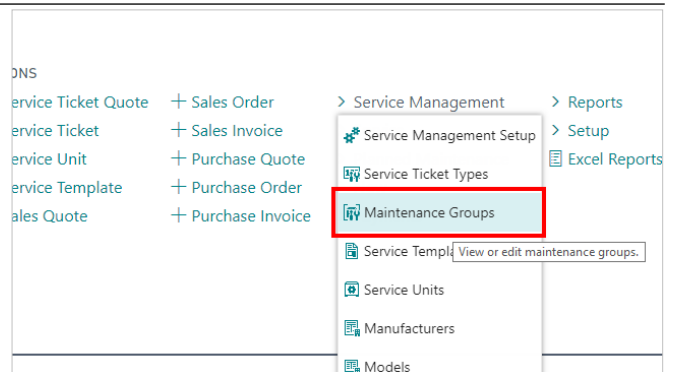


The following demonstrates the setup of a Maintenance Group.

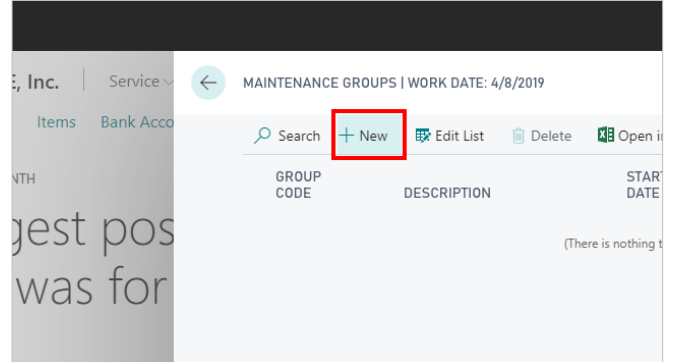
Click on the navigation menu item popup **Service Management**



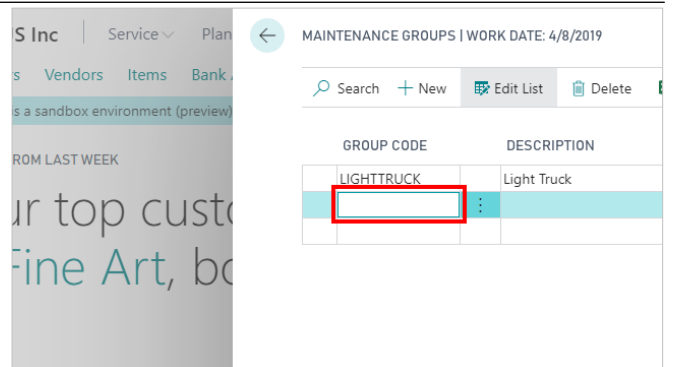
Click on the navigation menu item **Maintenance Groups**



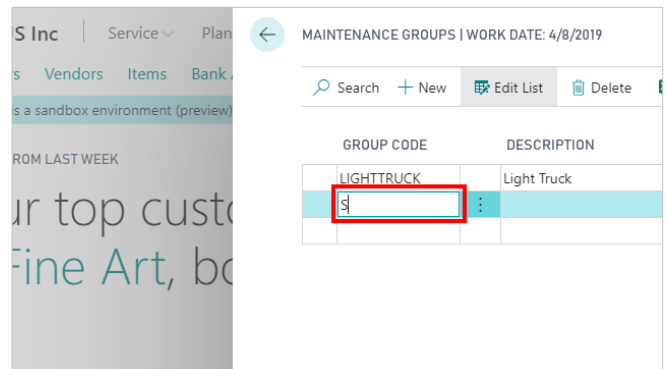
Click on the navigation menu item **New**



Click on the cell **Group Code**

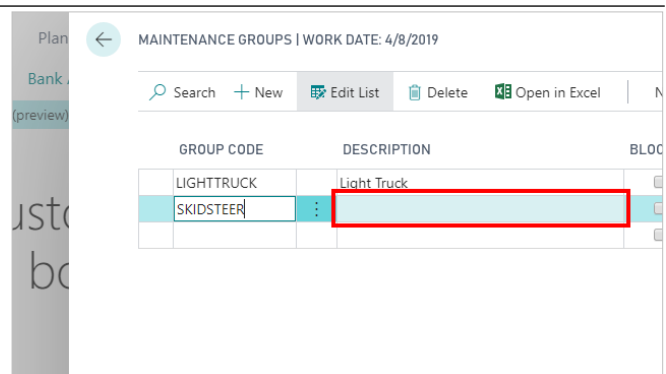


Enter the text **SKIDSTEER**.



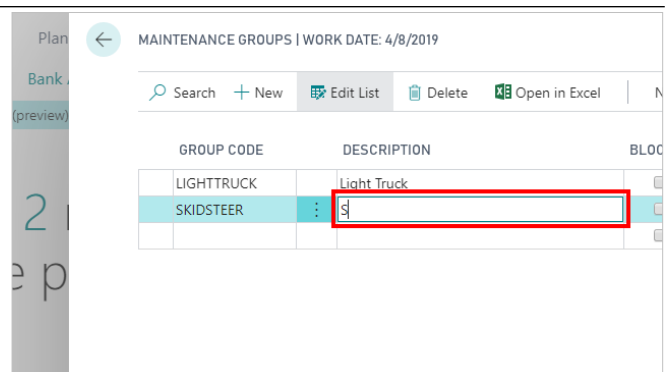
GROUP CODE	DESCRIPTION
LIGHTTRUCK	Light Truck
SKIDSTEER	

Click on the cell **Description**



GROUP CODE	DESCRIPTION	BLOCK
LIGHTTRUCK	Light Truck	
SKIDSTEER		

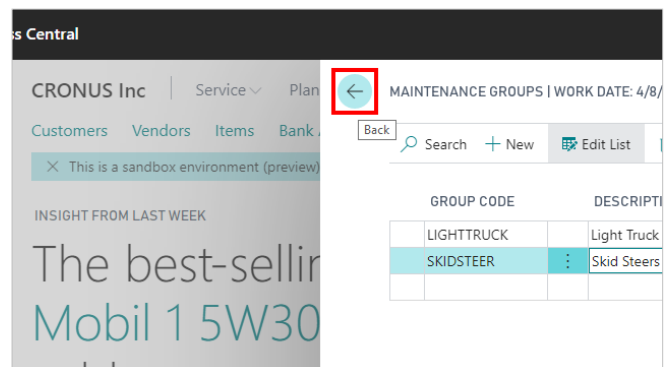
Enter the text **Skid Steers**.



GROUP CODE	DESCRIPTION	BLOCK
LIGHTTRUCK	Light Truck	
SKIDSTEER	Skid Steers	

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

Click on the back button



GROUP CODE	DESCRIPTION
LIGHTTRUCK	Light Truck
SKIDSTEER	Skid Steers

## 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.



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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.

The screenshot shows the 'Service Template' form with the 'General' tab selected. The 'Template No.' field is highlighted with a red box and has a red asterisk indicating it is mandatory. The 'Description' field is also visible below it. At the bottom, there are tabs for 'Template Lines' and 'Manage'.

Click on the link **Description**

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

This screenshot is similar to the previous one, but the 'Description' field is highlighted with a red box. The 'Template No.' field is also visible and has a red asterisk. The 'Template Lines' and 'Manage' tabs are at the bottom.



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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.



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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.

Template No. .... OILCHANGE - SS

Description .... Oil Change for Skid Steers

Template Lines | Manage

SERVICE TEMPLATE NO. TYPE NO.

Resource

Specifies the type of the service template line.  
Press Ctrl+F1 to learn more

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.

Template No. .... OILCHANGE - SS

Description .... Oil Change for Skid Steers

Manage

TEMPLATE NO. TYPE NO. DESCRIPTION

Resource

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.

Template Type ....

Steers Maintenance Group Code ....

0. DESCRIPTION

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.

Template Type .... Service

Maintenance Group Code .... SKIDSTEER

RIPTION QUANTITY UNIT

0.00



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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.



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

The screenshot shows the navigation menu with 'Service Management' highlighted by a red box. The menu includes options like Purchasing, Setup & Extensions, and Intelligent Cloud Insights. Under Service Management, there are sub-items: Service Ticket Quote, Service Ticket, Service Unit, Service Template, Sales Quote, + Sales Order, + Sales Invoice, + Purchase Quote, + Purchase Order, + Purchase Invoice, > Service Management, > Service, > Planned Maintenance, > New, > Payments, > Reports, > Setup, and Excel Report.

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

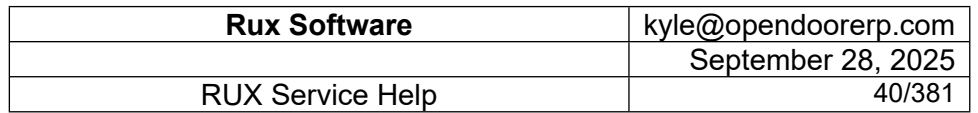
The screenshot shows the navigation menu with 'Service Templates' highlighted by a red box. The menu includes options like Purchasing, Setup & Extensions, and Intelligent Cloud Insights. Under Service Management, there are sub-items: Service Ticket Quote, Service Ticket, Service Unit, Service Template, Sales Quote, + Sales Order, + Sales Invoice, + Purchase Quote, + Purchase Order, + Purchase Invoice, > Service Management, > Service, > Planned Maintenance, > New, > Payments, > Reports, > Setup, and Excel Report. The 'Service Templates' sub-item is highlighted with a red box.

Click on the navigation menu item **New**

The screenshot shows the 'Service Templates' screen with the 'New' button highlighted by a red box. The screen includes a search bar, a 'New' button, a 'Manage' button, and an 'Open in Excel' button. Below these buttons is a table with columns: TEMPLATE NO., TEMPLATE TYPE, and DESCRIPTION. The table is currently empty, with a message '(There is nothing to display)'.

Click on the field **Template No.**

The screenshot shows the 'Service Templates' screen with the 'Template No.' field highlighted by a red box. The field is a text input box with a red asterisk next to it, indicating it is a required field. The field is currently empty.



template

..... \*

.....

Manage

[illegible]

		OILCHANGE - SS	
		<input type="text"/>	
		<input type="text"/> O	
<div>Manage</div>			
DATE NO.	TYPE	NO.	DESCRIPTION



The screenshot shows the 'Filter by' dialog box with the 'Filter by' section expanded. The 'All' filter is selected, and the 'All' button is highlighted with a red box.





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

..... All

..... All

..... Service

..... Planned Maintenance

..... Service

..... Maintenance

.....

QUANTITY UNIT COST UNIT PRICE

Click on the field **Maintenance Group Code**

..... All

.....

QUANTITY UNIT COST UNIT PRICE

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

..... All

..... Maintenance Group Code

GROUP CODE DESCRIPTION

SKIDSTEER Skid Steers

+ New Select record "SKIDSTEER"

QUANTITY UNIT COST UNIT PRICE

0.00 0.00

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**

Description ..... Oil Change for Skid Steers

Template Lines Manage

SERVICE TEMPLATE NO. TYPE NO.

Resource



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Click Resource in the options displayed.

Template Lines | Manage

SERVICE TEMPLATE NO.	TYPE	NO.
	Resource	
	Resource	
	Item	
	Resource	
	G/L Account	
	Text	

Click on the cell **No.**

Oil Change for Skid Steers

Manage

TEMPLATE NO.	TYPE	NO.	DESCRIPTION
	Resource		

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

Manage

PLATE NO.	TYPE	NO.	DESCRIPTION
	Resource		

NO.	NAME
LABOR	Labor - Oil Change
LIN	Select record "LABOR" Jrtin
MARK	Mark Hanson
MARY	Mary A. Dempsey
TIMOTHY	Timothy Sneath
+ New	

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.

Maintenance Group Code SKIDSTEER

DESCRIPTION	QUANTITY	UNIT
- Oil Change	1.00	



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

The Unit Cost defaults from the Resource Card.

Finance Group Code ..... SKIDSTEER

QUANTITY	UNIT COST	UNIT PRICE
1.00	22.25	

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

The Unit Price defaults from the Resource card.

..... SKIDSTEER

QUANTITY	UNIT COST	UNIT PRICE
1.00	22.25	75.00

Click on the cell **Type**

Template Lines | Manage

SERVICE TEMPLATE NO.	TYPE	NO.
	Resource	LABOR

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

Template Lines | Manage

SERVICE TEMPLATE NO.	TYPE	NO.
	Resource	LABOR

Resource

Resource

Item

Item point

Text



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Click on the cell **No.**

Manage			
TEMPLATE NO.	TYPE	NO.	DESCRIPTION
	Resource	LABOR	Labor - Oil Change
	Item		

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

TEMPLATE NO.	TYPE	NO.	DESCRIPTION
	Resource	LABOR	Labor - Oil Change
	Item		

NO.	DESCRIPTION
1001	Oil Filter
1003	Mobile Oil 5W30
1004	Air Filter for Skid Steer
1896-S	ATHENS Desk
+ New	

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.

DESCRIPTION	QUANTITY	UNIT
- Oil Change	1.00	
ter	1.00	

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

The Unit Cost defaults from the Item card.

QUANTITY	UNIT COST	UNIT P
1.00	22.25	
1.00	3.50	



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

The Unit Price defaults from the Item card.

QUANTITY	UNIT COST	UNIT PRICE
1.00	22.25	75.00
1.00	3.50	11.75

Click on the cell **Type**

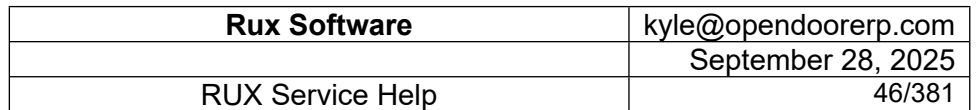
SERVICE TEMPLATE NO.	TYPE	NO.
	Resource	LABOR
	Item	1001

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

SERVICE TEMPLATE NO.	TYPE	NO.
	Resource	LABOR
	Item	1001

Click on the cell **No.**

TEMPLATE NO.	TYPE	NO.	DESCRIPTION
	Resource	LABOR	Labor - Oil Change
	Item	1001	Oil Filter



	Resource	LABOR	Labor - Oil Change																		
	Item	1001	Oil Filter																		
	Item	<div> <div></div> <div></div> </div>																			
		<table border="1"> <thead> <tr> <th>NO.</th> <th>DESCRIPTION</th> <th></th> </tr> </thead> <tbody> <tr> <td>1001</td> <td>Oil Filter</td> <td>PC</td> </tr> <tr> <td>1002</td> <td>Oil Gasket</td> <td>PC</td> </tr> <tr> <td>1003</td> <td>Oil SW30</td> <td>PC</td> </tr> <tr> <td>1004</td> <td>Air Filter for Skid Steer</td> <td>PC</td> </tr> <tr> <td>1896-S</td> <td>ATHENS Desk</td> <td>PC</td> </tr> </tbody> </table>		NO.	DESCRIPTION		1001	Oil Filter	PC	1002	Oil Gasket	PC	1003	Oil SW30	PC	1004	Air Filter for Skid Steer	PC	1896-S	ATHENS Desk	PC
NO.	DESCRIPTION																				
1001	Oil Filter	PC																			
1002	Oil Gasket	PC																			
1003	Oil SW30	PC																			
1004	Air Filter for Skid Steer	PC																			
1896-S	ATHENS Desk	PC																			
		+ New																			

Template Lines		Manage	
SERVICE TEMPLATE NO.	TYPE	NO.	
	Resource	LABOR	
	Item	1001	
	Item	1002	
	Resource		

SERVICE TEMPLATE NO.	TYPE	NO.
	Resource	LABOR
	Item	1001
	Item	1002
	Resource	
	Resource	
	Item	
	Group	
	Item	
	Text	

Manage			
TEMPLATE NO.	TYPE	NO.	DESCRIPTION
	Resource	LABOR	Labor - Oil Change
	Item	1001	Oil Filter
	Item	1002	Oil Gasket
	Item		



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

Item	1002	Oil Gasket
Item		
NO.	DESCRIPTION	
1001	Oil Filter	PC
1002	Oil Gasket	PC
1003	Mobile Oil 5W30	PC
10 Select record "1003" for Skid Steer		
1896-S	ATHENS Desk	PC
+ New		

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

DESCRIPTION	QUANTITY	UNIT
- Oil Change	1.00	
ter	1.00	
sket	1.00	
e Oil 5W30	1.00	

Enter the text **5.**

DESCRIPTION	QUANTITY	UNIT
- Oil Change	1.00	
ter	1.00	
sket	1.00	
e Oil 5W30	1.00	

Click on the back button

Dynamics 365 Business Central

←

SERVICE TEMPLATE | WORK DATE: 4/8/2019

Back

OILCHANGE - SS

Navigate

General

Template No. .... OILCHANGE - SS

Description ..... Oil Change for Skid

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



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Click on the navigation menu item **New**

Inc. | Service v  
Items Bank Acco  
NTH  
o custom  
Art, bou

SERVICE TEMPLATES | WORK DATE: 4/8/2019

Search + New Manage Open in Excel

Create a new entry.

TEMPLATE NO.	TEMPLATE TYPE	DESCRIPTION
OILCHANGE - SS	All	Oil Change

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

emplate

..... \*

.....

Manage

Enter the text **AirFilter - SS.**

emplate

..... \*

.....

Manage

Click on the field **Description**

emplate

..... \*

.....

Manage

TEMPLATE NO.	TYPE	NO.	DESCRIPTION
--------------	------	-----	-------------





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

emplate

AIRFILTER - SS

Ter

d

Me

Manage

ATE NO. TYPE NO. DESCRIPTION

Click on the field **Template Type**

All

All

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

All

All

Service

Planned Maintenance

Service

QUANTITY UNIT COST UNIT PRICE

Click on the field **Maintenance Group Code**

Service

QUANTITY UNIT COST UNIT PRICE



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

Service Type ..... Service

Maintenance Group Code .....

GROUP CODE	DESCRIPTION
SKIDSTEER	Skid Steers

+ New Select record "SKIDSTEER"

QUANTITY	UNIT COST	UNIT
0.00	0.00	

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.

Description ..... Changing the Air Filter on Skid Steers

Template Lines | Manage

SERVICE TEMPLATE NO.	TYPE	NO.
	Resource	

Resource  
Item  
G/L Account  
Text

Click on the cell **No.**

..... Changing the Air Filter on Skid Steers

Manage

TEMPLATE NO.	TYPE	NO.	DESCRIPTION
	Resource		

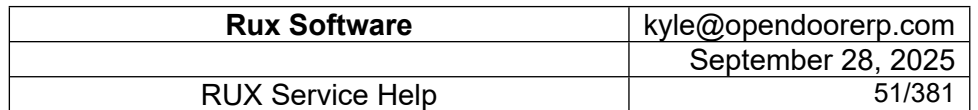
Click on the link in cell **No.** with the value **LABOR**

Manage

TEMPLATE NO.	TYPE	NO.	DESCRIPTION
	Resource		

NO.	NAME
LABOR	Labor - Oil Change
LIN	Select record "LABOR" Martin
MARK	Mark Hanson
MARY	Mary A. Dempsey
TIMOTHY	Timothy Sneath

+ New



Maintenance Group Code	
0.	DESCRIPTION
LABOR	Labor - Oil Change

ter on Skid Steers		Maintenance Group Code .....
O.	DESCRIPTION	QU
LABOR	Labor	

Template Lines		Manage
SERVICE TEMPLATE NO.	TYPE	NO.
	⋮ Resource	LABOR

Template Lines		Manage	
SERVICE TEMPLATE NO.	TYPE	NO.	
	Resource	LABOR	
	Resource		
	Item		
	Account		
	Item		
	Item		



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Click on the cell **No.**

Manage			
TEMPLATE NO.	TYPE	NO.	DESCRIPTION
	Resource	LABOR	Labor - Replace Air Filter
	Item		

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

NO.	DESCRIPTION	
1001	Oil Filter	PC
1002	Oil Gasket	PC
1003	Mobile Oil 5W30	PC
1004	Air Filter for Skid Steer	PC
Select record "1004"		
+ New		

Click on the back button

Dynamics 365 Business Central

Back Service Template

Navigate

General

Template No. AIRFILTER - SS

Description Changing the Air Filter

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

Click on the navigation menu item **New**

Service Inc. | Service | SERVICE TEMPLATES | WORK DATE: 4/8/2019

Items Bank Accounts

THREE MONTHS

sed 16 m  
ame per

Search + New Manage Open in Excel

TEMPLATE NO.	TEMPLATE TYPE	DESCRIPTION
AIRFILTER - SS	Service	Changing the Air Filter
OILCHANGE - SS	Service	Oil Change



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Click on the field **Template No.**

emplate

\*

Manage

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

emplate

\*

SS

Manage

Click on the field **Description**

emplate

\*

SS-General Service

Manage

DATE NO.      TYPE      NO.      DESCRIPTION


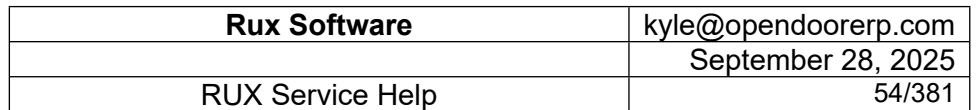
Enter the text **Skid Steer General Service.**

emplate

SS-GENERAL SERVICE

Manage

DATE NO.      TYPE      NO.      DESCRIPTION



All

All  
Service  
Planned Maintenance  
Service

QUANTITYUNIT COSTUNIT PRICE

[illegible]

Material Type	Service						
Maintenance Group Code	<table border="1"> <thead> <tr> <th>GROUP CODE</th> <th>DESCRIPTION</th> </tr> </thead> <tbody> <tr> <td>SKIDSTEER</td> <td>Skid Steers</td> </tr> </tbody> </table>	GROUP CODE	DESCRIPTION	SKIDSTEER	Skid Steers		
GROUP CODE	DESCRIPTION						
SKIDSTEER	Skid Steers						
	<div> <div>+ New</div> <div>Select record "SKIDSTEER"</div> </div>						
	<table border="1"> <thead> <tr> <th>QUANTITY</th> <th>UNIT COST</th> <th>UNIT</th> </tr> </thead> <tbody> <tr> <td>0.00</td> <td>0.00</td> <td></td> </tr> </tbody> </table>	QUANTITY	UNIT COST	UNIT	0.00	0.00	
QUANTITY	UNIT COST	UNIT					
0.00	0.00						



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

Select Resource.

Description ..... Skid Steer General Service

Template Lines | Manage

SERVICE TEMPLATE NO.	TYPE	NO.
	Resource	
		Resource

Click on the cell **No.**

..... Skid Steer General Service

Manage

TEMPLATE NO.	TYPE	NO.	DESCRIPTION
	Resource		
	Resource		
	Item		
	G/L Account		
	Text		

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

Manage

PLATE NO.	TYPE	NO.	DESCRIPTION
	Resource		

NO.	NAME
LABOR	Labor - Oil Change
LINDA	Linda Martin
MARK	Mark Hanson
MARY	Mary A. Dempsey
TIMOTHY	Timothy Sneath
+ New	

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

Service ..... Maintenance Group Code .....

NO.	DESCRIPTION	QU
LABOR	Labor - Oil Change	



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Enter the text **Labor - Lube**.

Service  Maintenance Group Code .....

Q.	DESCRIPTION	QU
LABOR	<input type="text"/>	

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

Maintenance Group Code ..... SKIDSTEER

DESCRIPTION	QUANTITY	UNIT
- Lube	1.00	

Enter the text **.5**.

Maintenance Group Code ..... SKIDSTEER

DESCRIPTION	QUANTITY	UNIT
- Lube	<input type="text"/>	

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

Template Lines | Manage

SERVICE TEMPLATE NO.	TYPE	NO
<input type="text"/>	Resource	LA





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

Template Lines			
SERVICE TEMPLATE NO.		TYPE	NO.
		Resource	LABOR
		Resource	

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

Service Template			
TEMPLATE NO.		TEMPLATE TYPE	
AIRFILTER - SS		Service	
OILCHANGE - SS		Service	

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

Template Lines			
SERVICE TEMPLATE NO.		TYPE	NO.
		Resource	LABOR
OILCHANGE - SS		Resource	

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

Template Lines			
SERVICE TEMPLATE NO.		TYPE	NO.
		Resource	LABOR
OILCHANGE - SS		Resource	



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

Service Template

SEARCH + New Manage Open in Excel

SERVICE TEMPLATES + New

TEMPLATE NO. ▼	TEMPLATE TYPE
AIRFILTER - SS	Service
OILCHANGE - SS	Service

Select record "AIRFILTER - SS"

Click on the cell **Type**

Template Lines Manage

SERVICE TEMPLATE NO.	TYPE	NO.
	Resource	LABOR
OILCHANGE - SS	Resource	
AIRFILTER - SS	Resource	

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

Template Lines Manage

SERVICE TEMPLATE NO.	TYPE	NO.
	Resource	LABOR
OILCHANGE - SS	Resource	
AIRFILTER - SS	Resource	

Resource

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

Template Lines Manage

SERVICE TEMPLATE NO.	TYPE	NO.
	Resource	LABOR
OILCHANGE - SS	Resource	
AIRFILTER - SS	Resource	

Resource

Resource  
Item  
G/L Account  
G/L Account



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Click on the cell **No.**

Manage			
TEMPLATE NO.	TYPE	NO.	DESCRIPTION
	Resource	LABOR	Labor - Lube
GE - SS	Resource		Oil Change for Skid Steers
- SS	Resource		Changing the Air Filter
	G/L Account		

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

SS	Resource		Oil Change for Skid Steers
	Resource		Changing the Air Filter on S
	G/L Account		
NO.	NAME	IN	
40001	INCOME	In	
40100	Income, Services	In	
40150	Income - Shop Supplies	In	
40200	Income, Product Sales	In	
40250	Job Sales	In	
40300	Sales Discounts	In	
+ New			

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

	QUANTITY	UNIT COST	UNIT P
	0.50	22.25	
	0.00	0.00	
's	0.00	0.00	
	1.00	0.00	

Enter the text **10.00**.

	QUANTITY	UNIT COST	UNIT P
	0.50	22.25	
	0.00	0.00	
's	0.00	0.00	
	1.00		



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

QUANTITY	UNIT COST	UNIT PRICE
0.50	22.25	75.00
0.00	0.00	0.00
0.00	0.00	0.00
1.00	10.00	0.00

Enter the text **20.00**.

QUANTITY	UNIT COST	UNIT PRICE
0.50	22.25	75.00
0.00	0.00	0.00
0.00	0.00	0.00
1.00	10.00	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**

Actions		
+ Service Ticket Quote	+ Sales Invoice	> Planned Maintenance
+ Service Ticket	+ Purchase Quote	> New
+ Service Unit	+ Purchase Order	> Payments
+ Service Template	+ Purchase Invoice	> Reports
+ Sales Quote	> Service Management	> Excel Reports
+ Sales Order	> Service	



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

+ Sales Quote

+ Sales Order

> Service Management

Service Management Setup

Service Ticket Types

Maintenance Groups

Service Templates

Service Checklists

Service Units

Manufacturers

Models

Service Unit Meter Worksheet

Excel Report

Open the list of standard service checkl

Click on the navigation menu item **New**

Dynamics 365 Business Central

← Standard Service Checklists

Search + New Edit List Delete Checklist Lines

Checklist Code ↑

→ 20KCHK

CHECKLIST DEMO

Enter the text **Inspection**.

Dynamics 365 Business Central

← Standard Service Checklists

Search + New Edit List Delete Checklist Lines

Checklist Code ↑

→

20KCHK

CHECKLIST DEMO

Click on **Description**

Description
20 K Checklist
001



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Enter the text **Inspection list**.

	Description
:	
	20 K Checklist
	001

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

Business Central

Standard Service Checklists

Search + New Edit List Delete Checklist Lines

Checklist Code ↑

→ INSPECTION

20KCHK

CHECKLIST DEMO

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

Standard Service Checklist lines

Search + New Edit List Delete

Type Description

→

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

Standard Service Checklist lines

Search + New Edit List Delete

Type Description

→

Text  
Boolean  
Decimal  
Named Value



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Click on the cell **Description**

← Standard Service Checklist lines

Search + New Edit List Delete Named Values

Type	Description	Min. Val
→ Text		0.0

Enter the text **Inspection**.

← Standard Service Checklist lines

Search + New Edit List Delete Named Values

Type	Description	Min. Val
→ Text		0.0

Click on the cell **Type**

← Standard Service Checklists

Search + New

Checklist Code ↑
→ RECORDING
20KCHK
TEST 2
TEST LIST

← Standard Service Checklist lines

Search + New Edit List Delete

Type	Description
→ Text	Inspection

Click on the cell **Type**

← Standard Service Checklists

Search + New

Checklist Code ↑
→ RECORDING
20KCHK
TEST 2
TEST LIST

← Standard Service Checklist lines

Search + New Edit List Delete

Type	Description
→ Text	Inspection



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

Standard Service Checklist

+ New

Checklist Code ↑

→

RECORDING

20KCHK

TEST 2

TEST LIST

Standard Service Checklist lines

+ New

Edit List

Delete

Type

Description

Text

Inspection

→

Text

Decimal

Named Value

Option

Option

Click on the cell **Description**

Service Checklists

+ New

Checklist Code ↑

RECORDING

20KCHK

TEST 2

TEST LIST

Standard Service Checklist lines

+ New

Edit List

Delete

Named Values

Type

Description

Min. Val

Text

Inspection

0.0

→

Option

0.0

Enter the text **Tires**.

Service Checklists

+ New

Checklist Code ↑

RECORDING

20KCHK

TEST 2

TEST LIST

Standard Service Checklist lines

+ New

Edit List

Delete

Named Values

Type

Description

Min. Val

Text

Inspection

0.0

→

Option

T

0.0

Click on the cell **Type**

Standard Service Checklist

+ New

Checklist Code ↑

→

RECORDING

20KCHK

TEST 2

TEST LIST

Standard Service Checklist lines

+ New

Edit List

Delete

Type

Description

Text

Inspection

→

Option

Tires





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Click on the cell **Type**

+ New

Checklist Code ↑

→ RECORDING

20KCHK

TEST 2

TEST LIST

Standard Service Checklist Items

→

Type

Text

Option

→

Description

Inspection

Tires

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

+ New

Checklist Code ↑

→ RECORDING

20KCHK

TEST 2

TEST LIST

Standard Service Checklist Items

→

Type

Text

Option

→

Description

Inspection

Tires

Text

Decimal

Named Value

Option

Option

Click on the cell **Description**

+ New

Checklist Code ↑

→ RECORDING

20KCHK

TEST 2

TEST LIST

Standard Service Checklist Items

→

Type

Text

Option

→

Description

Inspection

Tires

Min. Value

0.0

0.0

0.0

Enter the text **Gas**.

+ New

Checklist Code ↑

→ RECORDING

20KCHK

TEST 2

TEST LIST

Standard Service Checklist Items

→

Type

Text

Option

→

Description

Inspection

Tires

Min. Value

0.0

0.0

0.0

Gas

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

list lines

✓ Saved

w

Edit List

Delete

Named Values

Option Values

...

Description	Min. Value	Max. Value	Unit of Measure	Sort
Inspection	0.00	0.00		
Tires	0.00	0.00		
Gas	0.00	0.00		

Click on the navigation menu item **New**

← Standard Serv

← Standard Service Checklist Values

🔍

📄

+ New

Edit List

Delete

Type

Text

Option

→ Option

Value ↑

(There is nothing to display)

Enter the text **Yes**.

← Standard Serv

← Standard Service Checklist Values

🔍

📄

+ New

Edit List

Delete

Type

Text

Option

→ Option

Value ↑

→ Yes

Click on the cell **Value**

← Standard Service Checklist Values

🔍

📄

+ New

Edit List

Delete

Value ↑

→ Yes



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Enter the text **No**.

←

Standard Service Checklist Values

🔍

📄

+ New

Edit List

Delete

Value ↑

	Yes
→	No

Click on the back button

←

Standard Service Checklist Values

🔍

📄

+ New

Edit List

Delete

Value ↑

	Yes
→	No

←

Standard Service Checklist Values

🔍

📄

+ New

Edit List

Delete

Value ↑

	Yes
→	No

Click on **Type**

Edit List

Delete

📄

Checklist Code ↑

PECTION
CHK
→ ECKLIST DEMO

🔍

+ New

Edit List

Delete

Type

Description

Text	Inspection
Boolean	Tires
→ Boolean	Gas

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

Edit List

Delete

📄

Checklist Code ↑

PECTION
CHK
→ ECKLIST DEMO

🔍

+ New

Edit List

Delete

Type

Description

Text	Inspection
Boolean	Tires
Boolean	Gas
→	



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Click on the item Named Value in the list

A screenshot of a software interface showing a dropdown menu. The menu is open, displaying options: Text, Boolean, Decimal, and Named Value. The 'Named Value' option is highlighted with a red rectangular box.

Click on the cell **Description**

A screenshot of a software interface showing a table with columns: Type, Description, and Min. Value. The table contains the following data:

Type	Description	Min. Value
Text	Inspection	0.0
Boolean	Tires	0.0
Boolean	Gas	0.0
Named Value		0.0

The 'Named Value' row is selected, and the 'Description' cell is highlighted with a red rectangular box.

Enter the text **Optionals**.

A screenshot of a software interface showing a table with columns: Type, Description, and Min. Value. The table contains the following data:

Type	Description	Min. Value
Text	Inspection	0.0
Boolean	Tires	0.0
Boolean	Gas	0.0
Named Value	Optionals	0.0

The 'Named Value' row is selected, and the 'Description' cell is highlighted with a red rectangular box.

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

A screenshot of a software interface showing a table with columns: Type, Description, and Min. Value. The table contains the following data:

Type	Description	Min. Value
Text	Inspection	0.0
Boolean	Tires	0.0
Boolean	Gas	0.0
Named Value	Optionals	0.0

The 'Named Value' row is selected, and the 'Description' cell is highlighted with a red rectangular box.



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

Type	Description
Text	Inspection
Boolean	Tires
Boolean	Gas
Named Value	Optionals

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

Type	Description	Min. Value	Max. Value	Unit
Text	Inspection	0.00	0.00	
Boolean	Tires	0.00	0.00	
Boolean	Gas	0.00	0.00	
Named Value	Optionals	0.00	0.00	

Click on the navigation menu item **New**

Type	Description	Min. Value	Max. Value	Unit
Text	Inspection	0.00	0.00	
Boolean	Tires	0.00	0.00	
Boolean	Gas	0.00	0.00	
Named Value	Optionals	0.00	0.00	

Enter the text **Oil**.

Type	Description	Min. Value	Max. Value	Unit
Text	Inspection	0.00	0.00	
Boolean	Tires	0.00	0.00	
Boolean	Gas	0.00	0.00	
Named Value	Optionals	0.00	0.00	



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Click on **Value**

← Standard Service Checklist Values

Search + New Edit List Delete

Value ↑

→ Oil

Enter the text **Air**.

← Standard Service Checklist Values

Search + New Edit List Delete

Value ↑

→ Oil

→ Air

Click on the back button

← Standard Service Checklist Values

Search + New Edit List

Value ↑

→ Oil

→ Air

← Standard Service Checklist Values

Search + New Edit List

Value ↑

→ Oil

→ Air

Click on the back button

← Standard Service Checklist lines

Search + New Edit List

Type Description

Text Inspection

Boolean Tires

Boolean Gas

→ Named Value : Optionals

← Standard Service Checklist lines

Search + New Edit List

Type Description

Text Inspection

Boolean Tires

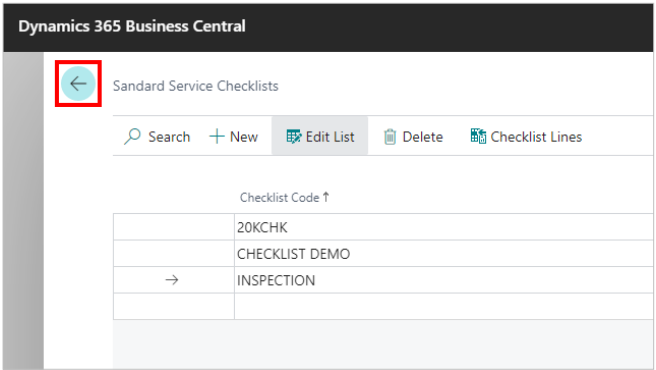
Boolean Gas

→ Named Value : Optionals



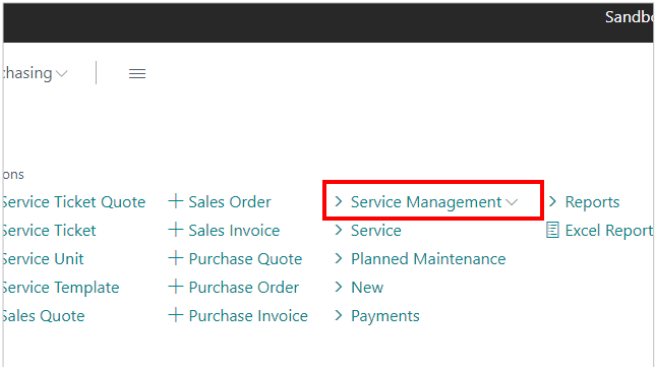
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Click on the back button

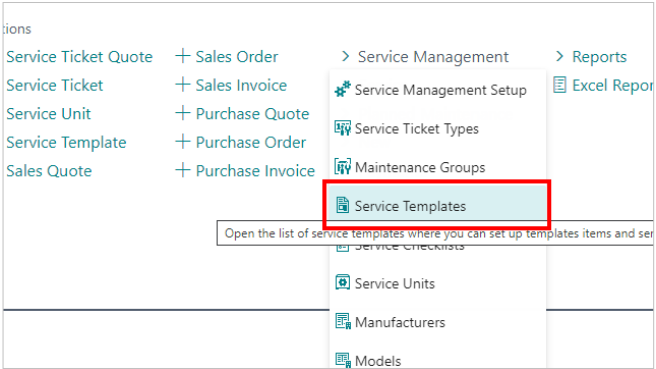


The following demonstrates how to add a checklist to a service template.

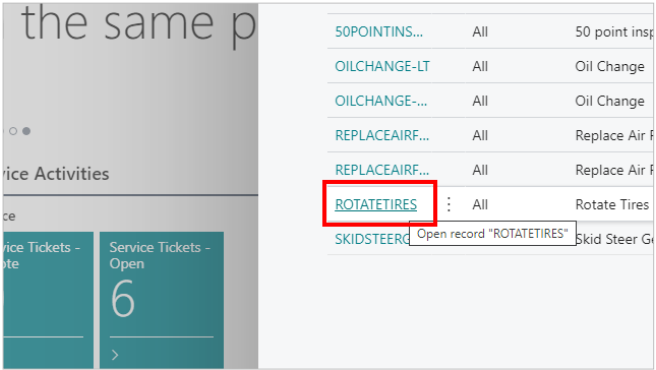
Click on the navigation menu item popup **Service Management**



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



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





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

The screenshot shows the 'Service Templates' screen. On the left is a list of templates with columns 'Template No.' and 'Temp'. The right pane shows the details for 'ROTATETIRES'. A red box highlights the 'Related' button in the top right corner of the details pane.

Click on the navigation menu item **Checklists**

This screenshot is similar to the previous one, but the 'Checklists' button, located below the 'Related' button, is now highlighted with a red box.

Click on the navigation menu item **New**

The screenshot shows the 'Checklists' screen. A red box highlights the '+ New' button in the top right corner of the main content area.

Click on the lookup button **Code**

The screenshot shows the 'Checklist Details' screen. A red box highlights the 'Code' lookup button, which is a small square with a downward arrow, located next to the 'Code' field.





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

Checklist Code ↑	Description
20KCHK	20 K Checklist
CHECKLIST DEMO	001
INSPECTION	Inspection list

Click on the cell **Description**

Type	Description	Min. Value
→		0.00

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

Type	Description	Min. Value
→ Text	Inspection	0.00
Boolean	Tires	0.00
Boolean	Gas	0.00
Named Value	Optionals	0.00

## 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**

Service Activity	Template No.	Description
OILCHANGE-LT	All	Oil Change
OILCHANGE-...	All	Oil Change
REPLACEAIRF...	All	Replace Air F
REPLACEAIRF...	All	Replace Air F
ROTATETIRES	All	Rotate Tires
SKIDSTEERGE...	All	Skid Steer G



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

Click on the navigation menu item **Checklists**

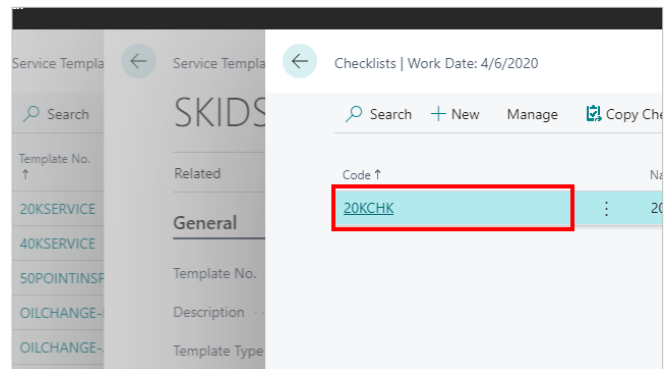
Click on the navigation menu item **Copy Checklists**

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

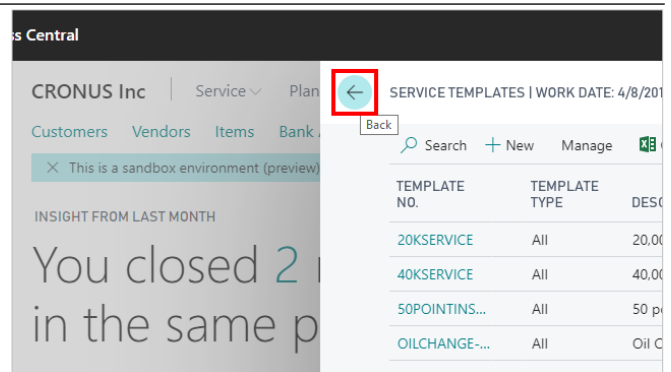


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Notice that the selected checklist has now been copied to the template.



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.

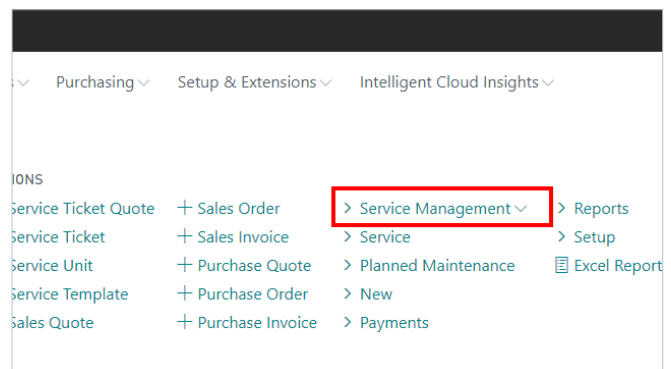
Manufacturers setup is optional.

### 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**





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Click on the navigation menu item **Manufacturers**

Service Ticket

Service Unit

Service Template

Sales Quote

+ Sales Invoice

+ Purchase Quote

+ Purchase Order

+ Purchase Invoice

Service Management Setup

Service Ticket Types

Maintenance Groups

Service Templates

Service Units

**Manufacturers**

Model

ODT Service Online Help

Setup

Excel Reports

Open the list of manufacturers.

Click on the navigation menu item **New**

Service

Plan

MANUFACTURERS | WORK DATE: 4/8/2019

Search

**+ New**

Edit List

Delete

Open i

Create a new entry.

CODE	NAME
FORD	Ford
NISSAN	Nissan

Click on the cell **Code**

Service

Plan

MANUFACTURERS | WORK DATE: 4/8/2019

Search

+ New

Edit List

Delete

C

CODE	NAME
FORD	Ford
NISSAN	Nissan

Enter the text **BOBCAT**.

Service

Plan

MANUFACTURERS | WORK DATE: 4/8/2019

Search

+ New

Edit List

Delete

C

CODE	NAME
FORD	Ford
NISSAN	Nissan



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Click on the cell **Name**

The screenshot shows a web application interface with a top bar containing 'DATE: 4/8/2019', 'SAVED', and a checkmark. Below the bar are buttons for 'Edit List', 'Delete', and 'Open in Excel'. A table is displayed with a header row labeled 'NAME' and two data rows: 'Ford' and 'Nissan'. The 'NAME' header cell is highlighted with a red border, and a red box is drawn around it.

Enter the text **Bobcat**.

The screenshot shows the same web application interface as the previous one. The 'NAME' header cell in the table is now highlighted with a red border, and a red box is drawn around it. The text 'Bobcat' has been entered into the cell.

Click on the back button

The screenshot shows a web application interface with a top bar containing 'DATE: 4/8/2019', 'SAVED', and a checkmark. Below the bar are buttons for 'Edit List', 'Delete', and 'Open in Excel'. A table is displayed with a header row labeled 'NAME' and two data rows: 'Ford' and 'Nissan'. The 'NAME' header cell is highlighted with a red border, and a red box is drawn around it. The text 'Bobcat' has been entered into the cell.

## 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.



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

Purchasing Setup & Extensions Intelligent Cloud Insights

IONS

Service Ticket Quote + Sales Order > Service Management > Reports

Service Ticket + Sales Invoice > Service > Setup

Service Unit + Purchase Quote > Planned Maintenance Excel Report

Service Template + Purchase Order > New

Sales Quote + Purchase Invoice > Payments

Click on the navigation menu item **Models**

Service Template + Purchase Order

Sales Quote + Purchase Invoice

Service Ticket Types

Maintenance Groups

Service Templates

Service Units

Manufacturers

Models

Open the list of models.

Click on the navigation menu item **New**

Service Plan

Models | WORK DATE: 4/8/2019

Search + New Edit List Delete Open i

Create a new entry.

CODE	NAME
F150	F150
FRONTIER	Frontier
S70	S70
TITAN	Titan

Click on the cell **Code**

Service Plan

Models | WORK DATE: 4/8/2019

Search + New Edit List Delete Open i

CODE	NAME
*	
F150	F150
FRONTIER	Fronti
S70	S70
TITAN	Titan



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Enter the text **S450**.

CODE	NAME
*	F150
F150	FRONTIER
FRONTIER	S70
S70	TITAN
TITAN	

Click on the cell **Name**

NAME	CODE
	F150
F150	FRONTIER
FRONTIER	S70
S70	TITAN
TITAN	

Enter the text **S450**.

NAME	CODE
S450	F150
F150	FRONTIER
FRONTIER	S70
S70	TITAN
TITAN	

Click on the back button

CODE	NAME
S450	F150
F150	FRONTIER
FRONTIER	S70
S70	TITAN
TITAN	

## 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.



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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.

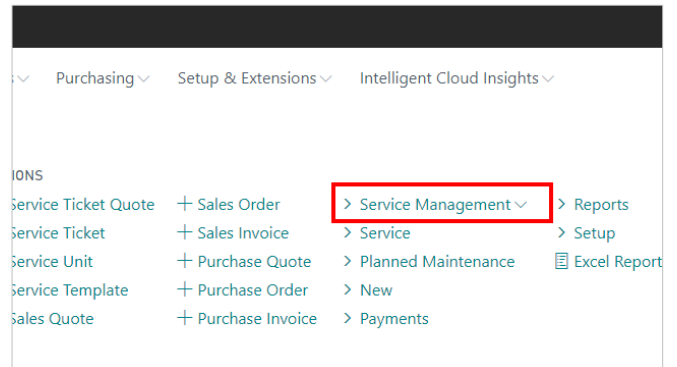
To learn about "How to Setup an Internal Customer for Servicing", go to the Financials Setups for Service category in the ODT Service Online Help.



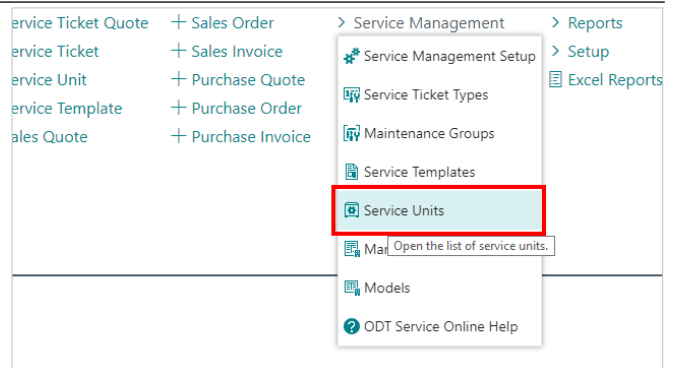


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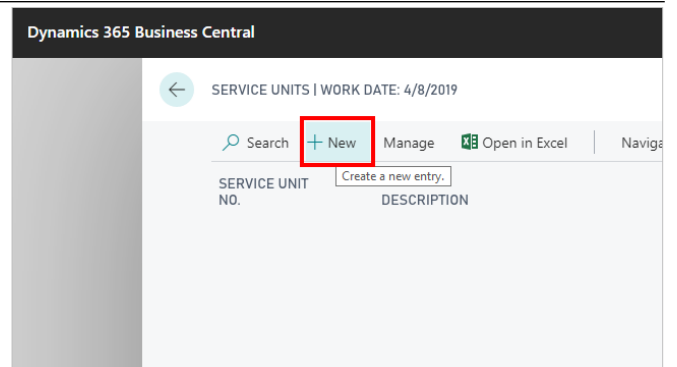
Click on the navigation menu item popup **Service Management**



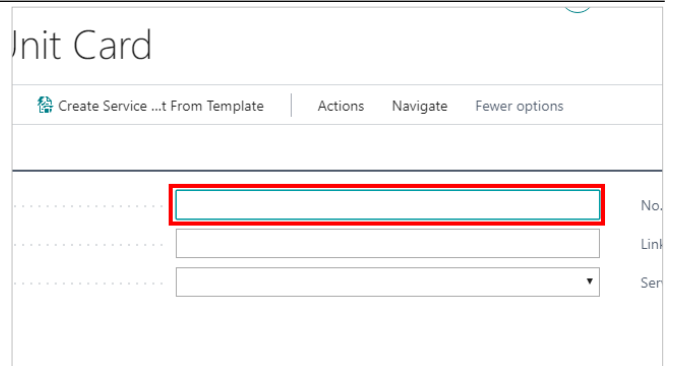
Click on the navigation menu item **Service Units**



Click on the navigation menu item **New**



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





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Press the **Enter** key.

Init Card

Create Service ...t From Template | Actions | Navigate | Fewer options

No.

Link

Ser

Click on the field **Description**

Init Card

Create Service ...t From Template | Actions | Navigate | Fewer options

SU00001

No.

Link

Ser

Enter the text **Skid Steer Loader**.

Init Card

Create Service ...t From Template | Actions | Navigate | Fewer options

SU00001

No.

Link

Ser

Click on the field **Customer No.**

Skid Steer Loader

Link

Ser

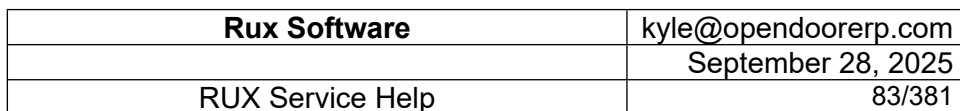
ZIP

Cor

Phc

EM

Inte



Customer

Customer No.

Customer Name

Address

Address 2

City

State

NO.	NAME	COUNTRY
10000	Adatum Corporation	USA
20000	Alfreds Futterhandlung	Germany
30000	School of Fine Art	USA
40000	Alpine Ski House	Switzerland
50000	Relecloud	USA

+ New

.....	<input type="text"/>	Mo
.....	<input type="text"/>	Ye
.....	<input type="text"/>	Da
.....	<input type="text"/>	Ac
.....	<input type="text"/>	In-

nce

e .....

or No. ....

or Name .....

or Item No. ....

or Item Name .....

Manufacturer Code .....

**Selected Maintenance**

CODE	NAME
BOBCAT	Bobcat

Maintenance Group Code .....

+ New

The screenshot shows a web form with several input fields. A red rectangular box highlights a dropdown menu. The dropdown menu is currently closed, showing a downward-pointing chevron icon on the right side. Below the dropdown menu, there are three more input fields, each with a calendar icon on the right side, indicating they are date pickers. The form is set against a light gray background with horizontal dashed lines separating the fields.



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

CODE	NAME
S450	S450 Skid Steers
S70	S70 Skid Steers

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.

Model No.	S450
Year	
Date Manufactured	
Acquisition Date	
In-service Date	

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

GROUP CODE	DESCRIPTION
SKIDSTEER	Skid Steers

Click on the back button

Dynamics 365 Business Central

← Back

SERVICE UNIT CARD | WORK DATE: 4/8/2019

SU00001

Actions Navigate

General

Service Unit No. SU00001

Description 2015 NISSAN Titan

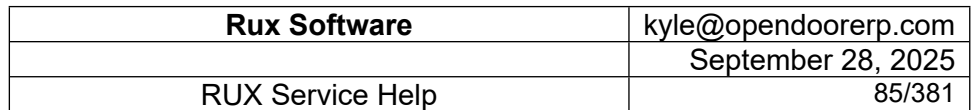
## 2.8.4. How to Link a Service Unit to a Fixed Asset

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:



Click on the field **Link Type**

[Create Service ...t From Template](#) | 
 [Actions](#) | 
 [Navigate](#) | 
 [Fewer options](#)

---

.....	<input type="text" value="SU00002"/>	No.
.....	<input type="text" value="Skid Steer Loader - Internal"/>	Link
.....	<input type="text" value=""/>	Ser

---

.....	<input type="text" value="C00010"/>	ZIP
-------	-------------------------------------	-----

	SU00002	No.
	Skid Steer Loader - Internal	Link
	<div style="border: 1px solid black; padding: 2px;"> <div style="background-color: #e6f2ff; padding: 2px;">Item</div> <div style="background-color: #d9ead3; padding: 2px;"><b>Fixed Asset</b></div> </div>	Ser
C00010		ZIP
Internal Servicing Customer		Cor

The screenshot shows a web form with several input fields. A red rectangular box highlights a dropdown menu. The dropdown menu is currently closed, showing a light blue background and a small downward-pointing arrow on the right side. Below the highlighted dropdown menu, there is a grey rectangular button and another dropdown menu. The form is set against a light grey background with horizontal lines.

NO.	DESCRIPTION
FA000100	Skid Steer Loader S70

+ New Select record "FA000100"

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

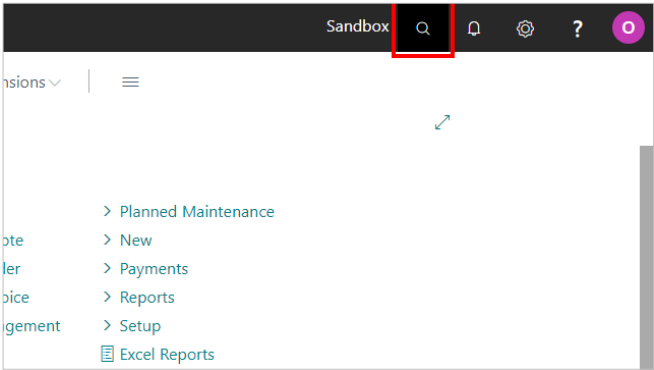
When using items that have SN tracking, It is possible for a Service Unit to be created automatically when an



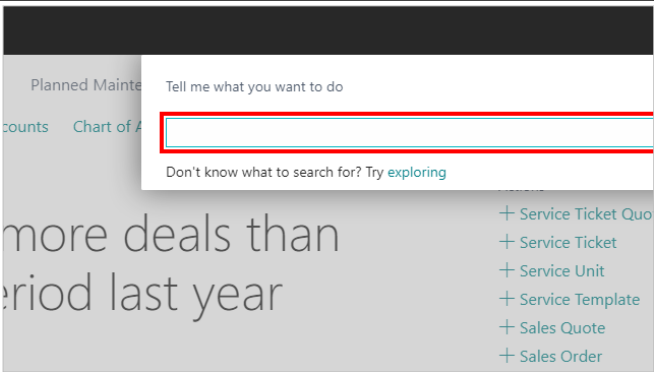
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item has been purchased or been sold to a customer. The item will then be used as a template to create a related Service Unit. The following demonstrates this process.

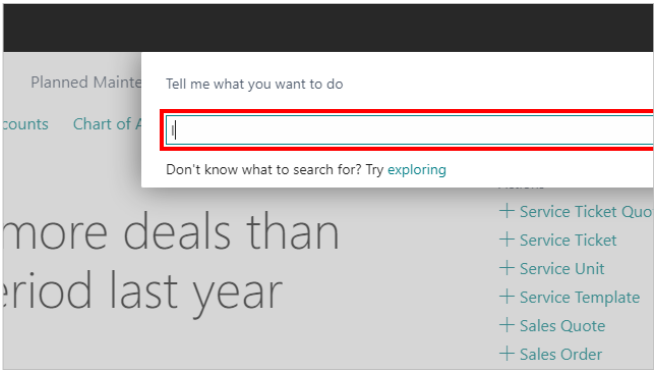
Click on the link **Tell me what you want to do**.  
**Quickly access actions, pages, reports, documentation, and apps and consulting services.**



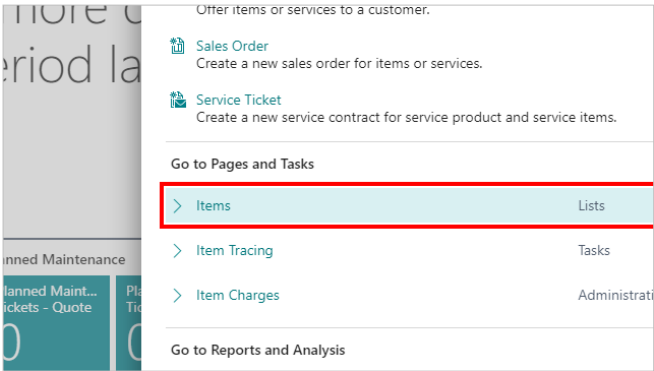
Click on the field **Type to start search**:



Enter the text **Item**.



Click on **Items Lists** ☐





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

Items   Work Date: 4/12/2021			
Search + New Manage Process Item Prices & Discounts Re			
No. ↑	Description	Type	Quantity on H
1000	Basic Vehicle	Inventory	
1896	Open record "1000" INS Desk	Inventory	
1900-S	PARIS Guest Chair, black	Inventory	
1906-S	ATHENS Mobile Pedestal	Inventory	
1908-S	LONDON Swivel Chair, blue	Inventory	

Ensure that the selected item has Serial Numbers enabled.

Replenishment >

Planning >

Item Tracking

Item Tracking Code SNALL

Serial Nos. SN1

Warehouse >

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.

Serial Nos.

Warehouse >

Service

Auto Create Service Unit-Sales

Auto Create Service Unit-Purchase

Maintenance Group Code

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

Serial Nos.

Warehouse >

Service

Auto Create Service Unit-Sales

Auto Create Service Unit-Purchase

Maintenance Group Code



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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.

Serial Nos. .... SN1

Warehouse >

Service

Auto Create Service Unit-Sales ..... ☒

Auto Create Service Unit-Purchase ..... ☐

Maintenance Group Code .....

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

SN1 Expiration Calculation .....

Manufacturer ..... ☒

Warranty Policy ..... ☐

Warranty Type .....

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

Item Tracking Code ..... SNALL

Serial Nos. .... SN1

Warehouse >

Service

Auto Create Service Unit-Sales ..... ☐

Auto Create Service Unit-Purchase ..... ☐

Maintenance Group Code .....

Group Code ↑	Description
LIGHTTRUCK	Light Truck
SKIDSTEER	

+ New

Select record "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**

Management ▾ Sales ▾ Purchasing ▾ Setup & Extensions ▾ | ≡

Actions

+ Service Ticket Quote	+ Sales Order	> Service Manager
+ Service Ticket	+ Sales Invoice	> Service
+ Service Unit	+ Purchase Quote	> Planned Maintenance
+ Service Template	+ Purchase Order	> New
+ Sales Quote	+ Purchase Invoice	> Payments





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Click on the lookup button **Customer Name**

The screenshot shows a form with a header bar containing buttons: Prepare, Order, Request Approval, Print/Send, Navigate, and More options. Below the header, there are several input fields. The first field is labeled 'Due Date' and has a red box around its lookup button. To the right of this field are other fields: 'Requested Delivery Date', 'External Document No.', and 'Status'.

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

The screenshot shows a 'Customers' dropdown menu. The menu lists several customers with their 'No.' and 'Name'. The customer with 'No.' 10000, 'Adatum Corporation', is highlighted. The dropdown is open, showing the list of customers.

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

The screenshot shows a 'Lines' table with columns: Type, No., Description, and Location Co. The first row is highlighted. The 'No.' column has a red box around its lookup button. Below the table, there is a 'Subtotal Excl. Tax (USD)' field.

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.

The screenshot shows a 'Lines' table with columns: Type, No., Description, and Location Co. The first row is highlighted. The 'No.' column has a dropdown menu open, showing a list of items. The item with 'No.' 1000, 'Basic Vehicle', is highlighted. The dropdown menu is open, showing the list of items.



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Click on the cell **Location Code**

4/12/2021 Status

Options

No.	Description	Location Code	Quantity	Qty. to Assemble to Order
1000	Basic Vehicle		*	

0.00 Total Excl. Tax (USD)

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

Options

Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved
Basic Vehicle	WEST	1		

Code ↑ EAST East Warehouse  
MAIN Main Warehouse  
→ WEST West Warehouse  
+ New

0 Total Incl. Tax (USD)

Click on the cell **Quantity**

2/2021 Status

Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity
Basic Vehicle	WEST	*		

0.00 Total Excl. Tax (USD)

Enter the text 1.

2/2021 Status

Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity
Basic Vehicle	WEST	*		

cal  
12:00:00 AM  
11/3/2026

0.00 Total Excl. Tax (USD)



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

Dynamics 365 Business Central

Sales Order | Work Date: 4/12/2021

S-ORD101005 · Adatum Corporation

Process Report Release **Posting** Prepare Order Request Approval

**General**

Customer Name ..... Adatum Corporation

Contact ..... Robert Townes

Posting Date ..... 4/12/2021

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

Dynamics 365 Business Central

Sales Order | Work Date: 4/12/2021

S-ORD101005 · Adatum Corporation

Process Report Release Posting Prepare Order Request Approval

**Post...** Post and New... Post and Send... Preview Posting

Finalize the document or journal by posting the amounts and quantities to the related accounts.

Customer Name ..... Adatum Corporation

Contact ..... Robert Townes

Posting Date ..... 4/12/2021

Click on the button **OK**

Ship Invoice Ship and Invoice

**OK** Cancel

50.00 Total Excl. Tax (USD) ..... 0.00 Total Tax (USD) ..... 0.00 Total Incl. Tax (USD) .....

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

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

Sandbox

Files Purchasing Setup & Extensions

Service Ticket Quote + Sales Order **> Service Management** > Reports

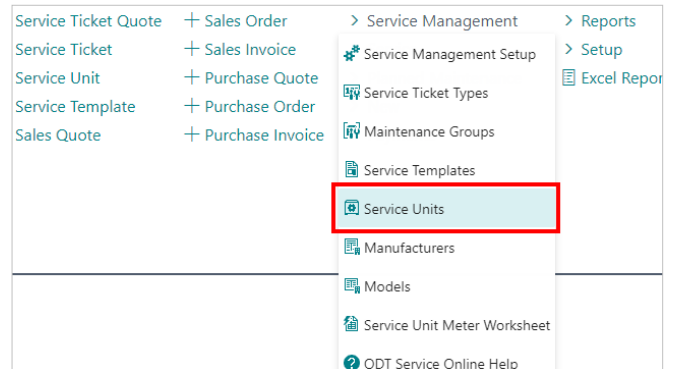
Service Ticket + Sales Invoice > Service > Setup

Service Unit + Purchase Quote > Planned Maintenance > Excel Report

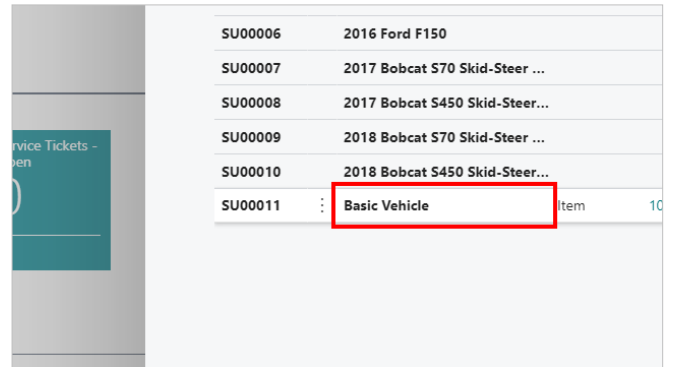
Service Template + Purchase Order > New

Sales Quote + Purchase Invoice > Payments

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



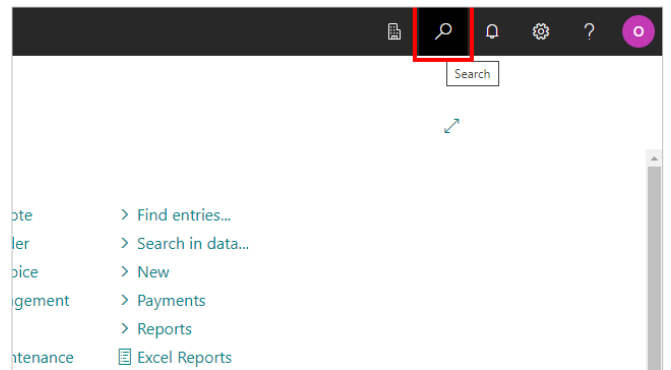
Notice that a new Service Unit has been created based on the item that was sold.



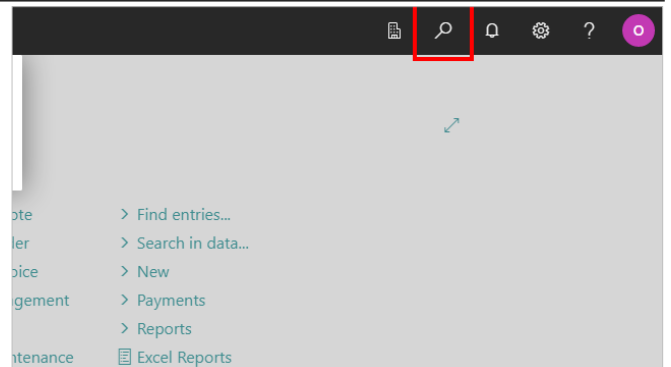
## 2.8.6. How to Automatically Create a Service Unit from a Fixed Asset

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**.





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Click on **Fixed Assets Lists** ☐

Tell me what you want to do

Fixed Asset

Go to Pages and Tasks

- > Fixed Assets Lists
- > Fixed Asset Setup Administration
- > Index Fixed Assets Tasks

Go to Reports and Analysis

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

Search + New Manage Home Fixed Asset Report Actions

Calculate Depreciation... Copy Fixed Asset...

No. ↑	Description
FA000090	test truck
FA000100	Flatbed Truck

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.

Electronic Document

Vehicle License Plate

Vehicle Year

SAT Federal Autotransport

Service

Auto Create Service Unit-Sales

Auto Create Service Unit-Purchase

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

Electronic Document

Vehicle License Plate

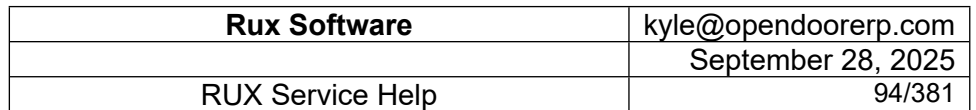
Vehicle Year

SAT Federal Autotransport

Service

Auto Create Service Unit-Sales

Auto Create Service Unit-Purchase



	SAT Trailer Type .....	
0	SCT Permission Type .....	
▼	SCT Permission Number .....	
Maintenance Group Code .....		
Manufacturer .....		

The screenshot shows the 'Maintenance Group' field with a dropdown arrow. The dropdown menu is open, displaying a list of maintenance group codes. The code '100' is highlighted in red. Below the list, a message states: 'Choose a value for Maintenance Group Code'.

SAT Trailer Type	
SCT Permission Type	
SCT Permission Number	
Maintenance Group Code	<div> <div>Group Code ↑</div> <div> <div>LIGHTTRUCK</div> <div>SKIDSTEER</div> </div> <div>Description</div> <div> <div>Light Truck</div> <div>Select record "LIGHTTRUCK"</div> </div> </div> <div>+ New</div>

Actions

+ Service Ticket Quote	+ Sales Order	> Service Manager
+ Service Ticket	+ Sales Invoice	> Service
+ Service Unit	+ Purchase Quote	> Planned Maintenance
+ Service Template	+ Purchase Order	> Warranty
+ Sales Quote	+ Purchase Order	Create a new purchase order.  jes...



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Click on the lookup button **Vendor Name**

The screenshot shows a software interface with a 'Vendor Name' field. A red box highlights the lookup button (three dots) next to the field. The interface also shows other fields like 'Vendor Invoice No.' and 'Status'.

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

The screenshot shows a 'Vendors' list. The 'No.' column has a value of 10000 highlighted with a red box. The list includes columns for 'No.' and 'Name'. Other vendors listed are 20000 (Consultants), 30000 (Graphic Design Institute), 40000 (Wide World Importers), 50000 (Nod Publishers), and 81000 (Raw material supplier).

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

The screenshot shows a software interface with a 'Vendor Invoice No.' field. A red box highlights the field. The interface also shows other fields like 'Vendor Name' and 'Status'.

Enter the text **12345**.

The screenshot shows a software interface with a 'Vendor Invoice No.' field. The text '12345' is entered into the field. The interface also shows other fields like 'Vendor Name' and 'Status'.



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

Document Date ..... 4/11/2022

Lines | Manage | Line | Functions | Order | Fewer options

Type	No.	Item Reference No.	Description
→ Item	*		

Choose a value for Type

Subtotal Excl. Tax (USD) .....

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

→ Item

Option Values

G/L Account

Sub → Item

Resource

Inv. Fixed Asset

Inv. Charge (Item)

Select from full list

Invoice Details >

Click on the cell **No.**

Document Date ..... 4/11/2022

Lines | Manage | Line | Functions | Order | Fewer options

Type	No.	Item Reference No.	Description
→ Fixed Asset	*		

Subtotal Excl. Tax (USD) .....

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

→ Fixed Asset

No. \*

6/9/2023

RU00002 test truck

FA000100 Flatbed Truck

+ New

Subtotal Excl. Tax (USD) .....

Inv. Discount Amount (USD) ...

Invoice Discount % .....





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Click on the cell **Quantity**

Status ..... Open				
Location Code	Bin Code	Quantity	Reserved Quantity	Unit of Measure Code
		*		—
0.00		Total Excl. Tax (USD) .....		

Enter the text **1**.

Status ..... Open				
Location Code	Bin Code	Quantity	Reserved Quantity	Unit of Measure Code
		* 1		—
0.00		Total Excl. Tax (USD) .....		

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

/2022		Status .....			
Order Fewer options					
Quantity	Reserved Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Tax Group Code
1	—		*	ATLANTA, GA	NONTAXABLE
0.00		Total Excl. Tax (USD) .....			

Enter the text **10000**.

/2022		Status .....			
Order Fewer options					
Quantity	Reserved Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Tax Group Code
1	—		* 10000	ATLANTA, GA	NONTAXABLE
0.00		Total Excl. Tax (USD) .....			



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

Dynamics 365 Business Central

Purchase Order

106006 · Fabrikam, Inc.

Home Prepare Print/Send Request Approval Order More options

**Post...** Release Create Whse. Receipt Create Inventory

Post the document or journal by posting the amounts and quantities to the related accounts.

**General**

Vendor Name ..... Fabrikam, Inc.

Contact ..... Krystal York

Click on the button **OK**

**Post**

☐ Receive

☐ Invoice

☒ Receive and Invoice

**OK** Cancel

Click on the button **No**

The order is posted as number 108209 and moved to the Posted Purchase Invoices window.

Do you want to open the posted invoice?

Yes **No**

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

SU00006	2016 Ford F150		
SU00007	2017 Bobcat S70 Skid-Steer ...		
SU00008	2017 Bobcat S450 Skid-Steer...		
SU00009	2018 Bobcat S70 Skid-Steer ...		
SU00010	2018 Bobcat S450 Skid-Steer...		
SU00011	Flatbed Truck	Fixed Asset	FA00010Q

## 2.9. How to Setup Service Status

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



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

Actions

+ Service Ticket Quote

+ Service Ticket

+ Service Unit

+ Service Template

+ Sales Quote

+ Sales Order

+ Sales Invoice

+ Purchase Quote

+ Purchase Order

+ Purchase Invoice

> Service Management

> Service

> Planned Maintenance

> New

> Payments

> Reports

Excel Reports

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

Service Templates

Service Checklists

Service Units

Manufacturers

Models

Service statuses

Service Unit Meter Worksheet

ODT Service Online Help

20

Sales Invoices Predicted Overdue

Click on the navigation menu item **New**

Service Inc. | Service

← ODTSM Service Status List

Search + New Edit List Delete

Status Line Type Code Description

(There is nothing)

Click on the cell **Status Line Type**

US Service Inc. | Service

← ODTSM Service Status List

Search + New Edit List Delete

Status Line Type Code Description

Both Head



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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

US Service Inc. | Service

ers Vendors Items Bank

od afterno

ODTSM Service Status List

Search + New Edit List Delete

Status Line Type Code Description

→ Both Head

Both Header and Line  
Ticket Header  
Ticket Line

Click on the cell **Code**

Service

ODTSM Service Status List

Search + New Edit List Delete

Status Line Type Code Description

→ Both Head

Enter the text **Entered**.

Service

ODTSM Service Status List

Search + New Edit List Delete

Status Line Type Code Description

→ Both Head

Click on the cell **Description**

Service

ODTSM Service Status List

Search + New Edit List Delete

Status Line Type Code Description Presentation Order ↑

→ Both Head Entered

0



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Enter the text **Initial entry**.

ODTSM Service Status List

Search + New Edit List Delete

Status Line Type	Code	Description	Presentation Order ↑
→ Both Head	ENTERED		0

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

st ✓ Saved

Edit List Delete

Code	Description	Presentation Order ↑	State	Insert Status Hea...	Insert Status Line	M
ENTERED	Initial entry	0	Pending	<input type="checkbox"/>	<input type="checkbox"/>	

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**.

st ✓ Saved

Edit List Delete

Code	Description	Presentation Order ↑	State	Insert Status Hea...	Insert Status Line	M
ENTERED	Initial entry	0	Pending	<input type="checkbox"/>	<input type="checkbox"/>	

Click on the cell **State**

✓ Saved

Delete

Description	Presentation Order ↑	State	Insert Status Hea...	Insert Status Line	Mark Com...
Initial entry	0	Pending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



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click on the option Pending

The screenshot shows a table with columns: Description, Presentation Order ↑, State, Insert Status Hea..., Insert Status Line, and Mark Com... The first row has 'Initial entry' in the Description column, '0' in the Presentation Order column, and 'Pending' in the State column. A dropdown menu is open for the 'Pending' status, showing options: Pending, In Progress, On Hold, and Complete. The 'Pending' option is highlighted.

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

The screenshot shows the same table as the previous one. The 'Insert Status Hea...' checkbox is highlighted with a red box.

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

The screenshot shows the same table as the previous one. The 'Insert Status Line' checkbox is highlighted with a red box.

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 screenshot shows the same table as the previous one. The 'Mark Com...' checkbox is highlighted with a red box.



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

resentation Order ↑	State	Def... Stat... Hea...	Def... Stat... Line	Mark Co...	Upd... Serv... Unit Stat...	Service Unit Status
0	Pending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

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

State	Def... Stat... Hea...	Def... Stat... Line	Mark Co...	Upd... Serv... Unit Stat...	Service Unit Status
Pending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

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

t Line	Mark Complete	Update Service Unit Status	Service Unit Status	Use for Intransit	Service Ticket Lock
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Requires minor serv...	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Requires minor serv...	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	In shop	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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.

Mark Complete	Update Service Unit Status	Service Unit Status	Use for Intransit	Service Ticket Lock
<input type="checkbox"/>	<input type="checkbox"/>	Requires minor servi...	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Requires minor servi...	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	In shop	<input type="checkbox"/>	<input checked="" type="checkbox"/>

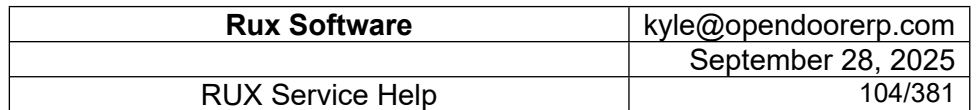
## 2.10.Service Planned Maintenance Setup

### 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.



## Business Manager Profile

ACTIONS		
+ Service Ticket Quote	+ Sales Invoice	> Planned Maintenance
+ Service Ticket	+ Purchase Quote	> New
+ Service Unit	+ Purchase Order	> Payments
+ Service Template	+ Purchase Invoice	> Reports
+ Sales Quote	> Service Management	> Setup
+ Sales Order	> Service	Excel Reports

ts

- + Service Unit
- + Service Template
- + Sales Quote
- + Sales Order

- + Purchase Order
- + Purchase Invoice
- > Service Management
- > Service

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

Open the list of service units.

Service Units

← SERVICE UNITS | WORK DATE: 4/15/2019

Search + New Manage Open in

Service Unit No. ↑	Description
<b>SU00001</b>	<b>Skid Steer Loader</b>
SU  Open record "SU00001" Skid Steer Loader - Internal	
SU00003	Skid Steer Loader S450
SU00004	Skid Steer Loader S70

The screenshot shows the 'SERVICE UNITS | WORK DATE' section on the left and the 'SERVICE UNIT CARD | WORK DATE: 4/15/2019' section on the right. The left sidebar contains a search bar and a table of service units. The right section displays the details for service unit 'SU00001', including a 'Navigate' button highlighted with a red box, and a 'General' section with fields for 'Service Unit No.' and 'Description'.

Service Unit No. ↑	Description
SU00001	Skid Steer Loader
SU00002	Skid Steer Loader
SU00003	Skid Steer Loader
SU00004	Skid Steer Loader

Service Unit Card | WORK DATE: 4/15/2019

SU00001

Actions [Navigate](#)

General

Service Unit No. .... SU00001

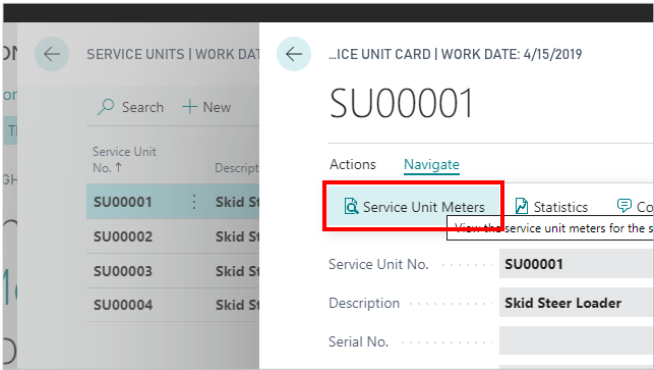
Description ..... Skid Steer Loader



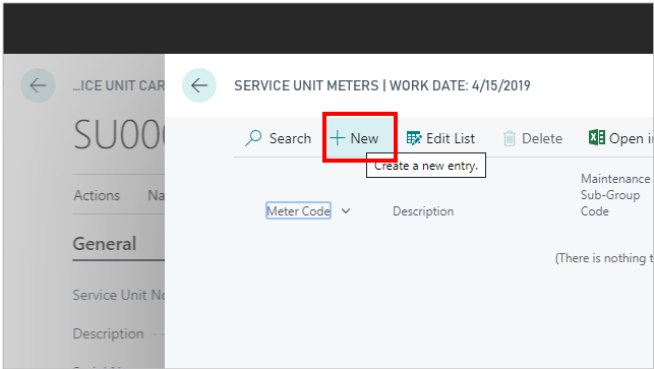


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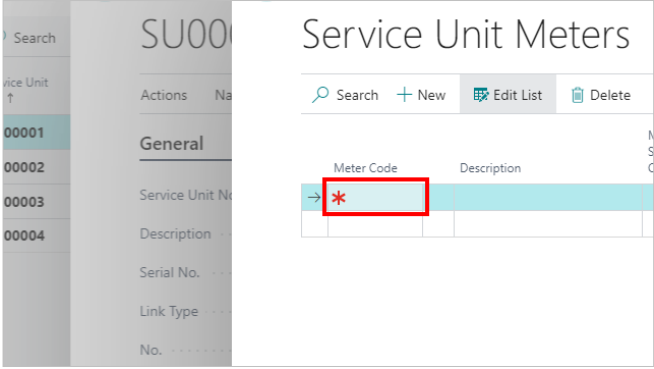
Click on the navigation menu item **Service Unit Meters**



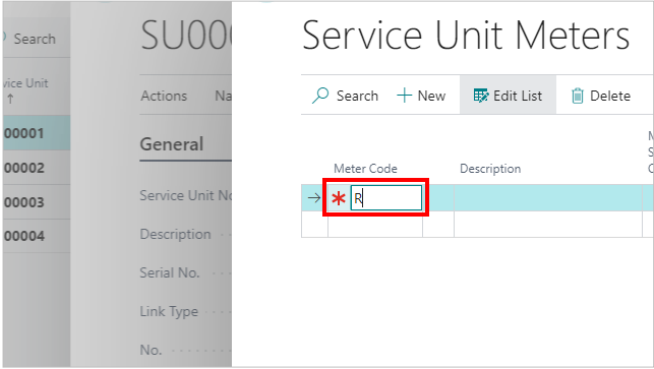
Click on the navigation menu item **New**



Click on the cell **Meter Code**



Enter the text **Regular**.





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Click on the cell **Description**

SU00

Service Unit Meters

Search + New Edit List Delete Open in Excel

Meter Code	Description	Maintenance Sub-Group Code	Unit Measure
→ * Regular			

Enter the text **Regular Maintenance**.

SU00

Service Unit Meters

Search + New Edit List Delete Open in Excel

Meter Code	Description	Maintenance Sub-Group Code	Unit Measure
→ REGULAR			

Click on the cell **Unit of Measure**

Unit Meters

New Edit List Delete Open in Excel More options

Description	Maintenance Sub-Group Code	Unit of Measure	Def...	Current Meter Reading	Expected
Regular Maintenance				0.00	

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

Description	Code	Measure	Reading	per D
Regular Maintenance			0.00	0.

Code ↑

KG Kilo

KM Kilometer

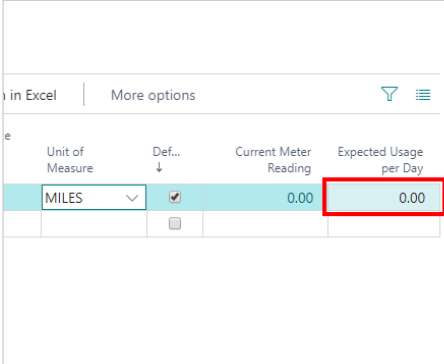
MILES Miles

PACK Pack

PALLET Pallet

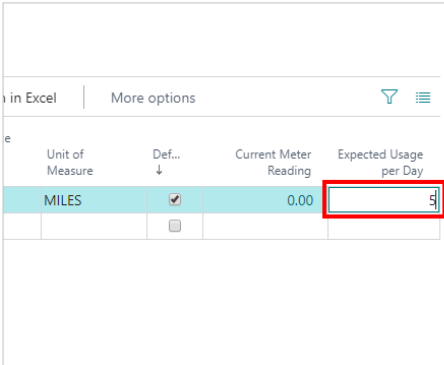
+ New

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



Unit of Measure	Def...	Current Meter Reading	Expected Usage per Day
MILES	<input checked="" type="checkbox"/>	0.00	0.00

Enter the text **50**.

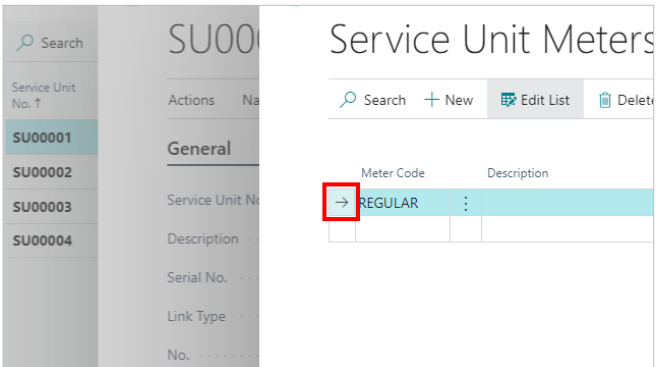


Unit of Measure	Def...	Current Meter Reading	Expected Usage per Day
MILES	<input checked="" type="checkbox"/>	0.00	50

### 2.10.1.3. How to Update a Service Unit Meter

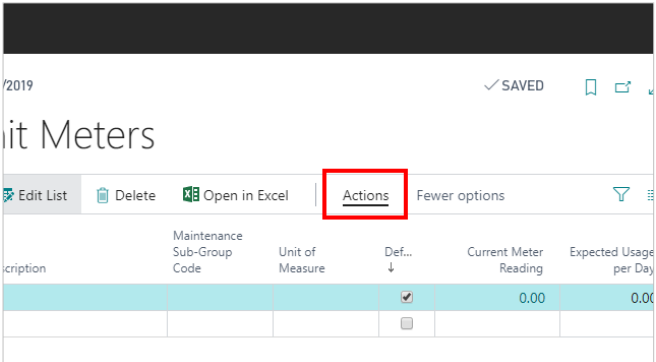
Business Manager Profile

Click on the Service Meter.



Meter Code	Description
REGULAR	

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

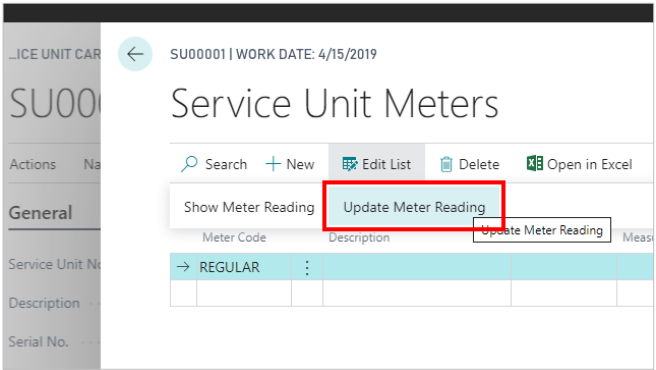


Description	Maintenance Sub-Group Code	Unit of Measure	Def...	Current Meter Reading	Expected Usage per Day
			<input checked="" type="checkbox"/>	0.00	0.00

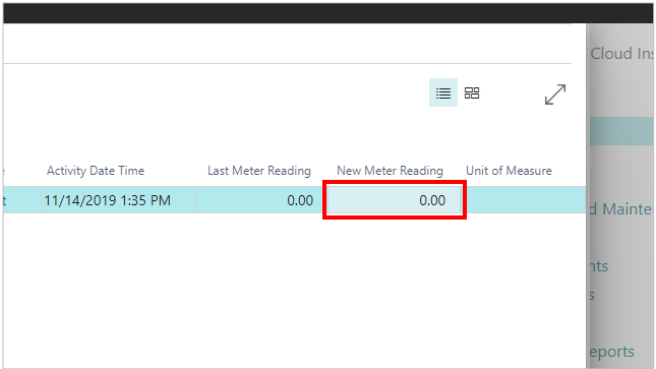


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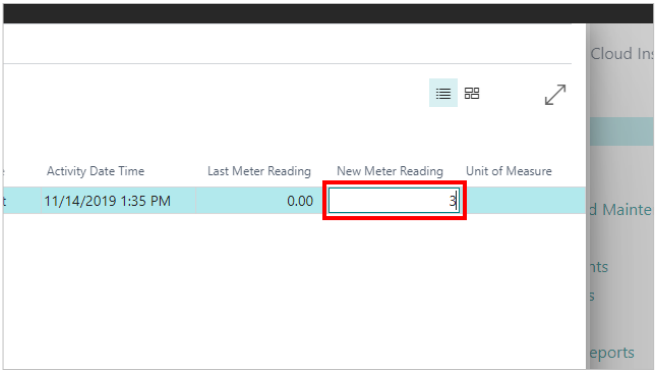
Click on the navigation menu item **Update Meter Reading**



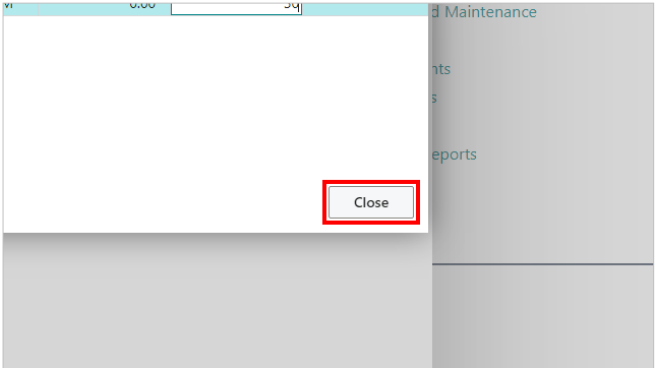
Click on the cell **New Meter Reading** with the value **0.00**



Enter the text **30**.



Click on the button **Close**



### 2.10.1.4. How to View Service Meter Usage History

Business Manager Profile



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Click on the Service Meter.

Service Unit Meters

Search + New Edit List Delete

Meter Code Description

→ REGULAR

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

Service Unit Meters

Edit List Delete Open in Excel Actions Fewer options

Description	Maintenance Sub-Group Code	Unit of Measure	Def...	Current Meter Reading	Expected Usage per Day
			✓	30.00	0.00

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

Service Unit Meters

Search + New Edit List Delete

Show Meter Reading Update Meter Reading

Meter Code Description

→ REGULAR

### 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**

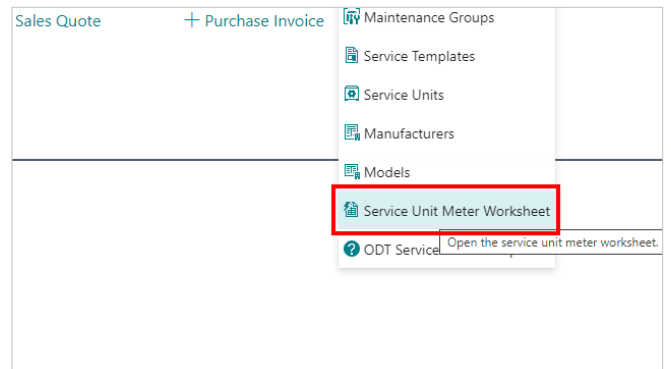
Service Management

Sales Purchasing Setup & Extensions Intelligent Cloud Insights Reports Setup Excel Report Payments



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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.

The screenshot shows a table with the following columns: Service Unit No. ↑, Maintenance Sub-Group Code ↑, Meter Code ↑, and De. The table contains the following data:

Service Unit No. ↑	Maintenance Sub-Group Code ↑	Meter Code ↑	De
SU00001		ODOM	
SU00002		ODOM	
SU00007		HOUR	
SU00008		HOUR	

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

Click on the cell **New Meter Reading**

The screenshot shows a table with the following columns: Meter Code ↑, Default, Current Meter Reading, and New Meter Reading. The table contains the following data:

Meter Code ↑	Default	Current Meter Reading	New Meter Reading
DM	<input checked="" type="checkbox"/>	0.00	
DM	<input checked="" type="checkbox"/>	0.00	
JR	<input checked="" type="checkbox"/>	0.00	
JR	<input checked="" type="checkbox"/>	0.00	

Enter the text **1000**.

The screenshot shows a table with the following columns: Meter Code ↑, Default, Current Meter Reading, and New Meter Reading. The table contains the following data:

Meter Code ↑	Default	Current Meter Reading	New Meter Reading
DM	<input checked="" type="checkbox"/>	0.00	
DM	<input checked="" type="checkbox"/>	0.00	
JR	<input checked="" type="checkbox"/>	0.00	
JR	<input checked="" type="checkbox"/>	0.00	



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Click on the cell **New Meter Reading**

✓ SAVED			
Open in Excel			
er Code ↑	Default	Current Meter Reading	New Meter Reading
DM	<input checked="" type="checkbox"/>	0.00	1000
DM	<input checked="" type="checkbox"/>	0.00	
JR	<input checked="" type="checkbox"/>	0.00	
JR	<input checked="" type="checkbox"/>	0.00	

Enter the text **1500**.

✓ SAVED			
Open in Excel			
er Code ↑	Default	Current Meter Reading	New Meter Reading
DM	<input checked="" type="checkbox"/>	0.00	1,000.00
DM	<input checked="" type="checkbox"/>	0.00	1
JR	<input checked="" type="checkbox"/>	0.00	
JR	<input checked="" type="checkbox"/>	0.00	

Click on the cell **New Meter Reading**

✓ SAVED			
Open in Excel			
er Code ↑	Default	Current Meter Reading	New Meter Reading
DM	<input checked="" type="checkbox"/>	0.00	1,000.00
DM	<input checked="" type="checkbox"/>	0.00	1500
JR	<input checked="" type="checkbox"/>	0.00	
JR	<input checked="" type="checkbox"/>	0.00	

Enter the text **1530**.

✓ SAVED			
Open in Excel			
er Code ↑	Default	Current Meter Reading	New Meter Reading
DM	<input checked="" type="checkbox"/>	0.00	1,000.00
DM	<input checked="" type="checkbox"/>	0.00	1,500.00
JR	<input checked="" type="checkbox"/>	0.00	
JR	<input checked="" type="checkbox"/>	0.00	



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Click on the cell **New Meter Reading**

Open in Excel			
er Code ↑	Default	Current Meter Reading	New Meter Reading
DM	<input checked="" type="checkbox"/>	0.00	1,000.00
DM	<input checked="" type="checkbox"/>	0.00	1,500.00
JR	<input checked="" type="checkbox"/>	0.00	1530
JR	<input checked="" type="checkbox"/>	0.00	

Enter the text **2400**.

Open in Excel			
er Code ↑	Default	Current Meter Reading	New Meter Reading
DM	<input checked="" type="checkbox"/>	0.00	1,000.00
DM	<input checked="" type="checkbox"/>	0.00	1,500.00
JR	<input checked="" type="checkbox"/>	0.00	1,530.00
JR	<input checked="" type="checkbox"/>	0.00	

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

CRONUS Service, Inc.   Service			
Customers	Vendors	Items	Bank
INSIGHT FROM LAST MONTH			
The largest po invoice was fo			
SERVICE UNIT METER WORKSHEET   WORK			
Back			
Search + New Edit List			
Service Unit No. ↑		Maintenance Group Code	
SU00001			
SU00002			
SU00007			
→ SU00008		:	

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

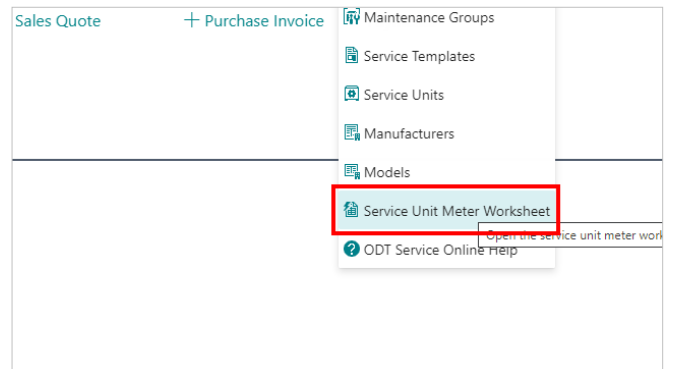
Sandb			
Sales	Purchasing	Setup & Extensions	Intelligent Cloud Insights
IONS			
Service Ticket Quote	+ Sales Order	> Service Management	> Reports
Service Ticket	+ Sales Invoice	> Service	> Setup
Service Unit	+ Purchase Quote	> Planned Maintenance	Excel Report
Service Template	+ Purchase Order	> New	
Sales Quote	+ Purchase Invoice	> Payments	





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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.

The screenshot shows a table with the following data:

Maintenance Sub-Group Code ↑	Meter Code ↑	Default	Current Meter Reading	New Meter R
	ODOM	<input checked="" type="checkbox"/>	1,000.00	
	ODOM	<input type="checkbox"/>	1,500.00	
	HOUR	<input checked="" type="checkbox"/>	1,530.00	
	HOUR	<input checked="" type="checkbox"/>	2,400.00	

## 2.10.2. How to Setup Planned Maintenance Schedules

### 2.10.2.1. Overview

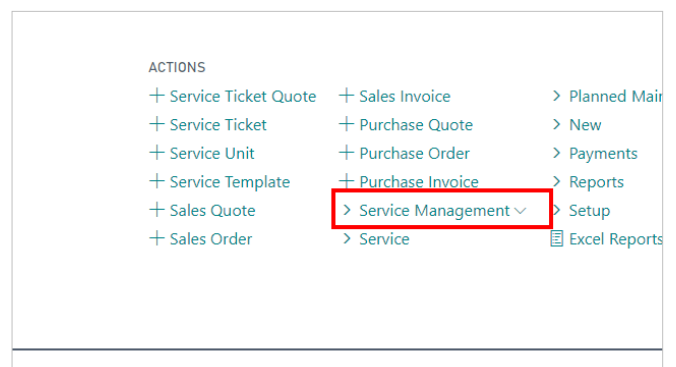
Planned Maintenance Schedules are used to identify what types of service should be used for Planned Maintenance, and under what conditions they should occur.

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

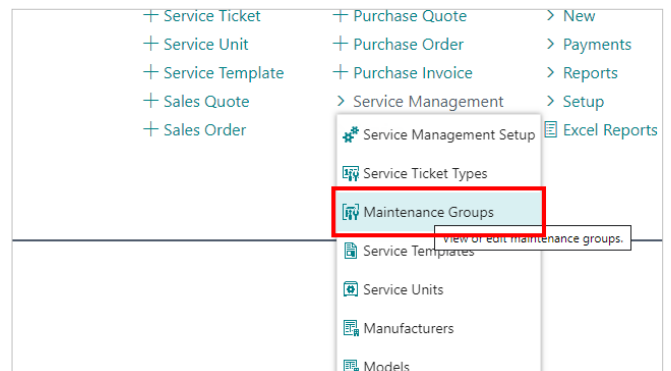
Click on the navigation menu item popup **Service Management**



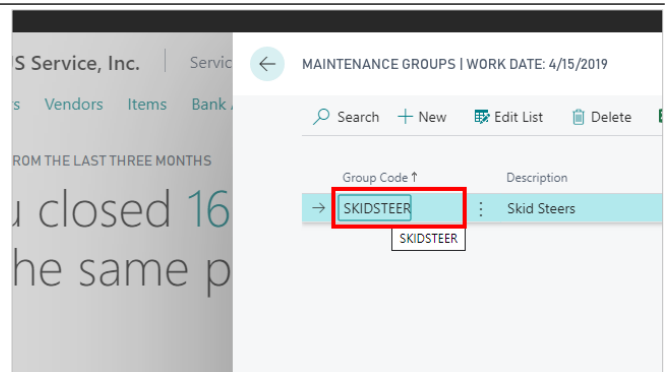


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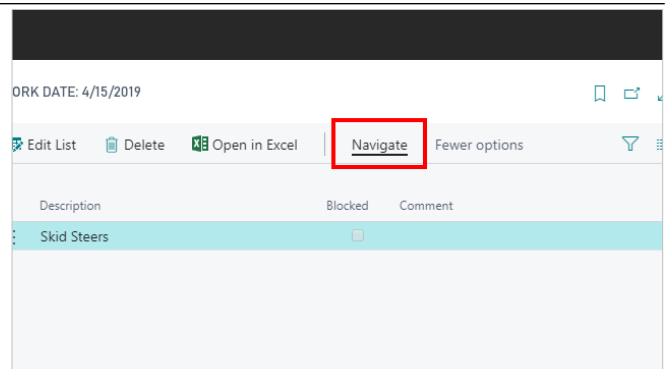
Click on the navigation menu item **Maintenance Groups**



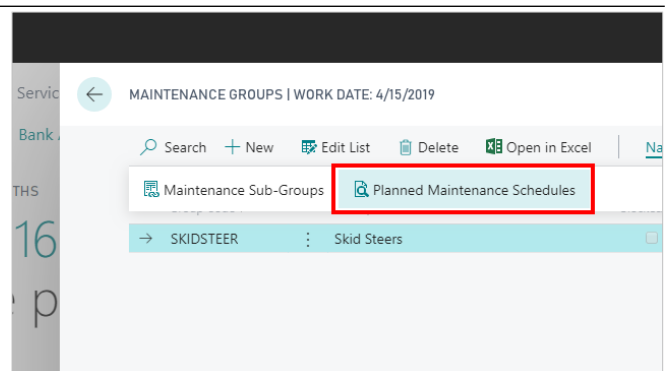
Click on the cell **Group Code** with the value **SKIDSTEER**



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



Click on the link **Planned Maintenance Schedules**





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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**



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

PLANNED MAINTENANCE SCHEDULES | WORK DATE: 4/15/2019 NOT SAVED

Search + New Edit List Delete Open in Excel

Maintenance Group Code ↑	Maintenance Sub-Group Code ↑	Template No. ↑	Schedule Type	Maintenan... Period	Usage	Usage
SKIDSTEER	SS-GENERAL ...		Fixed Usage			0.00
			Recurring Usage			
			Fixed Period			
			Recurring Usage			
			Recurring Usage & Period			

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

PLANNED MAINTENANCE SCHEDULES | WORK DATE: 4/15/2019 NOT SAVED

list Delete Open in Excel

Template No. ↑	Schedule Type	Maintenan... Period	Usage	Usage UOM	Bloc...	Serv Stati
SS-GENERAL ...	Recurring		0.00			

Enter the text **30**.

PLANNED MAINTENANCE SCHEDULES | WORK DATE: 4/15/2019 NOT SAVED

list Delete Open in Excel

Template No. ↑	Schedule Type	Maintenan... Period	Usage	Usage UOM	Bloc...	Serv Stati
SS-GENERAL ...	Recurring Usa		30			

Click on the cell **Usage UOM**

← PLANNED MAINTENANCE SCHEDULES | WORK DATE: 4/15/2019

Search + New Edit List Delete Open in Excel

Maintenance Group Code ↑	Usage	Usage UOM	Bloc...	Service Status	No. Of Days Serv
→ SKIDSTEER	30.00				0



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

Usage	Usage UOM	Bloc...	Status	Service
→ SKIDSTEER	30.00			0.00
Code ↑		Description		
KG		Kilo		
KM		Kilometer		
MILES		Miles		
PACK		Pack		
PALLET		Pallet		
+ New				

Click on the cell **Service Status**

TENANCE SCHEDULES | WORK DATE: 4/15/2019

NOT SAVED

New

Edit List

Delete

Open in Excel

	Usage	Usage UOM	Bloc...	Service Status	No. Of Days For Service	Service Cost
	30.00	MILES	<input type="checkbox"/>		0.00	0.00
			<input type="checkbox"/>			

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

TENANCE SCHEDULES | WORK DATE: 4/15/2019

NOT SAVED

New

Edit List

Delete




Open in Excel

	Usage	Usage UOM	Bloc...	Service Status	No. Of Days For Service	Service Cost
	30.00	MILES	<input type="checkbox"/>	<div></div>	0.00	0.00
			<input type="checkbox"/>	<div>Requires minor service Requires major service In shop Expired</div>		


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


EDULES | WORK DATE: 4/15/2019



NOT SAVED





Edit List

 Delete

 Open in Excel



Usage	Usage UOM	Bloc...	Service Status	No. Of Days For Service	Service Cost	Service Price
30.00	MILES		Requires r ▾	0.00	0.00	0.00
						



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

EDULES | WORK DATE: 4/15/2019 NOT SAVED

Edit List Delete Open in Excel

Usage	Usage UOM	Bloc...	Service Status	No. Of Days For Service	Service Cost	Service Price
30.00	MILES		Requires min	0.5	0.00	0.00

## 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.



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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.

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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.

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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".



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The following picture displays a Service Ticket.

**ST00017 - Service Ticket #ST00017 - Adatum Corporation**

Process: Report Actions: Navigate: Filter options

**General**

Customer No.: 10000 Service Date: 10/3/2019  
Customer Name: Adatum Corporation Service Ticket Type: REGULAR SERVICE  
Description: Service Ticket #ST00017 - Adatum Corporation Assigned Technician: LABOR  
Order Date: 4/15/2019 Default Service Unit No.: S00005

**Ticket Units/Lines**

TASK TYPE	SERVICE UNIT NO.	SERIAL NO.	DESCRIPTION	DEF. SER.	START DATE	END DATE	BUDGET TOTAL COST	ACTUAL TOTAL COST	BILLABLE TOTAL PRICE	INVOICED PRICE
Reading	S00005		2019 Fuel Filter	IS	10/3/2019	10/3/2019	27.25		143.25	
Reading	S00005		Oil Change	IS	10/3/2019	10/3/2019				
Reading	S00005			IS						

**Ticket Details**

JOB NO.	JOB TASK NO.	SERVICE UNIT NO.	SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION	DE. NO.	QUANTITY	UNIT OF MEASURE	UNIT COST	UNIT PRICE	LOCATION
ST00017		S00005	S00005	DISCHARGE-IT	Time and...	Resource	LABOR	Labor - Oil Change	1	1	22.25	75.00	
ST00017		S00005	S00005	DISCHARGE-IT	Time and...	Item	CONEXTER	Filter: Oil	1	PCS	3.00	11.75	

### 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





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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.



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### 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



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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**

The screenshot shows the RUX Software navigation menu. The 'ACTIONS' section is expanded, and the '+ Service Ticket' option is highlighted with a red box. Other options visible include '+ Service Ticket Quote', '+ Sales Order', '+ Sales Invoice', '+ Service Template', '+ Purchase Order', '+ Sales Quote', and '+ Purchase Invoice'.

Click on the field **Customer No.**

The screenshot shows the 'Service Ticket' form. The 'Customer No.' field is highlighted with a red box. The form includes fields for 'Customer No.', 'Customer Name', 'Service Date', and 'Service Description'. The 'Customer No.' field is currently empty.

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.

The screenshot shows the 'Customer No.' dropdown menu. The 'C00010' option is highlighted with a red box. The dropdown menu lists several options: '20000', '30000', '40000', '50000', and 'C00010'. The 'C00010' option is the only one with the 'Internal Customer' field enabled.

Click on the field **Service Date**

The screenshot shows the 'Service Date' field. The field is highlighted with a red box. The field is currently empty and has a calendar icon next to it.



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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**



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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.

CODE	DESCRIPTION
REGULARSERVICE	Regular S

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.

Service Unit No.	Assigned Technician

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.

Service Unit No.	Default Service Unit No.

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

Service Unit No.	Service Unit No.
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.



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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**

Dynamics 365 Business Central

SERVICE TICKET | WORK DATE: 4/8/2019

ST00001 · Service Ticket #S

Process Report Actions Navigate Fewer options

General

Customer No. C00010

Customer Name Internal Servicing Cu

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

Dynamics 365 Business Central

SERVICE TICKET | WORK DATE: 4/8/2019

ST00001 · Service Ticket #S

Process Report Actions Navigate Fewer options

Add Service Template Confirm Actuals View Job Jour

Add Service Template

Customer No. C00010

Customer Name Internal Servicing Cu

Description Service Ticket #ST00

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

ST00001 · Service

process Report Actions Naviga

general

customer No.

customer Name

escription

order Date

SERVICE TEMPLATES + New

TEMPLATE NO.	TEMPLATE TYPE
AIRFILTER-SS	Service
OILCHANGE-SS	Service
SS-GENERAL SERVICE	Service

Select record "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.



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Click on the cell **Description**

	SU00002	Skid Steer Loader - Internal	<input type="checkbox"/>	—
tal	SU00002	Skid Steer General Service	<input type="checkbox"/>	—
	SU00002	Labor - Lube	<input type="checkbox"/>	4/1
	SU00002	Oil Change for Skid Steers	<input type="checkbox"/>	4/1
	SU00002	Air Filter for Skid Steers	<input type="checkbox"/>	4/1
	SU00002	Income - Shop Supplies	<input type="checkbox"/>	4/1
	SU00002	Skid Steer General Service	<input type="checkbox"/>	—
			<input type="checkbox"/>	
S				

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

	SU00002	Skid Steer Loader - Internal	<input type="checkbox"/>	—
tal	SU00002	Skid Steer General Service	<input type="checkbox"/>	—
	SU00002	Labor - Lube	<input type="checkbox"/>	4/1
	SU00002	Oil Change for Skid Steers	<input type="checkbox"/>	4/1
	SU00002	Air Filter for Skid Steers	<input type="checkbox"/>	4/1
	SU00002	Income - Shop Supplies	<input type="checkbox"/>	4/1
	SU00002	Skid Steer General Service	<input type="checkbox"/>	—
		test Battery	<input type="checkbox"/>	—
			<input type="checkbox"/>	
S				

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.

	SU00002	Skid Steer Loader - Internal	<input type="checkbox"/>	—
tal	SU00002	Skid Steer General Service	<input type="checkbox"/>	—
	SU00002	Labor - Lube	<input type="checkbox"/>	4/15
	SU00002	Oil Change for Skid Steers	<input type="checkbox"/>	4/15
	SU00002	Air Filter for Skid Steers	<input type="checkbox"/>	4/15
	SU00002	Income - Shop Supplies	<input type="checkbox"/>	4/15
	SU00002	Skid Steer General Service	<input type="checkbox"/>	—
		Test Battery	<input type="checkbox"/>	—
			<input type="checkbox"/>	
S				

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

Process	Report	Actions	Navigate	Fewer options
Customer Name	Internal Servicing Customer			
Description	Service Ticket #ST00001 - Ir			
Order Date	4/8/2019			
Ticket Units/Lines				
Manage		Line	Fewer options	
<div>New LineDelete LineAdd Service TemplateView Ser</div>				
TASK TYPE	UNIT NO.	SERIAL NO.	DESCRIP	
Heading	SU00002		Skid Steer	
Begin-Total	SU00002		Skid Steer	
Posting	SU00002		Labor - Lu	





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

Internal Servicing Customer

Service Ticket #ST00001 - Internal Servicing Customer

4/8/2019

s/Lines | [Manage](#) | Line | Fewer options

[Delete Line](#) [Add Service Template](#) [View Service Ticket Details](#)

TYPE	UNIT NO.	SERIAL NO.	DESCRIPTION	SER...
g	SU00002		Skid Steer Loader - Internal	
-Total	SU00002		Skid Steer General Service	
ing	SU00002		Labor - Lube	
ing	SU00002		Oil Change for Skid Steers	
ina	SU00002		Air Filter for Skid Steers	

Click on the navigation menu item **New**

Dynamics 365 Business Central

SERVICE TICKET DETAILS | WORK DATE: 4/8/2019

[Search](#) [+ New](#) [Edit List](#) [Delete](#) [Item Availab](#)

Create a new entry.

JOB NO.	JOB TASK NO.	SERVICE UNIT NO.	SERVICE TEMPLATE NO.
---------	--------------	------------------	----------------------

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.

LS | WORK DATE: 4/8/2019

[Edit List](#) [Delete](#) [Item Availability By Location](#) [Open in Excel](#) | [Navigate](#)

JOB TASK NO.	SERVICE UNIT NO.	SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESC
0080000			Cost Tracking	Resource		
				Cost Tracking Only		

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

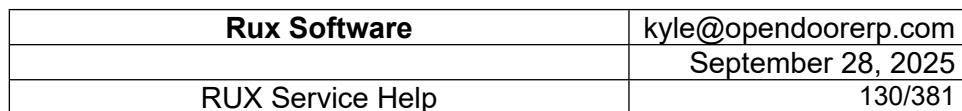
Select the applicable type to be used for the line.

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

TE: 4/8/2019

[Delete](#) [Item Availability By Location](#) [Open in Excel](#) | [Navigate](#) | Fewer opti

SERVICE UNIT NO.	SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION
SU00002		Cost Tracking	Resource		
			Resource		



Item Availability By Location | Open in Excel | Navigate | Fewer options

SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION
	Cost Tracking	Resource		
		Resource		
		Item		
		G/L Account		
		Text		

SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION	DE SE
	Cost Tracking	Resource	<input type="text" value=""/>		
			NO.	NAME	
			LABOR	Labor - Oil Change	
			<input type="text" value="Select record 'LABOR'"/>	Martin	
			MARK	Mark Hanson	
			MARY	Mary A. Dempsey	
			TIMOTHY	Timothy Sneath	
			+ New		

Item Availability by Location		Open in Excel	Navigate	Fewer options	
SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION	DE SE
	Cost Tracking	Resource	LABOR	L	

DESCRIPTION	DE... SE...	QUANTITY	UNIT OF MEASURE CODE	UNIT COST
Labor - Check Battery	<input type="checkbox"/>		HOUR	22.25
	<input type="checkbox"/>			



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Enter the text **.25**.

Enter the budgeted quantity for performing the task.

Navigate Fewer options				
DESCRIPTION	DE... SE...	QUANTITY	UNIT OF MEASURE CODE	UNIT COST
Labor - Check Battery	<input type="checkbox"/>	<input type="text" value=""/>	HOURL	22.25
	<input type="checkbox"/>			

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

Note that the Service Unit No. is automatically populated.

SERVICE TICKET DETAILS   WORK DATE: 4/8/2019					
Search	+ New	Edit List	Delete	Item Availability By Location	
JOB NO. ▼	JOB TASK NO. ▼	SERVICE UNIT NO.	SERVICE TEMPLATE NO.	LINE TYPE	TYPE
ST00001	0080000	SU00002		Cost Tracking	Res

Click on the back button

Dynamics 365 Business Central					
SERVICE TICKET DETAILS   WORK DATE: 4/8/2019					
Search	+ New	Edit List	Delete	Item Availability	
JOB NO. ▼	JOB TASK NO. ▼	SERVICE UNIT NO.	SERVICE TEMPLATE NO.		
ST00001	0080000	SU00002			

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**

Begin-Total	SU00002		Skid
Posting	SU00002		Lab
Posting	SU00002		Oil
Posting	SU00002		Air
Posting	SU00002		Inc
End-Total	SU00002		Skid
Posting	SU00002		Tes

Ticket Details

Ticket Details



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

Posting	SU00002		Labor - Lube
Posting	SU00002		Oil Change
Posting	SU00002		Air Filter for Skid Steer
Posting	SU00002		Income - Shop Supplies
End-Total	SU00002		Skid Steer General Service
Posting	SU00002		Test Battery
Heading			

Ticket Details

JOB TASK	SERVICE	SERVICE TEMPLATE
----------	---------	------------------

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

Begin-Total	SU00002		Skid Steer General Service
Posting	SU00002		Labor - Lube
Posting	SU00002		Oil Change
Posting	SU00002		Air Filter for Skid Steer
Posting	SU00002		Income - Shop Supplies
End-Total	SU00002		Skid Steer General Service
Posting	SU00002		Test Battery
Heading			

Ticket Details

Ticket Details

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

Begin-Total	SU00002		Skid Steer General Service
Posting	SU00002		Labor - Lube
Posting	SU00002		Oil Change for Skid Steer
Posting	SU00002		Air Filter for Skid Steers
Posting	SU00002		Income - Shop Supplies
End-Total	SU00002		Skid Steer General Service
Posting	SU00002		Test Battery
Heading			

Look up value

Ticket Details

Ticket Details

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.

SERVICE TICKET   WORK DATE: 4/8/2019		Search	+ New	Manage	Open in External
ST00001 · Service		SERVICE UNITS + New			
Process	Report	Actions		Navigation	
Customer Name	Description		Order Date		
Description		Order Date			
Order Date					
Ticket Units/Lines		Manage		Line	

SERVICE UNIT NO.	DESCRIPTION
SU00002	Skid Steer Loader - Internal
SU00003	Skid Steer Loader S450

Select record "SU00003"



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Click on the cell **Task Type**

Posting	SU00002		Lab
Posting	SU00002		Oil
Posting	SU00002		Air
Posting	SU00002		Incc
End-Total	SU00002		Skid
Posting	SU00002		Test
Heading	SU00003		Skid
Heading			
Ticket Details			
Ticket Details			
SERVICE			

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

Posting	SU00002		Oil
Posting	SU00002		Air
Posting	SU00002		Incc
End-Total	SU00002		Skid
Posting	SU00002		Test
Heading	SU00003		Skid
Heading			
Posting			
Heading			
Total			
Begin-Total			
End-Total			
Ticket Details			
Ticket Details			
JOB NO.	JOB TASK NO.	SERVICE UNIT NO.	SERVICE TEMPLATE NO.

Click on the cell **Description**

SU00002	Labor - Lube	<input type="checkbox"/>	4/1
SU00002	Oil Change for Skid Steers	<input type="checkbox"/>	4/1
SU00002	Air Filter for Skid Steers	<input type="checkbox"/>	4/1
SU00002	Income - Shop Supplies	<input type="checkbox"/>	4/1
SU00002	Skid Steer General Service	<input type="checkbox"/>	-
SU00002	Test Battery	<input type="checkbox"/>	4/1
SU00003	Skid Steer Loader S450	<input type="checkbox"/>	-
		<input type="checkbox"/>	
Is			
SERVICE			

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

SU00002	Oil Change for Skid Steers	<input type="checkbox"/>	4/1
SU00002	Air Filter for Skid Steers	<input type="checkbox"/>	4/1
SU00002	Income - Shop Supplies	<input type="checkbox"/>	4/1
SU00002	Skid Steer General Service	<input type="checkbox"/>	-
SU00002	Test Battery	<input type="checkbox"/>	4/1
SU00003	Skid Steer Loader S450	<input type="checkbox"/>	-
		<input type="checkbox"/>	-
		<input type="checkbox"/>	-
Is			
SERVICE			



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Press the **Arrow down** key.

	SU00002		Oil Change for Skid Steers	<input type="checkbox"/>	4/1
	SU00002		Air Filter for Skid Steers	<input type="checkbox"/>	4/1
	SU00002		Income - Shop Supplies	<input type="checkbox"/>	4/1
	SU00002		Skid Steer General Service	<input type="checkbox"/>	-
	SU00002		Test Battery	<input type="checkbox"/>	4/1
⋮	SU00003		Skid Steer Loader S450	<input type="checkbox"/>	-
⋮			Check fluid levels	<input type="checkbox"/>	-
				<input type="checkbox"/>	
Is					
SERVICE					

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

Process	Report	Actions	Navigate	Fewer options
Customer Name		Internal Servicing Customer		
Description		Service Ticket #ST00001 - Internal Servicing Customer		
Order Date		4/8/2019		
Ticket Units/Lines		Manage	Line	Fewer options
TASK TYPE	UNIT NO.	SERIAL NO.	DESCRIPTION	
Begin - total	SU00002		Skid Steer	
Posting	SU00002		Labor - Lube	
Posting	SU00002		Oil Change	
Posting	SU00002		Air Filter for	

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

Customer Name		Internal Servicing Customer		
Description		Service Ticket #ST00001 - Internal Servicing Customer		
Order Date		4/8/2019		
Ticket Units/Lines		Manage	Line	Fewer options
⌕ Delete Line	⚙ Add Service Template	View Service Ticket Details		
TASK TYPE	UNIT NO.	SERIAL NO.	DESCRIPTION	
Begin - total	SU00002		Skid Steer	
ing	SU00002		Labor - Lube	
ing	SU00002		Oil Change for Skid Steers	
ing	SU00002		Air Filter for Skid Steers	
ing	SU00002		Income - Shop Supplies	

Click on the navigation menu item **New**


Dynamics 365 Business Central				
SERVICE TICKET DETAILS   WORK DATE: 4/8/2019				
Search	New	Edit List	Delete	Item Available
Create a new entry.				
JOB NO. ▼	JOB TASK NO. ▼	SERVICE UNIT NO.	SERVICE TEMPLATE NO.	

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



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Click on the cell **No.**

Item Availability By Location  Open in Excel | [Navigate](#) [Fewer options](#)

SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION
	Cost Tracking	Resource		
		Resource		
		Item		
		G/L Account		
		Text		

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

[Item Availability by Location](#)
[Open in Excel](#)
[Navigate](#)
[Fewer options](#)

SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION	DE SE...
	Cost Tracking	Resource	<input type="text" value=""/>		

NO.

NAME

LABOR Labor - Oil Change

LINDA Linda Martin

MARK Mark Hanson

MARY Mary A. Dempsey

TIMOTHY Timothy Sneath

+ New

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

LINE TYPE	TYPE	NO.	DESCRIPTION	DE... SE...	QUA...
Cost Tracking	Resource	LABOR	Labor - Oil Change		

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

LINE TYPE	TYPE	NO.	DESCRIPTION	DE...	SE...	QUA
Cost Tracking	Resource	LABOR	<input type="text" value="L"/>			



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Click on the cell **Quantity**

Navigate Fewer options				
DESCRIPTION	DE... SE...	QUANTITY	UNIT OF MEASURE CODE	UNIT COST
Labor - Check Fluid Levels	<input type="checkbox"/>		HOURL	22.25
	<input type="checkbox"/>			

Enter the text **.25**.

Navigate Fewer options				
DESCRIPTION	DE... SE...	QUANTITY	UNIT OF MEASURE CODE	UNIT COST
Labor - Check Fluid Levels	<input type="checkbox"/>		HOURL	22.25
	<input type="checkbox"/>			

Click on the back button

Dynamics 365 Business Central				
← ← ← SERVICE TICKET DETAILS   WORK DATE: 4/8/2019				
Back Search + New Edit List Delete Item Availa				
JOB NO. ▼	JOB TASK NO. ▼	SERVICE UNIT NO.	SERVICE TEMPLATE NO.	
ST00001	0100000	SU00003		

### 3.3.2.5. How to Print the Service Ticket

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

Dynamics 365 Business Central				
← SERVICE TICKET   WORK DATE: 4/8/2019				
ST00001 · Service Ticket #S				
Process	Report	Actions	Navigate	Fewer options
General				
Customer No. ....			C00010	
Customer Name .....			Internal Servicing Cu	





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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 #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
<b>SU000002-Skid Steer Loader - Internal</b>					
<b>Skid Steer General Service</b>					
<b>Labor - Lube</b>					
Labor - Lube	Resource	LABOR	0.5	75.00	37.50
Parts: 0.00		Labor: 37.50	Other: 0.00	37.50	
<b>Oil Change for Skid Steers</b>					
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	
<b>Air Filter for Skid Steers</b>					
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	
<b>Income - Shop Supplies</b>					
Income - Shop Supplies	G/L Account	40150	1	20.00	20.00
Parts: 0.00		Labor: 0.00	Other: 20.00	20.00	
<b>Test Battery</b>					
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 SU000002: 277.75	
<b>SU000003-Skid Steer Loader S450</b>					
<b>Check fluid levels</b>					
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.



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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**

55 Business Central

← SERVICE TICKET | WORK DATE: 4/8/2019

ST00001 · Service Ticket #ST00001

Process Report Actions **Navigate** Fewer options

General

Customer No. .... C00010

Customer Name .... Internal Servicing Customer

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

← SERVICE TICKET | WORK DATE: 4/8/2019

ST00001 · Service Ticket #ST00001

Process Report Actions **Ticket** Fewer options

Customer No. .... C00010

Customer Name .... Internal Servicing Customer

Description .... Service Ticket #ST00001

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

Process Report Actions **Checklist** Fewer options

View or edit the checklists that are set up for the selected record.

Order Date .... 4/8/2019

Ticket Units/Lines | Manage Line Fewer options

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

← SERVICE TICKET | WORK DATE: 4/8/2019

ST00001 ·

Process Report

General

Customer No. ....

Customer Name ....

Description ....

← TICKET CHECKLISTS | WORK DATE: 4/8/2019

Search + New Manage Report

CHECKLIST CODE

**SS-GENSERV CHECKLIST**

Open record "SS-GENSERV CHECKLIST" in a new window



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

Dynamics 365 Business Central

TICKET CHECKLIST | WORK DATE: 4/8/2019

ST00001 · SS-GENERAL SER

Report

General

Checklist Code SS-GENSERV CHECK

Name Skid Steer General S

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

Dynamics 365 Business Central

TICKET CHECKLIST | WORK DATE: 4/8/2019

ST00001 · SS-GENERAL SER

Report

Print Checklist...

Print the ticket checklist.

Checklist Code SS-GENSERV CHECK

Name Skid Steer General S

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

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

NSERV CHECKLIST

teer General Service Chec

Send to... Print Preview Cancel

MIN. VALUE	MAX. VALUE	MEASURE CODE	VALUE	DECIMAL VALUE
0.00	0.00			0.00
0.00	0.00			0.00
0.00	0.00			0.00



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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**

Checklist Details | Manage

DESCRIPTION	MIN. V.
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	

Click on **Boolean Value**

LUE	MAX. VALUE	UNIT OF MEASURE CODE	BOOL... VALUE	DECIMAL VALUE	OPTION VALUE
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input checked="" type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	



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

Checklist Details		Manage
DESCRIPTION		MIN. V.
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		

Click on **Boolean Value**

LUE	MAX. VALUE	UNIT OF MEASURE CODE	BOOL... VALUE	DECIMAL VALUE	OPTION VALUE
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input checked="" type="checkbox"/>	0.00	
0.00	0.00		<input checked="" type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	

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		<input type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
		<input type="checkbox"/>		

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		<input type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
		<input type="checkbox"/>		



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Enter the text **20**.

MAX. VALUE	UNIT OF MEASURE CODE	BOOL... VALUE	DECIMAL VALUE	OPTION VALUE
0.00		<input type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	<input type="text" value="20"/>	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
		<input type="checkbox"/>		

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

MAX. VALUE	MEASURE CODE	VALUE	DECIMAL VALUE	OPTION VALUE
0.00		<input type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	20	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
		<input type="checkbox"/>		

Enter the text **21**.

MAX. VALUE	MEASURE CODE	VALUE	DECIMAL VALUE	OPTION VALUE
0.00		<input type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	20.00	
32.00		<input type="checkbox"/>	<input type="text" value="21"/>	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
		<input type="checkbox"/>		

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

0.00		<input type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	20.00	
32.00		<input type="checkbox"/>	21	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
		<input type="checkbox"/>		



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Enter the text **10**.

0.00		<input type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	20.00	
32.00		<input type="checkbox"/>	21.00	
32.00		<input type="checkbox"/>	10	
32.00		<input type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
		<input type="checkbox"/>		

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

0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	20.00	
32.00		<input type="checkbox"/>	21.00	
32.00		<input type="checkbox"/>	10	
32.00		<input type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
		<input type="checkbox"/>		

Enter the text **8**.

0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	20.00	
32.00		<input type="checkbox"/>	21.00	
32.00		<input type="checkbox"/>	10.00	
32.00		<input type="checkbox"/>	8	
0.00		<input type="checkbox"/>	0.00	
		<input type="checkbox"/>		

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**

	<input checked="" type="checkbox"/>	0.00		
	<input checked="" type="checkbox"/>	0.00		
	<input type="checkbox"/>	0.00		
	<input type="checkbox"/>	20.00		
	<input type="checkbox"/>	21.00		
	<input type="checkbox"/>	10.00		
	<input type="checkbox"/>	8		
	<input type="checkbox"/>	0.00		
	<input type="checkbox"/>			



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

0.00		
0.00		
0.00		
20.00		
21.00		
10.00		
8.00		
0.00	<input type="text"/>	<input type="button" value="Look up value"/>

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

20.00		
21.00		
10.00		
8.00		
0.00	<input type="text"/>	

VALUE

Mobil

Select record "Mobil"

+ New Select from full list

Click on the back button

Dynamics 365 Business Central

TICKET CHECKLIST | WORK DATE: 4/15/2019

Back

ST00001 · SS-GENERAL SER

Report

General

Checklist Code ..... SS-GENSERV CHECK

Name ..... Skid Steer General S

### 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.





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

Dynamics 365 Business Central

SERVICE TICKET | WORK DATE: 4/8/2019

ST00001 · Service Ticket #ST00001

Process | Report | Actions | Navigate | Fewer options

General

Customer No. C00010

Customer Name Internal Servicing Customer

Click on the link **Confirm Actuals**

Dynamics 365 Business Central

SERVICE TICKET | WORK DATE: 4/8/2019

ST00001 · Service Ticket #ST00001

Process | Report | Actions | Navigate | Fewer options

Add Service Template | Confirm Actuals | View Job Journal

Customer No. C00010

Customer Name Internal Servicing Customer

Description Service Ticket #ST00001 - Internal

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**

Service Ticket #ST00001

4/8/2019

Document No. DCC37000

Posting Date 4/15/2019

Template Name JOB

Batch Name ASTAPLETO

Manage | Line | Fewer options

ODT SERVICE UNIT NO. SERIAL NO. DESC

SU00002 Skid S

SU00002 Skid S

SU00002 Labor

SU00002 Oil Ch

SU00002 Air Fil

Job Task

Show results:

Where: Job No. is:

And: Job Task No. is:

Click on **Job Planning Line**

SU00002 Skid S

SU00002 Skid S

SU00002 Labor

SU00002 Oil Ch

SU00002 Air Fil

SU00002 Incom

SU00002 Skid S

SU00002 Test B

SU00003 Skid S

SU00003 Check

Job Planning Line

Show results:

Where: Type is:

And: No. is:

And: Planning Date is:



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Click on the button **OK**

A dialog box with several input fields and two buttons at the bottom: 'OK' and 'Cancel'. The 'OK' button is highlighted with a red rectangular box.

Click on the button **OK**

A confirmation message box stating 'Lines were successfully transferred to the journal.' with an 'OK' button highlighted in red. Below the message is a table with columns for date, description, and cost.

			(TOTAL COST)	ACTUAL (TOTAL COST)	BILL
			11.13		
			37.50		
			15.38		
			10.00		
			85.13		
			5.56		

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.

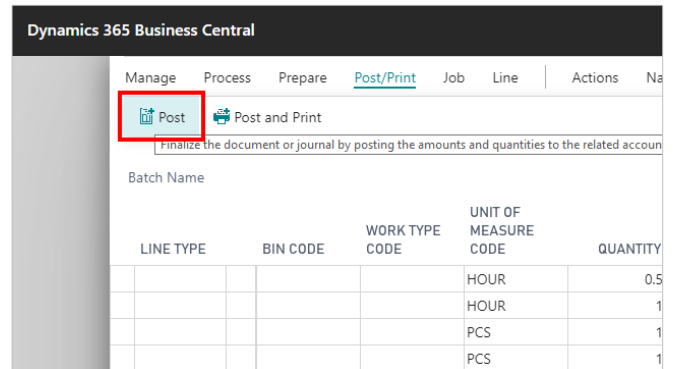
Click on the navigation menu item popup **Process**

A screenshot of the Dynamics 365 Business Central interface. The 'Process' button in the top navigation bar is highlighted with a red box. Below the navigation bar, the 'EDIT - JOB JOURNALS - ASTAPLETON - ODT\ASTAPLETON JOURNAL' section is visible, showing a table with columns for LINE TYPE, BIN CODE, WORK TYPE CODE, UNIT OF MEASURE CODE, and QUANTITY.

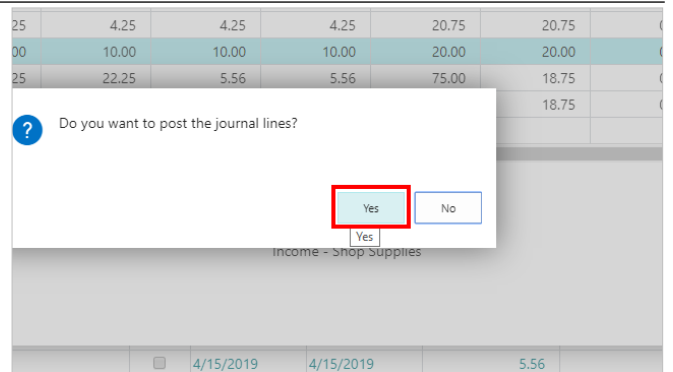
Click on the navigation menu item popup **Post/Print**

A screenshot of the Dynamics 365 Business Central interface. The 'Post/Print' button in the top navigation bar is highlighted with a red box. Below the navigation bar, the 'EDIT - JOB JOURNALS - ASTAPLETON - ODT\ASTAPLETON JOURNAL' section is visible, showing a table with columns for LINE TYPE, BIN CODE, WORK TYPE CODE, UNIT OF MEASURE CODE, and QUANTITY.

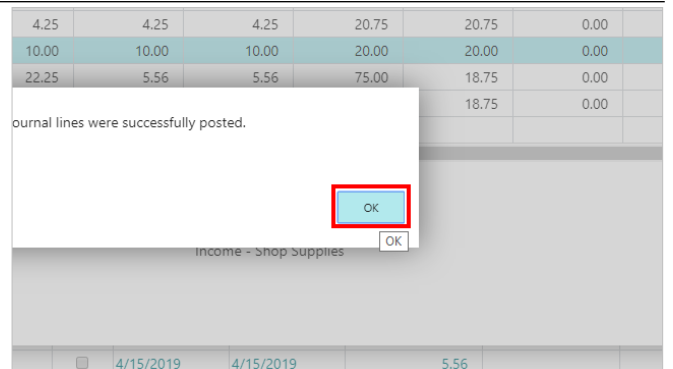
Click on the navigation menu item **Post**



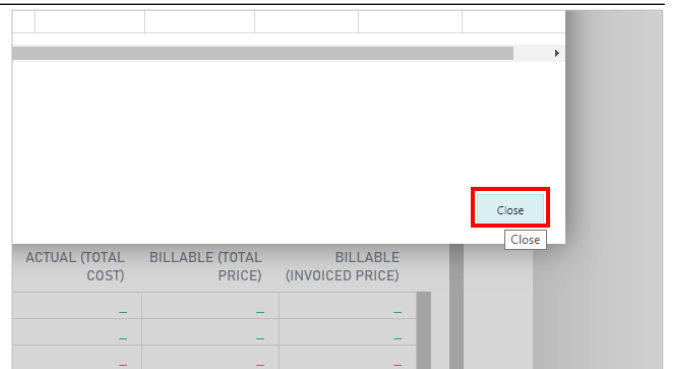
Click on the button **Yes**



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**

Dynamics 365 Business Central

SERVICE TICKET | WORK DATE: 4/15/2019

ST00001 · Service Ticket #S

Process Report Actions Navigate Fewer options

**General**

Customer No. .... C00010

Customer Name .... Internal Servicing Cu

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

et #ST00001 - Internal Servicing Custor

ptions

ew Job Journal Create Service Sales Invoice Mark Complete

Mark the current service ticket as completed.

Service Date .....

Servicing Customer .....

Service Ticket Type .....

Assigned Technician .....

Click on the button **Yes**

Are you sure you want to mark this service ticket as completed?

Yes No

Steers 4/15/2019 4/15/2019 37.50 11.13

eeers 4/15/2019 4/15/2019 15.38 15.38

plies 4/15/2019 4/15/2019 10.00 10.00

Service 4/15/2019 4/15/2019 85.13 85.13

Service 4/15/2019 4/15/2019 5.56 5.56

### 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**

Dynamics 365 Business Central

Service Ticket

Process Report Ticket Actions Related Fewer options

**General**

Customer No. ....

Customer Name .... \*

Description .....



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

The screenshot shows the top navigation bar with icons for edit, add, and delete. Below the bar, there are three buttons: 'Create Service Sales Invoice', 'Mark Complete' (with a checkmark icon), and 'Copy Document' (with a document icon). The 'Copy Document' button is highlighted with a red rectangular box. Below the buttons are several dropdown menus for 'Contact', 'Service Ticket Type', and 'Assigned Technician'.

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 screenshot shows the 'Options' dialog box. It contains several fields: 'Document No.' (ST00095), 'Sell-to Customer No.' (10000), and 'Sell-to Customer Name' (Adatum Corporation). Below these are two toggle switches: 'Include Header' and 'Recalculate Lines'. The 'Include Header' toggle is highlighted with a red rectangular box. The 'Recalculate Lines' toggle is also visible. At the bottom, there is an 'Advanced' section with a right-pointing arrow.

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

This screenshot is identical to the one above, showing the 'Options' dialog box. In this instance, the 'Recalculate Lines' toggle switch is highlighted with a red rectangular box. The 'Include Header' toggle is also visible and is currently turned on.

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

The screenshot shows a 'Document No.' lookup dialog box. It has a search bar with 'ST00095' entered. To the right of the search bar is a small square button with three dots, which is highlighted with a red rectangular box. Below the search bar are several rows of data, including '10000' and 'Adatum Corporation'. A tooltip message 'Review or update the value for Document No.' is visible next to the highlighted button.

Select the service ticket that you want to copy.



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

No. ↑	Description
ST00002	Service Ticket #ST00002 -
ST00004	Service Ticket #ST00004 -
ST00007	Service Ticket #ST00007 -
ST00009	Service Ticket #ST00009 -
ST00010	Service Ticket #ST00010 -
ST00015	Service Ticket #ST00015 -
ST00018	Service Ticket #ST00018 -

Click on the button **OK**

OK Cancel

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

ST00103 · Service Ticket #ST00103 - Adatum

Customer No.	10000
Customer Name	Adatum Corporation
Description	Service Ticket #ST00103 - Ad
Order Date	4/12/2021
Service Date	4/12/2021

## 3.4. Service for External Equipment

### 3.4.1. Overview of External Customer Equipment Servicing

#### 3.4.1.1. 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 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.



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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.

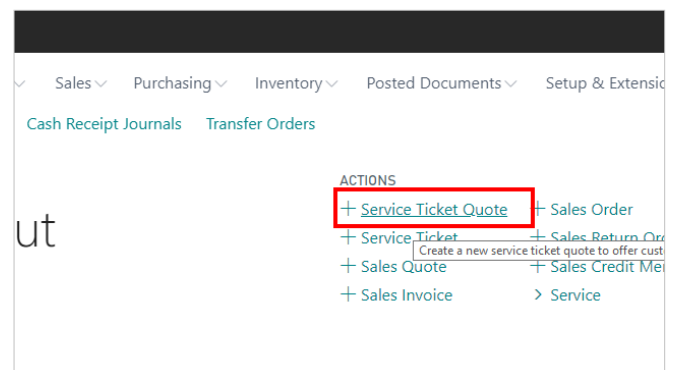
### 3.4.2.2. How to Create a Service Ticket Quote from Actions

Sales Order Process Profile

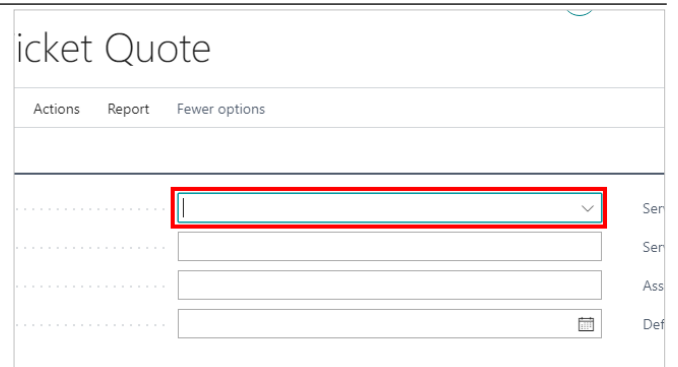
The same steps can be used when a user has the Business Manager Profile.

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.**





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

Process Report Actions Report Fewer options

General

Customer No. ....

Customer Name .....

Description .....

Order Date .....

Ticket Units/Lines | Manage | Line

ODT SERVICE

NO.	NAME	CT
10000	Adatum Corporation	
20000	Test Research	
30000	School of Fine Art	
40000	Alpine Ski House	
50000	Relecloud	
+ New		

Click on the field **Service Date**

Adatum Corporation

Service Date .....

Service Ticket Type .....

Assigned Technician .....

Default Service Unit No. ....

June 2019

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

Click on the link **Previous**

Adatum Corporation

Service Date .....

Service Ticket Type .....

Assigned Technician .....

Default Service Unit No. ....

June 2019

Previous

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

Click on the link **Previous**

Adatum Corporation

Service Date .....

Service Ticket Type .....

Assigned Technician .....

Default Service Unit No. ....

June 2019

Previous

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						





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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.



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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



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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**

Dynamics 365 Business Central

SERVICE TICKET QUOTE | WORK DATE: 4/15/2019

ST00002 · Service Quote #

Process Report Actions Report Fewer options

General

Customer No. 10000

Customer Name Adatum Corporation

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

Dynamics 365 Business Central

SERVICE TICKET QUOTE | WORK DATE: 4/15/2019

ST00002 · Service Quote #

Process Report Actions Report Fewer options

Make Ticket Add Service Template Cancel Ticket

Add Service Template

Customer No. 10000

Customer Name Adatum Corporation

Description Service Quote #ST00

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

SERVICE TEMPLATES + New

TEMPLATE NO.	TEMPLATE TYPE
AIRFILTER-SS	Service
OILCHANGE-SS	Service
SS-GENERAL SERVICE	Service

Select record "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.



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Click on the cell **Description**

	SU00001	Skid Steer Loader S450		
I	SU00001	Skid Steer General Service		
	SU00001	Labor - Lube		6/1
	SU00001	Oil Change for Skid Steers		6/1
	SU00001	Air Filter for Skid Steers		6/1
	SU00001	Income - Shop Supplies		6/1
	SU00001	Skid Steer General Service		
S				

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.

	SU00001	Skid Steer Loader S450		
I	SU00001	Skid Steer General Service		
	SU00001	Labor - Lube		6/1
	SU00001	Oil Change for Skid Steers		6/1
	SU00001	Air Filter for Skid Steers		6/1
	SU00001	Income - Shop Supplies		6/1
	SU00001	Skid Steer General Service		
S				

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

Customer No.	10000		
Customer Name	Adatum Corporation		
Description	Service Quote #ST00002 - A		
Order Date	4/8/2019		
<div>Ticket Units/Lines</div> <div><div>Manage</div>LineFewer options</div>			
TASK TYPE	ODT SERVICE UNIT NO.	SERIAL NO.	DESCRIPTION
Heading	SU00001		Skid Steer
Begin-Total	SU00001		Skid Steer
Posting	SU00001		Labor - Lu

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

Customer No.		10000
Customer Name		Adatum Corporation
Description		Service Quote #ST00002 - Adatum Corporation
Order Date		4/8/2019

<a href="#">Manage</a> Line Fewer options	
<a href="#">Delete Line</a> <a href="#">Add Service Template</a> <a href="#">View Service Ticket Details</a>	

TASK TYPE	UNIT NO.	SERIAL NO.	DESCRIPTION	DETAILED DESCRIPTION
g	SU00001		Skid Steer Loader S450	<a href="#">View or edit service ticket details for this line item</a>

total	SU00001		Skid Steer General Service	<input type="checkbox"/>
g	SU00001		Labor - Lube	<input type="checkbox"/>
g	SU00001		Oil Change for Skid Steers	<input type="checkbox"/>
la	SU00001		Air Filter for Skid Steers	<input type="checkbox"/>



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Click on the navigation menu item **New**

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SERVICE TICKET DETAILS | WORK DATE: 4/15/2019

Search + New Edit List Delete Item Availab

Create a new entry.

JOB NO. ▾ JOB TASK NO. ▾ SERVICE UNIT NO. SERVICE TEMPLATE NO.

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.

E: 4/15/2019

Delete Item Availability By Location Open in Excel Navigate Fewer opti

SERVICE UNIT NO.	SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION
		Time and Ma	Resource		

Click on the cell **No.**

Item Availability By Location Open in Excel Navigate Fewer options

SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION
	Time and Mat	Resource		

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

Item Availability By Location Open in Excel Navigate Fewer options

SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION	DE...	SE...
	Time and Mat	Resource				

NO. NAME

LABOR Labor - Oil Change

LINK Select record "LABOR" | rtin

MARK Mark Hanson

MARY Mary A. Dempsey

TIMOTHY Timothy Sneath

+ New



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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.

Availability By Location  Open in Excel   Navigate Fewer options						
LINE TYPE	TYPE	NO.	DESCRIPTION	DE... SE...	QUA	
Time and Mat Resource	LABOR		Labor - Oil Change	<input type="checkbox"/>		
				<input type="checkbox"/>		

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

Availability By Location  Open in Excel   Navigate Fewer options						
LINE TYPE	TYPE	NO.	DESCRIPTION	DE... SE...	QUA	
Time and Mat Resource	LABOR		La	<input type="checkbox"/>		
				<input type="checkbox"/>		

Click on the cell **Quantity**

Navigate Fewer options				
DESCRIPTION	DE... SE...	QUANTITY	UNIT OF MEASURE CODE	UNIT COST
Labor - Test Battery	<input type="checkbox"/>		HOURL	22.25
	<input type="checkbox"/>			

Enter the text **.25**.

Enter the budgeted quantity for performing the task.

Navigate Fewer options				
DESCRIPTION	DE... SE...	QUANTITY	UNIT OF MEASURE CODE	UNIT COST
Labor - Test Battery	<input type="checkbox"/>		HOURL	22.25
	<input type="checkbox"/>			



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

Note that the Service Unit No. is automatically populated.

← SERVICE TICKET DETAILS   WORK DATE: 4/15/2019					
Search + New Edit List Delete Item Availability By Location					
JOB NO. ▼	JOB TASK NO. ▼	SERVICE UNIT NO.	SERVICE TEMPLATE NO.	LINE TYPE	TYPE
ST00002	0080000	SU00001		Time and Mat Res	

Click on the back button

Dynamics 365 Business Central					
← SERVICE TICKET DETAILS   WORK DATE: 4/15/2019					
Back Search + New Edit List Delete Item Availab					
JOB NO. ▼	JOB TASK NO. ▼	SERVICE UNIT NO.	SERVICE TEMPLATE NO.		
ST00002	0080000	SU00001			

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**

Begin-Total	SU00001		Skid
Posting	SU00001		Lab
Posting	SU00001		Oil
Posting	SU00001		Air
Posting	SU00001		Inco
End-Total	SU00001		Skid
Posting	SU00001		Tes

Ticket Details

Ticket Details

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

Posting	SU00001		Lab
Posting	SU00001		Oil
Posting	SU00001		Air
Posting	SU00001		Inco
End-Total	SU00001		Skid
Posting	SU00001		Test
Posting	SU00001		
Posting	SU00001		
Heading	SU00001		
Total	SU00001		
Begin-Total	SU00001		
End-Total	SU00001		

Ticket Details

Ticket Details

JOB TASK	SERVICE	SERVICE TEMPLATE
----------	---------	------------------



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

Begin-Total	SU00001		Skid Steer
Posting	SU00001		Labor - Lube
Posting	SU00001		Oil Change
Posting	SU00001		Air Filter for
Posting	SU00001		Income - S
End-Total	SU00001		Skid Steer
Posting	SU00001		Test Batter
Heading			

**Ticket Details**

Ticket Details

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

Begin-Total	SU00001		Skid Steer General Service
Posting	SU00001		Labor - Lube
Posting	SU00001		Oil Change for Skid Steer
Posting	SU00001		Air Filter for Skid Steers
Posting	SU00001		Income - Shop Supplies
End-Total	SU00001		Skid Steer General Service
Posting	SU00001		Test Battery
Heading			

**Ticket Details**

Ticket Details

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

SERVICE TICKET QUOTE   WORK DATE: 4/15/20		Search	+ New	Manage	Open in Ex
ST00002 · Service		SERVICE UNITS + New			
Process	Report	Actions	Report		
General					
Customer No.					
Customer Name					
Description					
Order Date					

SERVICE UNIT NO.	DESCRIPTION
SU00001	Skid Steer Loader S450
SU00004	Skid Steer Loader S70

Select record "SU00004"

Click on the cell **Description**

	SU00001	Labor - Lube		6/1
	SU00001	Oil Change for Skid Steers		6/1
	SU00001	Air Filter for Skid Steers		6/1
	SU00001	Income - Shop Supplies		6/1
	SU00001	Skid Steer General Service		-
	SU00001	Test Battery		6/1
	SU00004	Skid Steer Loader S70		-

**Is**

**SERVICE**





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Enter the text **Check Fluid Levels**.

	SU00001	Labor - Lube	<input type="checkbox"/>	6/1
	SU00001	Oil Change for Skid Steers	<input type="checkbox"/>	6/1
	SU00001	Air Filter for Skid Steers	<input type="checkbox"/>	6/1
	SU00001	Income - Shop Supplies	<input type="checkbox"/>	6/1
	SU00001	Skid Steer General Service	<input type="checkbox"/>	-
	SU00001	Test Battery	<input type="checkbox"/>	6/1
	SU00004	Skid Steer Loader S70	<input type="checkbox"/>	-
			<input type="checkbox"/>	
Is				
SERVICE				

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.

	SU00001	Labor - Lube	<input type="checkbox"/>	6/1
	SU00001	Oil Change for Skid Steers	<input type="checkbox"/>	6/1
	SU00001	Air Filter for Skid Steers	<input type="checkbox"/>	6/1
	SU00001	Income - Shop Supplies	<input type="checkbox"/>	6/1
	SU00001	Skid Steer General Service	<input type="checkbox"/>	-
	SU00001	Test Battery	<input type="checkbox"/>	6/1
	SU00004	Skid Steer Loader S70	<input type="checkbox"/>	-
		Check Fluid Levels	<input type="checkbox"/>	-
Is				
SERVICE				

Press the **Arrow up** key.

	SU00001	Oil Change for Skid Steers	<input type="checkbox"/>	6/1
	SU00001	Air Filter for Skid Steers	<input type="checkbox"/>	6/1
	SU00001	Income - Shop Supplies	<input type="checkbox"/>	6/1
	SU00001	Skid Steer General Service	<input type="checkbox"/>	-
	SU00001	Test Battery	<input type="checkbox"/>	6/1
	SU00004	Skid Steer Loader S70	<input type="checkbox"/>	-
		Check Fluid Levels	<input type="checkbox"/>	-
			<input type="checkbox"/>	
Is				
SERVICE				

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

Customer No.	10000
Customer Name	Adatum Corporation
Description	Service Quote #ST00002 - A
Order Date	4/8/2019

Ticket Units/Lines	<div>Manage</div>	Line	Fewer options
--------------------	-------------------	------	---------------

TASK TYPE	ODT SERVICE UNIT NO.	SERIAL NO.	DESCRIPTION
Begin-Total	SU00001		Skid Steer
Posting	SU00001		Labor - Lift
Posting	SU00001		Oil Change
Posting	SU00001		Air Filter



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

Adatum Corporation	
Service Quote #ST00002 - Adatum Corporation	
4/8/2019	
s/Lines   Manage   Line   Fewer options	
Delete Line   Add Service Template   View Service Ticket Details	
TYPE	SERIAL NO.
total	SU00001
g	SU00001
g	SU00001
g	SU00001
g	SU00001
Skid Steer General	
Labor - Lube	
Oil Change for Skid Steers	
Air Filter for Skid Steers	
Income - Shop Supplies	

Click on the navigation menu item **New**

Dynamics 365 Business Central	
SERVICE TICKET DETAILS   WORK DATE: 4/15/2019	
Search   New   Edit List   Delete   Item Availability	
Create a new entry.	
JOB NO. ▼	JOB TASK NO. ▼
SERVICE UNIT NO.	
SERVICE TEMPLATE NO.	

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

Click on the cell **No.**

Item Availability By Location	
Open in Excel   Navigate   Fewer options	
SERVICE TEMPLATE NO.	LINE TYPE
Time and Mat	
Resource	
Resource	
Item	
G/L Account	
Text	

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

Item Availability By Location	
Open in Excel   Navigate   Fewer options	
SERVICE TEMPLATE NO.	LINE TYPE
Time and Mat Resource	
Resource	
Resource	
Item	
G/L Account	
Text	
LABOR	
Labor - Oil Change	
LIN   Select record "LABOR"   tin	
MARK	
Mark Hanson	
MARY	
Mary A. Dempsey	
TIMOTHY	
Timothy Sneath	
+ New	



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

Availability By Location  Open in Excel   Navigate Fewer options						
E	LINE TYPE	TYPE	NO.	DESCRIPTION	DE... SE...	QUA
	Time and Mat Resource		LABOR	Labor - Oil Change	<input type="checkbox"/>	
					<input type="checkbox"/>	

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

Availability By Location  Open in Excel   Navigate Fewer options						
E	LINE TYPE	TYPE	NO.	DESCRIPTION	DE... SE...	QUA
	Time and Mat Resource		LABOR	L	<input type="checkbox"/>	
					<input type="checkbox"/>	

Click on the cell **Quantity**

<a href="#">Navigate</a> <a href="#">Fewer options</a>					
DESCRIPTION		DE... SE...	QUANTITY	UNIT OF MEASURE CODE	UNIT COST
Labor - Check Fluid Levels	<input type="checkbox"/>			HOURL	22.25
	<input type="checkbox"/>				

Enter the text **.25**.

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

<a href="#">Navigate</a> <a href="#">Fewer options</a>					
DESCRIPTION		DE... SE...	QUANTITY	UNIT OF MEASURE CODE	UNIT COST
Labor - Check Fluid Levels	<input type="checkbox"/>			HOURL	22.25
	<input type="checkbox"/>				



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Click on the back button

Dynamics 365 Business Central

←

SERVICE TICKET DETAILS | WORK DATE: 4/15/2019

Search

+ New

Edit List

Delete

Item Available

JOB NO. ▾	JOB TASK NO. ▾	SERVICE UNIT NO.	SERVICE TEMPLATE NO.
ST00002	0100000	SU00004	

3.4.2.5. How to Print the Service Ticket

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

Dynamics 365 Business Central

←

SERVICE TICKET | WORK DATE: 4/8/2019

ST00003 · Service Ticket #9

Process

Report

Actions

Navigate

Fewer options

General

Customer No. ....

10000

Customer Name .....

Adatum Corporation

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

Dynamics 365 Business Central

←

SERVICE TICKET | WORK DATE: 4/8/2019

ST00003 · Service Ticket #9

Process

Report

Actions

Navigate

Fewer options

Print...

Prepare to print the document. A report request window for the document

Customer No. ....

10000

Customer Name .....

Adatum Corporation

Description .....

Service Ticket #ST000

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

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

SERIAL NO.

DESC

Skid St

Labor -

Oil Cha

Air Filte

Income

Skid S

Test B

Skid S

Check Fluid Levels

Job Planning Line

Show results:

Where: Job Task No. ▾ is:

Send to... Print Preview



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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  
Atlanta, 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 SW30	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			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**

Dynamics 365 Business Central

SERVICE TICKET QUOTE | WORK DATE: 4/15/2019

ST00002 · Service Quote #

Process Report Actions Report Fewer options

General

Customer No. 10000

Customer Name Adatum Corporation

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

SERVICE TICKET QUOTE | WORK DATE: 4/15/2019

ST00002 · Service Quote #

Process Report Actions Report Fewer options

Make Ticket Add Service Template Cancel Ticket

Convert the current service ticket quote to a service ticket

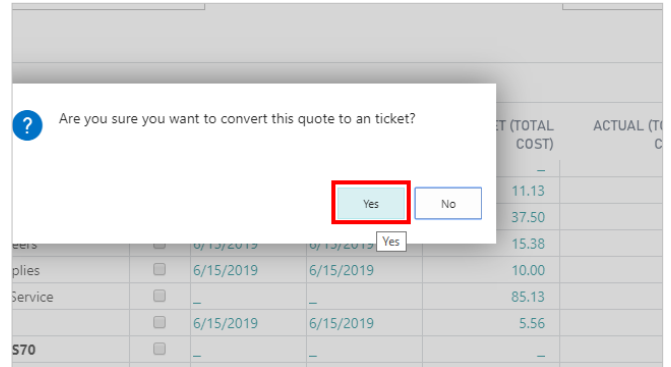
Customer No. 10000

Customer Name Adatum Corporation

Description Service Quote #ST00

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.

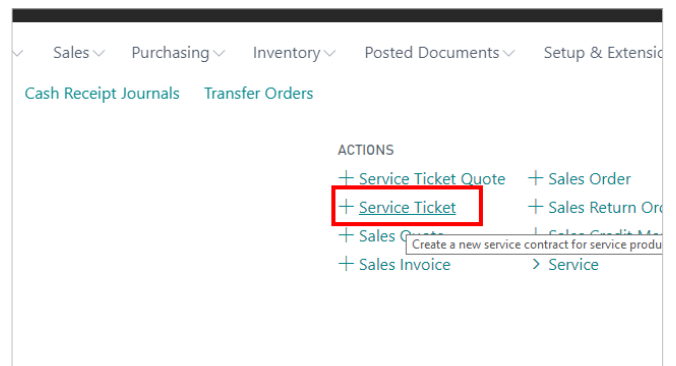
#### 3.4.3.2. How to Create an Internal Service Ticket from Actions

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**





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Click on the field **Customer No.**

icket

Actions    Navigate    Fewer options

Ser  
Ser  
Ass  
Def

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

Select the applicable customer.

Process    Report    Actions    Navigate    Fewer options

General

Customer No.

Customer Name

Description

Order Date

Ticket Units/Lines    Manage    Line

ODT SERVICE    + New

NO.	NAME	CT
10000	Adatum Corporation	
20000	Select record "10000" arch	
30000	School of Fine Art	
40000	Alpine Ski House	
50000	Relecloud	

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

Show more

Open the date picker

Click on **Previous** **Next** **June 2019**

Corporation

Service Date    4/8/2019

Service Ticket Type    

June 2019

Assigned Technician

Default Service Unit No.

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						




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Click on the link **Previous**

Corporation

Service Date ..... 4/8/2019

Service Ticket Type ..... 

Assigned Technician .....

Default Service Unit No. ....


May 2019

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

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.

Service Date ..... 4/8/2019

Service Ticket Type ..... 

Assigned Technician .....

Default Service Unit No. ....

April 2019

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Today Done

	END DATE	BUDGET (TOTAL COST)	ACTUAL (TOTAL COST)	BILLABLE (TOTAL PRICE)	BILL (INVOICED)

Click on the field **Service Ticket Type**

OFF

Show more

4/15/2019

...

...

...

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

Show more

4/15/2019

...

Look up value





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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.

Service Ticket | WORK DATE: 4/8/2019

T00003 · Service

Service Ticket Types + New

CODE	DESCRIPTION
REGULARSERVICE	Regular S

Select record "REGULARSERVICE"

Click on the field **Assigned Technician**

4/15/2019

REGULARSERVICE

LABOR

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.

Service Date 4/15/2019

Service Ticket Type REGULARSERVICE

Assigned Technician

Default Service Unit No.

NO.	NAME
LABOR	Labor - Oil Change
MARK	Mark Hanson
MARY	Mary A. Dempsey
TIMOTHY	Timothy Sneath

+ New

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.

4/15/2019

REGULARSERVICE

LABOR



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

Service Ticket Type	REGULARSERVICE						
Assigned Technician	LABOR						
Default Service Unit No.							
	<table><thead><tr><th>SERVICE UNIT NO.</th><th>DESCRIPTION</th></tr></thead><tbody><tr><td>SU00001</td><td>Skid Steer Loader S450</td></tr><tr><td>SU00002</td><td>Skid Steer Loader S70</td></tr></tbody></table>	SERVICE UNIT NO.	DESCRIPTION	SU00001	Skid Steer Loader S450	SU00002	Skid Steer Loader S70
SERVICE UNIT NO.	DESCRIPTION						
SU00001	Skid Steer Loader S450						
SU00002	Skid Steer Loader S70						
END DATE	BUDGET (TOTAL COST)						
	+ New						

### 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**

Dynamics 365 Business Central

← SERVICE TICKET | WORK DATE: 4/8/2019

ST00003 · Service Ticket #9

**Process** Report Actions Navigate Fewer options

General

Customer No. 10000

Customer Name Adatum Corporation

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

← SERVICE TICKET | WORK DATE: 4/8/2019

ST00003 · Service Ticket #9

Process Report Actions Navigate Fewer options

**Add Service Template** Confirm Actuals View Job Journal

Add Service Template

Customer No. 10000

Customer Name Adatum Corporation

Description Service Ticket #ST00003



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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**

	SU00001	Skid Steer Loader S450	<input type="checkbox"/>	—
tal	SU00001	Skid Steer General Service	<input type="checkbox"/>	—
	SU00001	Labor - Lube	<input type="checkbox"/>	4/1
	SU00001	Oil Change for Skid Steers	<input type="checkbox"/>	4/1
	SU00001	Air Filter for Skid Steers	<input type="checkbox"/>	4/1
	SU00001	Income - Shop Supplies	<input type="checkbox"/>	4/1
	SU00001	Skid Steer General Service	<input type="checkbox"/>	—
			<input type="checkbox"/>	
			<input type="checkbox"/>	
S				

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.

	SU00001	Skid Steer Loader S450	<input type="checkbox"/>	—
tal	SU00001	Skid Steer General Service	<input type="checkbox"/>	—
	SU00001	Labor - Lube	<input type="checkbox"/>	4/1
	SU00001	Oil Change for Skid Steers	<input type="checkbox"/>	4/1
	SU00001	Air Filter for Skid Steers	<input type="checkbox"/>	4/1
	SU00001	Income - Shop Supplies	<input type="checkbox"/>	4/1
	SU00001	Skid Steer General Service	<input type="checkbox"/>	—
		Test Battery	<input type="checkbox"/>	—
			<input type="checkbox"/>	
			<input type="checkbox"/>	
S				

Press the **Arrow up** key.

	SU00001	Skid Steer Loader S450	<input type="checkbox"/>	—
tal	SU00001	Skid Steer General Service	<input type="checkbox"/>	—
	SU00001	Labor - Lube	<input type="checkbox"/>	4/15
	SU00001	Oil Change for Skid Steers	<input type="checkbox"/>	4/15
	SU00001	Air Filter for Skid Steers	<input type="checkbox"/>	4/15
	SU00001	Income - Shop Supplies	<input type="checkbox"/>	4/15
	SU00001	Skid Steer General Service	<input type="checkbox"/>	—
		Test Battery	<input type="checkbox"/>	—
			<input type="checkbox"/>	
			<input type="checkbox"/>	
S				



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

Customer NO. 10000

Customer Name Adatum Corporation

Description Service Ticket #ST00003 - A

Order Date 4/8/2019

Ticket Units/Lines **Manage** Line Fewer options

TASK TYPE	ODT SERVICE UNIT NO.	SERIAL NO.	DESCRIPTION
Heading	SU00001		Skid Steer
Begin-Total	SU00001		Skid Steer
Posting	SU00001		Labor - Lu

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

Customer NO. 10000

Customer Name Adatum Corporation

Description Service Ticket #ST00003 - Adatum Corporation

Order Date 4/8/2019

s/Lines **Manage** Line Fewer options

Delete Line Add Service Template **View Service Ticket Details**

TYPE	UNIT NO.	SERIAL NO.	DESCRIPTION
g	SU00001		Skid Steer Loader 5450
-Total	SU00001		Skid Steer General Service
ing	SU00001		Labor - Lube
ing	SU00001		Oil Change for Skid Steers
ina	SU00001		Air Filter for Skid Steers

Click on the navigation menu item **New**

Dynamics 365 Business Central

SERVICE TICKET DETAILS | WORK DATE: 4/8/2019

Search **New** Edit List Delete Item Availability

Create a new entry.

JOB NO.	JOB TASK NO.	SERVICE UNIT NO.	SERVICE TEMPLATE NO.
---------	--------------	------------------	----------------------

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

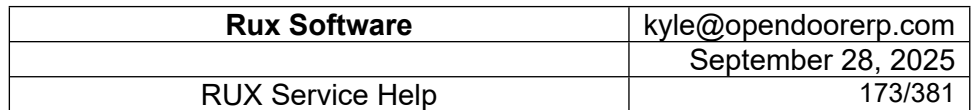
Note that the Line Type is automatically set to Time and Materials, when servicing external customer equipment.



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


Click on the cell **No.**

Item Availability By Location Open in Excel Navigate Fewer options

SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION
	Time and Mat Resource			




Item availability by Location  Open in Excel  Navigate Fewer options




SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION	DE... SE...
	Time and Mat	Resource	<input type="text" value=""/>		

NO.	NAME
LABOR	Labor - Oil Change
LINDA	Linda Martin
MARK	Mark Hanson
MARY	Mary A. Dempsey
TIMOTHY	Timothy Sneath




+ New

Availability By Location		 Open in Excel	Navigate		Fewer options
--------------------------	--	--	----------	--	---------------

LINE TYPE	TYPE	NO.	DESCRIPTION	DE... SE...	QUA
Time and Mat Resource		LABOR 	Labor - Oil Change		
					

LINE TYPE	TYPE	NO.	DESCRIPTION	DE... SE...	QUA...
Time and Mat Resource		LABOR			

DESCRIPTION	DE... SE...	QUANTITY	UNIT OF MEASURE CODE	UNIT COST
Labor - Test Battery			HOURL	22.25
				



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Enter the text **.25**.

Enter the quantity for performing the task.

Navigate Fewer options				
DESCRIPTION	DE... SE...	QUANTITY	UNIT OF MEASURE CODE	UNIT COST
Labor - Test Battery	<input type="checkbox"/>	<input type="text" value=""/>	HOURL	22.25
	<input type="checkbox"/>			

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

Note that the Service Unit No. is automatically populated.

← SERVICE TICKET DETAILS   WORK DATE: 4/8/2019					
Search + New Edit List Delete Item Availability By Location					
JOB NO. ▼	JOB TASK NO. ▼	SERVICE UNIT NO.	SERVICE TEMPLATE NO.	LINE TYPE	TYF
ST00003	0080000	SU00001		Time and Mat Res	

Click on the back button

Dynamics 365 Business Central					
← SERVICE TICKET DETAILS   WORK DATE: 4/8/2019					
Back Search + New Edit List Delete Item Availat					
JOB NO. ▼	JOB TASK NO. ▼	SERVICE UNIT NO.	SERVICE TEMPLATE NO.		
ST00003	0080000	SU00001			

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**

Begin-Total	SU00001		Skid
Posting	SU00001		Lab
Posting	SU00001		Oil
Posting	SU00001		Air
Posting	SU00001		Inc
End-Total	SU00001		Skid
Posting	SU00001		Tes

Ticket Details

Ticket Details



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

Begin-Total	SU00001		Skid
Posting	SU00001		Labor
Posting	SU00001		Oil Change
Posting	SU00001		Air Filter
Posting	SU00001		Income
End-Total	SU00001		Skid
Posting	SU00001		Test
Posting			

Ticket Details

Ticket Details

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.

Posting	SU00001		Labor
Posting	SU00001		Oil Change
Posting	SU00001		Air Filter
Posting	SU00001		Income
End-Total	SU00001		Skid
Posting	SU00001		Test
Posting			

Ticket Details

Ticket Details

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

Begin-Total	SU00001		Skid Steer
Posting	SU00001		Labor - Lube
Posting	SU00001		Oil Change
Posting	SU00001		Air Filter for
Posting	SU00001		Income - Shop
End-Total	SU00001		Skid Steer
Posting	SU00001		Test Battery
Heading			

Ticket Details

Ticket Details

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

Begin-Total	SU00001		Skid Steer General Service
Posting	SU00001		Labor - Lube
Posting	SU00001		Oil Change for Skid Steer
Posting	SU00001		Air Filter for Skid Steers
Posting	SU00001		Income - Shop Supplies
End-Total	SU00001		Skid Steer General Service
Posting	SU00001		Test Battery
Heading			

Ticket Details

Ticket Details



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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.

Service Ticket | Work Date: 4/8/2019

ST00003 · Service

Process Report Actions Naviga

General

Customer No. ....

Customer Name .....

Description .....

Order Date .....

Search + New Manage Open in B

SERVICE UNITS + New

SERVICE UNIT NO.	DESCRIPTION
SU00001	Skid Steer Loader S450
SU00004	Skid Steer Loader S70

Select record "SU00004"

Click on the cell **Description**

	SU00001	Labor - Lube	<input type="checkbox"/>	4/1
	SU00001	Oil Change for Skid Steers	<input type="checkbox"/>	4/1
	SU00001	Air Filter for Skid Steers	<input type="checkbox"/>	4/1
	SU00001	Income - Shop Supplies	<input type="checkbox"/>	4/1
	SU00001	Skid Steer General Service	<input type="checkbox"/>	-
	SU00001	Test Battery	<input type="checkbox"/>	4/1
	SU00004	Skid Steer Loader S70	<input type="checkbox"/>	-
			<input type="checkbox"/>	
Is				
SERVICE				

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

	SU00001	Labor - Lube	<input type="checkbox"/>	4/1
	SU00001	Oil Change for Skid Steers	<input type="checkbox"/>	4/1
	SU00001	Air Filter for Skid Steers	<input type="checkbox"/>	4/1
	SU00001	Income - Shop Supplies	<input type="checkbox"/>	4/1
	SU00001	Skid Steer General Service	<input type="checkbox"/>	-
	SU00001	Test Battery	<input type="checkbox"/>	4/1
	SU00004	Skid Steer Loader S70	<input type="checkbox"/>	-
			<input type="checkbox"/>	
Is				
SERVICE				

Press the **Arrow up** key.

	SU00001	Oil Change for Skid Steers	<input type="checkbox"/>	4/1
	SU00001	Air Filter for Skid Steers	<input type="checkbox"/>	4/1
	SU00001	Income - Shop Supplies	<input type="checkbox"/>	4/1
	SU00001	Skid Steer General Service	<input type="checkbox"/>	-
	SU00001	Test Battery	<input type="checkbox"/>	4/1
	SU00004	Skid Steer Loader S70	<input type="checkbox"/>	-
		Check Fluid Levels	<input type="checkbox"/>	
			<input type="checkbox"/>	
Is				
SERVICE				

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.





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

Ticket Units/Lines	Manage	Line	Fewer options
Begin - total	SU00001		Skid Steer
Posting	SU00001		Labor - Lube
Posting	SU00001		Oil Change
Posting	SU00001		Air Filter for

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

s/Lines	Manage	Line	Fewer options
Begin - total	SU00001		Skid Steer
Posting	SU00001		Labor - Lube
Posting	SU00001		Oil Change for Skid Steers
Posting	SU00001		Air Filter for Skid Steers
Posting	SU00001		Income - Shop Supplies

Click on the navigation menu item **New**

JOB NO.	JOB TASK NO.	SERVICE UNIT NO.	SERVICE TEMPLATE NO.
---------	--------------	------------------	----------------------

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

Click on the cell **No.**

SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION
	Time and Mat Resource			





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Enter the text **.25**.

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

Navigate Fewer options				
DESCRIPTION	DE... SE...	QUANTITY	UNIT OF MEASURE CODE	UNIT COST
Labor - Check Fluid Levels	<input type="checkbox"/>	<input type="text" value=""/>	HOURL	22.25
	<input type="checkbox"/>			

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

← SERVICE TICKET DETAILS   WORK DATE: 4/8/2019					
Search + New Edit List Delete Item Availability By Location					
JOB NO. ▼	JOB TASK NO. ▼	SERVICE UNIT NO.	SERVICE TEMPLATE NO.	LINE TYPE	TY
ST00003	0100000	SU00004		Time and Mat Res	

Click on the back button

Dynamics 365 Business Central					
← SERVICE TICKET DETAILS   WORK DATE: 4/8/2019					
Back Search + New Edit List Delete Item Avail					
JOB NO. ▼	JOB TASK NO. ▼	SERVICE UNIT NO.	SERVICE TEMPLATE NO.		
ST00003	0100000	SU00004			

### 3.4.3.5. How to Print the Service Ticket

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

Dynamics 365 Business Central

←

SERVICE TICKET | WORK DATE: 4/8/2019

ST00001 · Service Ticket #S

Process

Report

Actions

Navigate

Fewer options

General

Customer No. ....

C00010

Customer Name .....

Internal Servicing Cu



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

← SERVICE TICKET | WORK DATE: 4/8/2019

## ST00001 · Service Ticket #S

Process Report Actions Navigate Fewer options

**Print...**

Prepare to print the document. A report request window for the document...

Customer No. .... C00010

Customer Name ..... Internal Servicing Cu

Description ..... Service Ticket #ST00

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

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

Service Ticket #ST00001 ·

4/8/2019

fewer options

AL NO. DESCRIPTION

Skid Steer

Skid Steer General Service

Labor - Lube

Oil Change for Skid Steers

Air Filter for Skid Steers

Job Planning Line

Show results:

Where: Job Task No. is:

Send to... Print Preview

The following picture displays the Service Ticket document.

**Service Ticket**

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
<b>SU00002-Skid Steer Loader - Internal</b>					
<b>Skid Steer General Service</b>					
<b>Labor - Lube</b>					
Labor - Lube	Resource	LABOR	0.5	75.00	37.50
Parts: 0.00			Labor: 37.50	Other: 0.00	37.50
<b>Oil Change for Skid Steers</b>					
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
<b>Air Filter for Skid Steers</b>					
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
<b>Income - Shop Supplies</b>					
Income - Shop Supplies	G/L Account	40150	1	20.00	20.00
Parts: 0.00			Labor: 0.00	Other: 20.00	20.00
<b>Test Battery</b>					
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
<b>SU00003-Skid Steer Loader S450</b>					
<b>Check fluid levels</b>					
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.



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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**

Dynamics 365 Business Central

Service Ticket | Work Date: 4/12/2021

ST00003 · Service Ticket #ST00003 - Adatum Co

Process Report Ticket Actions **Related** Fewer options

**General**

Customer Name ..... Adatum Corporation

Description ..... Service Ticket #ST00003 - Adatum Corporation

Order Date ..... 4/12/2021

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

Dynamics 365 Business Central

Service Ticket | Work Date: 4/12/2021

ST00003 · Service Ticket #ST00003 - Adatum Co

Process Report Ticket Actions **Related** Fewer options

**Ticket** ▾

Customer Name ..... Adatum Corporation

Description ..... Service Ticket #ST00003 - Adatum Corporation

Order Date ..... 4/12/2021

Click on the navigation menu item **Checklist**

Process Report Ticket Actions **Related** Fewer options

**Ticket** ▾

- Dimensions
- Sales Invoices/Credit Memos
- Checklist**
- Attachments

Customer Name ..... Adatum Corporation

Description ..... Service Ticket #ST00003 - Adatum Corporation

Order Date ..... 4/12/2021

Contact ..... Robert Townes

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

SERVICE TICKET | WORK DATE: 4/8/2019

ST00003 ·

Process Report

**General**

Customer No. ....

Customer Name ..... Robert Townes

Description ..... Service Ticket #ST00003 - Adatum Corporation

CHECKLIST CODE

**SS-GENSERV CHECKLIST**

Open record "SS-GENSERV CHECKLIST" in a new window



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

Dynamics 365 Business Central

TICKET CHECKLIST | WORK DATE: 4/8/2019

ST00003 · SS-GENERAL SE

Report

General

Checklist Code ······ SS-GENSERV CHECK

Name ······ Skid Steer General S

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

Dynamics 365 Business Central

TICKET CHECKLIST | WORK DATE: 4/8/2019

ST00003 · SS-GENERAL SE

Report

Print Checklist...

Print the ticket checklist.

Checklist Code ······ SS-GENSERV CHECK

Name ······ Skid Steer General S

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

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

NSERV CHECKLIST

teer General Service Chec

Send to...

Print

Preview

Cancel

MIN. VALUE	MAX. VALUE	MEASURE CODE	VALUE	DECIMAL VALUE
0.00	0.00			0.00
0.00	0.00			0.00
0.00	0.00			0.00



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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.

SS-GENERAL SERVICE · SS-GENERAL SERVICE CHECKLIST

Make changes on the page

SS-GENERAL SERVICE CHECKLIST

Skid Steer General Service Checklist

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**

Checklist Details		Manage
DESCRIPTION	MIN. V.	
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		



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Click on **Boolean Value**

LUE	MAX. VALUE	UNIT OF MEASURE CODE	BOOL... VALUE	DECIMAL VALUE	OPTION VALUE
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	

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

Checklist Details		Manage
DESCRIPTION		MIN. V.
Check Under the Hood		
Windshield Washer Fluid Level		
Coolant		
Brake Fluid		Coolant
Check Tires		
Tire Condition: LF Tread: /32		
Tire Condition: RF Tread: /32		
Tire Condition: LR Tread: /32		
Tire Condition: RR Tread: /32		

Click on **Boolean Value**

LUE	MAX. VALUE	UNIT OF MEASURE CODE	BOOL... VALUE	DECIMAL VALUE	OPTION VALUE
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input checked="" type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	

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

Checklist Details		Manage
DESCRIPTION		MIN. V.
Check Under the Hood		
Windshield Washer Fluid Level		
Coolant		
Brake Fluid		
Check Tires		
Tire Condition: LF Tread: /32		Check Tires
Tire Condition: RF Tread: /32		
Tire Condition: LR Tread: /32		
Tire Condition: RR Tread: /32		
Oil Type		





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Click on **Boolean Value**

LUE	MAX. VALUE	UNIT OF MEASURE CODE	BOOL... VALUE	DECIMAL VALUE	OPTION VALUE
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input checked="" type="checkbox"/>	0.00	
0.00	0.00		<input checked="" type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	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		<input type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
		<input type="checkbox"/>		

Enter the text **22**.

MAX. VALUE	UNIT OF MEASURE CODE	BOOL... VALUE	DECIMAL VALUE	OPTION VALUE
0.00		<input type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	22	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
		<input type="checkbox"/>		

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

MAX. VALUE	MEASURE CODE	VALUE	DECIMAL VALUE	OPTION VALUE
0.00		<input type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	22	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
		<input type="checkbox"/>		



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Enter the text **22**.

MAX. VALUE	MEASURE CODE	VALUE	DECIMAL VALUE	OPTION VALUE
0.00		<input type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	22.00	
32.00		<input type="checkbox"/>	22	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
		<input type="checkbox"/>		

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

0.00		<input type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	22.00	
32.00		<input type="checkbox"/>	22	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0  0.00	
0.00		<input type="checkbox"/>	0.00	
		<input type="checkbox"/>		

Enter the text **12**.

0.00		<input type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	22.00	
32.00		<input type="checkbox"/>	22.00	
32.00		<input type="checkbox"/>		
32.00		<input type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
		<input type="checkbox"/>		

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

0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	22.00	
32.00		<input type="checkbox"/>	22.00	
32.00		<input type="checkbox"/>	12	
32.00		<input type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
		<input type="checkbox"/>		



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Enter the text **11**.

0.00	<input checked="" type="checkbox"/>	0.00
0.00	<input checked="" type="checkbox"/>	0.00
0.00	<input checked="" type="checkbox"/>	0.00
0.00	<input type="checkbox"/>	0.00
32.00	<input type="checkbox"/>	22.00
32.00	<input type="checkbox"/>	22.00
32.00	<input type="checkbox"/>	12.00
32.00	<input type="checkbox"/>	11
0.00	<input type="checkbox"/>	0.00
	<input type="checkbox"/>	

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

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

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	

Click on the cell **Option Value**

<input checked="" type="checkbox"/>	0.00
<input checked="" type="checkbox"/>	0.00
<input type="checkbox"/>	0.00
<input type="checkbox"/>	22.00
<input type="checkbox"/>	22.00
<input type="checkbox"/>	12.00
<input type="checkbox"/>	11.00
<input type="checkbox"/>	0.00
<input type="checkbox"/>	

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

22.00	
22.00	
12.00	
11.00	
0.00	

VALUE

Mobil

Select record "Mobil"

+ New

Select from full list

Click on the back button

Dynamics 365 Business Central

TICKET CHECKLIST | WORK DATE: 4/15/2019

Back

ST00003 · SS-GENERAL SE

Report

**General**

Checklist Code ..... SS-GENSERV CHECK

Name ..... Skid Steer General S

### 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**

Dynamics 365 Business Central

SERVICE TICKET | WORK DATE: 4/15/2019

ST00003 · Service Ticket #S

Process Report Actions Navigate Fewer options

**General**

Customer No. .... 10000

Customer Name ..... Adatum Corporation

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

Dynamics 365 Business Central

SERVICE TICKET | WORK DATE: 4/15/2019

ST00003 · Service Ticket #ST0

Process Report Actions Navigate Fewer options

Add Service Template Confirm Actuals View Job Journal

Confirm actuals to post usage for the current service

Customer No. .... 10000

Customer Name ..... Adatum Corporation

Description ..... Service Ticket #ST00003 - Ad



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Click on the field **Posting Date**

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

Values from: Last used options and filters

DOCST00003

4/15/2019

JOB

ASTAPLETON

REGULARSERVICE

LABOR

ACTUAL (TOTAL)

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**

Service Ticket #ST00003

4/8/2019

Posting Date 4/15/2019

Template Name JOB

Batch Name ASTAPLETON

Job Task

Show results:

Where: Job No. is: ST00003

And: Job Task No. is:

Click on **Job Planning Line**

Job Planning Line

Show results:

Where: Type is:

And: No. is:

And: Planning Date is:

Click on the button **OK**

OK

Cancel

UNIT OF MEASURE CODE

0.5 HOUR

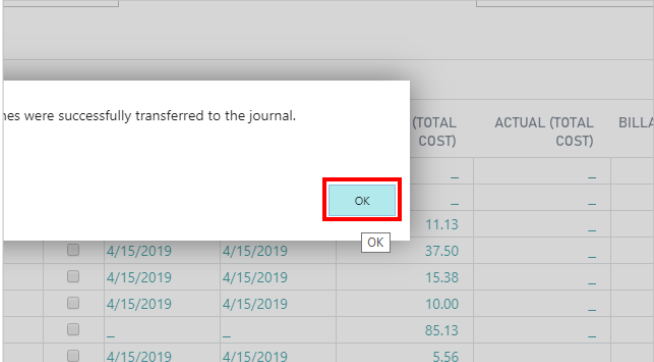
1 HOUR

1 PCS



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Click on the button **OK**



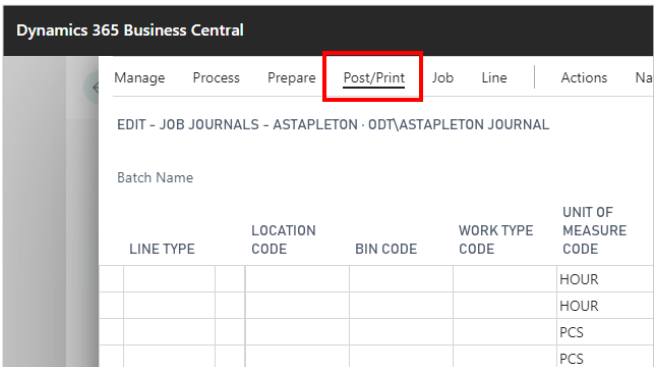
Lines were successfully transferred to the journal.

	(TOTAL COST)	ACTUAL (TOTAL COST)	BILL
	—	—	
	11.13	—	
<input type="checkbox"/> 4/15/2019 4/15/2019	37.50	—	
<input type="checkbox"/> 4/15/2019 4/15/2019	15.38	—	
<input type="checkbox"/> 4/15/2019 4/15/2019	10.00	—	
<input type="checkbox"/> —	85.13	—	
<input type="checkbox"/> 4/15/2019 4/15/2019	5.56	—	

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**

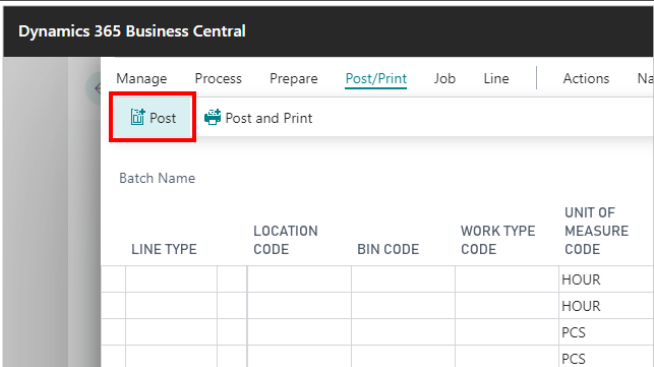


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

Manage	Process	Prepare	Post/Print	Job	Line	Actions	Na
EDIT - JOB JOURNALS - ASTAPLETON - ODT\ASTAPLETON JOURNAL							
Batch Name							
LINE TYPE	LOCATION CODE	BIN CODE	WORK TYPE CODE	UNIT OF MEASURE CODE			
				hour			
				hour			
				PCS			
				PCS			

Click on the link **Post**

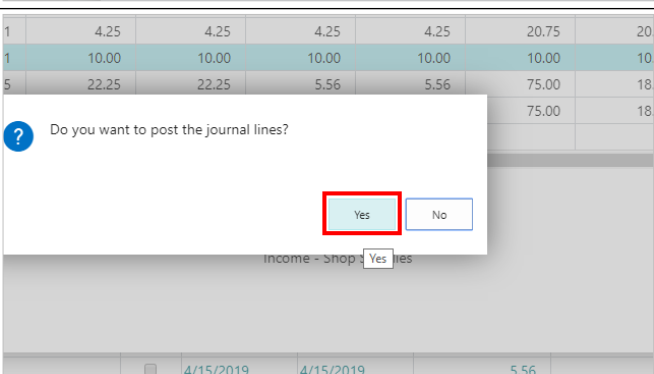
Alternatively Post and Print can be selected.



Dynamics 365 Business Central

Manage	Process	Prepare	Post/Print	Job	Line	Actions	Na
 Post	 Post and Print						
Batch Name							
LINE TYPE	LOCATION CODE	BIN CODE	WORK TYPE CODE	UNIT OF MEASURE CODE			
				hour			
				hour			
				PCS			
				PCS			

Click on the button **Yes**



Do you want to post the journal lines?

Income - Shop	Yes	No
---------------	-----	----



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Click on the button **OK**

4.25	4.25	4.25	4.25	20.75	20.75
10.00	10.00	10.00	10.00	10.00	10.00
22.25	22.25	5.56	5.56	75.00	18.75
Journal lines were successfully posted.				75.00	18.75
Income - Shop Supplies					
4/15/2019 4/15/2019 5.56					

Click on the button **Close**

Close					
Close					
ACTUAL (TOTAL COST)	BILLABLE (TOTAL PRICE)	BILLABLE (INVOICED PRICE)			
-	-	-			
-	-	-			
-	37.50	-			

### 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**

Dynamics 365 Business Central

Service Ticket | Work Date: 4/6/2020

ST00001 · Service Ticket #ST00001 - Adatum Corporation

Process **Report** Ticket Actions Related Fewer options

**General**

Customer Name ..... Adatum Corporation

Description ..... Service Ticket #ST00001 - Adatum Corporation

Order Date ..... 4/6/2020

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

Dynamics 365 Business Central

Service Ticket | Work Date: 4/6/2020

ST00001 · Service Ticket #ST00001 - Adatum Corporation

Process **Report** Ticket Actions Related Fewer options

**Print...** **Print Proforma...**

Customer Name ..... Adatum Corporation

Description ..... Service Ticket #ST00001 - Adatum Corporation

Order Date ..... 4/6/2020



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

Printer ..... (Handled by the browser)

Options

Number of Copies ..... 0

Print Company Address ..... ☒

Filter: Job

× No. .... ST00001

+ Filter

Click on the button **Preview**

er...

ced >

Send to... Print **Preview** Cancel

No.	Description	Defer Serv...	Quantity	Unit of Measure Code
LABOR	Labor - Lube	<input type="checkbox"/>	0.5	HOUR
LABOR	Labor - Oil Change	<input type="checkbox"/>	1	HOUR

The following picture is an example of a proforma invoice.

**Service Proforma**

Page: 1

CROWNUS SERVICE, Inc.  
7122 South Ashford Street  
Westminster  
Atlanta, GA 31172

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

Sold To: Adatum Corporation  
Robert Townes  
192 Market Square  
Atlanta, GA 31172  
USA

Ship To: Adatum Corporation  
Robert Townes  
192 Market Square  
Atlanta, GA 31172  
USA

Tax Ident. Type: Legal Entity  
Customer ID: 10000  
P.O. Number: 4/6/2020  
P.O. Date: 4/6/2020  
SalesPerson: Peter Sadow

Item No.	Description	Unit	Quantity	Unit Price	Total Price
<b>SU00001-2015 NISSAN Titan</b>					
<b>20,000 KM Service</b>					
<b>Labor - Lube</b>					
LABOR	Labor - Lube	Hour	0.50		
<b>Parts: 0.00 Labor: 0.00 Other: 0.00</b>					
<b>Oil Change</b>					
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
<b>Parts: 68.25 Labor: 75.00 Other: 0.00 143.25</b>					
<b>Rotate Tires</b>					
LABOR	Labor - Rotate Tires	Hour	0.50	75.00	37.50
<b>Parts: 0.00 Labor: 37.50 Other: 0.00 37.50</b>					
<b>Parts: 68.25 Labor: 112.50 Other: 0.00 Total SU00001: 180.75</b>					
<b>SU00004-2016 NISSAN Frontier</b>					
<b>20,000 KM Service</b>					
<b>Oil Change</b>					
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
<b>Parts: 68.25 Labor: 75.00 Other: 0.00 143.25</b>					
<b>Parts: 68.25 Labor: 75.00 Other: 0.00 Total SU00004: 143.25</b>					

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.





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

Dynamics 365 Business Central

SERVICE TICKET | WORK DATE: 4/15/2019

ST00003 · Service Ticket #

Process Report Actions Navigate Fewer options

General

Customer No. 10000

Customer Name Adatum Corporation

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

DATE: 4/15/2019

Service Ticket #ST00003 - Adatum Co

Actions Navigate Fewer options

Confirm Actuals View Job Journal Create Service Sales Invoice Mark Com

10000

Adatum Corporation

Service Ticket #ST00003 - Adatum Corporation

Click on the field **Posting Date**

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

EDIT - JOB CREATE SALES INVOICE

Options

Posting Date 4/15/2019

Create Invoice per Job

Job Task

Show results:

Click on **Job Task**

Options

Posting Date 4/15/2019

Create Invoice per Job

Job Task

Show results:

Where: Job No. is: ST00003

And: Job Task No. is:

Limit totals to:



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Click on the button **OK**

Job Task No. is:

to:

Planning Date Filter is:

**OK** Cancel

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**

Dynamics 365 Business Central

Service Ticket | Work Date: 4/12/2021

ST00003 · Service Ticket #ST00003 - Adatum Co

Process Report Ticket Actions **Related** Fewer options

**General**

Customer Name ..... Adatum Corporation

Description ..... Service Ticket #ST00003 - Adatum Corporation

Order Date ..... 4/12/2021

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

Dynamics 365 Business Central

Service Ticket | Work Date: 4/12/2021

ST00003 · Service Ticket #ST00003 - Adatu

Process Report Ticket Actions Related Fewer options

**Ticket** ▾

Customer Name ..... Adatum Corporation

Description ..... Service Ticket #ST00003 - Adatum Corpora

Order Date ..... 4/12/2021

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

ST00003 · Service Ticket #ST00003 - Adatu

Process Report Ticket Actions Related Fewer options

**Ticket** ▾

- Dimensions
- Sales Invoices/Credit Memos**
- Checklist
- Attachments

Service Date ..... 4/12/2021

Contact ..... Robert Townes



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

Service TICKET | WORK DATE: 4/15/2019

ST00003 · Service

Process	Report	Actions	Navigation	DOCUMENT TYPE	DOCUMENT NO.	LINE NO.
General				Invoice	S-INV102222	0
Customer No. ....						
Customer Name .....						
Description .....						

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

Service TICKET | WORK DATE: 4/15/2019

00003 · Service

Report	Actions	Navigation
Open Sales Invoice/Credit Memo...		

DOCUMENT TYPE	DOCUMENT NO.	LINE NO.	QUANTITY TRANSFERR...
Invoice	S-INV102222	0	11.50

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

Service TICKET | WORK DATE: 4/15/2019

00003 · Service

Manage **Posting** Prepare Invoice Release Re

EDIT - SALES INVOICE - S-INV102222 · ADATUM CORPORATION

General

Customer Name ..... Adatum Corporation

Contact ..... Robert Townes

Lines | Manage More options

Click on **Post Post and New... Post and Send... Preview Posting**

The standard Microsoft Dynamics 365 Business Central options are available for posting.

Service TICKET | WORK DATE: 4/15/2019

s · Service

Manage **Posting** Prepare Invoice Release Request Approval

Post Post and New... Post and Send... Preview Posting

General

Customer Name ..... Adatum Corporation

Contact ..... Robert Townes

Lines | Manage More options



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Click on the navigation menu item **Post**

The screenshot shows the Dynamics 365 Business Central interface for a 'SERVICE TICKET | WORK DATE: 4/15/2019'. The main area displays 'ST00003 · Service'. A navigation menu on the right includes 'Manage', 'Posting', 'Prepare', 'Invoice', and 'Release'. The 'Posting' menu is open, and the 'Post' option is highlighted with a red box. Below the menu, the 'General' section shows 'Customer Name' as 'Adatum Corporation' and 'Contact' as 'Robert Townes'.

Click on the button **Yes**

The screenshot shows a confirmation dialog box with the question 'Do you want to post the invoice?'. The 'Yes' button is highlighted with a red box. The background shows a list of labor items: 'Labor - Lube' (0.5 HOUR), 'Labor - Oil Change' (1 HOUR), 'Oil Filter' (1 PCS), 'Labor - Check Fluid Levels' (0.25 HOUR), and 'Labor - Check Fluid Levels' (0.25 HOUR).

Click on the button **Yes**

The screenshot shows a confirmation dialog box with the message 'The invoice is posted as number PS-INV103215 and moved to the Posted Sales Invoices window. Do you want to open the posted invoice?'. The 'Yes' button is highlighted with a red box. The background shows the same list of labor items as the previous screenshot.

The following demonstrates printing the Service Invoice.

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

The screenshot shows the Dynamics 365 Business Central interface for a 'POSTED SALES INVOICE | WORK DATE: 4/15/2019'. The main area displays 'PS-INV103215 · Adatum Co'. A navigation menu on the right includes 'Invoice', 'Correct', 'Print/Send', 'Navigate', and 'Electronic Document'. The 'Print/Send' option is highlighted with a red box. Below the menu, the 'General' section shows 'No.' as 'PS-INV103215' and 'Customer' as 'Adatum Corporation'.



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

POSTED SALES INVOICE | WORK DATE: 4/15/2019

PS-INV103215 · Adatum Corporation

Invoice Correct Print/Send Navigate Electronic Document Actions

Send... Print... Email **Print Service Invoice**

No. PS-INV103215

Customer Adatum Corporation

Contact Robert Townes

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.

EDIT - SERVICE - INVOICE

Options

Print Company Address ☒

Log Interaction ☒

Show Assembly Components ☐

Show Additional Fee Note ☐

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

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

And: Bill-to Customer No. is:

And: Ship-to Code is:

And: No. Printed is:

Send to... Print Preview



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The following pictures display a posted Service Invoice.

CRONUS SERVICE, Inc. 7122 South Ashford Street Westminster Atlanta, 31772		<b>INVOICE</b> 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

<b>Service Ticket #ST00003 - Adatum Corporation</b>				
Item/Description	Unit	Quantity	Unit Price	Total Price
<b>SIU00001-Skid Steer Loader S450</b>				
<b>Skid Steer General Service</b>				
<b>Air Filter for Skid Steers</b>				
LABOR Labor - Replace Air Filter	Hour	0.5	75.00	38.83
1004 Air Filter for Skid Steer	Piece	1	20.75	21.79
Parts: 20.75	Labor: 37.50	Other: 0.00		60.42
<b>Income - Shop Supplies</b>				
Income - Shop Supplies		1	20.00	21.00
Parts: 0.00	Labor: 0.00	Other: 20.00		21.00
<b>Labor - Lube</b>				
LABOR Labor - Lube	Hour	0.5	75.00	38.82
Parts: 0.00	Labor: 37.50	Other: 0.00		38.62
<b>Oil Change for Skid Steers</b>				
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	53.84
Parts: 68.25	Labor: 75.00	Other: 0.00		148.91



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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  
Amount Exempt from Sales Tax USD      0.00

**Subtotal:**      296.50  
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.



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### 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**

The screenshot shows the Dynamics 365 Business Central interface for a Service Ticket. The title bar reads 'Dynamics 365 Business Central'. Below it, the page title is 'SERVICE TICKET | WORK DATE: 4/15/2019'. The main content area shows 'ST00003 · Service Ticket #9'. A navigation bar contains 'Process', 'Report', 'Actions', 'Navigate', and 'Fewer options'. The 'Process' button is highlighted with a red rectangle. Below the navigation bar, the 'General' tab is selected, showing fields for 'Customer No.' (10000) and 'Customer Name' (Adatum Corporation).

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

The screenshot shows the Dynamics 365 Business Central interface for a Service Ticket. The title bar reads 'Dynamics 365 Business Central'. Below it, the page title is 'SERVICE TICKET | WORK DATE: 4/15/2019'. The main content area shows 'ST00003 · Service Ticket #9'. A navigation bar contains 'Process', 'Report', 'Actions', 'Navigate', and 'Fewer options'. The 'Mark Complete' button is highlighted with a red rectangle. Below the navigation bar, the 'General' tab is selected, showing fields for 'Customer No.' (10000) and 'Customer Name' (Adatum Corporation).

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

The screenshot shows the Dynamics 365 Business Central interface for a Service Ticket. The title bar reads 'Dynamics 365 Business Central'. Below it, the page title is 'SERVICE TICKET | WORK DATE: 4/15/2019'. The main content area shows 'ST00003 · Service Ticket #9'. A navigation bar contains 'Process', 'Report', 'Actions', 'Navigate', and 'Fewer options'. The 'Mark Complete' button is highlighted with a red rectangle. Below the navigation bar, the 'General' tab is selected, showing fields for 'Customer No.' (10000) and 'Customer Name' (Adatum Corporation).

### 3.4.3.11. 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.





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

Dynamics 365 Business Central

Service Ticket

Process

Report

Ticket

Actions

Related

Fewer options

General

Customer No.

Customer Name

Description

\*

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

+

Create Service Sales Invoice

Mark Complete

Copy Document

Contact

Service Ticket Type

Assigned Technician

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.

Options

Document No.

Sell-to Customer No.

Sell-to Customer Name

Include Header

Recalculate Lines

ST00095

10000

Adatum Corporation

☒

☒

Advanced >

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

Options

Document No.

Sell-to Customer No.

Sell-to Customer Name

Include Header

Recalculate Lines

ST00095

10000

Adatum Corporation

☒

☒

Advanced >

OK

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.



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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**

Transfer Orders

ACTIONS

+ Service Ticket Quote

+ Service Ticket

+ Sales Quote

+ Sales Invoice

+ Sales Order

+ Sales Return Order

+ Sales Credit Memo

> Service

> Planned Maintenance

> Tasks

> Sales

> Reports

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

+ Service Ticket Quote

+ Service Ticket

+ Sales Quote

+ Sales Invoice

+ Sales Order

+ Sales Return Order

+ Sales Credit Memo

> Service

> Planned Maintenance

> Tasks

> Sales

> Reports

Service Ticket Quotes

Service Tickets

Service Units

Open the list of service units.

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

SERVICE UNITS | WORK DATE: 4/8/2019

Search

+ New

Manage

Open in Excel

Navigation

SERVICE UNIT NO.

DESCRIPTION

SU00001

Skid Steer Loader S450

SU00003

Skid Steer Loader S450

SU00004

Skid Steer Loader S70



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### 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.

Dynamics 365 Business Central

SERVICE UNIT CARD | WORK DATE: 4/8/2019

SU00001

Create Service Ticket Create Service ...t From Template

General Create a new service ticket for the current service unit.

Service Unit No. SU00001

Description Skid Steer Loader S

### Click on the field **Customer No.**

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

Service Ticket #ST00004 - Adatum C

Actions Navigate Fewer options

10000

Adatum Corporation

Service Ticket #ST00004 - Adatum Corporation

4/8/2019

### 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.

on

Show more

4/8/2019

Type the date in the format MM/DD/YYYY

SU00001

### 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.

Show more

4/8/2019

SU00001

BUDGET (TOTAL COST)	ACTUAL (TOTAL COST)	BILLABLE (TOTAL PRICE)	BILLABLE (INVOICED PRICE)

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

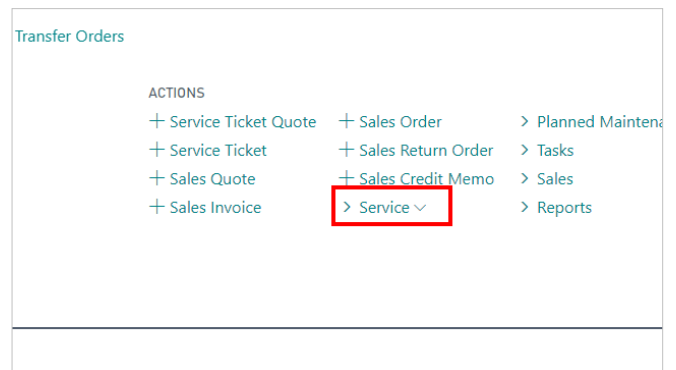
The same steps can be used when the user has the Business Manager Profile assigned to them.



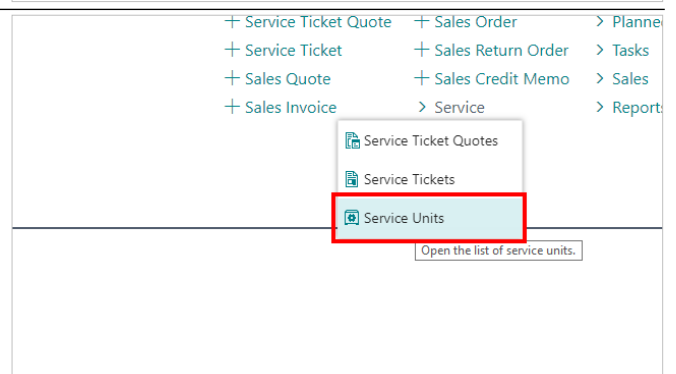
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The following demonstrates creating a Service Ticket with a Service Template being included.

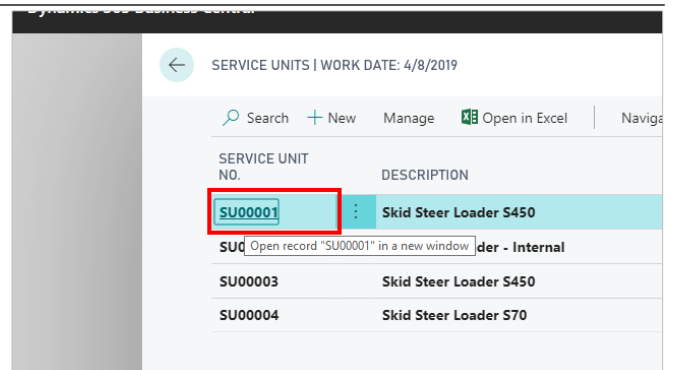
Click on the navigation menu item popup **Service**



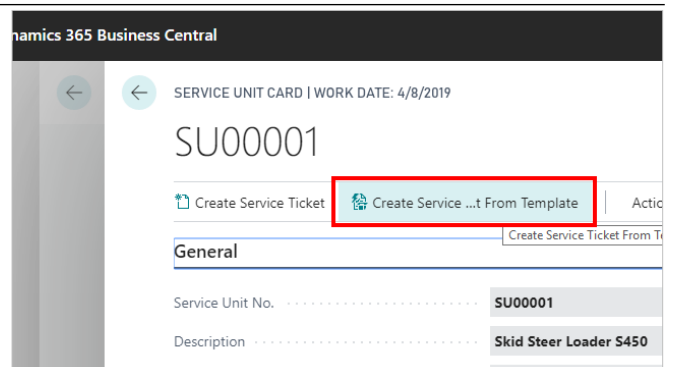
Click on the navigation menu item **Service Units**



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



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





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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.

TEMPLATE NO.	TEMPLATE TYPE
AIRFILTER-SS	Service
OILCHANGE-SS	Service
SS-GENERAL SERVICE	Service

Click on the field **Customer No.**

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

10000

Adatum Corporation

Service Ticket #ST00005 - Adatum Corporation

4/8/2019

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.

4/8/2019

SU00001

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.

SU00001

BUDGET (TOTAL COST)	ACTUAL (TOTAL COST)	BILLABLE (TOTAL PRICE)	BILLABLE (INVOICED PRICE)
---------------------	---------------------	------------------------	---------------------------



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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.

Manage Line Fewer options			
ODT SERVICE UNIT NO.	SERIAL NO.	DESCRIPTION	DEFER SERV...
SU00001		Skid Steer Loader S450	<input type="checkbox"/>
SU00001		Oil Change for Skid Steers	<input type="checkbox"/>
			<input type="checkbox"/>

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**

Actions		
+ Service Ticket Quote	+ Purchase Quote	> Find entries...
+ Service Ticket	+ Purchase Order	> New
+ Service Unit	+ Purchase Invoice	> Payments
+ Service Template	> Service Management	> Reports
+ Sales Quote	> Service	Excel Report
+ Sales Order	> Planned Maintenance	
+ Sales Invoice	> Warranty	

Click on the navigation menu item Warranty Types

+ Service Unit	+ Purchase Invoice	> Payr
+ Service Template	> Service Management	> Rep
+ Sales Quote	> Service	Exce
+ Sales Order	> Planned Maintenance	
+ Sales Invoice	> Warranty	
	Warranties	
	Warranty Types	

Click on the navigation menu item **New**

Warranty Policy Types   Work Date: 1/25/2024	
Search	+ New Edit List Delete
Create a new entry.	
Code ↑	Description
→ GENERAL	General
LIMITED	limited



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Click on the cell **Code**

nties | Service ▾ | P

Vendors | Items | Bank

Warranty Policy Types | Work Date: 1/25/2024

Search + New Edit List Delete

Code ↑

→

GENERAL

LIMITED

Description

General

limited

Enter the text **Power Train**.

nties | Service ▾ | P

Vendors | Items | Bank

Warranty Policy Types | Work Date: 1/25/2024

Search + New Edit List Delete

Code ↑

→

GENERAL

LIMITED

Description

General

limited

Click on the cell **Description**

Date: 1/25/2024

Edit List Delete

Description

General

limited

Enter the text **Power Train**.

Date: 1/25/2024 ✓ Saved

Edit List Delete

Description

General

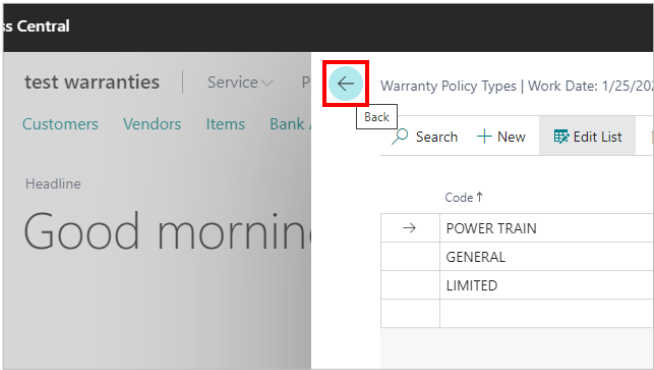
limited





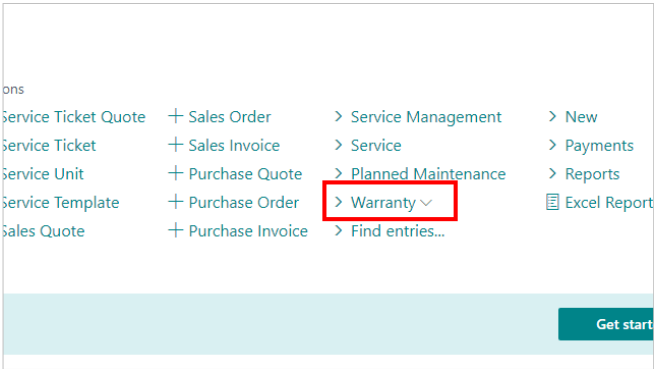
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Click on the back button

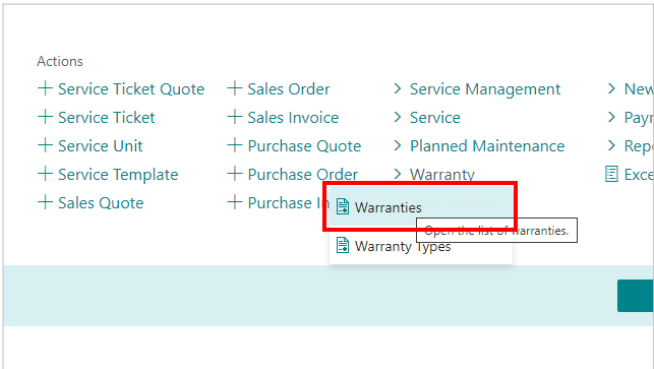


3.6.2. How to set up Warranties

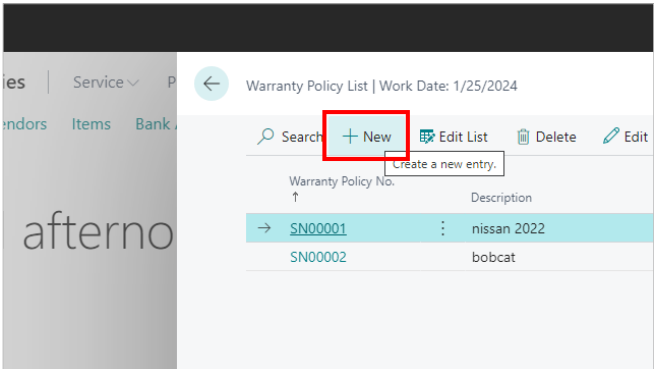
Click on the navigation menu item popup **Warranty**



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



Click on the navigation menu item **New**





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Click on the field **Description**

+ New

Policy No.

01

02

Warranty Policy

General

Warranty Policy No. ....

Description .....

Warranty Vendor .....

Warranty Policy Lines

Manage

Enter the text **Warranty Policy 2022**.

+ New

Policy No.

01

02

03

Warranty Policy

General

Warranty Policy No. ....

Description .....

Warranty Vendor .....

Warranty Policy Lines

Manage

Click on the lookup button **Manufacturer**

✓ Saved

✕

↗

Manufacturer .....

Effective Date ...

Choose a value for Manufacturer

Select the manufacturer this warranty will apply to.  
Click on the link in cell **Code** with the value **BOBCAT**

...

Manufacturer .....

Policy Effective Date .....

Code ↑

Name

BOBCAT

FORD

NISSAN

Select record "BOBCAT"

Bobcat

Nissan

+ New

Line Effective Date ↑

Coverage-Usage

Coverage-Usage UOM

Duration


Perc



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Select the date this policy will become effective.  
Click on the link **Open the date picker**


Manufacturer ..... BOBCAT

Effective Date ..... 

Open the date picker for Policy Effective Date

Click on a date in the calendar

Manufacturer ..... BOBCAT

Policy Effective Date ..... 

January 2024

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Go to today Done

Click on the cell **Warranty Type**

Warranty Vendor .....

Warranty Policy Lines | Manage

Warranty Type	Description

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**

Warranty Type

Description

Jordan Moresby

test

LIMITED

POWER TRAIN

+ New

Select record "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.



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Click on the cell **Coverage-Usage** with the value **0**

Warranty Vendor ..... ▼

Warranty Policy Lines | Manage

Warranty Type ↑	Line Effective Date ↑	Coverage- Usage	Coverage- Usage UOM	Coverage- Duration
POWER TRAIN	1/1/2024	0		
→		0		

Enter the text **10000**.

Warranty Vendor ..... ▼

Warranty Policy Lines | Manage

Warranty Type ↑	Line Effective Date ↑	Coverage- Usage	Coverage- Usage UOM	Coverage- Duration
POWER TRAIN	1/1/2024			
→				

Click on the cell **Coverage-Usage UOM**

Warranty Vendor ..... ▼

Warranty Policy Lines | Manage

Warranty Type ↑	Line Effective Date ↑	Coverage- Usage	Coverage- Usage UOM	Coverage- Duration	Coverage- Percent
POWER TRAIN	1/1/2024	10000			0.00
→					

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

Warranty Type ↑	Line Effective Date ↑	Coverage- Usage	Coverage- Usage UOM	Coverage- Duration	Coverage- Percent
POWER TRAIN	1/1/2024	10000			0.00
→					

Adatum Corporation

1

6/21/2022

KM

Select record "KM"

MILES

+ New

Description

Hour

Kilo

Kilometer

Liter

Miles



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Coverage Duration determines how long this policy will remain in effect.  
Click on the cell **Coverage-Duration**

<div>.....</div> <div>▼</div>						
Lines   Manage						
	Line Effective Date ↑	Coverage-Usage	Coverage-Usage UOM	Coverage-Duration	Coverage-Percent	
⋮	1/1/2024	10000	KM		0.00	

Enter the text **1y**.

<div>.....</div> <div>▼</div>						
Lines   Manage						
	Line Effective Date ↑	Coverage-Usage	Coverage-Usage UOM	Coverage-Duration	Coverage-Percent	
⋮	1/1/2024	10000	KM		0.00	

Coverage Percent specifies what percentage of service will be covered under warranty.

Click on the cell **Coverage-Percent** with the value **0.00**

<div>.....</div> <div>▼</div>						
Manage						
	Coverage-Usage	Coverage-Usage UOM	Coverage-Duration	Coverage-Percent		
4	10000	KM	1y	0.00		

Enter the text **50**.

<div>.....</div> <div>▼</div>						
Manage						
	Coverage-Usage	Coverage-Usage UOM	Coverage-Duration	Coverage-Percent		
4	10000	KM	1Y	50		



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Click on the back button

Central

test v ← Warranty Policy List | Work Date: 1/25/2024

Custom Search + New

Headline

Go

Warranty Policy No. ↑

SN00001

SN00002

→ SN00003

SN00003

General

Warranty Policy No. .... SN00003

Description ..... Warranty Policy 2

Warranty Vendor .....

Click on the back button

Central

test warranties | Service v P ← Warranty Policy List | Work Date: 1/25/2024

Customers Vendors Items Bank

Headline

Good morning

Warranty Policy No. ↑

SN00001

SN00002

→ SN00003

Description

nissan 2

bobcat

Warranty

### 3.6.3. How to Assign Warranties to Service Units

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

Actions

+ Service Ticket Quote + Purchase Quote > Find entries..

+ Service Ticket + Purchase Order > New

+ Service Unit + Purchase Invoice > Payments

+ Service Template > Service Management > Reports

+ Sales Quote > Service > Excel Report

+ Sales Order > Planned Maintenance

+ Sales Invoice > Warranty

Click on the navigation menu item **Open the list of service units.**

+ Sales Quote

+ Sales Order

+ Sales Invoice

Service Management Setup

Service Ticket Types

Maintenance Groups

Service Templates

Service Checklists

Service Units

Manufacturers

Models

Service statuses

Service Unit Meter Worksheet



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Select the Service Unit you wish to assign a warranty to.  
Click on the link in cell **Service Unit No.** with the value **SU00010**

Get started: Complete a few steps	
Service Activities	
Service Tickets - Note	Service Tickets - Open
17	
SU00005	2015 Ford F150
SU00006	2016 Ford F150
SU00007	2017 Bobcat S70 Skid-Steer ..
SU00008	2017 Bobcat S450 Skid-Steer.
SU00009	2018 Bobcat S70 Skid-Steer ..
<b>SU00010</b>	2018 Bobcat S450 Skid-Steer.
Open record "SU00010"	

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

Dynamics 365 Business Central	
Service Unit Card   Work Date: 1/25/2024	
SU00010	
Actions	<b>Related</b>
General	
Service Unit No.	SU00010
Description	2018 Bobcat S450 Skid-Steer Loader
Serial No.	

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

Service Ledger Entries	
Attachments	
<b>Service Unit Warranties</b>	
View/Edit the service unit warranties for the selected	
Link Description	
Service Status	
Default Meter Code	ODOMETER

Click on the navigation menu item **New**

Service Unit Warranties   Work Date: 1/25/2024	
Search	<b>+ New</b>
Create a new entry.	
Service Unit No. ↑	Warranty Policy No. ↑
(There is nothing)	



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Click on the lookup button **Warranty Policy No.**

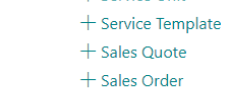
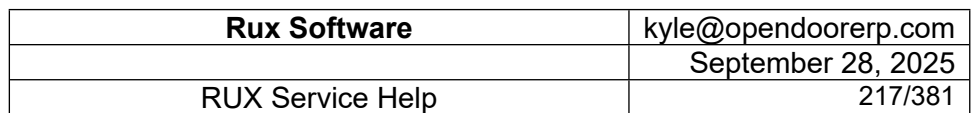
Select the Warranty Policy you wish to be assigned to this unit  
Click on the link in cell **Warranty Policy No.** with the value **SN00003**

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**






The screenshot shows the 'Service Management Setup' menu in Dynamics 365. The menu is open, displaying a list of options. The 'Service Templates' option is highlighted with a red rectangle. Below the 'Service Templates' option, there is a sub-menu item that reads 'Open the list of service templates where you can se'. The other options in the menu are 'Service Ticket Types', 'Maintenance Groups', 'Service Checklists', 'Service Units', 'Manufacturers', and 'Models'. On the left side of the screenshot, there is a sidebar with a list of service-related items: 'Service Unit', 'Service Template', 'Sales Quote', 'Sales Order', and 'Sales Invoice'. On the right side, there is a list of reports: 'Payments', 'Reports', and 'Excel Report'.

Service Management Setup	Service Templates
Service Ticket Types	Open the list of service templates where you can se
Maintenance Groups	
Service Checklists	
Service Units	
Manufacturers	
Models	

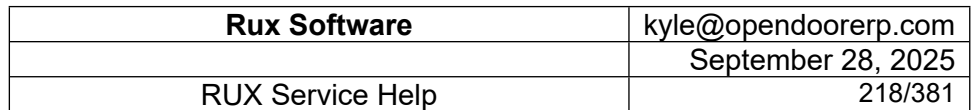
The screenshot shows a table with the following data:

Template No.	Template Type	Description
20KSERVICE	All	20,000 KM S
40KSERVICE	All	40,000 KM S
50POINTINS...	All	50 point insp
OILCHANGE-LT	All	Oil Change
OILCHANGE-...	All	Oil Change
REPLAC	Open record "OILCHANGE-SS"	Replace Air f
REPLACEAIRF...	All	Replace Air f
ROTATETIRES	All	Rotate Tires
SKIDSTEERGE...	All	Skid Steer G




The screenshot shows the 'Edit Item' dialog box. The 'Edit' button, represented by a pencil icon, is highlighted with a red square. A tooltip message 'make changes on the page.' is visible below the button. The dialog also contains a 'Cancel' button and a 'Save' button.

<div> <div></div> <div>▼</div> </div>		Total Price .....
	Ticket Detail Line Type	Warranty Type
Change	Both Budget an...	1.00
	Both Budget an...	1.00
	Both Budget an...	1.00
V30	Both Budget an...	6.00



Ticket Detail Line Type	Warranty Type	Quantity	U
Both Budget an...	<input type="text" value="kl"/>	1.00	
Both Budget an...	CHICAGO, IL	Description	
Both Budget an...	LIMITED	General	
Both Budget an...	POWER TRAIN	limited	
	Power Train		
	<input type="text" value="Select record 'POWER TRAIN'"/>		
	+ New		

Ticket Detail Line				
Type	Warranty Type	Quantity	Unit Cost	
Both Budget an...	POWER TRAIN	1.00	22.25	
Both Budget an...	POWER TRAIN	1.00	3.50	
Both Budget an...	POWER TRAIN	1.00	0.50	
Both Budget an...	POWER TRAIN 	6.00	2.25	

[illegible][illegible]



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Select the Service Unit that has the warranty applied to it.  
Click on the link in cell **Service Unit No.** with the value **SU00010**

SU00004	2016 NISSAN Frontier
SU00005	2015 Ford F150
SU00006	2016 Ford F150
SU00007	2017 Bobcat S70 Skid-Steer ...
SU00008	2017 Bobcat S450 Skid-Steer...
SU00009	2018 Bobcat S70 Skid-Steer ...
SU00010	2018 Bobcat S450 Skid-Steer...

Select record "SU00010"

Click on the button **Yes**

Starting Date .....  
Ending Date .....

? This service unit no. exists on other active service ticket(s) (ST00018). Do you want to proceed adding it to this ticket?

Yes No

Salesperson .....

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

Contact No. .... CT000008  
Phone No. ....  
Mobile Phone No. ....  
Email ..... mr.andy.teal@contoso.com

Ticket Units/Lines **Manage** Line Fewer options

Task Type	ODT Service Unit No.	Serial No.	Description
→ Heading	SU00010		2018 Bob

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

Phone No. ....  
Mobile Phone No. ....  
Email ..... mr.andy.teal@contoso.com

Ticket Units/Lines **Manage** Line Fewer options

New Line Delete Line **Add Service Template** Service Unit Met

Task Type	ODT Service Unit No.	Serial No.	Description
→ Heading	SU00010		2018 Bob



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Select the service that will be performed under warranty  
Click on the link in cell **Template No.** with the value **OILCHANGE-SS**

Template No.	Template Type	Description
OILCHANGE-SS	All	Oil Change
REPLACEAIR	All	Replace Air Filter
SKIDSTEERG...	All	Skid Steer Gen...

The Is Warrantable field can be used to toggle if the service is being performed under warranty.  
Click on **Is Warrantable**

Total Cost	Billable (Total Price)	Billable (Invoiced Price)	Service Status	Is Warrantable
-	-	-		<input type="checkbox"/>
-	154.00	-		<input type="checkbox"/>

Notice that the Total Price has been reduced, based on what was specified during the warranty setup.

Budget (Total Cost)	Actual (Total Cost)	Billable (Total Price)	Billable (Invoiced Price)	Service Status
-	-	-	-	
24	39.75	76.99	-	

Open record "76.99"

## 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

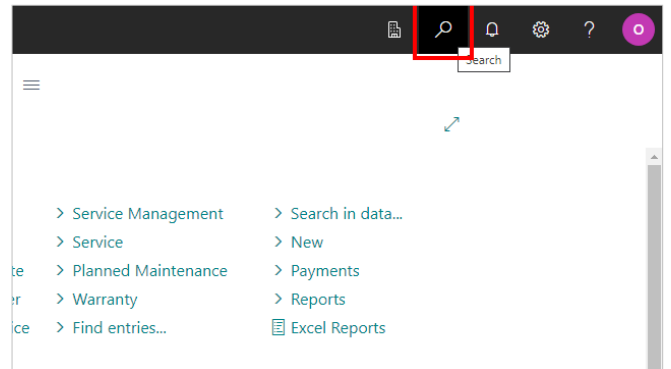
The Apply Maintenance Expense feature allows you to post service costs back to a fixed asset or item that has been linked to a service unit. Apply Maintenance Expense can be used from both Service Tickets and Planned Maintenance Tickets.

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.

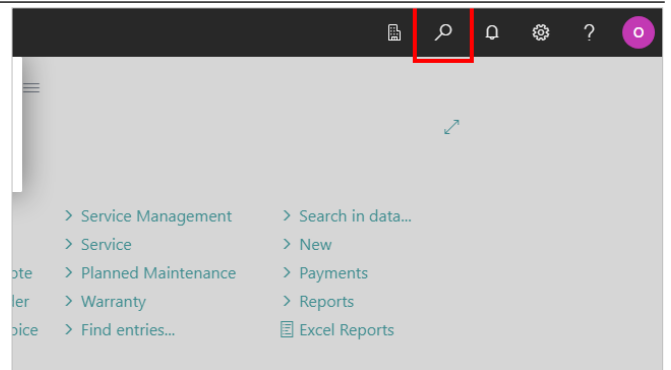


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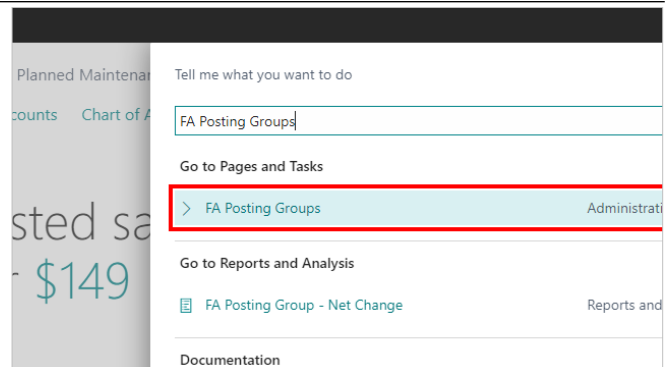
Click on the button **Search**



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.

10800	10800	10800		
10800	10800	10800		
10800	10800	10800		
10800	10800	10800		
10800	10800	10800		
10800	10800	10800		
10800	10800	10800	61200	
			61200	



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Apply Maintenance Expense can be used with either Fixed Assets or Items .  
If using items, they must have Serial Numbers set up.

Planning >

Item Tracking

Item Tracking Code ..... SNALL

Serial Nos. .... SN1

Warehouse >

Service >

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

Purchasing ▾ | ≡

ons

Service Ticket Quote	+ Sales Order	> Service Management ▾	> Search in de
Service Ticket	+ Sales Invoice	> Service	> New
Service Unit	+ Purchase Quote	> Planned Maintenance	> Payments
Service Template	+ Purchase Order	> Warranty	> Reports
Sales Quote	+ Purchase Invoice	> Find entries...	Excel Repor

Click on the navigation menu item **Open the list of service units.**

Service Ticket	+ Sales Invoice	Service Management Setup	> New
Service Unit	+ Purchase Quote	Service Ticket Types	> Payments
Service Template	+ Purchase Order	Maintenance Groups	> Reports
Sales Quote	+ Purchase Invoice	Service Templates	Excel Repor
		Service Checklists	
		Service Units	Open the list of service units
		Manufacturers	Show demo
		Models	
		Service statuses	
		Service Unit Meter Worksheet	

Click on the link in cell **Service Unit No.** with the value **SU00015**

SU00007	2017 Bobcat S70 Skid-Steer ...		
SU00008	2017 Bobcat S450 Skid-Steer...		
SU00009	2018 Bobcat S70 Skid-Steer ...		
SU00010	2018 Bobcat S450 Skid-Steer...		
SU00011	Bobcat	Fixed Asset	FA000100
SU00015	Flatbed Truck	Fixed Asset	FA00011Q
SUT00002	Delivery truck		



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Ensure that the Fixed Asset or Item is linked to a Service Unit

General

Service Unit No.

SU00015

Description

Flatbed Truck

Serial No.

Link Type

Fixed Asset

No.

FA000110

Customer

Apply Maintenance Expense will only work for Internal Customers

Payments >

Shipping >

Statistics >

Service

Internal Customer

☒

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

PurchasingShopify

Service Ticket Quote

+ Sales Order

> Service Management

> Search in da

Service Ticket

+ Sales Invoice

> Service

> New

Service Unit

+ Purchase Quote

> Planned Maintenance

> Payments

Service Template

+ Purchase Order

> Warranty

> Reports

Sales Quote

+ Purchase Invoice

> Find entries...

Excel Repor

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

PurchasingShopify

Service Ticket Quote

+ Sales Order

> Service Management

> Search in c

Service Ticket

+ Sales Invoice

\* Service Management Setup

> New

Service Unit

+ Purchase Quote

Service Ticket Type

View or edit settings for Service Ma

Service Template

+ Purchase Order

Maintenance Groups

> Reports

Sales Quote

+ Purchase Invoice

Service Templates

Excel Repc

Service Checklists



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Service Management Setup contains to toggle between manually or automatically posting maintenance expense for fixed assets and items.

▼	Allow Multiple Clocking .....	<input checked="" type="radio"/>
▼	Auto Assign User on Clock In .....	<input checked="" type="radio"/>
▼	Prompt to Clock In/Out on Task .....	Always
▼	Prompt to Change Status .....	Always
▼	Maintenance Expense Amount Type .....	Total Price
	Show Journal and Post Manually FA Expense .....	<input checked="" type="radio"/>
▼	Show Journal and Post Manually Item Expense .....	<input checked="" type="radio"/>
▼		
▼		

The automatic or manual posting of Items and Fixed Assets can be toggled separately.

▼	Auto Assign User on Clock In .....	<input checked="" type="radio"/>
▼	Prompt to Clock In/Out on Task .....	Always
▼	Prompt to Change Status .....	Always
▼	Maintenance Expense Amount Type .....	Total Price
	Show Journal and Post Manually FA Expense .....	<input checked="" type="radio"/>
▼	Show Journal and Post Manually Item Expense .....	<input checked="" type="radio"/>
▼		
▼		
▼	Calendar to Use .....	STANDARD

Click on **Maintenance Expense Amount Type Total Cost Total Price**

▼	Show Completed Task Queue .....	<input checked="" type="radio"/>
▼	Allow Multiple Clocking .....	<input checked="" type="radio"/>
▼	Auto Assign User on Clock In .....	<input checked="" type="radio"/>
▼	Prompt to Clock In/Out on Task .....	Always
▼	Prompt to Change Status .....	Always
▼	Maintenance Expense Amount Type .....	Total Price
	Show Journal and Post Manually FA Expense .....	<input checked="" type="radio"/>
▼	Show Journal and Post Manually Item Expense .....	<input checked="" type="radio"/>
▼		

Click on the field **Maintenance Expense Amount Type**

.....	<input checked="" type="radio"/>
.....	<input checked="" type="radio"/>
.....	<input checked="" type="radio"/>
c .....	Always
.....	Always
Type .....	Total Price
y FA Expense .....	<input checked="" type="radio"/>
y Item Expense .....	<input checked="" type="radio"/>





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Click on the item **Total Price** in the list

A screenshot of a software interface showing a dropdown menu. The menu is open, displaying three options: 'Total Price', 'Total Cost', and 'Total Price'. The 'Total Price' option at the bottom is highlighted with a blue background and a red border. Above the dropdown, there are two 'Always' labels and a 'Total Price' label.

### 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

A screenshot of a software interface showing the 'General' tab of a service ticket form. The form includes fields for Customer Name (Adatum Corporation), Description (Service Ticket #ST00014 - Adatum Corpora), Order Date (4/11/2022), Service Date (4/11/2022), and Contact (Robert Townes). A red box highlights the 'General' tab header.

Click on the lookup button **Default Service Unit No.**

A screenshot of a software interface showing the 'Default Service Unit No.' lookup button. The button is highlighted with a red box. Below the button, there is a text input field with the value 'SU00015' and a 'Choose a value for Default Service Unit No.' button.

Click on the link in cell **Service Unit No.** with the value **SU00015**

A screenshot of a software interface showing the 'Service Unit No.' lookup results. The results are displayed in a table with columns for 'Service Unit No.' and 'Description'. The row with 'SU00015' and 'Flatbed Truck' is highlighted with a red box.

Service Unit No.	Description
SU00005	2015 Ford F150
SU00006	2016 Ford F150
SU00007	2017 Bobcat S70 Skid-Steer ..
SU00008	2017 Bobcat S450 Skid-Steer..
SU00009	2018 Bobcat S70 Skid-Steer ..
SU00010	2018 Bobcat S450 Skid-Steer..
SU00011	Bobcat
SU00015	Flatbed Truck
SUT00002	Delivery truck



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After creating the ticket, the Apply Maintenance Expense toggle must be enabled  
Click on the toggle field **Apply Maintenance Expense**

Assigned Technician	
Location Code	
Open PO Lines Exist	No
Service Ticket Status	PENDING
Apply Maintenance Expense	<input checked="" type="checkbox"/>
Salesperson	JO

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

Service Date	4/11/2022
Contact	Robert Townes
Service Ticket Type	
Default Service Unit No.	SU00015
Ticket Units/Lines	<b>Manage</b> Line Fewer options
New Line Delete Line Add Service Template Service Unit Met	
→ Heading	SU00015 Flatbed Truck

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

Contact	Robert Townes
Service Ticket Type	
Default Service Unit No.	SU00015
Ticket Units/Lines	Manage Line Fewer options
New Line Delete Line <b>Add Service Template</b> Service Unit Met	
→ Heading	SU00015 Flatbed Truck

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

Service Templates			
Template No.	Template Type	Description	
→ 20KSERVICE	All	20,000 KM Se	
40KSERVICE	All	40,000 KM Se	
50POINTINS...	All	50 point inspe	
<b>OILCHANGE...</b>	All	Oil Change	
REPLACEAIR...	All	Replace Air Fi	
ROTATETIRES	All	Rotate Tires	



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The Apply Maintenance Expense checkbox is used to specify which service templates will be applied as a maintenance expense

Total Price)	Billable (Invoiced Price)	Service Status	Is War...	Apply Mai... Exp...
—	—		<input type="checkbox"/>	<input type="checkbox"/>
13.25	—	PENDING	<input type="checkbox"/>	<input type="checkbox"/>

Click on **Apply Maintenance Expense**

Total Price)	Billable (Invoiced Price)	Service Status	Is War...	Apply Mai... Exp...
—	—		<input type="checkbox"/>	<input type="checkbox"/>
13.25	—	PENDING	<input type="checkbox"/>	<input type="checkbox"/>

Click on the navigation menu item **Home**

Dynamics 365 Business Central

Service Ticket

ST00015 · Service Ticket #ST00015 - Adatu

Home Report Ticket Actions Automate Fewer options

Dimensions Statistics Ledger Entries Sales Invoices/Credit M

General

Customer Name ..... Adatum Corporation

Description ..... Service Ticket #ST00015 - Adatum Corpora

Before applying the maintenance expense, Confirm Actuals must be ran.  
Click on the navigation menu item **Confirm Actuals**

Dynamics 365 Business Central

Service Ticket

ST00015 · Service Ticket #ST00015 - Adatu

Home Report Ticket Actions Automate Fewer options

Add Service Template Confirm Actuals View Job Journal Cre

Confirm actuals to post usage for the current s

General

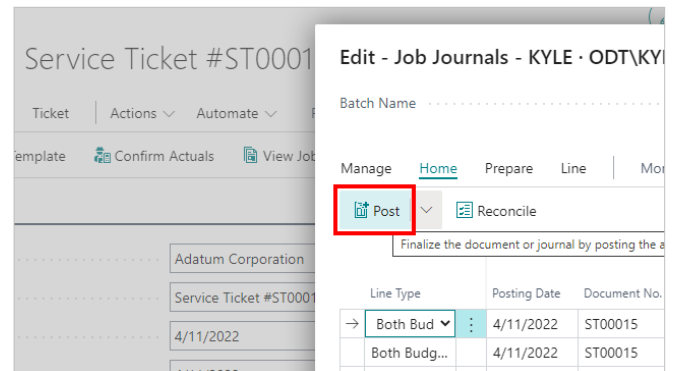
Customer Name ..... Adatum Corporation

Description ..... Service Ticket #ST00015 - Adatum Corpora

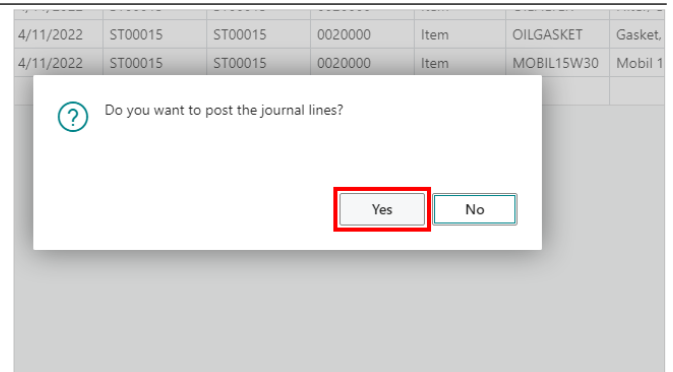


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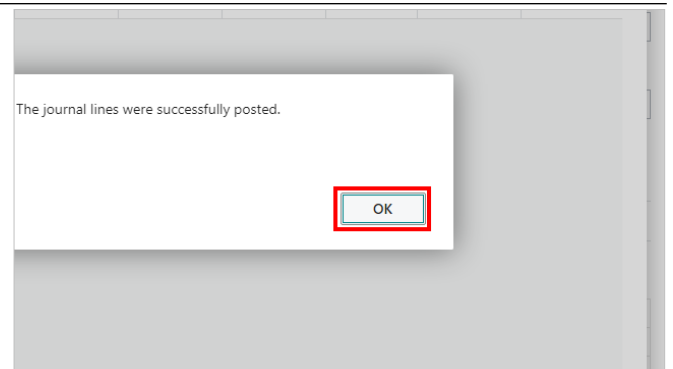
Click on the navigation menu item **Post**



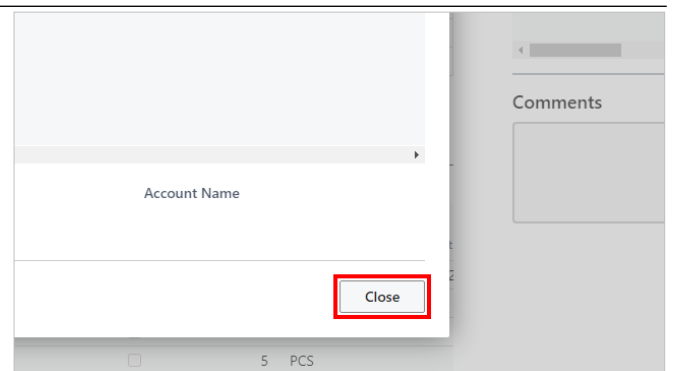
Click on the button **Yes**



Click on the button **OK**



Click on the button **Close**





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Now that Confirm Actuals has been ran, the Apply Maintenance Expense action can be ran  
Click on the navigation menu item popup **Actions**

Dynamics 365 Business Central

Service Ticket

ST00015 · Service Ticket #ST00015 - Adatum Corporation

Home Report Ticket **Actions** Automate Fewer options

Add Service Template Confirm Actuals View Job Journal Create

General

Customer Name Adatum Corporation

Description Service Ticket #ST00015 - Adatum Corporation

Click on the navigation menu item **Apply Maintenance Expense**

Dynamics 365 Business Central

Service Ticket

ST00015 · Service Ticket #ST00015 - Adatum Corporation

Home Report Ticket Actions Automate Fewer options

Add Service Template **Apply Maintenance Expense** Journal Create

Other Apply the maintenance expense of the current

General

Customer Name Adatum Corporation

Description Service Ticket #ST00015 - Adatum Corporation

Click on the button **Yes**

Service Ticket Status PENDING

Apply Maintenance Expense

Are you sure you want to post the maintenance expenses from this service ticket to the linked fixed asset?

Yes No

Budget (Total Cost)	Actual (Total Cost)	Billable (Total Price)	Billable (Invoiced Price)	Service Status	Is War
-	-	-	-	PENDING	
37.50	37.50	143.25	-	PENDING	

Now that the maintenance has been applied, we can view it from the Fixed Asset card.

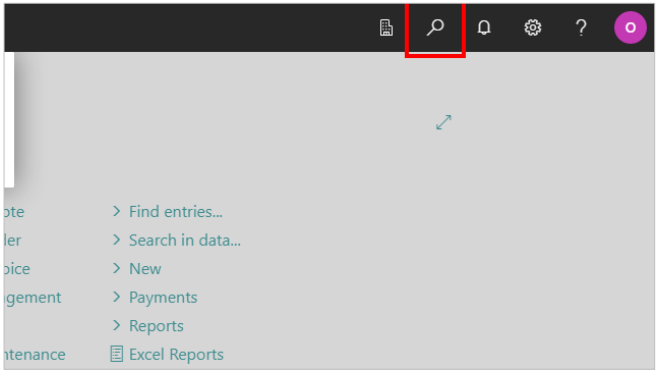
Click on the button **Search**

Find entries...  
Search in data...  
New  
Payments  
Reports  
Excel Reports

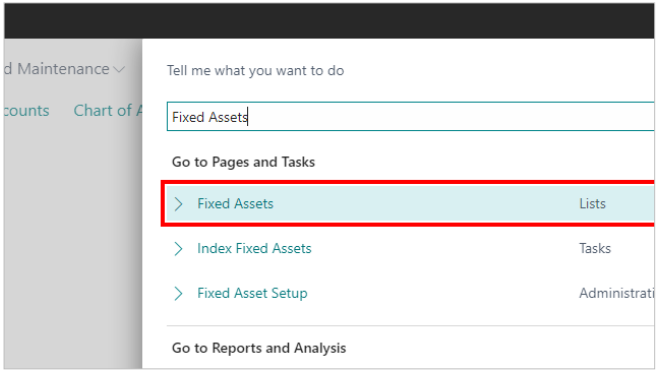


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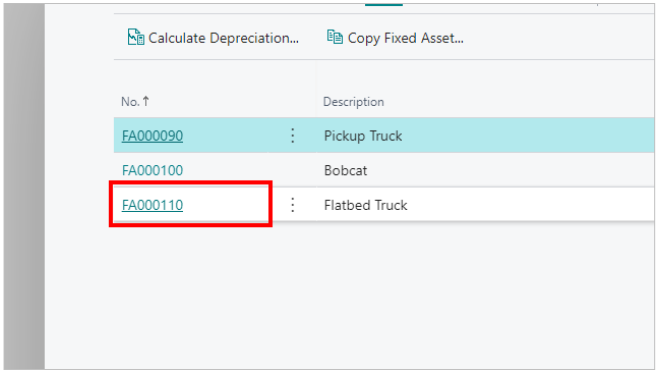
Enter the text **Fixed Assets**.



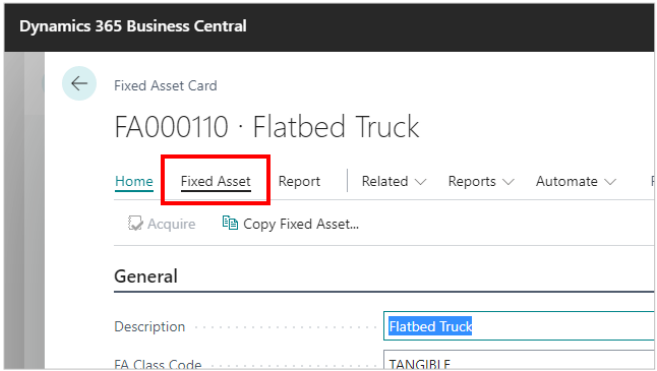
Click on **Fixed Assets Lists** ☐



Click on the link in cell **No.** with the value **FA000110**



Click on the navigation menu item **Fixed Asset**





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Click on the navigation menu item **Statistics**

Dynamics 365 Business Central

Fixed Asset Card

FA000110 · Flatbed Truck

Home Fixed Asset Report Related Reports Automate

Dimensions **Statistics** Comments Attachments Depreciation

General View detailed historical information about the fixed asset. (F7)

Description Flatbed Truck

FA Class Code TANGIBLE

Notice that some of the amounts have now been updated.

	0.00
	0.00
	0.00
Last FA Posting Date	Amount
4/11/2022	1,037.50
	0.00
	0.00
	0.00
	0.00

Click on **Amount**

	0.00
	0.00
	0.00
Last FA Posting Date	Amount
4/11/2022	1,037.50
	0.00
	0.00
	0.00
	0.00

Notice that a new FA Ledger Entry has been added.

FA Ledger Entries Search Find entries... Cancel entries...

FA Posting Date	Document Type	Document No.	FA No.	Depreciation Book Code
4/11/2022	Invoice	G05003	FA000110	COMPANY
4/11/2022	Invoice	G05004	FA000110	COMPANY



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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.

Item Code	Quantity	Amount	Unit Cost (Calculated)	Inventory Value (Calculated)	Unit (Revaluation)
	1	0.00	85.00	85.00	85.00
	1	0.00	10.00	10.00	10.00
	1	0.00	10.00	10.00	10.00
	1	0.00	10.00	10.00	10.00
	1	0.00	10.00	10.00	10.00

## 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.

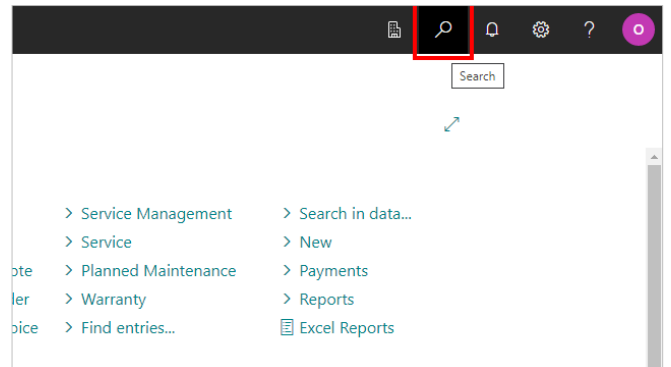
The following demonstrates how to set up and use the Visual Resource Scheduler.



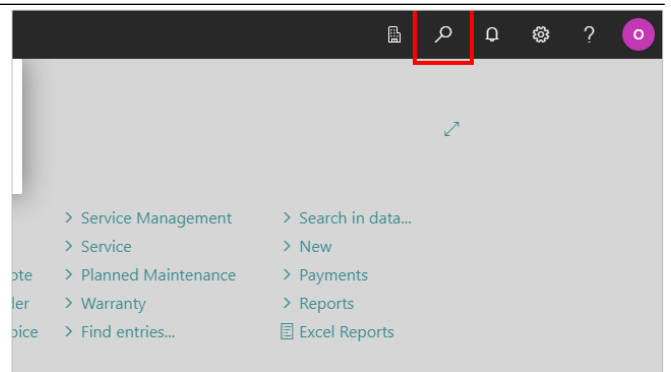
### 3.8.1. How to set up the Visual Resource Scheduler

To use the Visual Resource Scheduler, you must have a Base Calendar set up

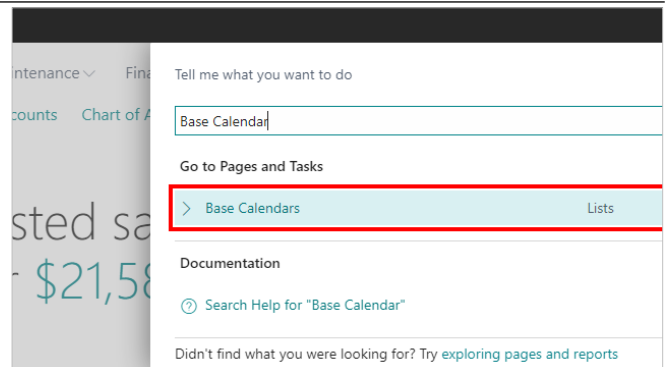
Click on the button **Search**



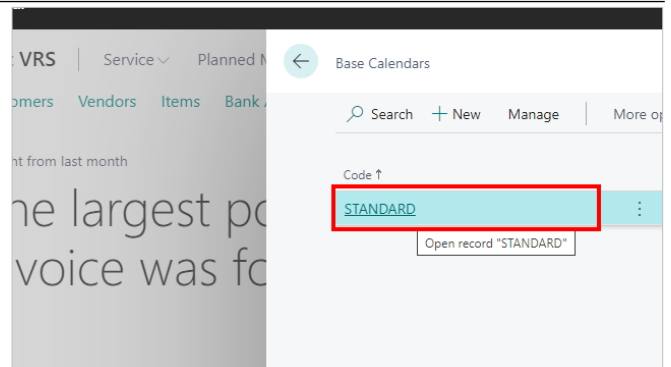
Enter the text **Base Calendar**.



Click on **Base Calendars Lists** ☐



Click on **Code**



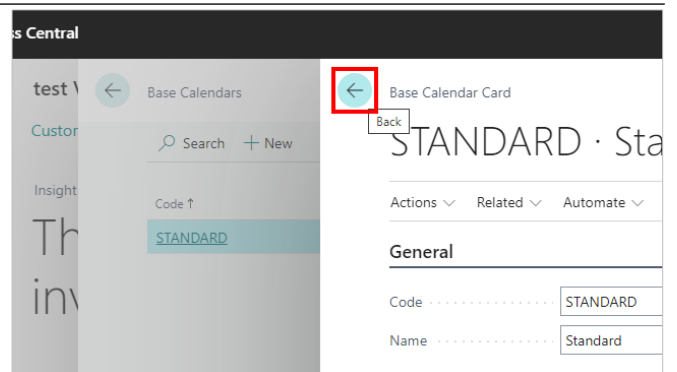


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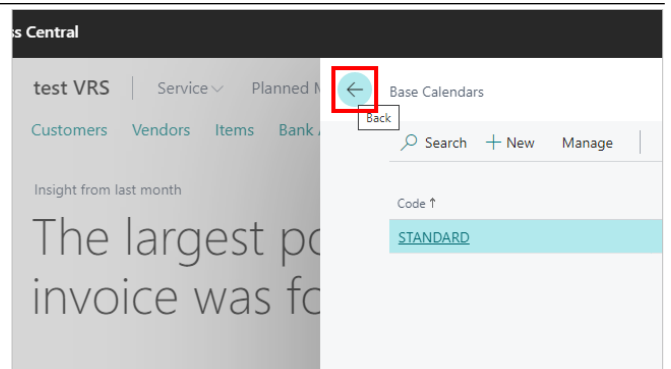
The dates in the Visual Resource Scheduler will display according to what is specified in the Base Calendar.

Lines			
	Date ↑		Day ↑
→	4/10/2023	:	Monday
	4/11/2023		Tuesday
	4/12/2023		Wednesday
	4/13/2023		Thursday
	4/14/2023		Friday
	4/15/2023		Saturday
	4/16/2023		Sunday
	4/17/2023		Monday
	4/18/2023		Tuesday
	4/19/2023		Wednesday

Click on the back button

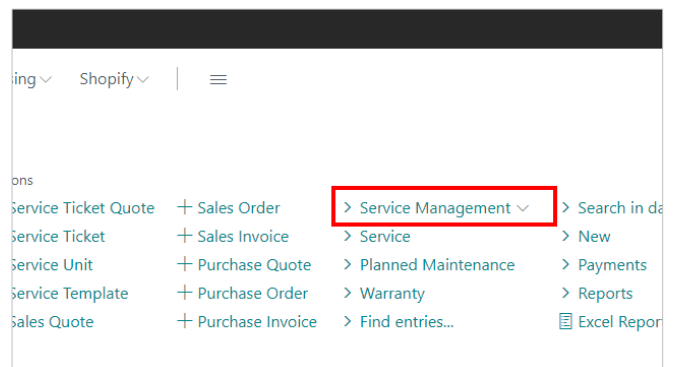


Click on the back button



There are some additional settings that can be configured in Service Management Setup.

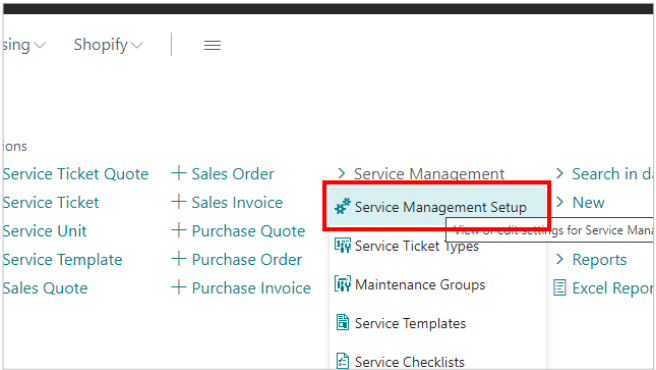
Click on the navigation menu item popup **Service Management**





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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.

Prompt to Clock in/Out on task

Always

Prompt to Change Status

Always

Calendar to Use

STANDARD

1.00

Work Start Time

8:00:00 AM

Work End Time

5:00:00 PM

Click on the lookup button **Calendar to Use**

Always

Always

STANDARD

Choose a value for Calendar to Use

8:00:00 AM

5:00:00 PM

Click on STANDARD

se

ne

e

STANDARD

Code ↑

→ STANDARD

Select record "STANDARD"

+ New



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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.

Posted Planned Maint. Inv. Nos. .... PWT-INV+

Warranty Policy Nos. .... WTY-POL

Filter Service Units By Customer No. .... ☐

**Visual Resource Scheduler**

Schedule View ..... Resource Time line Day

Resource Default End Hour .....

Hide Weekend ..... ☐

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.

warranty Policy Nos. .... WTY-POL

Filter Service Units By Customer No. .... ☐

**Visual Resource Scheduler**

Schedule View ..... Resource Time line Day

Resource Default End Hour .....

Hide Weekend ..... ☐

The Hide Weekend field will toggle if weekends are displayed on the Visual Resource Scheduler

Filter Service Units By Customer No. .... ☐

**Visual Resource Scheduler**

Schedule View ..... Resource Time line Day

Resource Default End Hour .....

Hide Weekend ..... ☒

Work Start Time specifies what time the work day starts on the Visual Resource Scheduler.

▼ Prompt to Change Status ..... Always

▼ Calendar to Use ..... STANDARD

1.00 Work Start Time ..... 8:00:00 AM

Work End Time ..... 5:00:00 PM



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Work End Time specifies what time the work ends starts on the Visual Resource Scheduler.

1.00

Calendar to Use ..... STANDARD

Work Start Time ..... 8:00:00 AM

Work End Time ..... 5:00:00 PM

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

1.00

line Week

Work Start Time ..... 8:00:00 AM

Work End Time ..... 5:00:00 PM

Create Labor Line ..... ☒

Default List ..... Tickets/Tasks

Click on the back button

Dynamics 365 Business Central

←

Back

Service Management Setup

Create Default Data Automate Fewer options

General

Service Unit Nos. .... SERV-UNI

Automatic Service Unit Nos. ....

Service Ticket Nos. .... SERV-TIX

Next, you must configure the resources that will appear in the Visual Resource Scheduler.

Click on the button **Search**

Search

> Service Management

> Service

> Planned Maintenance

> Warranty

> Find entries...

> Search in data...

> New

> Payments

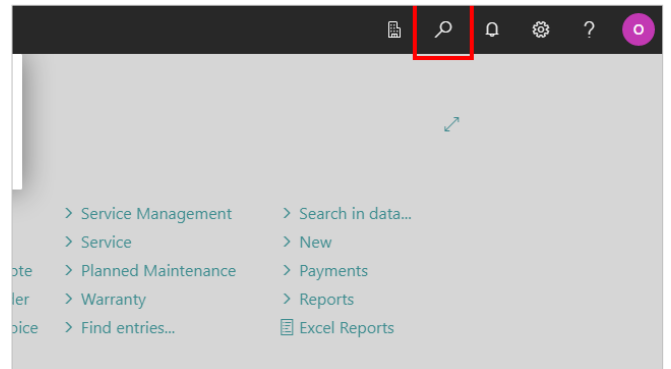
> Reports

Excel Reports

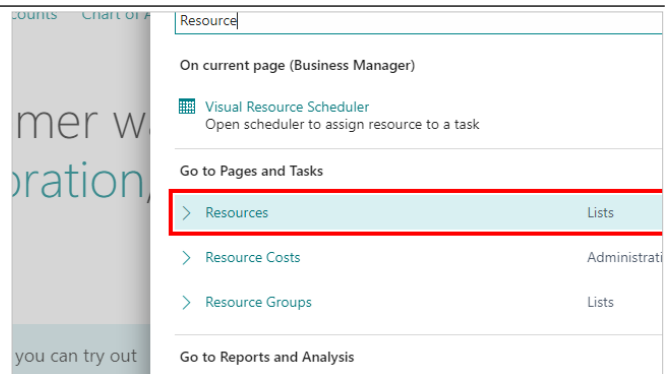


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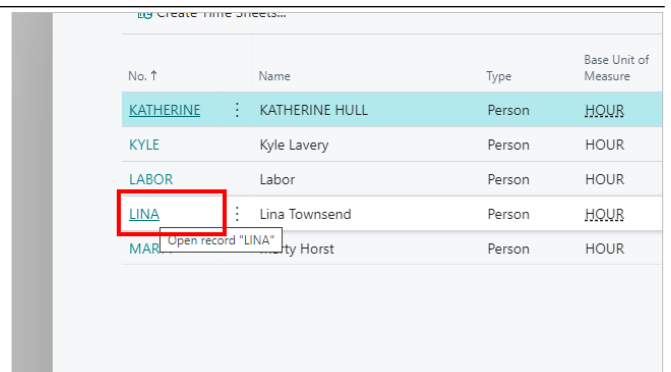
Enter the text **Resource**.



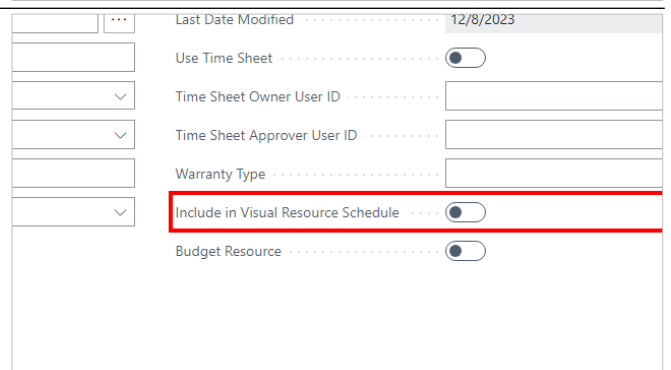
Click on **Resources Lists** ☐



Click on **No.**



The Include In Visual Resource Scheduler option will toggle which resources will appear in the scheduler





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Click on the toggle field **Include in Visual Resource Schedule**

A screenshot of a settings form. The 'Include in Visual Resource Schedule' toggle is highlighted with a red box and is currently turned on. Other fields include 'Last Date Modified' (12/0/2023), 'Use Time Sheet' (toggle off), 'Time Sheet Owner User ID', 'Time Sheet Approver User ID', 'Warranty Type', and 'Budget Resource' (toggle off).

Resources displayed in the visual scheduler will be sorted based on there Resource Group.

A screenshot of a resource details form for 'Lina Townsend'. The 'Resource Group No.' field is highlighted with a red box and contains the value 'TEAM 2'. Other fields include 'No.' (LINA), 'Type' (Person), 'Base Unit of Measure' (HOUR), 'Search Name' (LINA TOWNSEND), 'Blocked' (toggle off), and 'Invoicing'.

### 3.8.2. How to use the Visual Resource Scheduler

Click on the button **Search**

A screenshot of the Visual Resource Scheduler interface. The 'Search' button in the top right corner is highlighted with a red box. The interface shows a list of resources with columns for 'Find entries...', 'Search in data...', 'New', 'Payments', 'Reports', and 'Excel Reports'.

Enter the text **Visual Resource Scheduler**.

A screenshot of the Visual Resource Scheduler interface. The 'Search' button in the top right corner is highlighted with a red box. The interface shows a list of resources with columns for 'Find entries...', 'Search in data...', 'New', 'Payments', 'Reports', and 'Excel Reports'.



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Click on **Visual Resource Scheduler**  
**Administration** ☐

Visual Resource Scheduler

On current page (Business Manager)

Visual Resource Scheduler

Open scheduler to assign resource to a task

Go to Pages and Tasks

> Visual Resource Scheduler

Administration

> Visual Resource Scheduler Entries

Lists

Documentation

Search Help for "Visual Resource Scheduler"

On the left side of the screen is a list of the resources that were configured to display on the visual scheduler, sorted by Resource Group

Visual Resource Scheduler

Today Previous Next Visual Resource Schedule Entries

Start Date: 06/06/23

Resources

TEAM 1

KATHERINE

LABOR

TEAM 2

KYLE

8:00 AM

9:00 AM

10:00 AM

The center of the screen displays the days and times that can be scheduled.

Visual Resource Schedule Entries Expand All Collapse All Refresh Day Week

Tuesday, June 6, 2023

9:00 AM

10:00 AM

11:00 AM

12:00 PM

1:00 PM

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.

Tickets/Tasks

4:00 PM

School of Fine Art ST00003

SU00007 2017 Bobcat S70 Skid-Steer Loader Shop Supply

Alpine Ski House ST00004

SU00005 2015 Ford F150 Oil Change

Alpine Ski House ST00005

SU00004 2016 NISSAN Frontier Replace Air Filter

Adatum Corporation ST00007

SU00003 2015 NISSAN Frontier Oil Change

Trey Research ST00009

SU00009 2018 Bobcat S70 Skid-Steer Loader Replace Air

Adatum Corporation ST00010

To assign a ticket or task, click and drag an item from the list on the right, to the schedule in the center.





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Click and hold the left mouse button on **Adatum Corporation ST00017**

SU00009 2018 Bobcat S70 Skid-Steer Loader Replace Air
Adatum Corporation ST00010
SU00006 2016 Ford F150 Oil Change
Trey Research ST00011
SU00008 2017 Bobcat S450 Skid-Steer Loader Oil Change
Trey Research ST00012
SU00005 2015 Ford F150 Oil Change
Alpine Ski House ST00014
SU00005 2015 Ford F150 Rotate Tires
Adatum Corporation ST00017
SU00005 2015 Ford F150 Labor - Lube
SU00005 2015 Ford F150 Oil Change
SU00005 2015 Ford F150 Rotate Tires
SU00005 2015 Ford F150 50 point inspection

Release the left mouse button on the link **Adatum Corporation ST00017**

ash

Day

Week

Month

June 7, 2023

1:00 PM

2:00 PM

3:00 PM

4:00 PM

Tickets,

Adatum Corporation 51

School of F

SU00007

Alpine Ski I

SU00005

Alpine Ski I

SU00004

Adatum Co

SU00003

Trey Resea

SU00009

Adatum Co

Notice that all tasks that were part of the ticket have now been assigned to the resource

June 7, 2023	1:00 PM	2:00 PM	3:00 PM	4:00 PM	Tickets,
			SU00005 2015 Ford F150		School of F
			SU00005 2015 Ford F150		SU00007
			SU00005 2015 Ford F150		Alpine Ski
			SU00005 2015 Ford F150		SU00005
					Alpine Ski
					SU00004
					Adatum Co
					SU00003
					Trey Resea
					SU00009
					Adatum Co
					SU00006
					Trey Resea
					SU00008

You can also assign tasks individually

Click and hold the left mouse button on **SU00003 2015 NISSAN Frontier Oil Change**

	4:00 PM	Tickets/Tasks
		School of Fine Art ST00003
		SU00007 2017 Bobcat S70 Skid-Steer Loader Shop Supply
		Alpine Ski House ST00004
		SU00005 2015 Ford F150 Oil Change
		Alpine Ski House ST00005
		SU00004 2016 NISSAN Frontier Replace Air Filter
		Adatum Corporation ST00007
		SU00003 2015 NISSAN Frontier Oil Change
		Trey Research ST00009
		SU00009 2018 Bobcat S70 Skid-Steer Loader Replace Air
		Adatum Corporation ST00010
		SU00006 2016 Ford F150 Oil Change
		Trey Research ST00011
		SU00008 2017 Bobcat S450 Skid-Steer Loader Oil Change
		Trey Research ST00012
		SU00005 2015 Ford F150 Oil Change



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Release the left mouse button on the link **SU00003 2015 NISSAN Frontier Oil Change**

June 8, 2023					Tickets
1:00 PM	2:00 PM	3:00 PM	4:00 PM		School of F
					SU00007
					Alpine Ski I
					SU00005
					Alpine Ski I
					SU00004
					Adatum Co
					SU00003
					Trey Resea
					SU00009
					Adatum Co
					SU00006
					Trey Resea
					SU00008
					Trey Resea
					SU00005

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**

June 8, 2023					Tickets
1:00 PM	2:00 PM	3:00 PM	4:00 PM		School of F
					SU00007
					Alpine Ski I
					SU00005
					Alpine Ski I
					SU00004
					Adatum Co
					SU00003
					Trey Resea
					SU00009
					Adatum Co
					SU00006
					Trey Resea
					SU00008
					Trey Resea
					SU00005

Service Unit: SU00003  
2015 NISSAN Frontier Task:  
Oil Change Ticket: ST00007  
Status: Released Start  
Date:06/08/23 Start Time:  
3:00:00 PM,End  
Date:06/08/23,End Time:  
4:00:00 PM

Release the left mouse button on the link **SU00003 2015 NISSAN Frontier Oil Change ST00007 Status: Released**

June 8, 2023					Tickets
1:00 PM	2:00 PM	3:00 PM	4:00 PM		School of F
					SU00007
					Alpine Ski I
					SU00005
					Alpine Ski I
					SU00004
					Adatum Co
					SU00003
					Trey Resea
					SU00009
					Adatum Co
					SU00006
					Trey Resea
					SU00008
					Trey Resea
					SU00005

Service Unit: SU00003  
2015 NISSAN Frontier Task:  
Oil Change Ticket: ST00007  
Status: Released Start  
Date:06/08/23 Start Time:  
3:00:00 PM,End  
Date:06/08/23,End Time:  
5:00:00 PM

The same task can be assigned to multiple technicians.

Click and hold the left mouse button on **SU00003 2015 NISSAN Frontier Oil Change**

Tickets/ Tasks	
4:00 PM	School of Fine Art ST00003
	SU00007 2017 Bobcat S70 Skid-Steer Loader Shop Supply
	Alpine Ski House ST00004
	SU00005 2015 Ford F150 Oil Change
	Alpine Ski House ST00005
	SU00004 2016 NISSAN Frontier Replace Air Filter
	Adatum Corporation ST00007
	SU00003 2015 NISSAN Frontier Oil Change
	Trey Research ST00009
	SU00009 2018 Bobcat S70 Skid-Steer Loader Replace Air
	Adatum Corporation ST00010
	SU00006 2016 Ford F150 Oil Change
	Trey Research ST00011
	SU00008 2017 Bobcat S450 Skid-Steer Loader Oil Change
	Trey Research ST00012
	SU00005 2015 Ford F150 Oil Change



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Release the left mouse button on the link **SU00003**  
**2015 NISSAN Frontier Oil Change**

		SU00005 2015 Ford F150	SU00005
		SU00005 2015 Ford F150	Alpine Ski I
		SU00005 2015 Ford F150	SU00004
			Adatum Co
		SU00003 2015 NISSAN Frontier Oil Change ST00007	SU00003
			Trey Resea
			SU00009
			Adatum Co
			SU00006
		SU00003 2015 NISSAN Frn	Trey Resea
			SU00008
			Trey Resea
			SU00005
			Alpine Ski I
			SU00005
			Adatum Co
			SU00005
			SU00005

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.

		SU00005 2015 Ford F150	
		SU00005 2015 Ford F150	
		SU00003 2015 NISSAN Frontier Oil Change ST00007	SU00003
			Trey Resea
			SU00009
			Adatum Co
			SU00006
		SU00003 2015 NISSAN Frn	Trey Resea
		SU00006 2016 Ford F150	SU00008
			Trey Resea
			SU00005
			Alpine Ski I
			SU00005
			Adatum Co
			SU00005
			SU00005
			SU00005

Double click on the link **SU00003 2015 NISSAN Frontier Oil Change ST00007 Status: Released**

		SU00005 2015 Ford F150	SU00005
		SU00005 2015 Ford F150	Alpine Ski I
		SU00005 2015 Ford F150	SU00004
			Adatum Co
		SU00003 2015 NISSAN Frontier Oil Change ST00007	SU00003
			Trey Resea
			SU00009
			Adatum Co
			SU00006
		SU00003 2015 NISSAN Frn	Trey Resea
		SU00006 2016 Ford F150	SU00008
			Trey Resea
			SU00005
			Alpine Ski I
			SU00005
			Adatum Co
			SU00005
			SU00005

Double clicking on a task will display more detailed information about the task.

Edit - Visual Resource Scheduler Event - 19	
Delete Current Event	Open Ticket
Page	
General	
Technician Code	LINA
Name	Lina Townsend
Service Unit	2015 NISSAN Frontier
Ticket No.	ST00007
Job Task No.	0020000



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

9:00 AM 10:00 AM 11:00 AM 12:00 PM 1:00 PM

Edit - Visual Resource Scheduler Event - 19

Delete Current Event Open Ticket Page Open Service Ticket

General

Technician Code LINA Description

Name Lina Townsend Start Date

You can also open the ticket the task is part of to view information about it directly.

Home Report Ticket Actions Automate Fewer options

Add Service Template Confirm Actuals View Job Journal Create

General

Customer Name Adatum Corporation

Description Service Ticket #ST00007 - Adatum Corporation

Order Date 4/10/2023

Service Date 4/10/2023

Contact Robert Townes

Click on **Task Type**

Ticket Units/Lines Manage Line Fewer options

Task Type	ODT Service Unit No.	Serial No.	Description
Heading	SU00003		2015 NISSAN F
Posting	SU00003		Oil Change

Ticket Details

Ticket Details

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

Contact No. C1000001

Phone No.

Mobile Phone No.

Email adatum.corporation@contoso.com

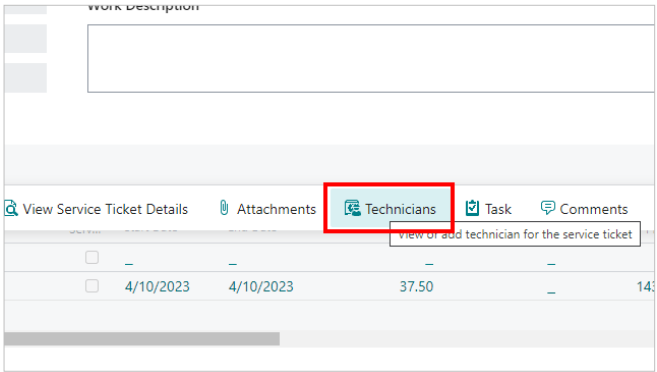
Ticket Units/Lines Manage Line Fewer options

Task Type	ODT Service Unit No.	Serial No.	Description
Heading	SU00003		2015 NISSAN F
Posting	SU00003		Oil Change

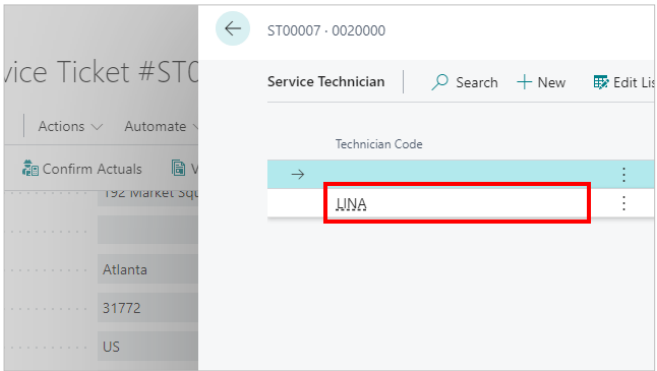


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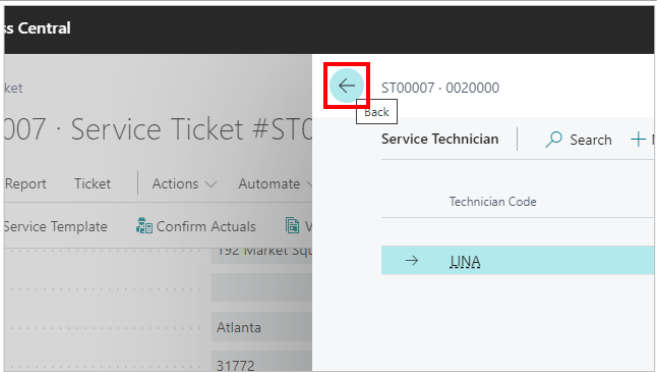
Click on the navigation menu item **Technicians**



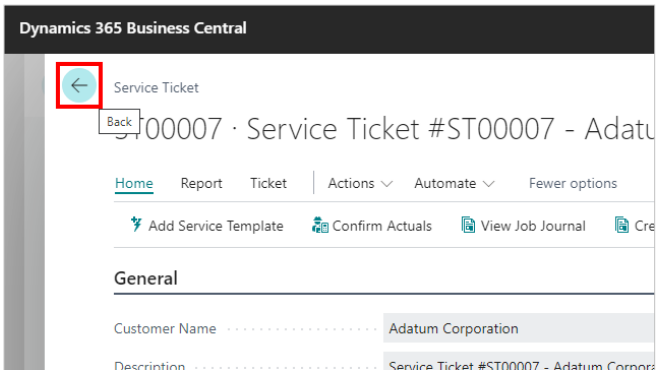
Notice that the Technician has automatically been assigned to the task.



Click on the back button



Click on the back button





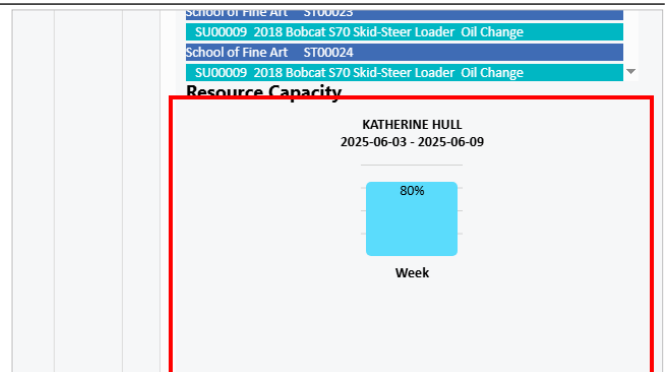
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Click on the button **Close**

Start Time ..... 3:00:00 PM  
End Date ..... 6/14/2023  
End Time ..... 4:00:00 PM

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**

No. ↑	Name	Type	Base Unit of Measure
<a href="#">KATHERINE</a>	KATHERINE HULL	Person	HOURL
KYLE	Kyle	Person	HOURL
LABOR	Labor	Person	HOURL
<a href="#">LINA</a>	Lina Townsend	Person	HOURL
MARTY	Marty Horst	Person	HOURL

Click on the toggle field **Budget Resource**

Use time sheet ..... ☐

Time Sheet Owner User ID .....

Time Sheet Approver User ID .....

Warranty Type .....

Include in Visual Resource Schedule ..... ☒

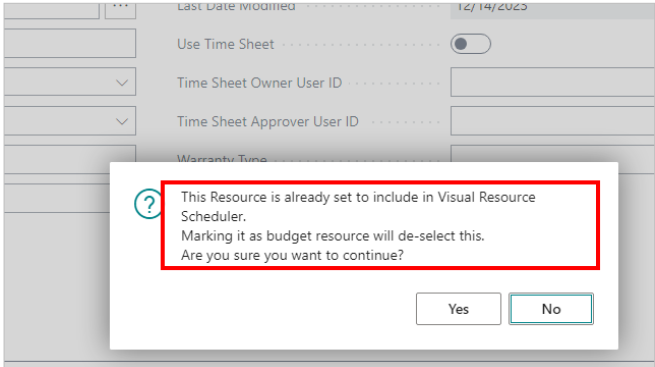
Budget Resource ..... ☒

Tax Group Code ..... LABOR

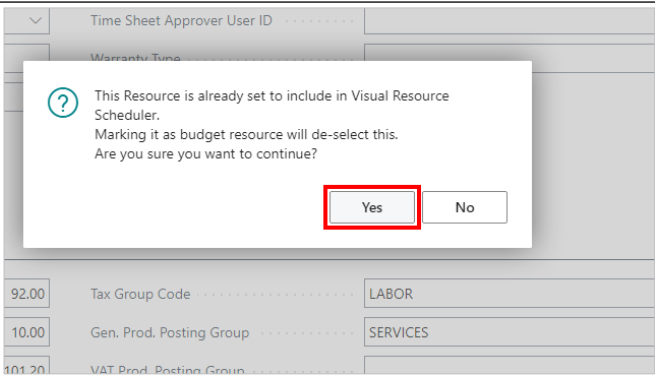


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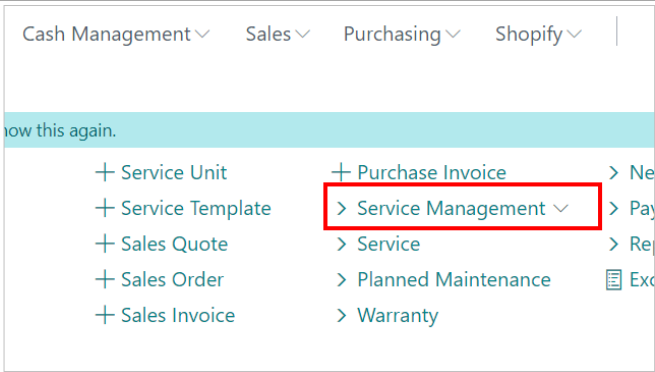
Note that the Budget Resource toggle cannot be enabled at the same time as the Include In Visual Resource Scheduler toggle.



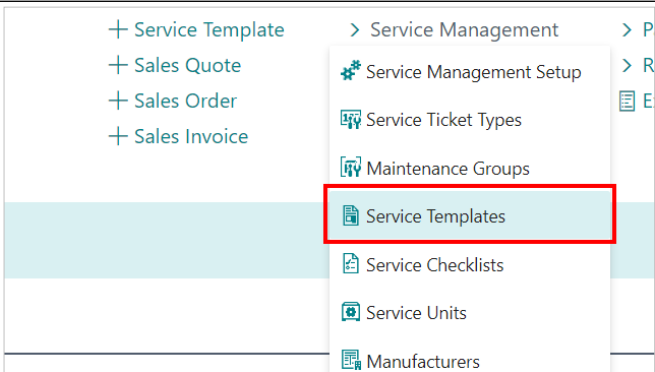
Click on the button **Yes**



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



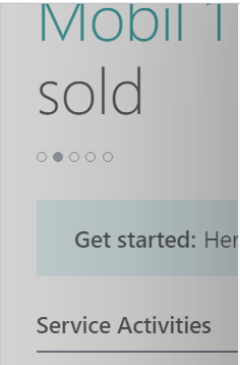
Click on the navigation menu item **Service Templates**







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

 Get started: Here Service Activities	20KSERVICE	All	20
	40KSERVICE	All	40
	50POINTINS...	All	50
	OILCHANGE-LT	All	Oi
	OILCHANGE-...	All	Oi
	REPLACEAIRF...	All	Re
	REPLACEAIRF...	All	Re
	ROTATETIRES	All	Ro

Make sure that the Budget Resource has been added to the Service Template

Template Lines				 New Line	 Delete Line
Service Template No.	Type	No.	Description		
→	Resource	LINA	Lina Townsend		
	Item	OILFILTER	Filter, Oil		
	Item	OILGASKET	Gasket, Oil		
	Item	MOBIL15W30	Mobil 1 5W30		

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**

Ticket Detail Line Type	Warranty Type	Quantity	Unit Cost
Both Budg...	GENERAL	1.00	101.20
Both Budg...	GENERAL	1.00	3.50
Both Budg...	GENERAL	1.00	0.50
Both Budg...	GENERAL	6.00	2.25

Enter the text **3.**

Ticket Detail Line Type	Warranty Type	Quantity	Unit Cost
Both Budg...	GENERAL	3.	101.20
Both Budg...	GENERAL	1.00	3.50
Both Budg...	GENERAL	1.00	0.50
Both Budg...	GENERAL	6.00	2.25






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Click on the back button

Dynamics 365 Business Central



Service Template

OILCHANGE-SS

Related Automate

General

Template No. OILCHANGE-SS

After the Service Template has been set up, create a new Service Ticket

Activities

Sales This Month

0

See more

ST00112 Service Ticket #ST001

ST00117 Service Ticket #ST001

ST00120 Service Ticket #ST001

ST00124 Service Ticket #ST001

ST00125 Service Ticket #ST001

ST00129 Service Ticket #ST001

ST00130 Service Ticket #ST001

Open record "ST00130"

Add the Service Template to the ticket

Service Unit Meters Attachments Task

Service No. Serial No. Description Defer Serv...

00007 2017 Bobcat S70 Skid-Steer ...

00007 Oil Change

Oil Change

Make sure that the ticket is set to a status of Released so it will display in the Visual Scheduler

Service Picture

No

PENDING

Service Picture



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

Open PO Lines Exist ..... No

Service Ticket Status ..... PENDING

Apply Maintenance Expe... ..

Admin Ticket ..... → PENDING

Tag ..... RELEASED

Work Description

COMPLETED

ON HOLD

+ New

Click on the button **Yes**

Ending Date

Service ticket status changed from PENDING to RELEASED. Do you want to update the lines?

Yes

No

Admin Ticket ..... ☐

Tag .....

Click on **Service Ticket Status**

Ending Date .....

Location Code .....

Your Reference .....

Open PO Lines Exist ..... No

Service Ticket Status ..... RELEASED

Apply Maintenance Expe... .. ☐

Admin Ticket ..... ☒

Tag .....

Once the ticket has finished being set up, open the Visual Resource Scheduler

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

Actions

+ Service Ticket Quote + Purchase Quote > Fin

+ Service Ticket + Purchase Order > Se

+ Service Unit + Purchase Invoice > Ne

+ Service Template > Service Management > Pay

+ Sales Quote > Service > Re

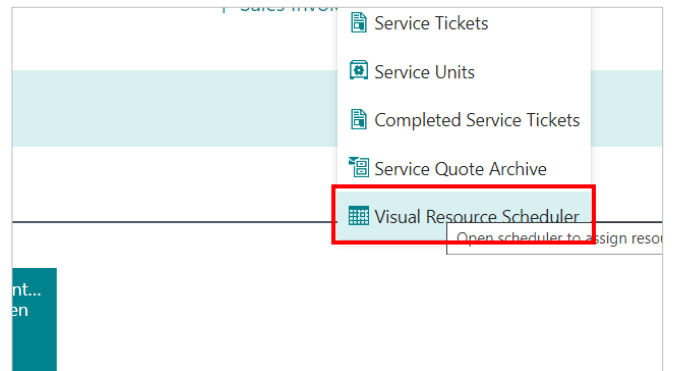
+ Sales Order > Planned Maintenance

+ Sales Invoice > Warranty

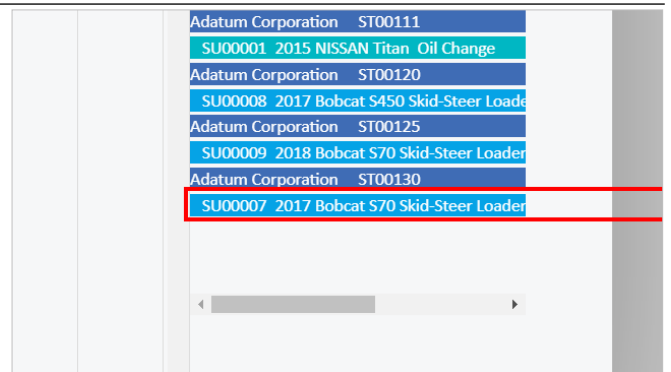


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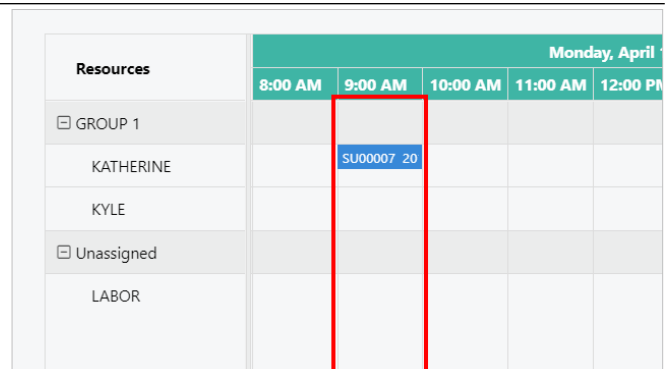
Click on the navigation menu item **Visual Resource Scheduler**



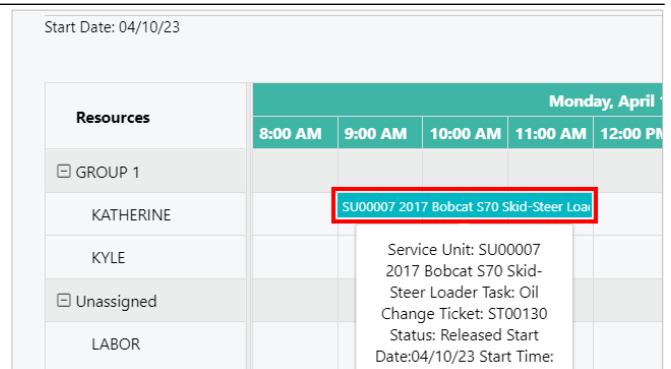
Click and Drag the task to assign it to a Resource



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.



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Click on the Service Tickets Cue

Get started: Here are a few things you can try out

Service Activities

Service	Planned Maintenance
Service Tickets - Quote 1	Service Tickets - Open 35 Specifies the number of service tickets that have been opened.

Start by creating a new service ticket

Click on the navigation menu item **New**

Service Tickets - Open

+ New Manage Report Actions

Create a new entry.

Service Ticket No.	Description	Order Date
ST00013	Service Ticket #ST00013 - Adat...	4/10/2023
ST00014	Service Ticket #ST00014 - Rele...	4/10/2023
ST00015	Service Ticket #ST00015 - Adat...	4/10/2023
ST00016	Service Ticket #ST00016 - Rele...	4/10/2023
ST00017	Service Ticket #ST00017 - Adat...	4/10/2023

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

Related Automate Fewer options

View Job Journal Create Service Sales Invoice Update Meter Reading

Service Ticket Type  
Choose a value for Customer No.

Default Service Unit No.

Assigned Technician

Starting Date

Ending Date

Click on the link in cell **No.** with the value **50000**

Customer No.

Customer Name \*

Description

Order Date

Service Date

Sell-to

Address

Address 2

City

Post Code

No.	Name	ZIP
10000	Adatum Corporation	31
20000	Trey Research	61
30000	School of Fine Art	37
40000	Alpine Ski House	31
50000	Relecloud	31

Select record "50000"

+ New



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There is a new field labeled Admin Ticket. Toggling this will indicate that this is an admin ticket to be used for events.

Location Code	
Your Reference	
Open PO Lines Exist	No
Service Ticket Status	PENDING
Apply Maintenance Expense	<input type="checkbox"/>
Admin Ticket	<input checked="" type="checkbox"/>
Tag	
Work Description	

Click on the toggle field **Admin Ticket**

Location Code	
Your Reference	
Open PO Lines Exist	No
Service Ticket Status	PENDING
Apply Maintenance Expense	<input type="checkbox"/>
Admin Ticket	<input checked="" type="checkbox"/>
Tag	
Work Description	

Enter the events you would like to have in the Description field of the Task Lines

Click on the cell **Description**

nes   <a href="#">Manage</a>   Line					
<a href="#">Delete Line</a> <a href="#">Add Service Template</a> <a href="#">Service Unit Meters</a> <a href="#">View Service Ticket Data</a>					
ODT Service Unit No.	Serial No.	Description	Defer Serv...	Start Date	
			<input type="checkbox"/>		

Enter the text **Vacation**.

nes   <a href="#">Manage</a>   Line					
<a href="#">Delete Line</a> <a href="#">Add Service Template</a> <a href="#">Service Unit Meters</a> <a href="#">View Service Ticket Data</a>					
ODT Service Unit No.	Serial No.	Description	Defer Serv...	Start Date	
			<input type="checkbox"/>		

192 Market Square  
com ren con



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Click on the cell **Description**

nes | [Manage](#) | Line

[Delete Line](#) [Add Service Template](#) [Service Unit Meters](#) [View Service Ticket Data](#)

ODT Service Unit No.	Serial No.	Description	Defer Serv...	Start Date
		Vacation	<input type="checkbox"/>	

Enter the text **Sick**.

nes | [Manage](#) | Line

[Delete Line](#) [Add Service Template](#) [Service Unit Meters](#) [View Service Ticket Data](#)

ODT Service Unit No.	Serial No.	Description	Defer Serv...	Start Date
		Vacation	<input type="checkbox"/>	
			<input type="checkbox"/>	

Click on the cell **Description**

nes | [Manage](#) | Line

[Delete Line](#) [Add Service Template](#) [Service Unit Meters](#) [View Service Ticket Data](#)

ODT Service Unit No.	Serial No.	Description	Defer Serv...	Start Date
		Vacation	<input type="checkbox"/>	
		Sick	<input type="checkbox"/>	

Enter the text **Emergency**.

nes | [Manage](#) | Line

[Delete Line](#) [Add Service Template](#) [Service Unit Meters](#) [View Service Ticket Data](#)

ODT Service Unit No.	Serial No.	Description	Defer Serv...	Start Date
		Vacation	<input type="checkbox"/>	
		Sick	<input type="checkbox"/>	
			<input type="checkbox"/>	



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Click on the cell **Service Status** with the value **RELEASED**

Service Unit Meters View Service Ticket Details Attachments Technicians					
(Total Cost)	Billable (Total Price)	Billable (Invoiced Price)	Service Status	Is War...	Comments/Details
-	-	-	RELEASED	<input type="checkbox"/>	0/0
-	-	-	RELEASED	<input type="checkbox"/>	0/0
-	-	-	RELEASED	<input type="checkbox"/>	0/0

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

chasing	Shopify	
ons		
Service Ticket Quote	+ Sales Order	> Service Management
Service Ticket	+ Sales Invoice	> Service
Service Unit	+ Purchase Quote	> Planned Maintenance
Service Template	+ Purchase Order	> Warranty
Sales Quote	+ Purchase Invoice	> Find entries...

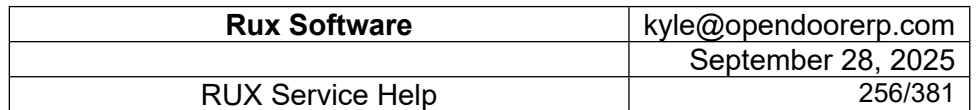
Click on the navigation menu item **Visual Resource Scheduler**

+ Service Unit	+ Purchase	Service Ticket Quotes
+ Service Template	+ Purchase	Service Tickets
+ Sales Quote	+ Purchase	Service Units
		Completed Service Tickets
		Service Quote Archive
		Visual Resource Scheduler

Admin Tickets and related events are always displayed at the top of the task list and highlighted in green.

Free Preview Mode Tickets/Tasks			
3			Relecloud ST00005
0 PM	2:00 PM	3:00 PM	Vacation
			Sick
			Emergency
			Adatum Corporation ST00003
			SU00003 2015 NISSAN Frontier Labor - Lube
			SU00003 2015 NISSAN Frontier Oil Change
			SU00003 2015 NISSAN Frontier Rotate Tires
			SU00003 2015 NISSAN Frontier 50 point inspection

Events can be assigned to technicians the same way you assign tasks



The screenshot displays a software interface in 'Free Preview Mode' for managing 'Tickets/Tasks'. On the left, a calendar grid is visible with columns for '10 PM', '2:00 PM', and '3:00 PM'. The main area on the right lists tasks. The first task is 'Relecloud ST00005', which is expanded to show three sub-items: 'Vacation', 'Sick', and 'Emergency'. The 'Vacation' item is highlighted with a red rectangular border. Below these are tasks from 'Adatum Corporation' (ST00003) and 'Trey Research' (ST00004).

Task ID	Task Description
Relecloud ST00005	Vacation
Relecloud ST00005	Sick
Relecloud ST00005	Emergency
Adatum Corporation ST00003	SU00003 2015 NISSAN Frontier Labor - Lube
SU00003 2015 NISSAN Frontier	Oil Change
SU00003 2015 NISSAN Frontier	Rotate Tires
SU00003 2015 NISSAN Frontier	50 point inspection
Trey Research ST00004	

The screenshot displays the 'My Calendar' application interface. At the top, there's a header with navigation icons and buttons: 'Collapse All', 'Refresh', 'Day', 'Week', 'Month', 'Clear Filter', and 'Filter Ticket'. Below the header, the date '23' is shown. The main calendar view is for 'Monday, April 10, 2023'. The time slots are labeled from '00 PM' to '1:00 PM'. A red box highlights a 'Vacation' event in the 9:00 AM to 10:00 AM slot. A tooltip is displayed over the event, showing details: 'Task: Vacation Start Date: 04/10/23 Start Time: 9:00:00 AM End Date: 04/10/23 End Time: 10:00:00 AM'.

				Monday, April 10, 2023						
00 PM	2:00 PM	3:00 PM	4:00 PM	8:00 AM	9:00 AM	10:00 AM	11:00 AM	12:00 PM	1:00 PM	
					Vacation					
						Sick				
						Emergency				

...

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.

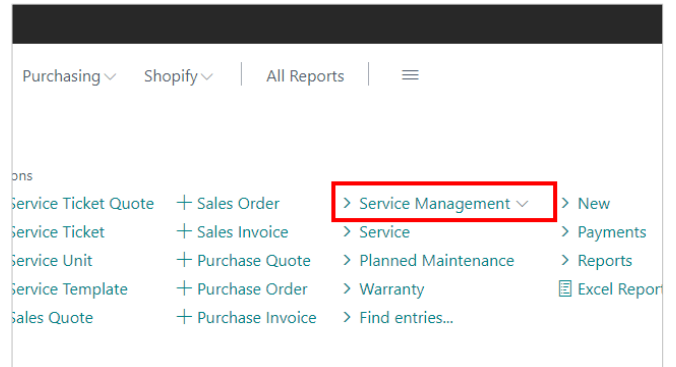




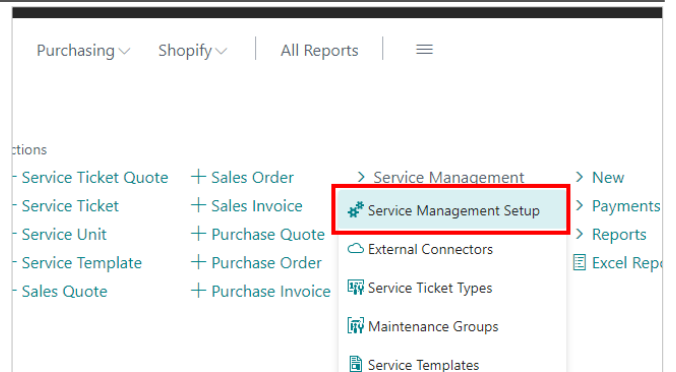
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### 3.9.1. How to setup RMA functionality

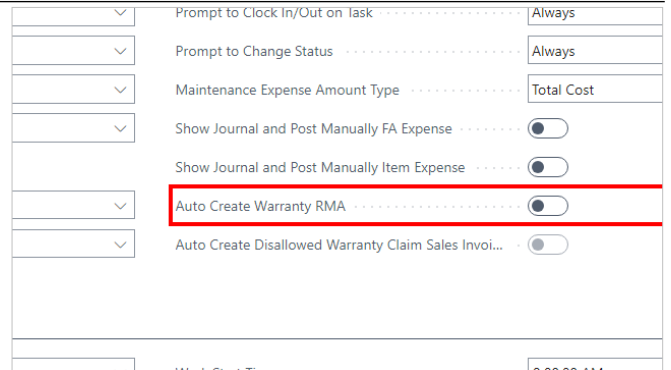
Click on the navigation menu item popup **Service Management**



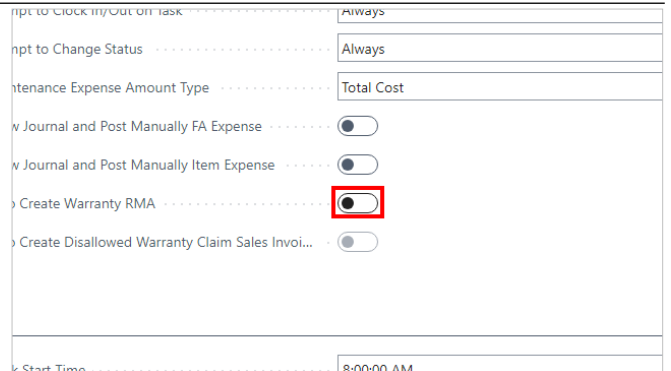
Click on the navigation menu item **Service Management Setup**



The Auto Create Warranty RMA option must be enabled to use the RMA feature.



Click on the toggle field **Auto Create Warranty RMA**





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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.

<input type="checkbox"/>	Prompt to Change Status	Always
<input type="checkbox"/>	Maintenance Expense Amount Type	Total Cost
<input type="checkbox"/>	Show Journal and Post Manually FA Expense	<input type="checkbox"/>
<input type="checkbox"/>	Show Journal and Post Manually Item Expense	<input type="checkbox"/>
<input type="checkbox"/>	Auto Create Warranty RMA	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Auto Create Disallowed Warranty Claim Sales Invoi...	<input type="checkbox"/>
<input type="checkbox"/>	Work Start Time	8:00:00 AM
<input type="checkbox"/>	Work End Time	5:00:00 PM

Click on the toggle field **Auto Create Disallowed Warranty Claim Sales Invoice**

<input type="checkbox"/>	Prompt to Change Status	Always
<input type="checkbox"/>	Maintenance Expense Amount Type	Total Cost
<input type="checkbox"/>	Show Journal and Post Manually FA Expense	<input type="checkbox"/>
<input type="checkbox"/>	Show Journal and Post Manually Item Expense	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Auto Create Warranty RMA	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Auto Create Disallowed Warranty Claim Sales Invoi...	<input type="checkbox"/>
<input type="checkbox"/>	Work Start Time	8:00:00 AM
<input type="checkbox"/>	Work End Time	5:00:00 PM

There are some additional fields that must be populated

Click on the button **Search**

Search	
> Service Management	> New
> Service	> Payments
> Planned Maintenance	> Reports
> Warranty	Excel Reports
> Find entries...	

Enter the text **Customer Posting Groups**.

Search	
> Service Management	> New
> Service	> Payments
> Planned Maintenance	> Reports
> Warranty	Excel Reports
> Find entries...	



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Click on **Customer Posting Groups Administration**



Tell me what you want to do

Customer Posting Groups

Go to Pages and Tasks

> Customer Posting Groups Administration

Search for 'Customer Posting Groups'

Search company data

Search Help

Click on the cell **Disallowed Warranty Claim Account**

	Credit Rounding Account	Payment Tolerance Debit Acc.	Payment Tolerance Credit Acc.	Disallowed Warranty Claim Account
	40920	40330	40330	

Enter the **Disallowed Warranty Claim Account** number.

	Credit Rounding Account	Payment Tolerance Debit Acc.	Payment Tolerance Credit Acc.	Disallowed Warranty Claim Account
	40920	40330	40330	

Name	Income/Ba...	Bloc...	Direct Post...
Repairs and Maintenance for R...	Income Sta...		<input checked="" type="checkbox"/>
Insurances, Rental	Income Sta...		<input checked="" type="checkbox"/>
Other Rental Expenses	Income Sta...		<input checked="" type="checkbox"/>

Click on the back button

Dynamics 365 Business Central

← Customer Posting Groups

Search Analyze + New Edit List Delete Edit View

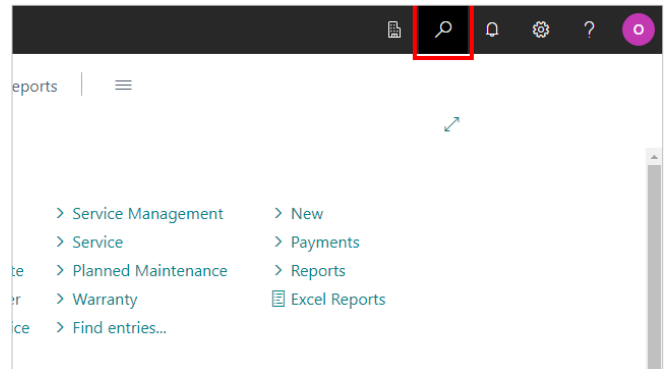
Show All Accounts

Code ↑	View All Accounts	Receivables Account	Service Charge Acc.	Payment Disc. Debit Acc.	Pe C
--------	-------------------	---------------------	---------------------	--------------------------	------

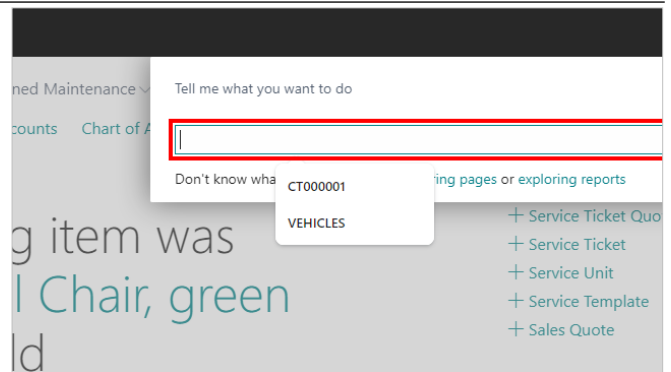


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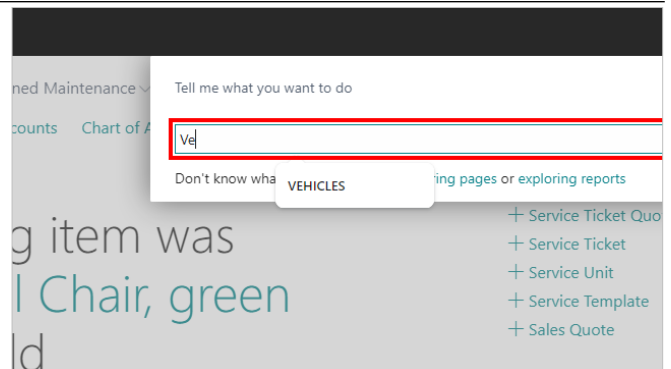
Click on the button **Search**



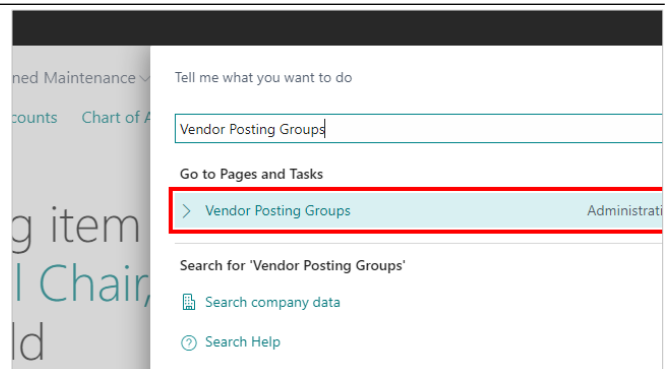
Click on the field **Tell me what you want to do**



Enter the text **Vendor Posting Groups**.



Click on **Vendor Posting Groups Administration** ☐





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Click on the cell **Warranty Claim Account**

Debit Rounding Account	Credit Rounding Account	Payment Tolerance Debit Acc.	Payment Tolerance Credit Acc.	Warranty Claim Account
67300	67300	40330	40330	

Enter **Warranty Claim Account**.

Debit Rounding Account	Credit Rounding Account	Payment Tolerance Debit Acc.	Payment Tolerance Credit Acc.	Warranty Claim Account
67300	67300	40330	40330	
No.	Name	Income/Ba...	Bloc...	
10000	Balance Sheet	Balance Sh...		4/8/2024
10001	Assets	Balance Sh...		5/25/2005
11000	Intangible Fixed Assets	Balance Sh...		

Click on the link in cell **No.** with the value **50230**

No.	Name	Income/Ba...	Bloc...
50230	Cost of Labor, Warranty/Contract		

Click on the back button

Dynamics 365 Business Central			
←	Vendor Posting Groups		
Back	Search	Analyze	+ New
		Edit List	Delete
		Edit	Vi
Show All Accounts			
Code ↑	Description	View All Acc...	Payables Account

### 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.



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Click on the cell **Is Warrantable** with the value **on**

Service Ticket Details					
Attachments Technicians Task Comments					
Billable (Total Price)	Billable (Invoiced Price)	Service Status	Is War...	Comments/Details	Appl Mai... Exp...
-	-		<input type="checkbox"/>	0/0	
143.25	-	PENDING	<input type="checkbox"/>	0/4	

Click on **Is Warrantable**

Service Ticket Details					
Attachments Technicians Task Comments					
Billable (Total Price)	Billable (Invoiced Price)	Service Status	Is War...	Comments/Details	Appl Mai... Exp...
-	-		<input type="checkbox"/>	0/0	
143.25	-	PENDING	<input type="checkbox"/>	0/4	

Click on the link in cell **Billable (Total Price)** with the value **71.61**

Template Service Unit Meters View Service Ticket Details Attachments Tech					
Date	Budget (Total Cost)	Actual (Total Cost)	Billable (Total Price)	Billable (Invoiced Price)	Service Status
3/2024	37.50	-	71.61	-	PENDING

Click on the button **Close**

Attachments	
Documents	0



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	September 28, 2025
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Click on the navigation menu item **Create Service Sales Invoice**

Service Ticket #ST00013 - Trey Research

Priorities are not defined for Source Code: SALES. Don't show again | Do you want to initialize Dimensions?

Actions | Related | Automate | Fewer options

Confirm Actuals | View Job Journal | **Create Service Sales Invoice** | Update Measurements

Work Type Code

Click on the button **OK**

Created by: [text box]

Posting Date Filter [text box]

OK Cancel

No.	Description	Unit of Measure	Quantity	Measure Code
LABOR	Labor - Oil Change	1	1	HOURL
OILFILTER	Filter, Oil	1	1	PCS
OILGASKET	Gasket, Oil	1	1	PCS

Click on the button **OK**

Service Line Completed [toggle]

E-Signature Status [text box]

1 invoice is created.

OK

Start Date	End Date	Cost	Actual (Total Cost)	Billable (Total Price)
4/8/2024	4/8/2024	37.50	-	71.61

Click on the button **Yes**

Service Line Completed [toggle]

E-Signature Status [text box]

Do you want to view the newly created invoice?

Yes No

Serv...	Start Date	End Date	Cost	Actual (Total Cost)	Billable (Total Price)
	4/8/2024	4/8/2024	37.50	-	71.61



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Click on the button **Post**

Dynamics 365 Business Central

Service Ticket

Sales Invoice - SV00005 · Trey Research

Manage Home Prepare Print/Send Request Approval Invoice Page Action

**Post** Release

Finalize the document or journal by posting the amounts and quantities to the related accounts in yo

General

Customer No. 20000

Customer Name Trey Research

Click on the button **Yes**

Due Date

External Document No.

Do you want to post the invoice?

Yes No

Status

Work Description

A message will appear after posting confirming that the RMA document has been created.

Your Reference

Document Date

Posting Date

Due Date

External Document No.

Return Merchandise Authorization RMA00003 created for the warranty claim.

OK

Click on the button **OK**

Due Date 4/22/2024

External Document No.

Return Merchandise Authorization RMA00003 created for the warranty claim.

OK

Status

Work Description

JO

Open





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Click on the button **No**

Due Date ..... 4/22/2024

External Document No. .... JO

The invoice is posted as number PSV00003 and moved to the Posted Sales Invoices window.

Do you want to open the posted invoice?

Yes **No**

Status ..... Open

Work Description

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

Service Ticket

ST00013 · Service Ticket #ST00013 - Trey Research

Home Report Ticket Actions **Related** Automate Fewer options

Add Service Template Confirm Actuals View Job Journal Create Service Ticket

General

Customer No. .... 20000

Customer Name ..... Trey Research

the RMA action in the Related tab will link to the created RMA document

Click on the navigation menu item **RMA**

Service Ticket

ST00013 · Service Ticket #ST00013 - Trey Research

Home Report Ticket Actions **Related** Automate Fewer options

Add Service Template Confirm Actuals **RMA** History

General

Customer No. .... 20000

Customer Name ..... Trey Research

The **Warranty Original Claim** field displays the amount of the original warranty claim.

Line	Line Group Code	Line Discount %	Line Amount Excl. Tax	Warranty Original Claim	Disallowed Warranty Claim	Return Qty. to Ship
1	NON-TAXABLE		71.63	71.63	0.00	1



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The **Disallowed Warranty Claim** field displays the amount of the claim that was determined to not be valid and will not be paid

Line Discount %	Line Amount Excl. Tax	Warranty Original Claim	Disallowed Warranty Claim	Return Qty. to Ship
	41.00	71.63	0.00	1

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**

Tax Area Code	Tax Group Code	Line Discount %	Line Amount Excl. Tax	Warranty Original Claim	Disallowed Warranty Claim
ATLANTA, GA	NONTAXABLE		41.00	71.63	0.00

Notice that Disallowed Warranty Claim field has been updated to reflect the amount that is not approved

Line Discount %	Line Amount Excl. Tax	Warranty Original Claim	Disallowed Warranty Claim	Return Qty. to Ship
	41.00	71.63	30.63	1

Click on the button **Post...**

Dynamics 365 Business Central

Purchase Return Order

RMA00003 · Fabrikam, Inc.

Home Prepare Print/Send Request Approval Return Order Actions

Post... Release Create Warehouse Shipment Apply E

Buy from State GA

ZIP Code 31772

City Atlanta

Country/Region US



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Click on the button **OK**

Status ..... Open

☐ Ship

☐ Invoice

☒ Ship and Invoice

**OK** Cancel

	Tax Group Code	Line Discount %	Line Amount Excl. Tax	Warranty Original Claim	Disallowed Warranty Claim	Return Qt
A	NONTAXABLE		41.00	71.63	30.63	

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

...

...

...

Status ..... Open

**i** SV00006 Service Sales Invoice created for the disallowed warranty claim amount 30.625.

**OK**

Click on the button **OK**

Status ..... Open

SV00006 Service Sales Invoice created for the disallowed warranty claim amount 30.625.

**OK**

	Tax Group Code	Line Discount %	Line Amount Excl. Tax	Warranty Original Claim	Disallowed Warranty Claim	Retu
, GA	NONTAXABLE		41.00	71.63	30.63	

After posting, there will be a link to the disallowed warranty claim invoice on the posted document  
Click on the button **Yes**

Status ..... Open

**?** The return order is posted as number 109003 and moved to the Posted Purchase Credit Memos window.

Do you want to open the posted credit memo?

**Yes** No

	Tax Area Code	Tax Group Code	Line Discount %	Line Amount Excl. Tax	Warranty Original Claim	Disallow Warranty Cl
0	ATLANTA, GA	NONTAXABLE		41.00	71.63	30



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

The screenshot shows the top navigation bar of the RUX interface. The 'Related' dropdown menu is open, and the 'Related' option is highlighted with a red box. The dropdown menu also includes 'Automate' and 'Fewer options'.

Click on the navigation menu item **Disallowed Warranty Claim Invoice**

The screenshot shows the top navigation bar of the RUX interface. The 'Disallowed Warranty Claim Invoice' dropdown menu is open, and the 'Disallowed Warranty Claim Invoice' option is highlighted with a red box. The dropdown menu also includes 'Service Ticket' and 'E-Document'.

Notice that the Customer Name is for the original customer specified on the Service Ticket

The screenshot shows the 'General' section of the 'Disallowed Warranty Claim Invoice' form. The 'Customer Name' field is highlighted with a red box and contains the text 'Trey Research'. Other fields include 'No.' (SV000006), 'Customer No.' (20000), 'Address' (153 Thomas Drive), and 'City' (Chicago).

Notice that the Line Amount being charged is the same amount that was denied in the original RMA document

Tax Area Code	Tax Group Code	Line Discount %	Line Amount Excl. Tax	Amount Including Tax	Qty. to Assign
CHICAGO, IL	NONTAXABLE		30.63	30.63	0

When everything is ready, the remaining amount can be charged back to the original customer



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RUX Service Help	269/381

Click on the button **Post**

Dynamics 365 Business Central

Sales Invoice

SV000006 · Trey Research

Home Prepare Print/Send Request Approval Invoice Actions Relat

Post Release

Customer No. 20000

Customer Name Trey Research

Sell-to

Address 153 Thomas Drive

Click on the button **Yes**

Do you want to post the invoice?

Yes No

Service Ticket Exists No

The invoice is posted as number PS-INV103216 and moved to the Posted Sales Invoices window.

Do you want to open the posted invoice?

Yes No

Service Ticket Exists No

## 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**

ent Sales Purchasing Shopify All Reports

Service Ticket Quote + Sales Order > Service Management > New

Service Ticket + Sales Invoice > Service > Payments

Service Unit + Purchase Quote > Planned Maintenance > Reports

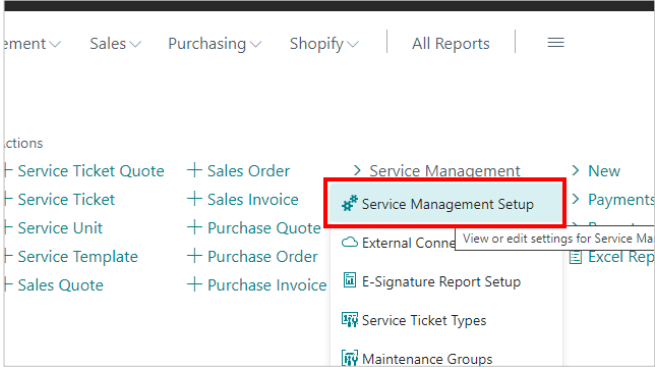
Service Template + Purchase Order > Warranty Excel Report

Sales Quote + Purchase Invoice > Find entries...

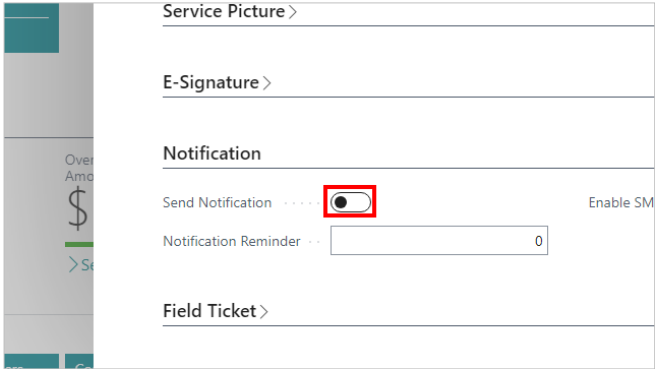


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RUX Service Help	270/381

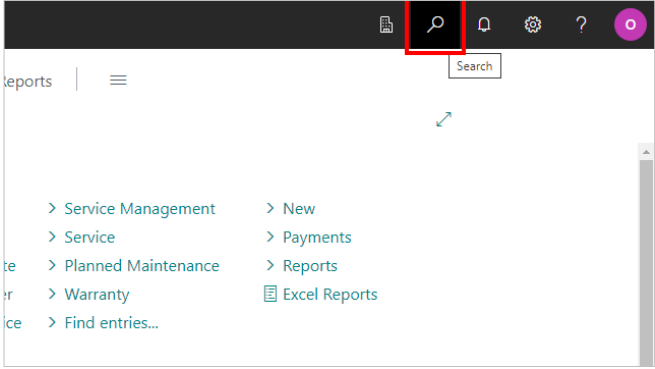
Click on the navigation menu item **Service Management Setup**



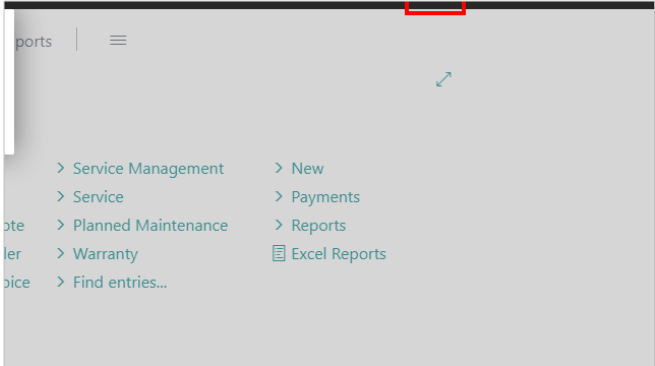
Click on the toggle field **Send Notification**



Click on the button **Search**



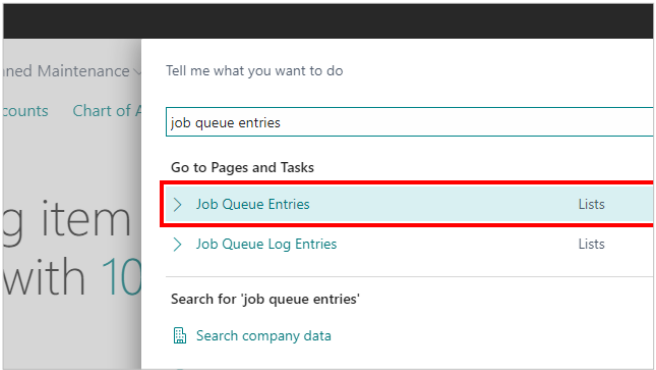
Enter the text **job queue entries**.





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RUX Service Help	271/381

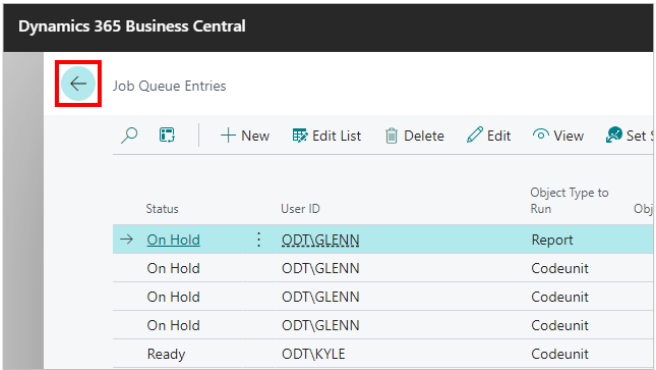
Click on **Job Queue Entries Lists** ☐



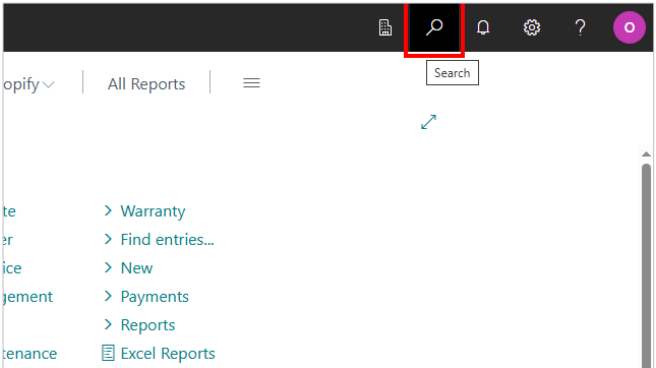
Ensure that codeunit 23072662 for ODT Notification has been added to Job Queue Entries

Object ID	Object Type to Run	Object ID to Run	Object Caption to Run
ODT\GLENN	Report	1511	Delegate Approval Requests
ODT\GLENN	Codeunit	3997	Retention Policy JQ
ODT\GLENN	Codeunit	842	Cash Flow Forecast Update
ODT\GLENN	Codeunit	6700	O365 Sync. Management
ODT\KYLE	Codeunit	1350	Telemetry Management
ODT\KYLE	Codeunit	23072662	ODTSM Notification

Click on the back button



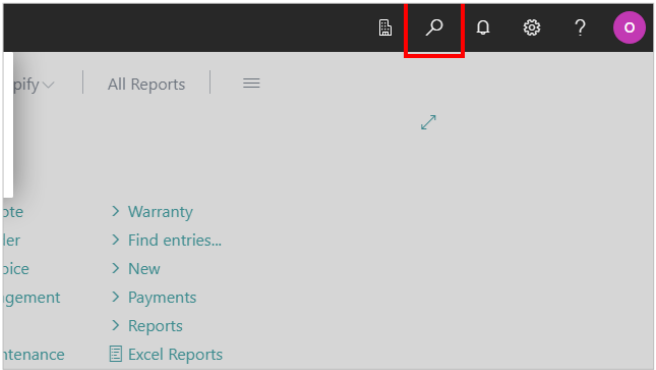
Click on the button **Search**



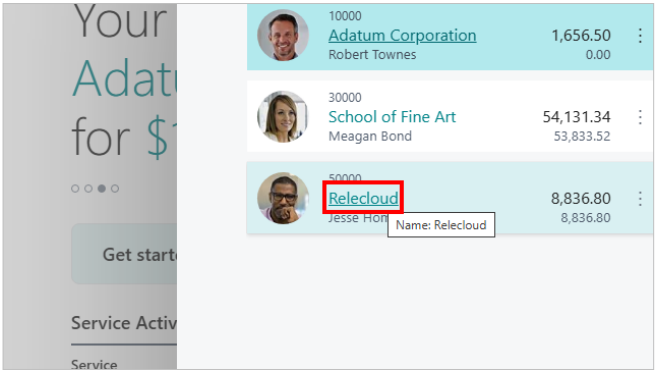
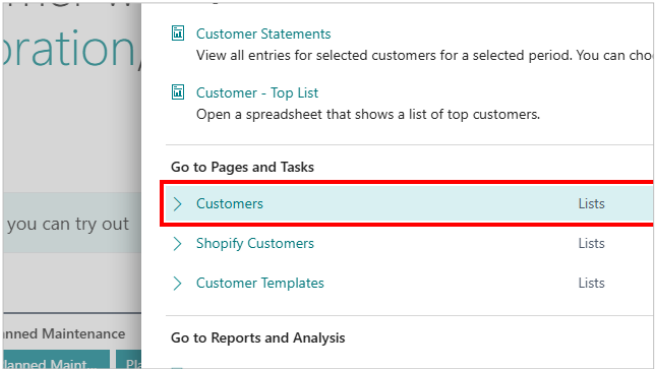


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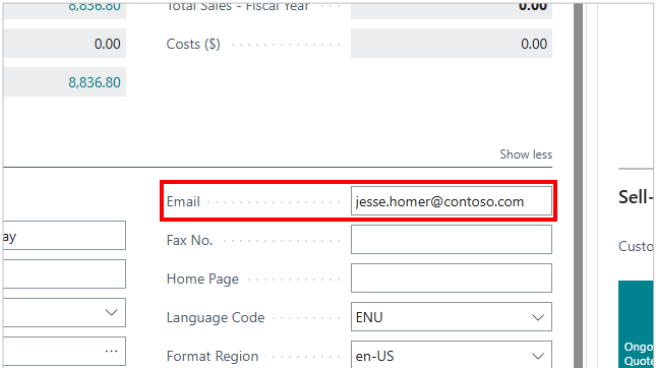
Enter the text **Customer**.



Click on **Customers Lists** ☐



Ensure the customer email is populated







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Click on the field **Notification Type**

Language Code ..... ENU

Format Region ..... en-US

Contact

Contact Code ..... CT000022

Contact Name ..... Jesse Homer

Notification Type ..... **[Red Box]**

DOMESTIC DOMESTIC

You can change the preferred notification type to Email, SMS, or both

Format Region ..... en-US

Contact

Contact Code ..... CT000022

Contact Name ..... Jesse Homer

Notification Type ..... **[Red Box]**

SMS

E-mail

SMS/Email

Click on the back button

Dynamics 365 Business Central

Customers

Customer Card

Back

50000 · Relecloud

Home Request Approval New Document

Contact Apply Template

General

No. .... 50000

Click on the back button

Dynamics 365 Business Central

CRONUS CO

Data Search

Insight from last

Your Adatum for \$

Customers

+ New Manage Home

Register Customer Payments

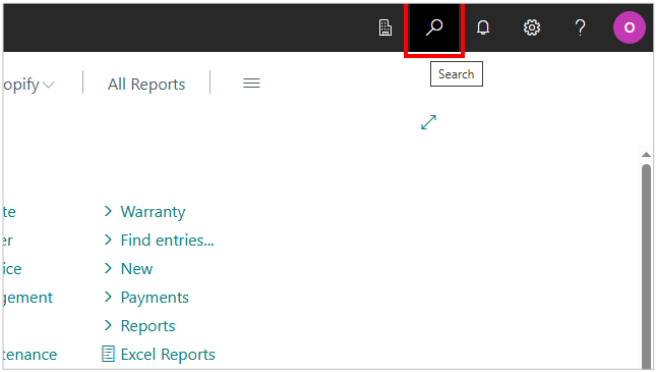
10000 Adatum Corporation Robert Townes

30000 School of Fine Art Meagan Bond

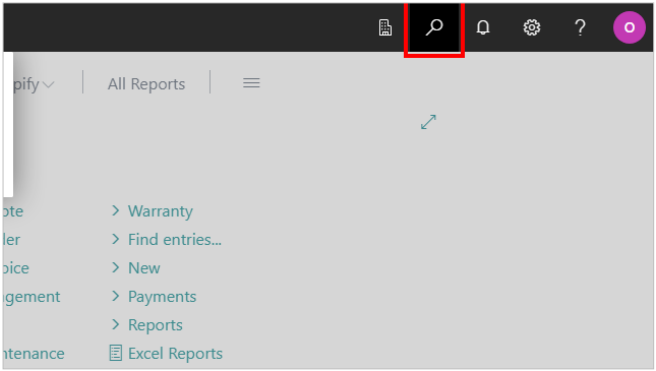


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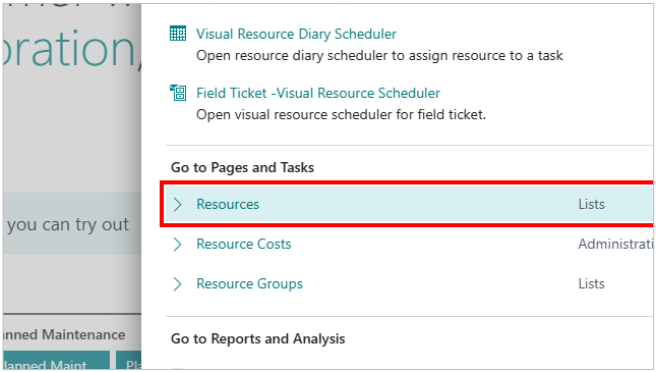
Click on the button **Search**



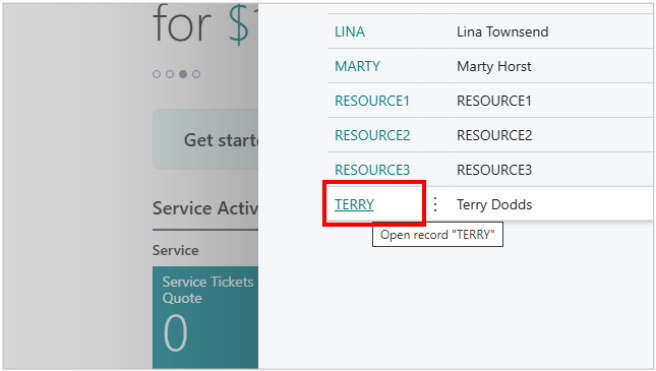
Enter the text **Resource**.



Click on **Resources Lists** ☐



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





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RUX Service Help	275/381

If using E-Mail for notifications, the populate the E-Mail field

	Social Security No. ....	
	Education .....	
	Contract Class .....	
...	Employment Date .....	3/1/1997
	E-mail .....	
...	SMS E-mail .....	
▼	Receive Notification .....	<input checked="" type="checkbox"/>

If using SMS E-Mail for notifications, the populate the SMS E-Mail field

	Social Security No. ....	
	Education .....	
	Contract Class .....	
...	Employment Date .....	3/1/1997
	E-mail .....	
...	SMS E-mail .....	
▼	Receive Notification .....	<input checked="" type="checkbox"/>


Click on the toggle field **Receive Notification**

Education .....	
Contract Class .....	
Employment Date .....	3/1/1997
E-mail .....	
SMS E-mail .....	
Receive Notification .....	<input checked="" type="checkbox"/>

Field Ticket Item Category Filter .....	
Field Ticket Item Location .....	

Click on the back button

Dynamics 365 Business Central

 Resource Card

TERRY · Terry Dodds

[Home](#) Resource Report Related Automate Fewer options

Create Time Sheets...

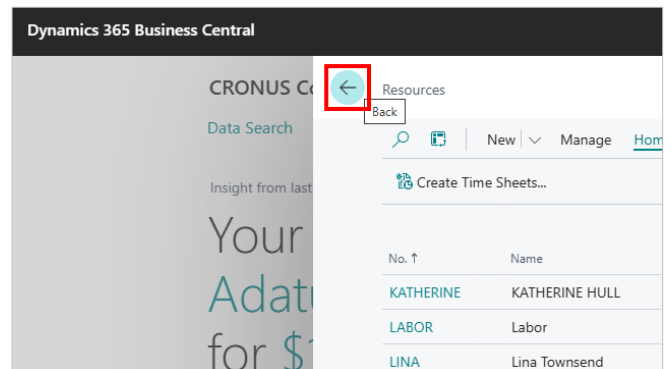
Invoicing

Direct Unit Cost .....	
Indirect Cost % .....	



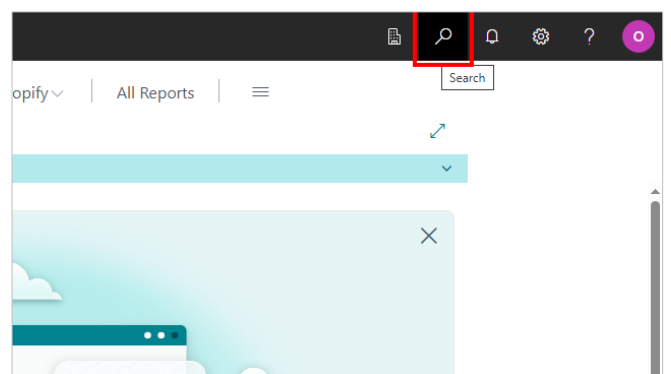
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Click on the back button

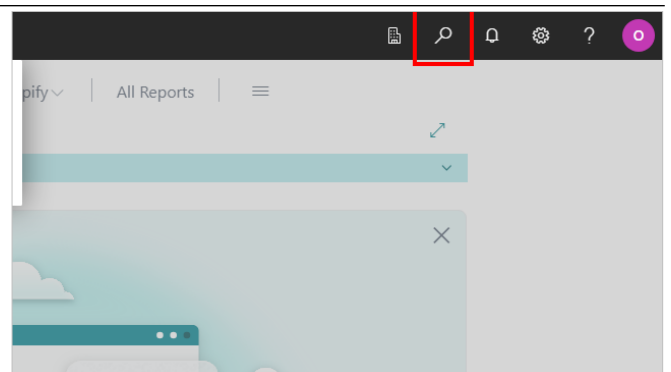


Next, you need to create templates for the notifications that will be sent.

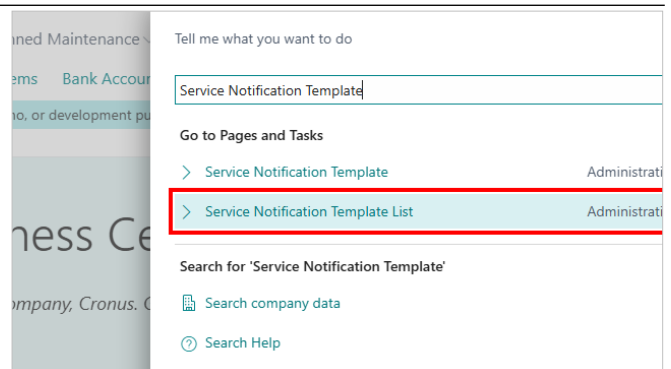
Click on the button **Search**



Enter the text **Service Notification Template**.



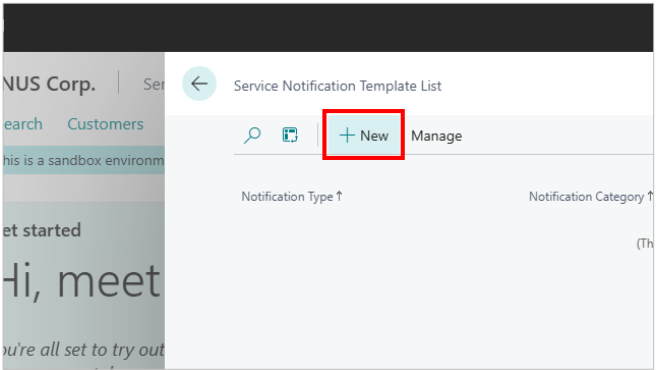
Click on **Service Notification Template List Administration** ☐



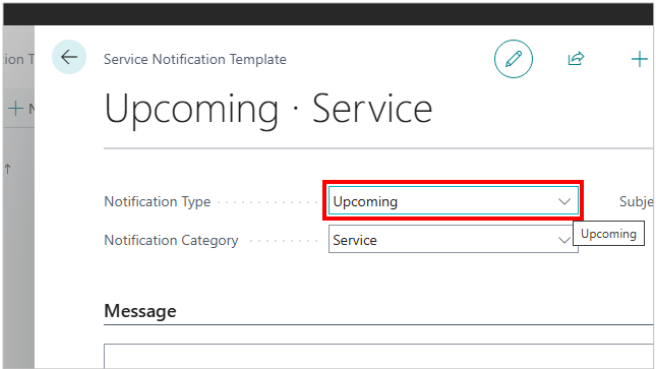


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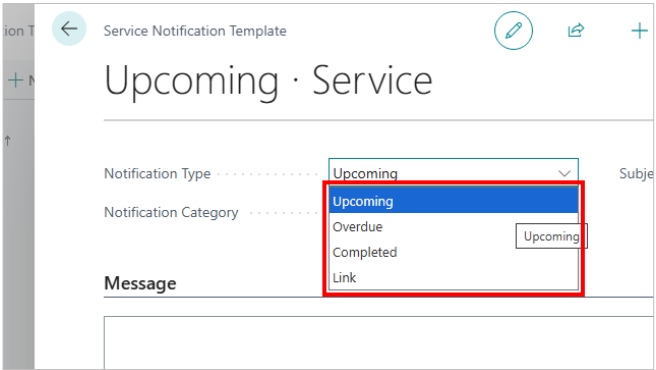
Click on the navigation menu item **New**



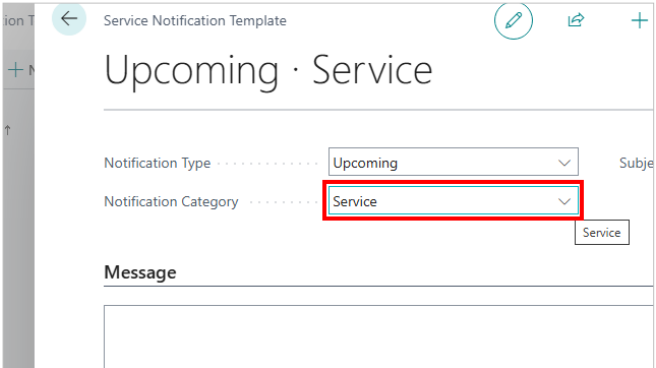
Click on the field **Notification Type**



Notification Type determines what kind for notification this is for.



Click on the field **Notification Category**





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Notification Category determines if the notification is for Service Tickets or individual tasks. Note that some Notification Types limit which categories can be selected.

Upcoming · Service

Notification Type ..... Upcoming

Notification Category ..... Service

Message

The Subject field will specify the subject line of the sent email.

Subject .....

Enter the text **Service Notification**.

Subject ..... Service Notification

The Message field will specify content to be added to the body of the email.

Message



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Enter the text **This is a notification of a service update..**

Message

⌵

The Footer field specifies content to be added to the footer if the email

Footer

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

Notification Template

Open the page in read-only mode

oming · Service

Notification Type Upcoming

Notification Category Service

Subject

Click on the back button

365 Business Central

Service Notification T

Service Notification Template

Back

Upcoming · Serv

Notification Type Upcom

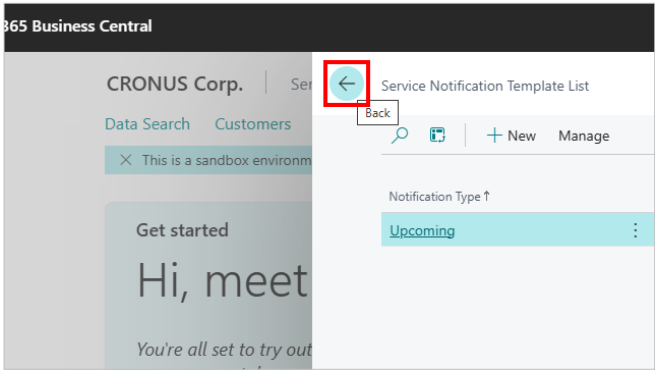
Notification Category Service

Message



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Click on the back button

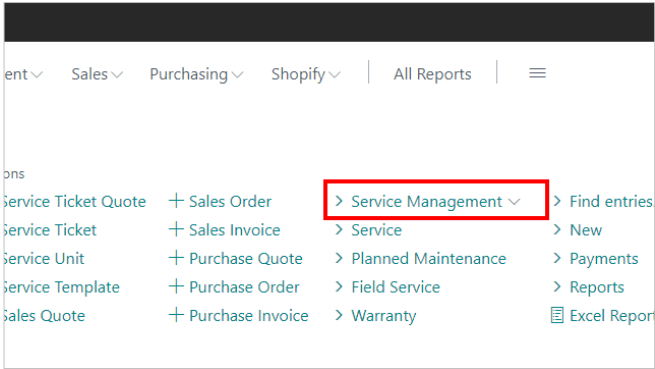


### 3.11.Field Service

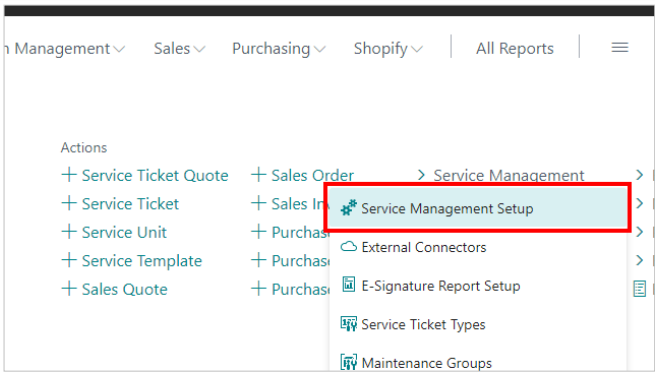
The following demonstrates how to setup and use Field Service Projects

#### 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

	Posted Planned Maint. Inv. ...	PM-INV+
	Warranty Policy Nos. ....	WTY-POL
	RMA Nos. ....	
	Service Template Nos. ....	
	Field Service Project Nos. ....	FS-TIX
	Field Ticket Nos. ....	FS-TIX





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Ensure that the Field Ticket Nos. field is populated

Posted Planned Maint. Inv. .... PM-INV+

Warranty Policy Nos. .... WTY-POL

RMA Nos. ....

Service Template Nos. ....

Field Service Project Nos. .... FS-TIX

Field Ticket Nos. .... FS-TIX

Week Work Start Time ..... 8:00:00 AM

Click on the back button

365 Business Central

kyle test 151 us | Ser

Data Search

Customers

×

This is a sandbox environm

Insight from last week

The best-s

Mobil 1 5V

←

ODT Service Ma

Create Default Data

More option

General

Filter Service Units By Cust... ..

Report Service Items as ..... Parts

Statuses will also need to be set up for Field Service.

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

Actions

+ Service Ticket Quote

+ Service Ticket

+ Service Unit

+ Service Template

+ Sales Quote

+ Sales Order

+ Sales Invoice

+ Purchase Quote

+ Purchase Order

+ Purchase Invoice

> Service Management

> Service

> Planned Maintenance

> Field Service

> Warranty

> Find entries

> New

> Payments

> Reports

Excel Report

Power BI Re

Click on the navigation menu item **Field Service and Field Ticket Status Setup**

Service Units

Completed Field Service Projects

Field Service Projects Archive

Field Service Quote Archive

Field Ticket -Visual Resource Scheduler

Field Service and Field Ticket Status Setup

Field Service Project

Field Service P... - Quote

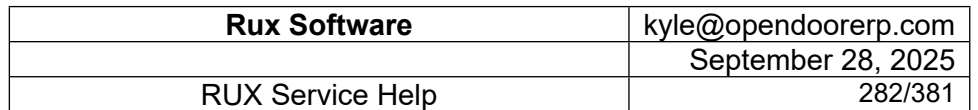
Field Service P... - Open

2

17

Overdue Purch. Invoice

Sales Invoices Predicted








	Status Line Type	Code	Description
→	Both Header and Line	:	PENDING
	Both Header and Line		RELEASED
	Ticket Line		IN PROCESS
	Both Header and Line		ON HOLD
	Both Header and Line		COMPLETE
	Both Header and Line	:	RELEASEFIELD
	Both Header and Line		COMPLETETFIELD

Mark Complete	Service Unit Status	Service Unit Status	Use for Intransit	Use for Quote
<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Dynamics 365 Business Central**

Field Service and Field Ticket Status

Back



 + New
  Edit List
  Delete

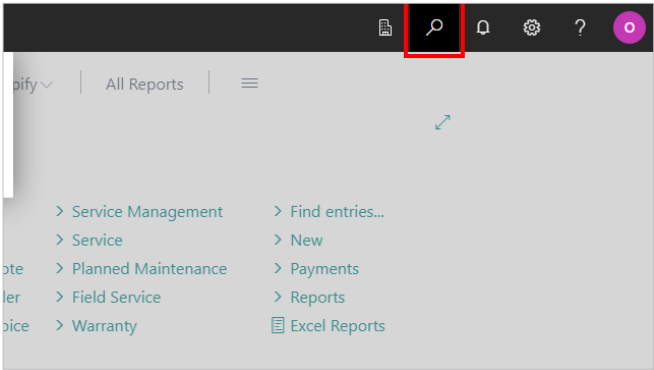
Status Line Type	Code	Description
Both Header and Line	PENDING	
Both Header and Line	RELEASED	
Ticket Line	IN PROCESS	
Both Header and Line	ON HOLD	
Both Header and Line	COMPLETE	

The screenshot shows the top navigation bar of the Microsoft Dynamics 365 application. The search icon, represented by a magnifying glass, is highlighted with a red rectangular box. Other icons in the bar include a document, a bell for notifications, a gear for settings, a question mark for help, and a user profile icon. Below the navigation bar, the main content area displays a list of reports under the heading 'All Reports'. The list includes 'Service Management', 'Service', 'Planned Maintenance', 'Field Service', and 'Warranty' on the left, and 'Find entries...', 'New', 'Payments', 'Reports', and 'Excel Reports' on the right. A red arrow points to the search icon in the navigation bar.

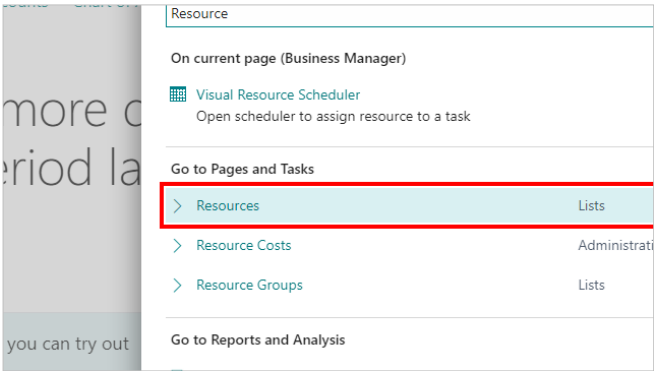


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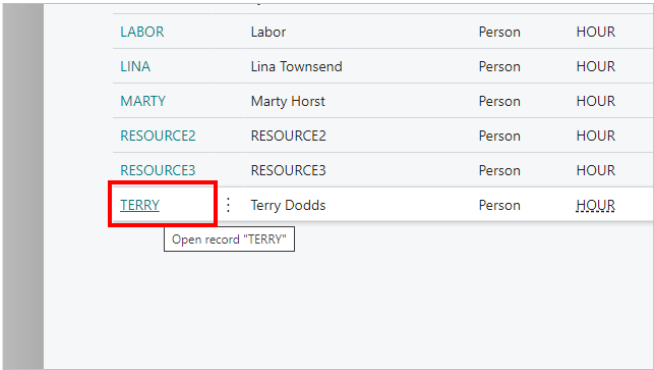
Enter the text **Resource**.



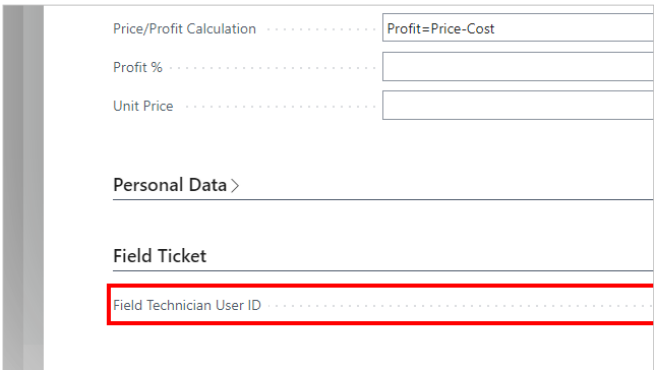
Click on **Resources Lists** ☐



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



Click on **Field Technician User ID**





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Click on the lookup button **Field Technician User ID**

The screenshot shows a Dynamics 365 Business Central form. On the right side, there is a vertical list of fields: Unused Capacity, Invoiced, Invoiced %, Usage (Cost), Profit, and Profit %. Below these fields is a dropdown menu with a red box around it, labeled 'Choose a value for Field Technician User ID'.

Click on the back button

The screenshot shows a Dynamics 365 Business Central form for 'TERRY · Terry Dodds'. At the top left, there is a blue back button with a red box around it. The form includes fields for No., Name, and Type, with values TERRY, Terry Dodds, and Person respectively.

Click on the back button

The screenshot shows a Dynamics 365 Business Central form for 'Resources'. At the top left, there is a blue back button with a red box around it. The form includes a table with columns for No., Name, Type, and Base Unit of Measure. The table contains three rows: KATHERINE (KATHERINE HULL, Person, HOUR), KYLE (kyle, Person, HOUR), and LABOR (Labor, Person, HOUR).

### 3.11.3. Setup Service Templates

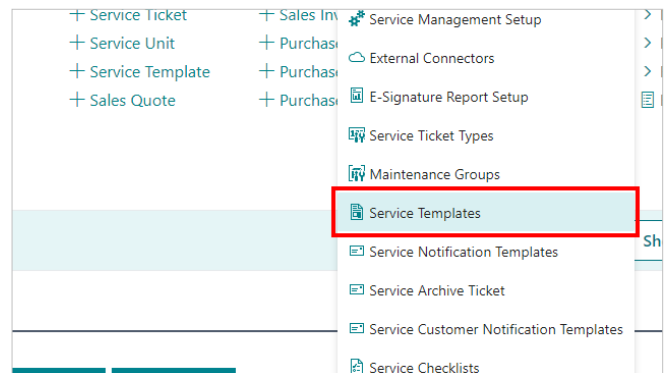
Click on the navigation menu item popup **Service Management**

The screenshot shows a Dynamics 365 Business Central navigation menu. The 'Service Management' item is highlighted with a red box. The menu includes sections for Sales, Purchasing, Shopify, All Reports, and a list of service-related items: Service Ticket Quote, Service Ticket, Service Unit, Service Template, Sales Quote, + Sales Order, + Sales Invoice, + Purchase Quote, + Purchase Order, + Purchase Invoice, > Service Management, > Service, > Planned Maintenance, > Field Service, > Warranty, > Find entries, > New, > Payments, > Reports, and Excel Report.



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



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

Template No.	Template Type	Description
20KSERVICE	All	20,000 KM S
40KSERVICE	All	40,000 KM S
50POINTINS...	All	50 point insp
OILCHANGE-LT	All	Oil Change
OILCHANGE-SS	All	Oil Change
REPLACEAIRF...	All	Replace Air F
REPLACEAIRF...	All	Replace Air F
ROTATETIRES	All	Rotate Tires
SKIDSTEERGE...	All	Skid Steer G

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.



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Click on the field **Template Type**

Template No. ↑

20KSERVICE

40KSERVICE

50POINTINS...

OILCHANGE-

OILCHANGE-

REPLACEAIRF

REPLACEAIRF

ROTATETIRES

SKIDSTEERGE

Service

Related Automate

General

Template No. .... OILCHANGE-SS Maintenance

Description .... Oil Change Total Cost

Template Type .... All Total Price

Template Lines

New Line Delete Line

Service Template No. Type No. Description

### 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**

things you can try out

Planned Maintenance

Planned Maint... Tickets - Quote 0

Planned Maint... Tickets - Open 1

Field Service

Field Service P... - Quote 1

Field Service P... - Open 19

Field Ticket Approva 0

Click on the navigation menu item **New**

Service P

Field Service Project Quotes

+ New Manage Home Report Mo

Make Ticket Cancel Ticket

Field Service Project Quote No. ↑ Description Order Date

FS000021 : Service Ticket #FS00021 - Adat... 4/8/2024

The setup of a Field Service Project Quote is similar to other ticket types

Make Ticket Add Service Template Cancel Ticket Copy Docu

General

Customer No. ....

Customer Name .... \*

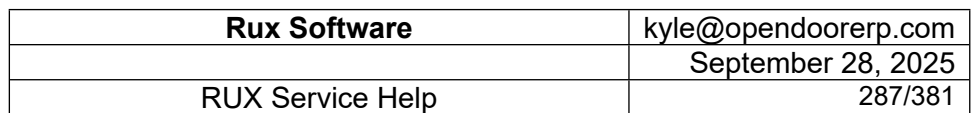
Description ....

Order Date ....

Service Date ....

Sell-to

Address ....



Related Automate Fewer options

X Cancel Ticket Copy Document

	Contact
	Field Service Project Type
	Assigned Technician
	Default Service Unit No.
	Starting Date

Make Ticket

Add Service Template

Cancel Ticket

Copy Document

General

Customer No.

.....\*

Customer Name

.....\*

Description

.....

Order Date

.....

Service Date

.....

Sell-to

.....

Address

.....

No. ↑

Name

ZIP

10000

Adatum Corporation

31000

20000

Select record "10000"

61000

30000

School of Fine Art

37000

40000

Alpine Ski House

31000

50000

Relecloud

31000

+ New

Show More

[illegible]

The screenshot shows the 'Service Units' list in the Dynamics 365 interface. The table has two columns: 'Service Unit No.' and 'Description'. The first row is highlighted in blue and has a red box around the 'Service Unit No.' value 'SU00002'. The second row is 'SU00004' and '2016 NISSAN Frontier'. The third row is 'SU00005' and '2015 Ford F150'. The fourth row is 'SU00007' and '2017 Bobcat S70 Skid-Steer...'. The fifth row is 'SU00009' and '2018 Bobcat S70 Skid-Steer...'. The sixth row is 'SU00010' and '2018 Bobcat S450 Skid-Steer...'. The 'Service Unit No.' column is highlighted with a red box, and the '2016 NISSAN Titan' row is highlighted in blue.

Service Unit No.	Description
SU00002	2016 NISSAN Titan
SU00004	2016 NISSAN Frontier
SU00005	2015 Ford F150
SU00007	2017 Bobcat S70 Skid-Steer...
SU00009	2018 Bobcat S70 Skid-Steer...
SU00010	2018 Bobcat S450 Skid-Steer...



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

Mobile Phone No. ....  
Email ..... adatum.corporation@contoso.com

Ticket Units/Lines | Manage | Line

New Line View Service Unit Meters  
Delete Line **Add Service Template** View Service Ticket Details

Task Type	ODT Service Unit No.	Serial No.	Description
→ Heading	SU000002		2016 NISSAN T

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

Service Templates | New

Template No.	Template Type	Description
→ 20KSERVICE	All	20,000 KM Se
40KSERVICE	All	40,000 KM Se
50POINTINS...	All	50 point inspe
<b>OILCHANGE-LT</b>	All	Oil Change
REPLACEAIR...	All	Replace Air Fi
ROTATETIRES	All	Rotate Tires

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

Field Service Project Quote

FS00029 · Service Ticket #FS00029 - Adatu

× Default Dimension Priorities are not defined for Source Code: SALES. Don't sh

Home Report Quote Actions Related Automate Fewer

**Make Ticket** Add Service Template Cancel Ticket Copy Docu

Sell-to

Address ..... 192 Market Square

Address 2 .....

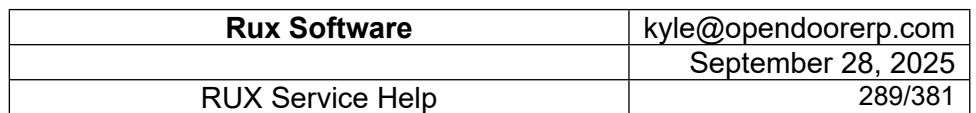
City ..... Atlanta

Click on the button **Yes**

Are you sure you want to convert this quote to an ticket?

Yes No





Add Service Template
 View Job Journal
 Update Meter

Confirm Actuals
 Create Service Sales Invoice
 Mark Complete

### General

Customer No.	10000
Customer Name	Adatum Corporation
Description	Service Ticket #FS00029 - Adatum Corpora
Order Date	4/8/2024
Service Date	4/8/2024

New Line

View

Service Unit Meters

Delete Line

Add Service Template

View Service Ticket Details

Task Type	ODT Service Unit No.	Serial No.	Description
→ <b>Heading</b>	⋮ SU00002		<b>2016 NISSAN T</b>
<div></div> Posting	⋮ SU00002		Oil Change

Ticket Details

Ticket Details

Contact No. .....  
 Phone No. ....  
 Mobile Phone No. ....  
 Email ..... **adatum.corporation@contoso.com**

Ticket Units/Lines    [Manage](#)    **[Line](#)**

New Line    View    Service Unit Meters    Add





Delete Line    Add Service Template    View Service Ticket Details    Ticket

Task Type	ODT Service Unit No.	Serial No.	Description

Mobile Phone No. ....

Email ..... [adatum.corporation@contoso.com](mailto:adatum.corporation@contoso.com)

Ticket Units/Lines | Manage | Line

Dimensions   **Field Ticket**  Create Service Sales Invoice  Print P

Task Type	ODT Service Unit No.	Serial No.	Description
<b>Heading</b>	<b>SU00002</b>		<b>2016 NISSAN T</b>
→ Posting	SU00002		Oil Change



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Click on the button **Yes**

Do you want to create a new field ticket for Oil Change?

Yes No

Notice that some of the Field Ticket information has already been filled in. You can adjust these fields as needed.

Field Service Project Suggest Copy Post Print...

**General**

Field Ticket No. FT00045

Field Ticket Date 4/8/2024

Field Service Project No. FS00029

Field Service Line 0020000

Responsibility Center

Crew Member 1 kyle

Crew Member 2

Click on **Field Ticket Line**

GL

Major

**Field Ticket Line** Manage Line

New Line Delete Line

Type	No.	Project Task No.	Line Type	Employee No.
→ Resource	KYLE	0020000	Both Budg...	KYLE

The Field Ticket Lines contains information about the items and resources being used. You can add more lines as needed

Field Ticket Line Manage Line

New Line Delete Line

Type	No.	Project Task No.	Line Type	Employee No.
→ Resource	KYLE	0020000	Both Budg...	KYLE



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When using the Field Service approval process, notice that the status field says Open

...	Crew Member 3	
	Site Contact	
	On-Site Contact Email	
▼	On-Site Phone No.	
▼	Status	Open
...	Department Code	SALES
...	Customergroup Code	SMALL

To begin the approval process, first the approval must be sent  
Click on the navigation menu item **Send**

Automate Fewer options

Suggest

Copy

Post

Print...

Send

Cancel

Approve

Reject

FT00045	...	Crew Member 3
4/8/2024		Site Contact

Notice that the status has changed to Pending Approval

...	Crew Member 3	
	Site Contact	
	On-Site Contact Email	
	On-Site Phone No.	
	Status	Pending Approval
	Department Code	SALES
	Customergroup Code	SMALL

Click on the navigation menu item **Approve**

Force Code: PROJNL Don't show again | Do you want to initialize Dimension Priorities?

Post

Print...

Send

Cancel

Approve

Reject

...	Crew Member 3	
	Site Contact	



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Notice that the status has changed to Approved

...	Crew Member 3 .....	
	Site Contact .....	
	On-Site Contact Email .....	
	On-Site Phone No. ....	
	Status .....	Approved
	Department Code .....	SALES
	Customergroup Code .....	SMALL

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

Dynamics 365 Business Central

Field Ticket

FT00045

Default Dimension Priorities are not defined for Source Code: PROJNL. Don't

Home | Field Ticket | Automate | Fewer options

Dimensions

General

Field Ticket No. .... FT00045

When you are done, the Field Ticket can be posted

Click on the navigation menu item **Post**

Ticket

00045

Default Dimension Priorities are not defined for Source Code: PROJNL. Don't show again | Do you

me | Field Ticket | Automate | Fewer options

Field Service Project | Suggest | Copy | Post | Print... | Send | Cancel

Post the Field Ticket

General

Ticket No. .... FT00045

Ticket Date .... 4/8/2024

Click on the button **Yes**

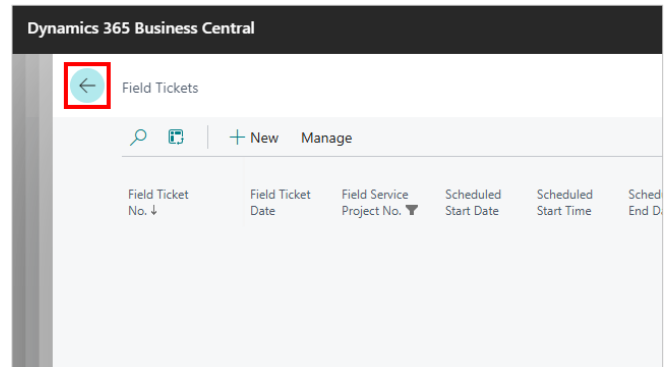
On-Site Contact Email .....

On-Site Phone No. ....

Are you sure you want to post Ticket FT00045?

Yes | No

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 reoccurring 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

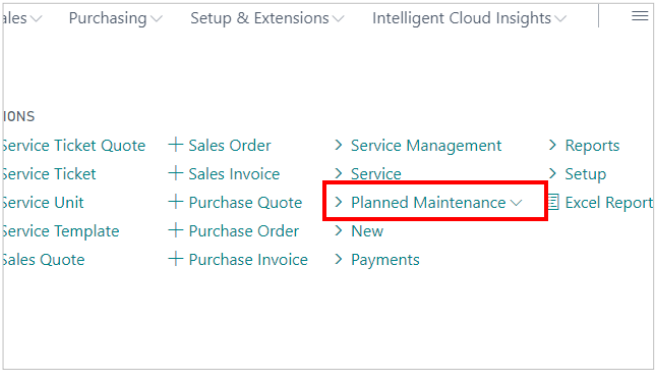
Business Manager Profile

Additional Planned Maintenance Schedules and Service Meters have been created prior to this example.

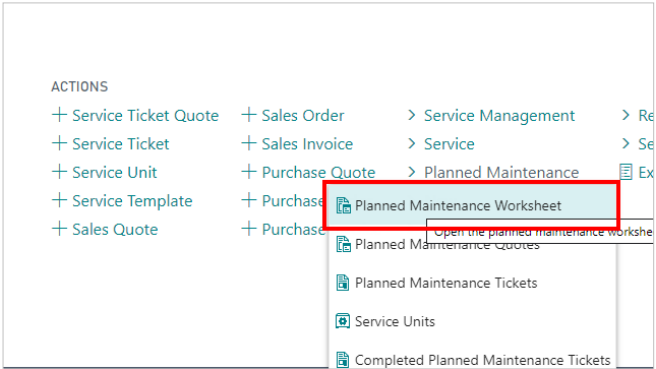


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Click on the navigation menu item popup **Planned Maintenance**

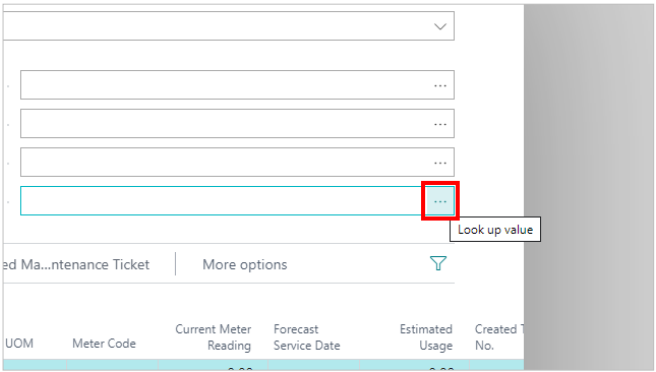


Click on the navigation menu item **Planned Maintenance Worksheet**

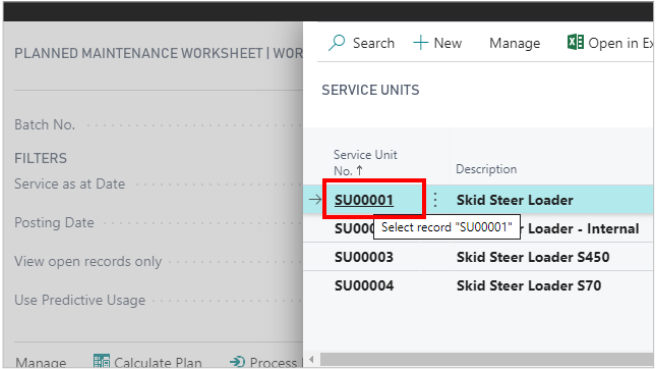


There are a variety of filters that can be used to identify planned maintenance tickets. The following example will use the Service Unit filter.

Click on the lookup button **Select Service Unit(s)**



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





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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.

Service as at Date ..... 4/15/2019  
Posting Date ..... 4/15/2019  
View open records only ..... ☐  
Use Predictive Usage ..... ☐  
Manage **Calculate Plan** Process Deferred Service View  
Calculate planned maintenance according to planned  
Service Unit No. ↑ Service Unit Description Service Template No. ↑  
→

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

Use Predictive Usage ..... ☐  
Manage **Calculate Plan** Process Deferred Service View  
Service Unit No. ↑ Service Unit Description Service Template No. ↑  
**SU00001** Skid Steer Loader SS-GENERAL ...  
→

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.

Select Service Location(s) .....  
Select Service Customer(s) .....  
Select Maintenance Group(s) .....  
Select Service Unit(s) .....  
View Service Unit View Service Template **Create Planned Maintenance Ticket** View  
Create Planned Maintenance  
Service Template Description Posting Date Planned Maint Trigger Trigger Date Trigger Usage  
Skid Steer General Service 4/15/2019 Recurring U... 30.00

Click on the button **OK**

planned maintenance tickets created.  
OK



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Click on the navigation menu item **View Planned Maintenance Ticket**

Posting Date	Planned Maint Trigger	Trigger Date	Trigger Usage	Usage UOM	Meter Code	Current Meter Reading
4/15/2019	Recurring U...		30.00	MILES	REGULAR	3

### 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**







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

Dynamics 365 Business Central

Planned Maintenance Worksheet | Work Date: 6/16/2021

Edit - Planned Maintenance Ticket Quote - PM00034 · Service T

Manage Process Report Quote Page Actions Related Fewer opt

Make Ticket Add Service Template Cancel Ticket

Customer Name ..... Trey Research

Description ..... Service Ticket #PM00034 - Trey F

Order Date ..... 4/12/2021

Click on the button **Yes**

Are you sure you want to convert this quote to an ticket?

Yes No

#### 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**

One Ticket per Customer ..... ☒

Select Service Location(s) .....

Select Service Customer(s) .....

Select Maintenance Group(s) .....

Click on the toggle field **One Ticket per Customer**

One Ticket per Customer ..... ☐

t Service Location(s) .....

t Service Customer(s) .....

t Maintenance Group(s) .....

To demonstrate One Ticket Per Customer we must select two different Service Units.



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Click on the lookup button **Select Service Unit(s)**

Click on the link in cell **Service Unit No.** with the value **SU00007**

→	SU00001	2015 NISSAN Titan
	SU00002	2016 NISSAN Titan
	SU00003	2015 NISSAN Frontier
	SU00004	2016 NISSAN Frontier
	SU00005	2015 Ford F150
	SU00006	2016 Ford F150
	SU00007	2017 Bobcat S70 Skid-Steer ..
	SU00008	2017 Bobcat S450 Skid-Steer.
	SU00009	2018 Bobcat S70 Skid-Steer ..
	SU00010	2018 Bobcat S450 Skid-Steer.

Click on the lookup button **Select Service Unit(s)**

Click on the link in cell **Service Unit No.** with the value **SU00008**

→	SU00001	2015 NISSAN Titan
	SU00002	2016 NISSAN Titan
	SU00003	2015 NISSAN Frontier
	SU00004	2016 NISSAN Frontier
	SU00005	2015 Ford F150
	SU00006	2016 Ford F150
	SU00007	2017 Bobcat S70 Skid-Steer ..
	SU00008	2017 Bobcat S450 Skid-Steer.
	SU00009	2018 Bobcat S70 Skid-Steer ..
	SU00010	2018 Bobcat S450 Skid-Steer.



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Click on the navigation menu item **Calculate Plan**

Service as at Date ..... 4/6/2020

Posting Date ..... 4/6/2020

View open records only ..... ☐

Use Predictive Usage ..... ☐

Manage **Calculate Plan** Process Deferred Service View Service Unit

Calculate planned maintenance according to planned maintenance schedule

Service Unit No. ↑	Service Unit Description	Service Template No. ↑	Service Template
→			

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.

Service Unit No. ↑	Service Unit Description	Service Template No. ↑	Service Template
→	SU00007 : 2017 Bobcat S70 Skid-Steer Loader	OILCHANGE-SS	Oil Change
	SU00007 2017 Bobcat S70 Skid-Steer Loader	REPLACEAIRFI...	Replace Air Fi
	SU00008 2017 Bobcat S450 Skid-Steer Loa...	OILCHANGE-SS	Oil Change
	SU00008 2017 Bobcat S450 Skid-Steer Loa...	REPLACEAIRFI...	Replace Air Fi

Click on the cell **Service Unit No.** with the value **SU00007**

Use Predictive Usage ..... ☐

Manage **Calculate Plan** Process Deferred Service View Service Unit

Service Unit No. ↑	Service Unit Description	Service Template No. ↑	Service Template
→	SU00007 : 2017 Bobcat S70 Skid-Steer Loader	OILCHANGE-SS	Oil Change
	SU00007 SU00007 2017 Bobcat S70 Skid-Steer Loader	REPLACEAIRFI...	Replace Air Fi
	SU00008 2017 Bobcat S450 Skid-Steer Loa...	OILCHANGE-SS	Oil Change
	SU00008 2017 Bobcat S450 Skid-Steer Loa...	REPLACEAIRFI...	Replace Air Fi

Click on the row menu button

Use Predictive Usage ..... ☐

Manage **Calculate Plan** Process Deferred Service View Service Unit

Service Unit No. ↑	Service Unit Description	Service Template No. ↑	Service Template
→	SU00007 : 2017 Bobcat S70 Skid-Steer Loader	OILCHANGE-SS	Oil Change
	SU00007 Show more options 2017 Bobcat S70 Skid-Steer Loader	REPLACEAIRFI...	Replace Air Fi
	SU00008 2017 Bobcat S450 Skid-Steer Loa...	OILCHANGE-SS	Oil Change
	SU00008 2017 Bobcat S450 Skid-Steer Loa...	REPLACEAIRFI...	Replace Air Fi



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Click on the menu item **Select More**

Service Unit No. ↑	Service Unit Description	Service Template No. ↑	Service Template Description
→ SU00007	2017 Bobcat S70 Skid-Steer Loader	OILCHANGE-SS	Oil Change
New Line	2017 Bobcat S70 Skid-Steer Loader	REPLACEAIRFL...	Replace Air Filter
Delete Line	2017 Bobcat S450 Skid-Steer Loader	OILCHANGE-SS	Oil Change
Select More	2017 Bobcat S450 Skid-Steer Loader	REPLACEAIRFL...	Replace Air Filter

Select the service line for Oil Change for both units.

Manage	Calculate Plan	Process Deferred Service	View Service Unit
Service Unit No. ↑	Service Unit Description	Service Template No. ↑	Service Template Description
→ <input checked="" type="radio"/> SU00007	2017 Bobcat S70 Skid-Steer Loader	OILCHANGE-SS	Oil Change
<input type="radio"/> SU00007	2017 Bobcat S70 Skid-Steer Loader	REPLACEAIRFL...	Replace Air Filter
<input checked="" type="radio"/> SU00008	2017 Bobcat S450 Skid-Steer Loader	OILCHANGE-SS	Oil Change
<input type="radio"/> SU00008	2017 Bobcat S450 Skid-Steer Loader	REPLACEAIRFL...	Replace Air Filter

Click on the navigation menu item **Create Planned Maintenance Ticket(s)**

Select Service Location(s)

Select Service Customer(s)

Select Maintenance Group(s)

Select Service Unit(s)

View Service Unit

View Service Template

Create Planned...ance Ticket(s)

View Planned Maintenance Ticket(s)


Service Template No.	Service Template Description	Posting Date	Planned Maint Trigger	Trigger Date	Trigger Usage
CHANGE-SS	Oil Change	4/6/2020	Recurring U...	4/6/2020	50.
ACEAIRFIL...	Replace Air Filter	4/6/2020	Fixed Period	4/6/2020	0.
CHANGE-SS	Oil Change	4/6/2020	Recurring U...	4/6/2020	50.


Notice that only 1 ticket has been created after selecting both lines.


Select Maintenance Group(s) ...

Select Service Unit(s) .....

ew Service Unit

 View Service Template

 Create Planned...ance Ticket(s)

 View Planned

io.

Service Template Des

GE-SS Oil Change

IRFL... Replace Air Filter

GE-SS Oil Change

IRFL... Replace Air Filter

2 planned maintenance entries processed, 1 planned maintenance tickets created.

OK



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Click on the button **OK**

planned maintenance entries processed, 1 planned maintenance tickets created.

**OK**

Click on the navigation menu item **View Planned Maintenance Ticket**

Select Service Location(s) .....  
Select Service Customer(s) .....  
Select Maintenance Group(s) .....  
Select Service Unit(s) ..... SU00007

Template Create Planned...ance Ticket(s) **View Planned M...enance Ticket** More

View Planned Maintenance Ticket. View th

Posting Date	Planned Maint Trigger	Trigger Date	Trigger Usage	Usage UOM	Meter Code
4/6/2020	Recurring U...	4/6/2020	50.00	HOUR	HOUR
4/6/2020	Fixed Period	4/6/2020	0.00		
4/6/2020	Recurring U...	4/6/2020	50.00	HOUR	HOUR

Notice that the ticket that was created now has lines for both of the selected Service Units.

Service Date ..... 4/6/2020

Ticket Units/Lines Manage More options

Task Type	ODT Service Unit No.	Serial No.	Description	Defer Serv...
→ Heading	SU00007		2017 Bobcat S70 Skid-Steer ...	
Posting	SU00007		Oil Change	
Heading	SU00008		2017 Bobcat S450 Skid-Steer...	
Posting	SU00008		Oil Change	

Ticket Details

## 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**

..... DEFAULT

Select Service Location(s) .....  
**Open the date picker** Customer(s) .....  
Select Maintenance Group(s) .....  
Select Service Unit(s) .....



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Change the date to April 16, 2019.

DEFAULT

at Date ..... 4/15/2019

te ..... April 2019

records only ..... Su Mo Tu We Th Fr Sa

ive Usage ..... 7 8 9 10 11 12 13

Calculate Plan Process Defer View Service Templa

Today Done

Service Unit Description Service Template No. Service Template Description Posting

Skid Steer Loader SS-GENERAL ... Skid Steer General Service 4/15/

Click on the toggle field **Use Predictive Usage**

Batch No. ....

FILTERS

Service as at Date ..... 4/16/2019

Posting Date ..... 4/15/2019

View open records only ..... ☐

Use Predictive Usage ..... ☒

Manage Calculate Plan Process Deferred Service View Service Unit View Ser

Service Unit No. Service Unit Description Service Template No. Service Template Description

SU00001 Skid Steer Loader SS-GENERAL Skid Steer General Service

Click on the navigation menu item **Calculate Plan**

FILTERS

Service as at Date ..... 4/16/2019

Posting Date ..... 4/15/2019

View open records only ..... ☐

Use Predictive Usage ..... ☒

Manage Calculate Plan Process Deferred Service View Ser

Calculate planned maintenance according to planne

Service Unit No. Service Unit Description Service Template No.

SU00001 Skid Steer Loader SS-GENERAL ...

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.

Use Predictive Usage

Manage Calculate Plan Process Deferred Service View Ser

Service Unit No. Service Unit Description Service Template No.

SU00001 Skid Steer Loader SS-GENERAL ...

SU00003 Skid Steer Loader S450 SS-GENERAL ...



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Trigger usage displays the amount of usage required to trigger the Service Meter. In this example, the amount is 30 hours.

Select Service Unit(s)						
Service Template   Create Planned Maintenance Ticket   View Planned Maintenance Ticket						
Posting Date	Planned Maint Trigger	Trigger Date	Trigger Usage	Usage UOM	Meter Code	
4/15/2019	Recurring U...		30.00	MILES	REGULAR	
4/15/2019	Recurring U...		30.00	MILES	REGULAR	
				30.00		

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.

Selected Maintenance Ticket   More options					
UOM	Meter Code	Current Meter Reading	Forecast Service Date	Estimated Usage	Created T No.
	REGULAR	30.00	4/15/2019	0.00	PM0000
	REGULAR	20.00	4/16/2019	20.00	
				20.00	

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**

Manage   Calculate Plan   Process Deferred Service   View		
Service Unit No. ↑	Service Template No. ↑	Service Template Description
→ SU00001	SS-GENERAL ...	Skid Steer General Service
SU00003	SS-GENERAL ...	Skid Steer General Service
	SU00003	





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Click on the cell **Defer Service** with the value **Until Date Next Service**

View Planned Maintenance Ticket

More options

	Forecast Service Date	Estimated Usage	Created Ticket No.	Defer Service	Defer Until Date
0	4/15/2019	0.00	PM00001		
0	4/16/2019	20.00			

Click on the item **Until Date** in the list

View Planned Maintenance Ticket

More options

Forecast Service Date	Estimated Usage	Created Ticket No.	Defer Service	Defer Until Date
4/15/2019	0.00	PM00001		
4/16/2019	20.00			

Until Date

Next Service

Click on the cell **Defer Until Date**

View Planned Maintenance Ticket		More options	
Estimated Usage	Created Ticket No.	Defer Service	Defer Until Date
0.00	PM00001		
20.00		Until Date	

Select the date to April 23, 2019

0.00	PM00001		
20.00		Until Date	



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Click on the navigation menu item **Process Deferred Service**

Service Unit No.	Service Template Description	Posting Date	Planned Maint Trigger
SU00001	Skid Steer General Service	4/15/2019	Recurring U...
→ SU00003	Skid Steer General Service	4/15/2019	Recurring U...

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 deferral.  
Click on the field **Service as at Date**

4/16/2019

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

Change the date to April 23, 2019

at Date ..... 4/23/2019

ite ..... 4/15/2019

records only ..... ☐

tive Usage ..... ☒

Calculate Plan Process Deferred Service View Service Unit View Service Template

Service Template Description	Posting Date	Planned Maint Trigger	Trigger Date	Trigger Usage
Skid Steer General Service	4/15/2019	Recurring U...		30.00

Click on the link **Calculate planned maintenance according to planned maintenance schedules that have been set up.**

Service as at Date ..... 4/23/2019

Posting Date ..... 4/15/2019

View open records only ..... ☐

Use Predictive Usage ..... ☒

Manage Calculate Plan Process Deferred Service View Service Unit

Calculate planned maintenance according to planned

Service Unit No. ↑	Service Template Description	Posting Date	Trigger Date	Trigger Usage
→ SU00001	Skid Steer General Service	4/15/2019		

Since the service date has been changed, Calculate Plan will now display the deferred entry.

Manage Calculate Plan Process Deferred Service View Service Unit

Service Unit No. ↑	Service Template Description	Posting Date	Trigger Date	Trigger Usage
→ SU00001	Skid Steer General Service	4/15/2019		
SU00003	Skid Steer General Service	4/15/2019		

## 4.2.7. How to View the Planned Maintenance Entry Archive

Business Manager Profile

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

Service Ticket Quote + Sales Order > Service Management > Reports

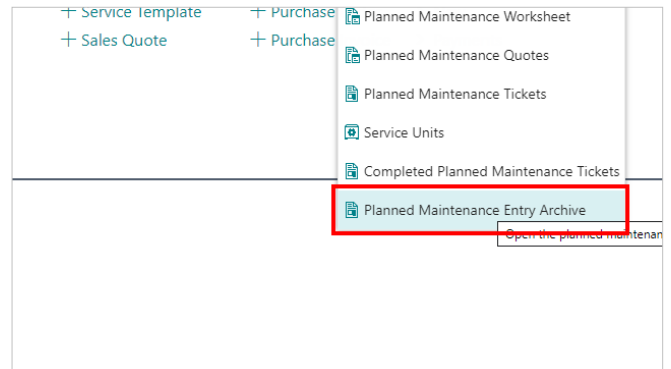
Service Ticket + Sales Invoice > Service > Setup

Service Unit + Purchase Quote > Planned Maintenance ▾ Excel Report

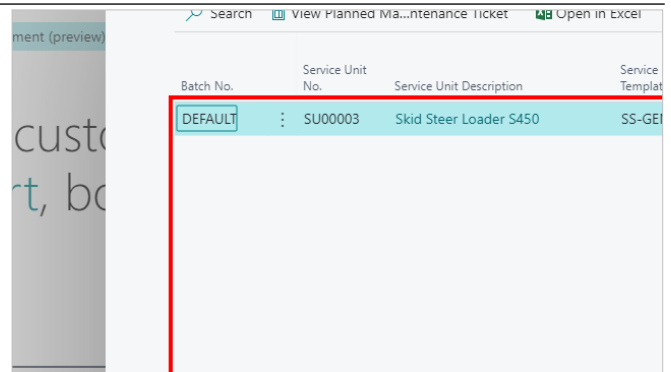
Service Template + Purchase Order > New

Sales Quote + Purchase Invoice > Payments

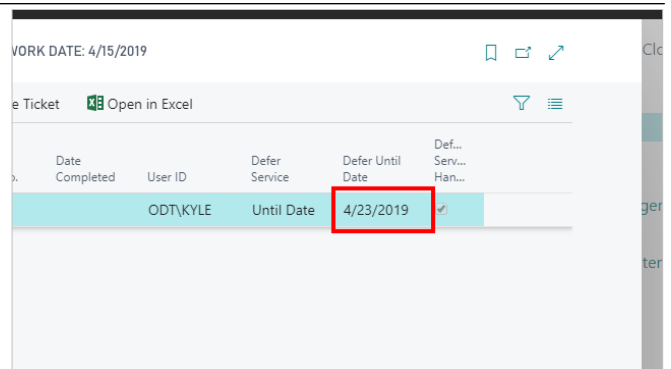
Click on the navigation menu item **Planned Maintenance Entry Archive**



The archive will display a list of all tickets that have been processed using the Planned Maintenance Worksheet.

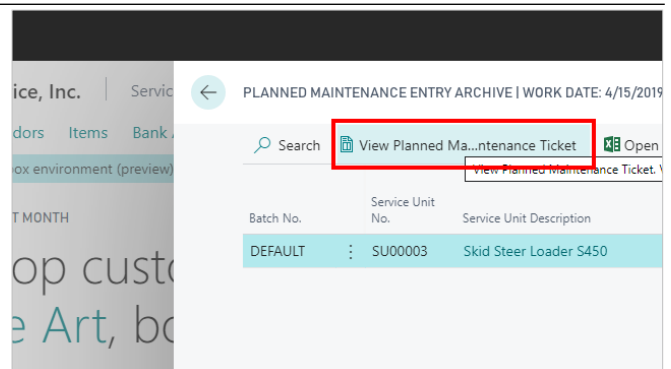


Click on the cell **Defer Until Date** with the value **4/23/2019**



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.



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- From the Activities Cue, Planned Maintenance Quote, then select New.

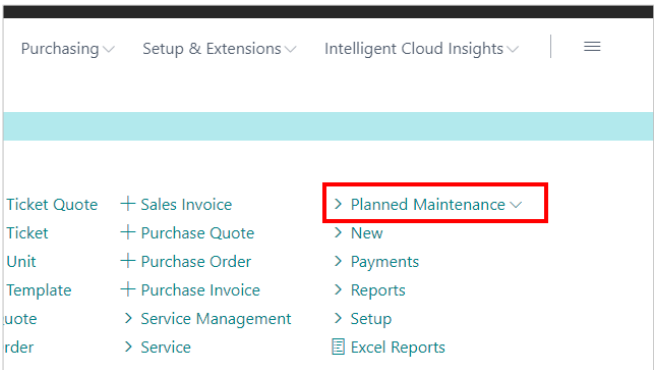
Upon approval from the customer, the Planned Maintenance Quote should be converted into a Planned Maintenance Ticket.

### 4.3.2. How to create a Planned Maintenance Quote

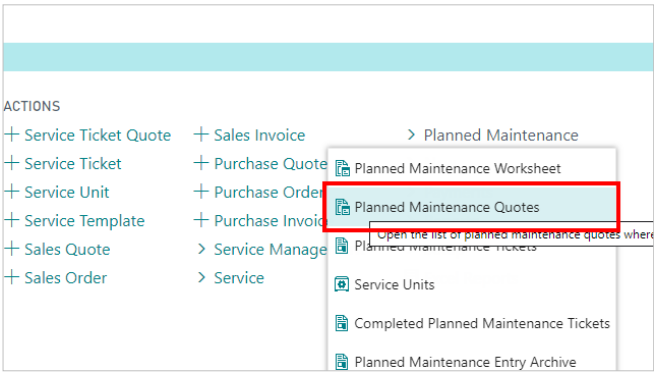
The following demonstrates the creation of a Planned Maintenance Quote.

Business Manager Profile

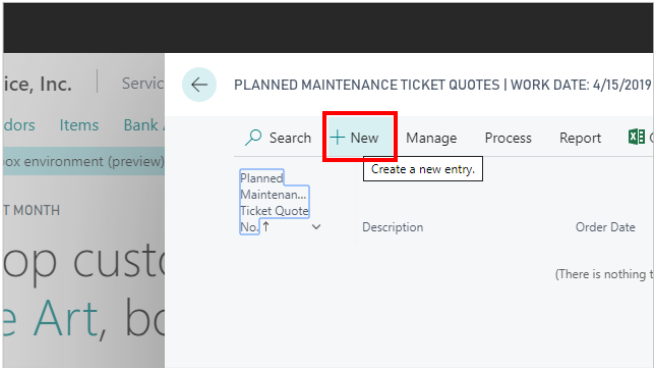
Click on the navigation menu item popup **Planned Maintenance**



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



Click on the navigation menu item **New**





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

Ticket Quote

<input type="text"/>	Service Date .....
<input type="text"/>	Look up value Ticket Type .....
<input type="text"/>	Assigned Technician .....
<input type="text"/>	Default Service Unit No. ....

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

Process Report More options

General

Customer No. ....																			
Customer Name .....																			
Description .....	<table><thead><tr><th>No. ↑</th><th>Name</th><th>ZIP</th></tr></thead><tbody><tr><td>10000</td><td>Adatum Corporation</td><td>31</td></tr><tr><td>20000</td><td>Select record "10000"</td><td>61</td></tr><tr><td>30000</td><td>School of Fine Art</td><td>37</td></tr><tr><td>40000</td><td>Alpine Ski House</td><td>31</td></tr><tr><td>50000</td><td>Relecloud</td><td>31</td></tr></tbody></table>	No. ↑	Name	ZIP	10000	Adatum Corporation	31	20000	Select record "10000"	61	30000	School of Fine Art	37	40000	Alpine Ski House	31	50000	Relecloud	31
No. ↑	Name	ZIP																	
10000	Adatum Corporation	31																	
20000	Select record "10000"	61																	
30000	School of Fine Art	37																	
40000	Alpine Ski House	31																	
50000	Relecloud	31																	
Order Date .....																			

Ticket Units/Lines Manage More options

ODT Service Unit + New

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.

More options

10000	▼	Service
Adatum Corporation		Service
<input type="text"/>		Assigned
4/15/2019	📅	Default

Manage More options

Click on the field **Service Ticket Type**  
This field is optional.

Show more

4/15/2019	📅
<input type="text"/>	...
Look up value	▼
<input type="text"/>	▼



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Click on the field **Assigned Technician**  
This field is optional.

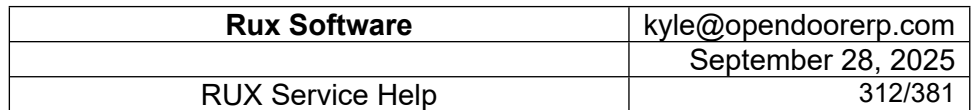
Click on the field **Default Service Unit No.**  
If the selected service unit is already on another open service ticket, a message will be displayed to indicate this and confirm if you want to proceed.

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**



PLANNED MAINTENANCE TICKET QUOTE | WORK DATE: 4/15/2019

# PM00002

Process | Report | More options

Make Ticket
 Add Service Template
 Cancel Ticket

Add Service Template

Customer No. .... 10000

Customer Name .... Adatum Corporation

Description ....

PLANNED MAINTENANCE TICKET QUOTE | WO

PM000002

Process Report More options

General

Customer No. ....

Customer Name .....

Description .....

SERVICE TEMPLATES

Template No.	Template Type	Skid Steer
→ SS-GENERAL S...	All	Skid Steer

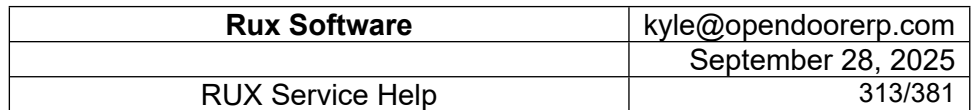
Select record "SS-GENERAL SERVICE"

The following demonstrates manually entering a ticket line on a Planned Maintenance Quote.

	SU00001	Skid Steer Loader	<input type="checkbox"/>	—
tal	SU00001	Skid Steer General Service	<input type="checkbox"/>	—
	SU00001	Labor - Lube	<input type="checkbox"/>	4/1
	SU00001	Oil Change for Skid Steers	<input type="checkbox"/>	4/1
	SU00001	Air Filter for Skid Steers	<input type="checkbox"/>	4/1
	SU00001	Income - Shop Supplies	<input type="checkbox"/>	4/1
	SU00001	Skid Steer General Service	<input type="checkbox"/>	—
			<input type="checkbox"/>	

	SU00001		Skid Steer Loader	<input type="checkbox"/>	
tal	SU00001		Skid Steer General Service	<input type="checkbox"/>	-
	SU00001		Labor - Lube	<input type="checkbox"/>	4/1
	SU00001		Oil Change for Skid Steers	<input type="checkbox"/>	4/1
	SU00001		Air Filter for Skid Steers	<input type="checkbox"/>	4/1
	SU00001		Income - Shop Supplies	<input type="checkbox"/>	4/1
	SU00001		Skid Steer General Service	<input type="checkbox"/>	-
			<div style="border: 2px solid red; padding: 2px;">A</div>	<input type="checkbox"/>	
				<input type="checkbox"/>	
S					





	<input type="checkbox"/>	-	-	-	-
	<input type="checkbox"/>	-	-	-	-
	<input type="checkbox"/>	4/15/2019	4/15/2019	11.13	-
	<input type="checkbox"/>	4/15/2019	4/15/2019	37.50	-
	<input type="checkbox"/>	4/15/2019	4/15/2019	15.38	-
	<input type="checkbox"/>	4/15/2019	4/15/2019	10.00	-
	<input type="checkbox"/>	-	-	74.01	-
	<input type="checkbox"/>				
	<input type="checkbox"/>				

Open record ""

View	Edit List	Delete	Item Availability By Location	Open in Excel	More
------	-----------	--------	-------------------------------	---------------	------

ITEM DETAILS					
Job Task No. ↑	Service Unit No.	Service Template No.	Line Type	Type	No.
0080000			Time and Mat	Resource	
			Time and Materials		

Item Availability By Location | Open in Excel | More options

Service Template No. Line Type Type No. Description

Time and Resource Look up value

Cost Tracking Only  
Fixed Price Billing  
Time and Materials

The screenshot shows the 'Time and Mat' table with a dropdown menu open for the 'Resource' column. The dropdown menu lists several resources, with 'LABOR' highlighted and a red box around it. A tooltip for 'LABOR' is visible, showing 'Select record "LABOR"'.

Service Template No.	Line Type	Type	No.	Description
				Time and Mat Resource
				LABOR Labor - Oil Change
				MARK Mark Hanson
				MARY Mary A. Dempsey
				TIMOTHY Timothy Sneath
				+ New



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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 overridden to more accurately describe the task being performed.

EDIT - SERVICE TICKET DETAILS

Job No. ↑ ▼	Type	No.	Description	Defer Serv...	Q
PM00002	Resource	LABOR	Labor - Oil Change	<input type="checkbox"/>	

Enter the text **additional Labor**.

EDIT - SERVICE TICKET DETAILS

Job No. ↑ ▼	Type	No.	Description	Defer Serv...	Q
PM00002	Resource	LABOR	Ad	<input type="checkbox"/>	

Click on the cell **Quantity**

EDIT - SERVICE TICKET DETAILS

Description	Defer Serv...	Quantity	Unit of Measure Code	Unit Cost
Additional Labor	<input type="checkbox"/>	1	HOURL	22.25

Enter the text **1**.

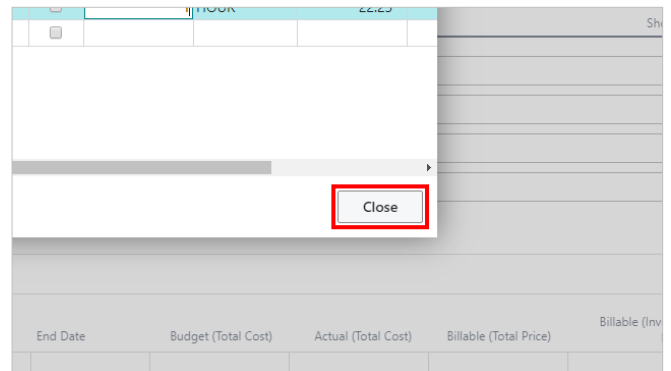
EDIT - SERVICE TICKET DETAILS

Description	Defer Serv...	Quantity	Unit of Measure Code	Unit Cost
Additional Labor	<input type="checkbox"/>	1	HOURL	22.25



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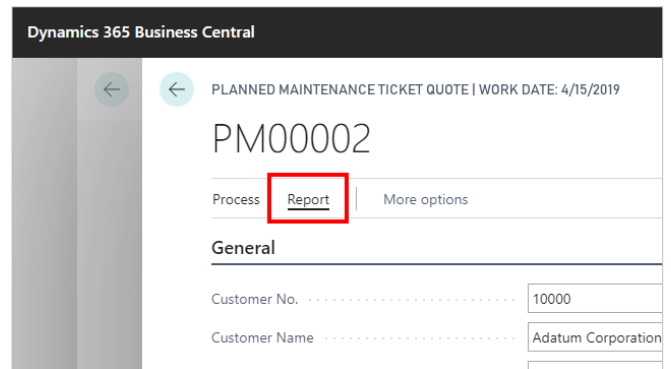
Click on the button **Close**



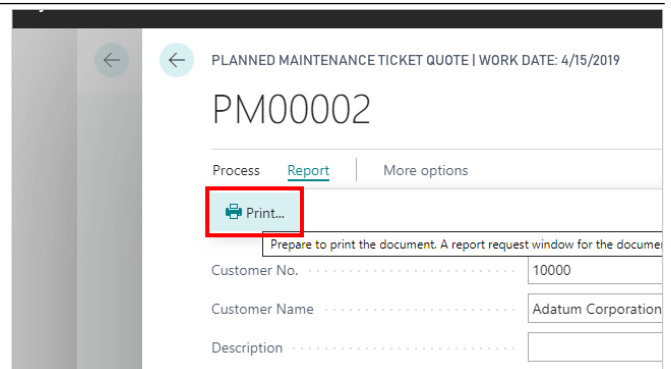
#### 4.3.5. How to Print the Planned Maintenance Quote

The following demonstrates how to print a Planned Maintenance Quote.

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

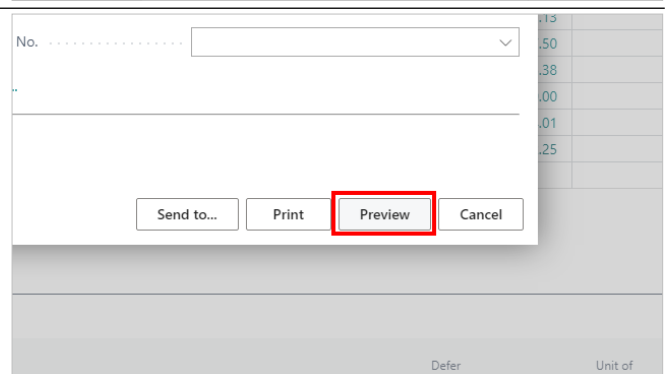


Click on the navigation menu item **Print...**



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**





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## 4.4. How to Process Planned Maintenance Tickets

### 4.4.1. Overview

A Planned Maintenance Ticket can be created:

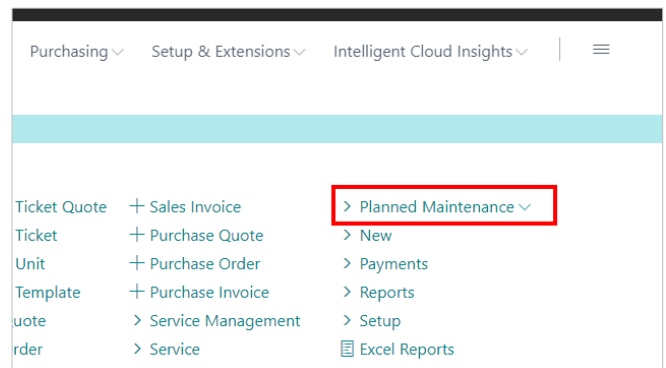
- From the main menu option, Planned Maintenance, by selecting Planned Maintenance Tickets, which opens the Planned Maintenance Ticket list where New can be selected.
- From the Actions part of the profile by selecting, Planned Maintenance, then Planned Maintenance Tickets.
- From the Activities Cue, 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

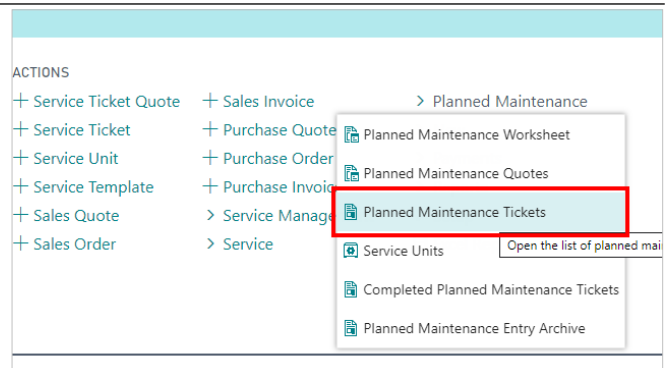
Planned Maintenance Tickets can be created manually, or they can be created using the Planned Maintenance Worksheet. Tickets created using the Planned Maintenance Worksheet will have all required fields filled in automatically.

The following demonstrates how to create a new Planned Maintenance Ticket.

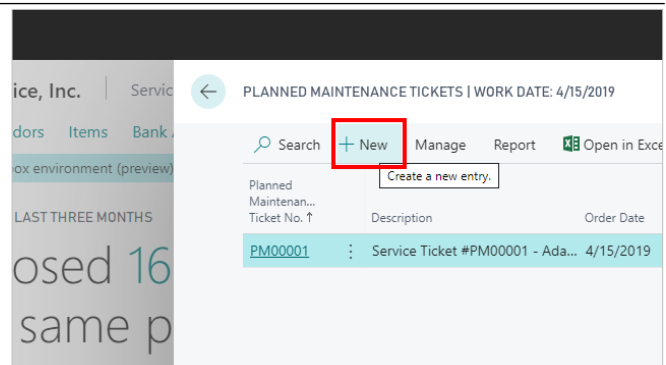
Click on the navigation menu item popup **Planned Maintenance**



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



Click on the navigation menu item **New**





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

anned Maintenance Ticket

Process Report More options

General

Customer No. ....

Customer Name ....

Description ....

Order Date ....

Service Date ....

Ticket Type ....

Assigned Technician ....

Default Service Unit ...

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

Process Report More options

General

Customer No. ....

Customer Name ....

Description ....

Order Date ....

Ticket Units/Lines

No. ↑	Name	ZIF
10000	Adatum Corporation	31
20000	School of Fine Art	37
30000	Alpine Ski House	31
40000	Relecloud	31

+ New

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.

Process Report More options

General

Customer No. .... 10000

Customer Name .... Adatum Corporation

Description ....

Order Date ....

Ticket Units/Lines

Manage More options

Click on the field **Service Ticket Type**  
This field is optional.

Service Date .... 4/15/2019

Service Ticket Type ....

Assigned Technician ....

Default Service Unit ...



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Click on the field **Assigned Technician**  
This field is optional.

The screenshot shows a service ticket form with fields for Service Date (4/15/2019), Service Ticket Type, Assigned Technician, and Default Service Unit. The Assigned Technician dropdown menu is highlighted with a red box, and a 'Look up value' button is visible below it.

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.

The screenshot shows the same service ticket form, but now the Default Service Unit dropdown menu is highlighted with a red box.

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

The screenshot shows the dropdown menu for the Default Service Unit field. The option 'SU00001 Skid Steer Loader' is highlighted with a red box. Other options include 'SU00003 Skid Steer Loader S450' and 'SU00004 Skid Steer Loader S70'.

### 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**

The screenshot shows the service ticket form for 'PM00003 · Service Corporation'. The 'Process' button in the header is highlighted with a red box. The form also displays customer information: Customer No. 10000 and Customer Name Adatum Corporation.



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

PM00003 · Service Corporation

Process Report More options

**Add Service Template** View Job Journal

Confirm Actual Add Service Template Planned ...

Customer Name Adatum Corporation

Description Service Ticket #PM00003

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

PLANNED MAINTENANCE T

Search + New Manage Open in Ex

SERVICE TEMPLATES

Template No.	Template Type	Description
<b>SS-GENERAL S...</b>	All	Skid Steer

A Service Template can also be added from the ticket lines.

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

Customer No. 10000 Service

Customer Name Adatum Corporation Service

Description Service Ticket #PM00003 - Adatu Assigne

Order Date 4/15/2019 Default

Ticket Units/Lines **Manage** More options

Task Type	ODT Service Unit No.	Serial No.	Description
→ <b>Heading</b>	<b>SU00001</b>		<b>Skid Steer Load</b>
Begin-Total	SU00001		Skid Steer Gener
Posting	SU00001		Labor - Lube

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

Description Service Ticket #PM00003 - Adatu As

Order Date 4/15/2019 De

Ticket Units/Lines **Manage** More options

New Line **Add Service Template** View Service Tick

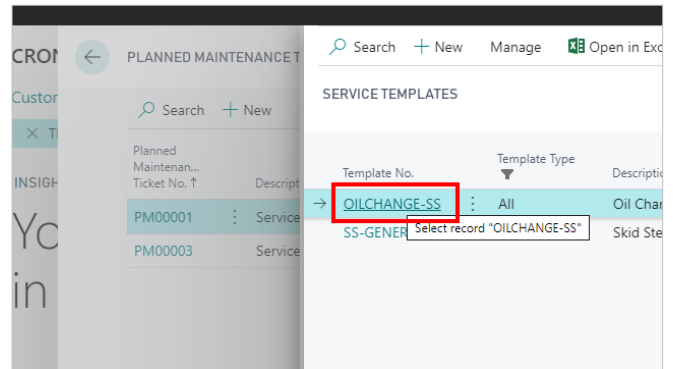
Delete Line Service Unit Meters

Begin-Total	SU00001		Skid Steer
Posting	SU00001		Labor - Lut
Posting	SU00001		Oil Change
Posting	SU00001		Air Filter fo



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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**

total	SU00001		Skid Steer General Service	<input type="checkbox"/>	—
	SU00001		Labor - Lube	<input type="checkbox"/>	4/1
	SU00001		Oil Change for Skid Steers	<input type="checkbox"/>	4/1
	SU00001		Air Filter for Skid Steers	<input type="checkbox"/>	4/1
	SU00001		Income - Shop Supplies	<input type="checkbox"/>	4/1
il	SU00001		Skid Steer General Service	<input type="checkbox"/>	—
	SU00001		Oil Change for Skid Steers	<input type="checkbox"/>	4/1
				<input type="checkbox"/>	
Is					

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.

total	SU00001		Skid Steer General Service	<input type="checkbox"/>	—
	SU00001		Labor - Lube	<input type="checkbox"/>	4/1
	SU00001		Oil Change for Skid Steers	<input type="checkbox"/>	4/1
	SU00001		Air Filter for Skid Steers	<input type="checkbox"/>	4/1
	SU00001		Income - Shop Supplies	<input type="checkbox"/>	4/1
il	SU00001		Skid Steer General Service	<input type="checkbox"/>	—
	SU00001		Oil Change for Skid Steers	<input type="checkbox"/>	4/1
			A	<input type="checkbox"/>	
Is					

Click on the link in cell Budget (Total Cost).

<input type="checkbox"/>	—	—	—	—	
<input type="checkbox"/>	4/15/2019	4/15/2019	11.13	—	
<input type="checkbox"/>	4/15/2019	4/15/2019	37.50	—	
<input type="checkbox"/>	4/15/2019	4/15/2019	15.38	—	
<input type="checkbox"/>	4/15/2019	4/15/2019	10.00	—	
<input type="checkbox"/>	—	—	74.01	—	
<input type="checkbox"/>	4/15/2019	4/15/2019	37.50	—	
<input type="checkbox"/>	4/15/2019	4/15/2019	—	—	
					Open record **





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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 overridden to more accurately describe the task being performed.



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Enter the text **additional Labor**.

The screenshot shows the 'TICKET DETAILS' section of a software interface. It features a table with columns: Line Type, Type, No., Description, and Defer Serv... The first row is highlighted in light blue and contains the text 'Time and Mat Resource' under Line Type, 'LABOR' under Type, and 'A' under Description. The 'Description' cell is highlighted with a red rectangular box.

Click on the cell **Quantity**

The screenshot shows the 'Item Availability By Location' section. It features a table with columns: Description, Defer Serv..., Quantity, and Unit of Measure Code. The first row is highlighted in light blue and contains the text 'Additional Labor' under Description, an empty checkbox under Defer Serv..., an empty field under Quantity, and 'HOUR' under Unit of Measure Code. The 'Quantity' cell is highlighted with a red rectangular box.

Enter the text **1**.

This screenshot is identical to the previous one, but the 'Quantity' field in the first row of the table now contains the number '1'. The 'Quantity' cell remains highlighted with a red rectangular box.

Click on the button **Close**

The screenshot shows the 'Item Availability By Location' section with a modal dialog box open. The dialog box has a 'Close' button at the bottom right, which is highlighted with a red rectangular box. The background table is partially visible and dimmed.

**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**

Dynamics 365 Business Central

PLANNED MAINTENANCE TICKET | WORK DATE: 4/15/2019

PM00003 · Service Ticket #

Process **Report** Actions Navigate Fewer options

**General**

Customer No. .... 10000

Customer Name ..... Adatum Corporation

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

Dynamics 365 Business Central

PLANNED MAINTENANCE TICKET | WORK DATE: 4/15/2019

PM00003 · Service Ticket #

Process **Print...** Actions Navigate Fewer options

Customer No. .... 10000

Customer Name ..... Adatum Corporation

Description ..... Service Ticket #PM00003

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**

× Job Task No. ....

+ Filter...

Send to... Print **Preview** Cancel

	4/15/2019	4/15/2019	Total Cost)	Actu
Top Supplies			11.13	
General Service			37.50	
for Skid Steers			15.38	
Labor			10.00	
			74.01	
			37.50	
			22.25	

#### 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**

Dynamics 365 Business Central

PLANNED MAINTENANCE TICKET | WORK DATE: 4/15/2019

PM00003 · Service Ticket #

**Process** | Report | Actions | Navigate | Fewer options

**General**

Customer No. .... 10000

Customer Name ..... Adatum Corporation

Click on the link **Confirm actuals to post usage for the current planned maintenance ticket.**

Dynamics 365 Business Central

PLANNED MAINTENANCE TICKET | WORK DATE: 4/15/2019

PM00003 · Service Ticket #PM

**Process** | Report | Actions | Navigate | Fewer options

Add Service Template | **Confirm Actuals** | View Job Journal

Confirm actuals to post usage for the current planned maintenance ticket.

Customer No. .... 10000

Customer Name ..... Adatum Corporation

Description ..... Service Ticket #PM00003 - Ad

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**

Dynamics 365 Business Central

EDIT - JOB JOURNALS - KYLE · ODT\KYLE JOURNAL

Batch Name ..... KYLE

Line Type	Posting Date	Document No.	Job No.	Job Task No.	Type
→ Both Budget	4/15/2019	DOCPM000...	PM00003	0030000	Re
Both Budget...	4/15/2019	DOCPM000...	PM00003	0040000	Re
Both Budget...	4/15/2019	DOCPM000...	PM00003	0040000	Ite
Both Budget...	4/15/2019	DOCPM000...	PM00003	0040000	Ite

Click on the navigation menu item **Post**

Dynamics 365 Business Central

PLANNED MAINTENANCE TICKET | WORK DATE: 4/15/2019

PM00003 · Service

**Post** | Post and Print

Finalize the document or journal by posting the amount.

Batch Name

Line Type	Posting Date	Document No.
→ Both Budget	4/15/2019	DOCPM000...
Both Budget...	4/15/2019	DOCPM000...
Both Budget...	4/15/2019	DOCPM000...
Both Budget...	4/15/2019	DOCPM000...



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Click on the button **Yes**

DOCPM000...	PM00003	0050000	Item	1004	Air Filter for Skid Steer
DOCPM000...	PM00003	0060000	G/L Account	40150	Income - Shop Supplies
DOCPM000...	PM00003	0080000	Resource	LABOR	Labor - Oil Change

Do you want to post the journal lines?

**Yes** No

JOB DESCRIPTION	ACCOUNT NAME
Service Ticket #PM00003 - Adatum Corpo...	Labor - Oil Change

Click on the button **OK**

PM00003	0050000	Item	1004	Air Filter for Skid Steer
PM00003	0060000	G/L Account	40150	Income - Shop Supplies
PM00003	0080000	Resource	LABOR	Labor - Oil Change

The journal lines were successfully posted.

**OK**

JOB DESCRIPTION	ACCOUNT NAME
Service Ticket #PM00003 - Adatum Corpo...	Labor - Oil Change

Click on the button **Close**

ACCOUNT NAME

**Close**

End Date	Budget (Total Cost)	Actual (Total Cost)	Billable (Total Price)	Billable (Invoice Price)
4/15/2019	11.13	-	37.50	-

## 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**

Dynamics 365 Business Central

← PLANNED MAINTENANCE TICKET | WORK DATE: 4/15/2019

PM00003 · Service Ticket #

**Process** Report Actions Navigate Fewer options

Add Service Template Confirm Actuals View Job Journal

Customer No. 10000

Customer Name Adatum Corporation



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

Dynamics 365 Business Central

PLANNED MAINTENANCE TICKET | WORK DATE: 4/15/2019

PM00003 · Service Ticket #

Process Report Actions Navigate Fewer options

General

Customer No. 10000

Customer Name Adatum Corporation

Click on the navigation menu item **Create Planned Maintenance Sales Invoice**

PLANNED MAINTENANCE TICKET | WORK DATE: 4/15/2019

Service Ticket #PM00003 - Adatum Corporation

Actions Navigate Fewer options

Confirm Actuals View Job Journal Create Planned Maintenance Sales Invoice Mark Complete

10000

Adatum Corporation

Service Ticket #PM00003 - Adatum Corporation

Verify that the Posting Date is correct.

JOB CREATE SALES INVOICE

Options

Posting Date 4/15/2019

Create Invoice per Job

Filter: Job Task

Job No. PM00003

Click on the button **OK**

Filter totals by:

Planning Date Filter

+ Filter...

OK Cancel

				Total Cost	Actual
Supplies	4/15/2019	4/15/2019		11.13	
General Service	4/15/2019	4/15/2019		37.50	
Skid Steers	4/15/2019	4/15/2019		15.38	
Labor	4/15/2019	4/15/2019		10.00	
				74.01	
				37.50	
				22.25	



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Click on the button **OK**

invoice is created.

OK

			Total Cost)	Actual (Total Cost)
			11.13	11.13
			37.50	37.50
			15.38	15.38
			10.00	10.00
			74.01	74.01
			37.50	37.50

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**

Do you want to view the newly created invoice?

Yes No

			Total Cost)	Actual
			11.13	
			37.50	
			15.38	
			10.00	
			74.01	
			37.50	

The following demonstrates how to post the invoice.

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

Manage **Posting** Prepare Invoice Release Re

EDIT - SALES INVOICE - S-INV102223 - ADATUM CORPORATION

General

Customer Name ..... Adatum Corporation

Contact ..... Robert Townes

Lines | Manage More options

Click on the navigation menu item **Post**

Manage Posting Prepare Invoice Release

**Post** Post and New... Post and Se

Finalize the document or journal by posting the e

General

Customer Name ..... Adatum Corporation

Contact ..... Robert Townes

Lines | Manage More options



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Click on the button **Yes**

Do you want to post the invoice?

Yes No

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 invoice is posted as number PS-INV103216 and moved to the Posted Sales Invoices window. Do you want to open the posted invoice?

Yes No

The following demonstrates how to print the posted invoice.

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

Dynamics 365 Business Central

POSTED SALES INVOICE | WORK DATE: 4/15/2019

PS-INV103216 · Adatum Co

Invoice Correct **Print/Send** Navigate Electronic Document

General

No. .... PS-INV103216

Customer .... Adatum Corporation

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

POSTED SALES INVOICE | WORK DATE: 4/15/2019

PS-INV103216 · Adatum Corporation

Invoice Correct Print/Send Navigate Electronic Document More options

Send... Print... Email **Print Service Invoice**

No. .... PS-INV103216

Customer .... Adatum Corporation

Contact .... Robert Townes





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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.

Changes to the options and filters below will be saved only to: 'Last used options and filters'

Use default values from: ..... Last used options and filters

**Options**

Print Company Address ..... ☒

Log Interaction ..... ☒

Show Assembly Components ..... ☐

Show Additional Fee Note ..... ☐

Click on the button **Preview**

Send to... Print **Preview** Cancel

Total Tax (USD) ..... 17.86

Total Incl. Tax (USD) ..... 495.11

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**

Dynamics 365 Business Central

Planned Maintenance Ticket | Work Date: 4/12/2021

PM00002 · Service Ticket #PM00002 - Ada

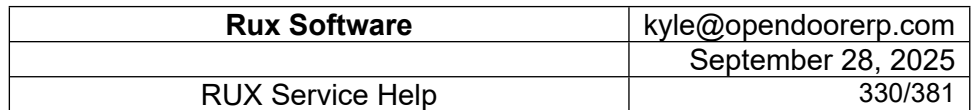
Process **Report** Ticket Actions Related Fewer options

**General**

Customer Name ..... Adatum Corporation

Description ..... Service Ticket #PM00002 - A

Order Date ..... 4/12/2021





Dynamics 365 Business Central

← Planned Maintenance Ticket | Work Date: 4/12/2021

## PM00002 · Service Ticket #PM00002 - Ada

Process Report Ticket Actions Related Fewer options

 Print...  **Print Proforma...**

Customer Name	Adatum Corporation
Description	Service Ticket #PM00002 - A
Order Date	4/12/2021

A screenshot of the 'Print' dialog box in Microsoft Word. The dialog box is white with a thin gray border. At the top, there is a text field containing 'er...' and a 'Print Range' section with '11.13' and '59.76'. Below this is a 'Print' button, which is highlighted with a red rectangle. To the left of the 'Print' button are 'Send to...' and 'Print' buttons, and to the right is a 'Cancel' button. The background shows a portion of a document with a table.

[illegible]

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

Dynamics 365 Business Central

←

←

PLANNED MAINTENANCE TICKET | WORK DATE: 4/15/2019

PM000003 · Service Ticket #

Process

Report

Actions

Navigate

Fewer options

General

Customer No. .... 10000

Customer Name ..... Adatum Corporation



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

Adatum Corporation

Job Journal Create Planned ...e Sales Invoice **Mark Complete**

Mark the current planned maintenance

Service Date

Service Ticket Type

Assigned Technician

Click on the button **Yes**

Are you sure you want to mark this planned maintenance ticket as completed?

Yes No

	Total Cost	Actual
	11.13	
	37.50	
Skid Steers	15.38	
op Supplies	10.00	
eneral Service	74.01	
for Skid Steers	37.50	

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.

Page	6403	Purchase Document Line Entity
Page	6404	workflowPurchaseDocuments
Page	6403	Sales Document Line Entity
Page	6402	workflowSalesDocuments
Page	42	Sales Order
Page	23072642	Service Unit Card
Page	23072692	Service Unit Meter Worksheet
→ Page	23072691	Service Unit Usage Worksheet
Page	1170	User Tasks
Page	6408	workflowCustomers
Page	6406	workflowGenJournalBatches
Page	6407	workflowGenJournalLines
Page	6409	workflowItems

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.

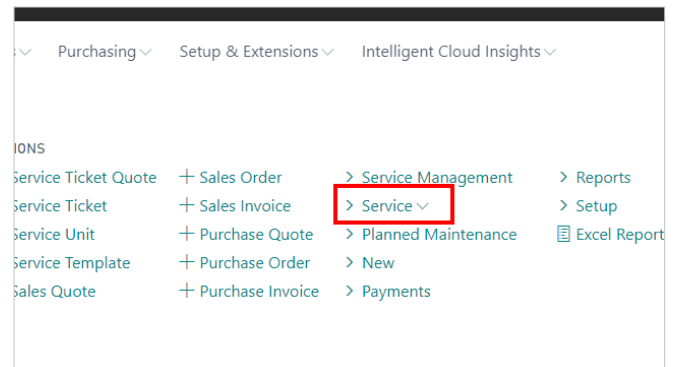
#### 5.1.2. How to Review Service Ledger Entries

Business Manager Profile

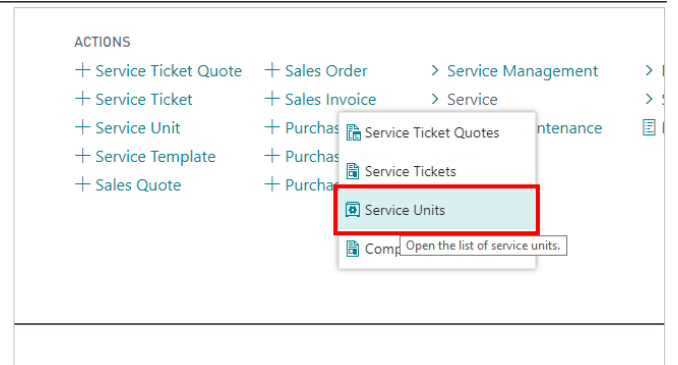
Users with the Sales Order Processor Profile can use the same steps to view Service Ledger Entries from the Service Unit.

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.



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

NITS   WORK DATE: 4/8/2019			
h + New Manage Open in Excel <b>Navigate</b> Fewer options			
DESCRIPTION	LINK TYPE	NO.	LINK DESCRIPTION
2015 NISSAN Titan			
2016 NISSAN Titan			
2015 NISSAN Frontier			
2016 NISSAN Frontier			

Click on the navigation menu item **Service Ledger Entries**

S   WORK DATE: 4/8/2019			
+ New Manage Open in Excel <b>Navigate</b> Fewer options			
nit Meters Statistics Service History <b>Service Ledger Entries</b>			
DESCRIPTION	LINK TYPE	NO.	View the service ledger entries for the selected rec
2015 NISSAN Titan			
2016 NISSAN Titan			
2015 NISSAN Frontier			
2016 NISSAN Frontier			

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**

SU00002	2016 N	DOCST00001	Resource	LABOR
SU00003	2015 N	DOCST00001	Item	OILFILTER
SU00004	2016 N	DOCST00001	Item	OILGASKET
SU00005	2015 F	DOCST00001	Item	MOBIL15W30
SU00006	2016 F	DOCST00001	Resource	LABOR
SU00007	2017 B	PS-INV103...	Resource	LABOR
SU00008	2017 B	PS-IN PS-INV103217	Resource	LABOR
SU00009	2018 B	PS-INV103...	Item	OILFILTER
SU00010	2018 B	PS-INV103...	Item	OILGASKET
		PS-INV103...	Item	MOBIL15W30

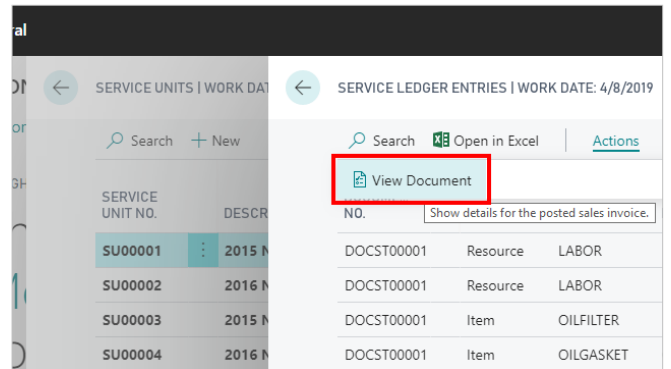
Click on the navigation menu item popup **Actions**

SERVICE LEDGER ENTRIES   WORK DATE: 4/8/2019			
Search Open in Excel <b>Actions</b> Fewer options			
DOCUME... NO.	TYPE	NO.	DESCRIPTION
DOCST00001	Resource	LABOR	Labor - Lube
DOCST00001	Resource	LABOR	Labor - Oil Change
DOCST00001	Item	OILFILTER	Filter, Oil
DOCST00001	Item	OILGASKET	Gasket, Oil

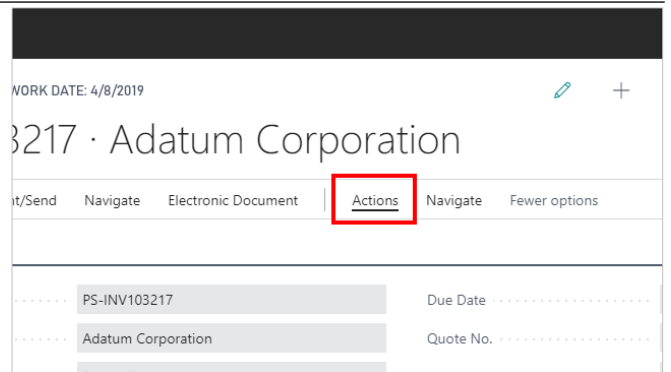


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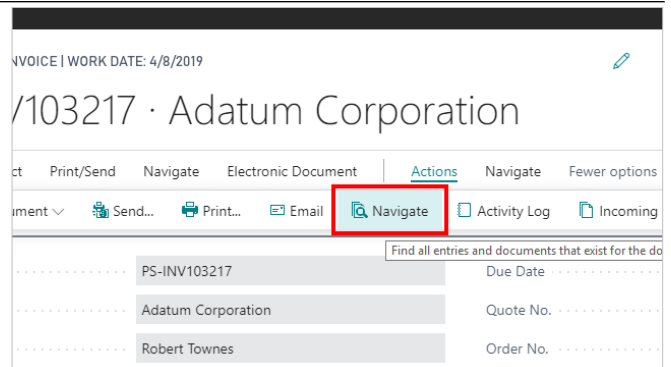
Click on the navigation menu item **View Document**



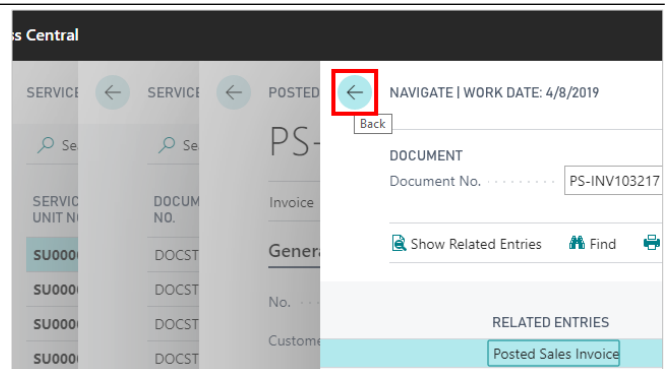
Click on the navigation menu item popup **Actions**



Click on the navigation menu item **Navigate**



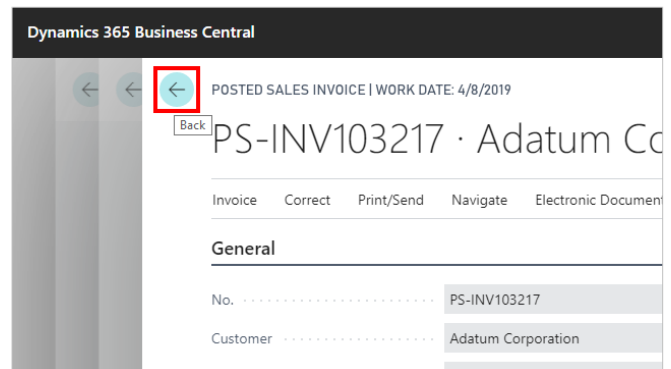
Click on the back button





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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.

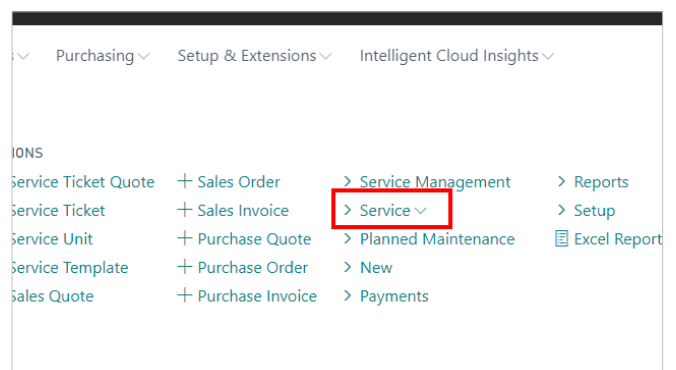
### 5.2.2. How to Review Service Unit Servicing History

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**





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

ACTIONS

+ Service Ticket Quote

+ Service Ticket

+ Service Unit

+ Service Template

+ Sales Quote

+ Sales Order

+ Sales Invoice

+ Purchas

+ Purchas

+ Purchas

> Service Management

> Service

Service Ticket Quotes

Service Tickets

Service Units

Comp Open the list of service units.

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

ONUS Inc

Service

Plan

←

SERVICE UNITS | WORK DATE: 4/8/2019

Search

+ New

Manage

Open in

SERVICE UNIT NO.

DESCRIPTION

SU00001

2015 NISSAN Titan

SU00002

2016 NISSAN Titan

SU00003

2015 NISSAN Frontier

SU00004

2016 NISSAN Frontier

SU00005

2015 Ford F150

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

Dynamics 365 Business Central

←

←

SERVICE UNIT CARD | WORK DATE: 4/8/2019

SU00001

Actions

Navigate

General

Service Unit No.

SU00001

Description

2015 NISSAN Titan

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

SERVICE UNIT CARD | WORK DATE: 4/8/2019

SU00001

Navigate

Service Unit Meters

Statistics

Comments

Service History

Service Ledger Entries

View the service history for the selected record.

Service Unit No.

SU00001

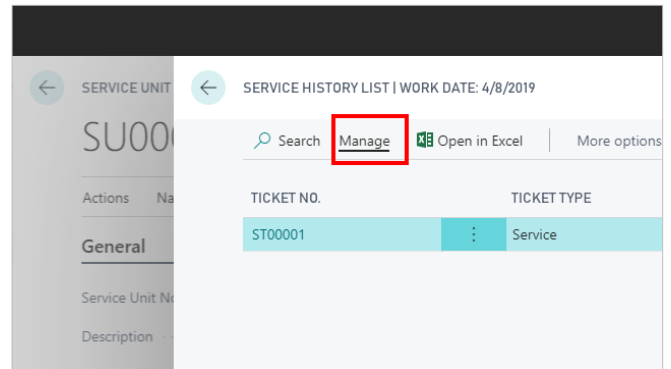
Description

2015 NISSAN Titan

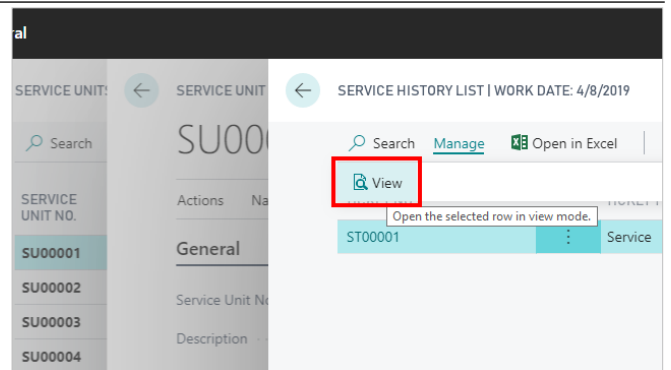
Select the ticket record to be viewed.



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

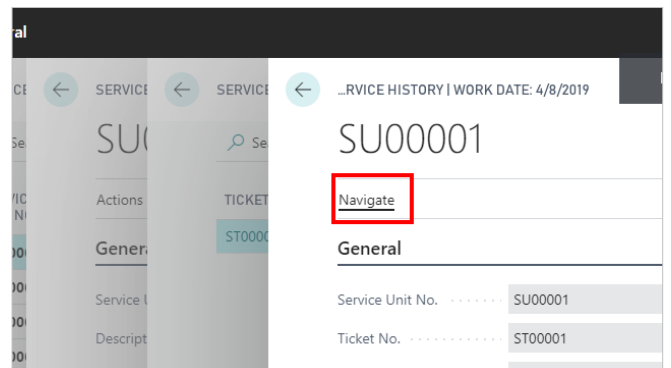


Click on the navigation menu item **View**

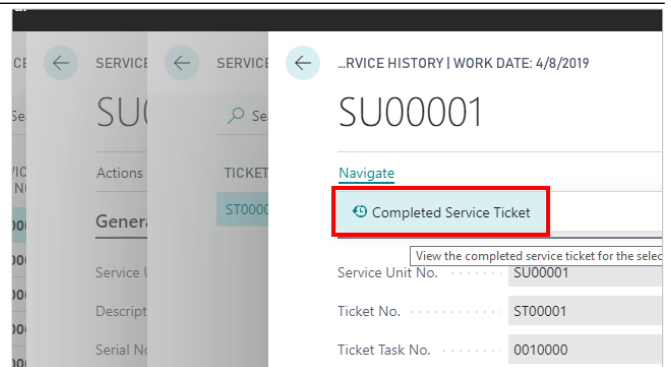


The following demonstrates the opening of the Completed Service Ticket from the Service Ticket.

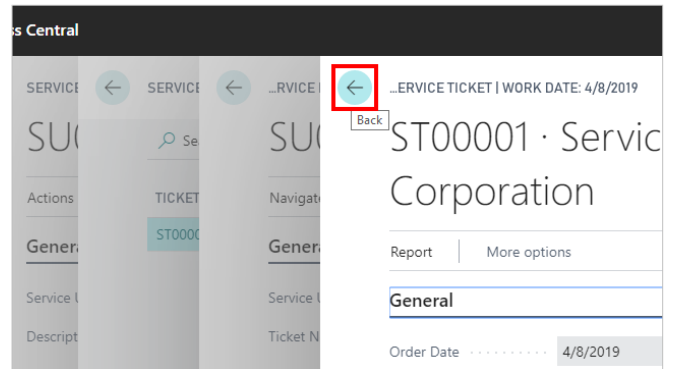
Click on the navigation menu item popup **Navigate**



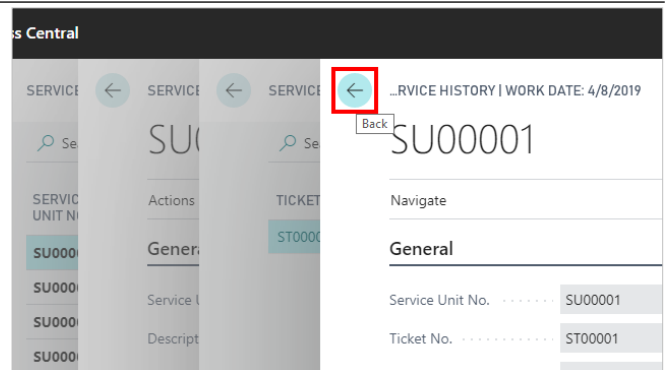
Click on the navigation menu item **Completed Service Ticket**



Click on the back button

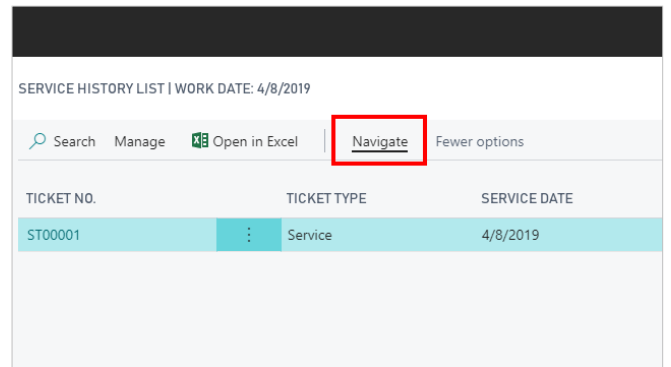


Click on the back button

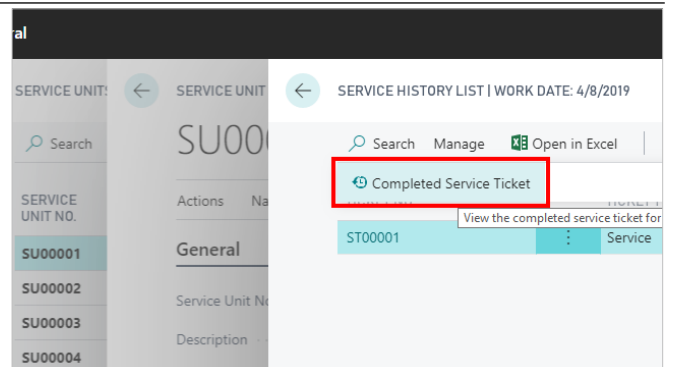


Alternatively the Completed Service Ticket can be opened from the Service History List using the following steps.

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



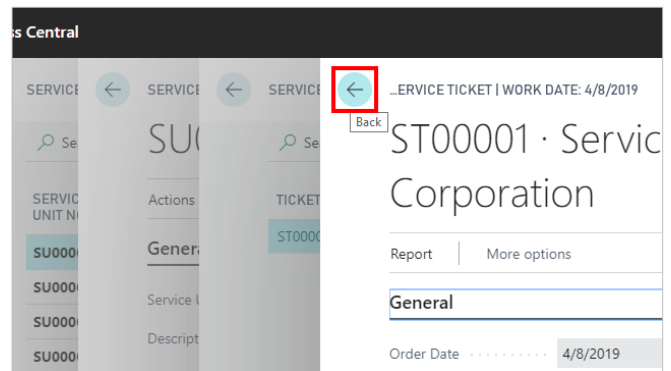
Click on the navigation menu item **Completed Service Ticket**



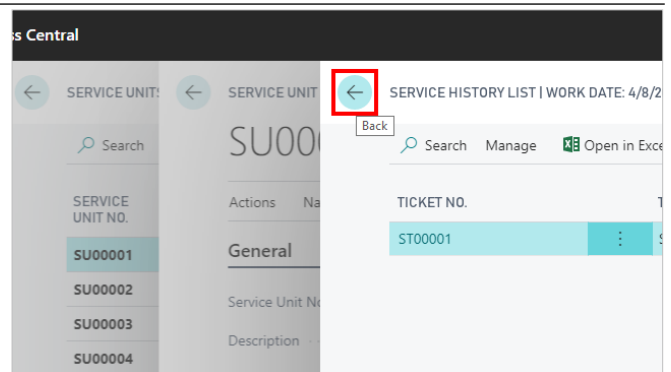


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Click on the back button



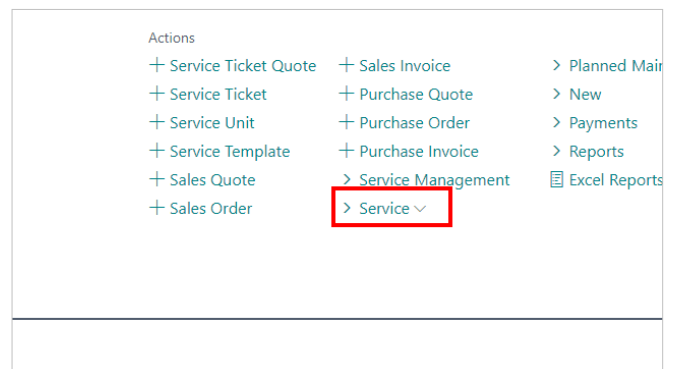
Click on the back button



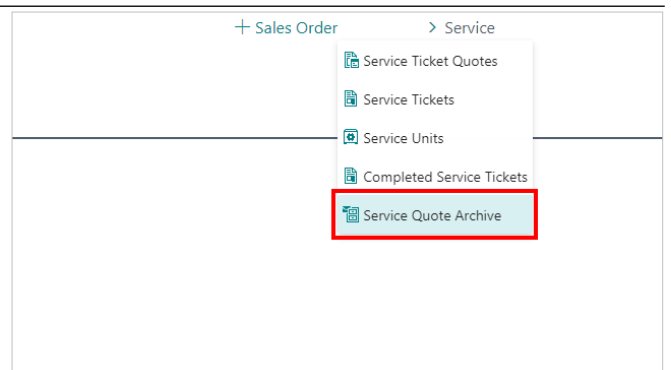
### 5.2.3. How to view the Service Quote Archive

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**





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Select the quote that you wish to view  
Click on the cell **Service Ticket Quote No.** with the value **ST00001**

ST00001 · Service Ticket #ST00001 - Adatu	
Process	Report Quote Related Fewer options
Service Ticket Quote No. ↑	Description
→ ST00001	Service Ticket #ST00001 - Adatum Corporation
ST00002	Service Ticket #ST00002 - Adatum Corporation
ST00003	Service Ticket #ST00003 - Adatum Corporation
ST00005	Service Ticket #ST00005 - Adatum Corporation
ST00006	Service Ticket #ST00006 - Trey Research
ST00007	Service Ticket #ST00007 - Trey Research

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

Dynamics 365 Business Central	
← Quote Archive	
ST00001 · Service Ticket #ST00001 - Adatu	
Process	Report Quote Related Fewer options
Service Ticket Quote No. ↑	Description
→ ST00001	Service Ticket #ST00001 - Adatum Corporation
ST00002	Service Ticket #ST00002 - Adatum Corporation
ST00003	Service Ticket #ST00003 - Adatum Corporation

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

Dynamics 365 Business Central	
← Quote Archive	
ST00001 · Service Ticket #ST00001 - Adatu	
Process	Report Quote Related Fewer options
Show Document	
No. ↑	Description
→ ST00001	Service Ticket #ST00001 - Adatum Corporation
ST00002	Service Ticket #ST00002 - Adatum Corporation
ST00003	Service Ticket #ST00003 - Adatum Corporation
ST00005	Service Ticket #ST00005 - Adatum Corporation

You can now view information about the completed Service Ticket Quote.

Report	Quote	Related	Fewer options
General			
Service Ticket No.	ST00001		
Customer No.	10000		
Customer Name	Adatum Corporation		
Description	Service Ticket #ST00001 - Adatum Corpora		
Order Date	4/12/2021		
Service Date	4/12/2021		
Sell-to			

## 5.3. How to Review Planned Maintenance History

### 5.3.1. How to view the Planned Maintenance Entry Archive

Business Manager Profile



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

IONS			
Service Ticket Quote	+ Sales Order	> Service Management	> Reports
Service Ticket	+ Sales Invoice	> Service	> Setup
Service Unit	+ Purchase Quote	> Planned Maintenance	Excel Report
Service Template	+ Purchase Order	> New	
Sales Quote	+ Purchase Invoice	> Payments	

Click on the navigation menu item **Planned Maintenance Entry Archive**

+ Service Template	+ Purchase	Planned Maintenance Worksheet
+ Sales Quote	+ Purchase	Planned Maintenance Quotes
		Planned Maintenance Tickets
		Service Units
		Completed Planned Maintenance Tickets
		Planned Maintenance Entry Archive

The archive will display a list of all tickets that have been processed using the Planned Maintenance Worksheet.

Batch No.	Service Unit No.	Service Unit Description	Service Template
DEFAULT	SU00003	Skid Steer Loader S450	SS-GE

Click on the cell **Defer Until Date** with the value **4/23/2019**

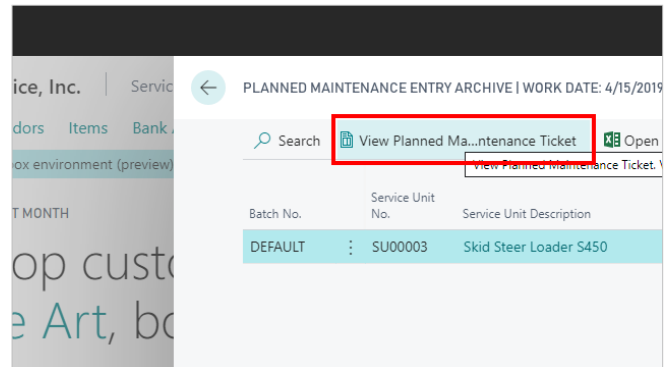
WORK DATE: 4/15/2019					
e Ticket Open in Excel					
Date Completed	User ID	Defer Service	Defer Until Date	Def... Serv... Han...	
ODT\KYLE	Until Date		4/23/2019	✓	



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### Click on the navigation menu item **View Planned Maintenance Ticket**

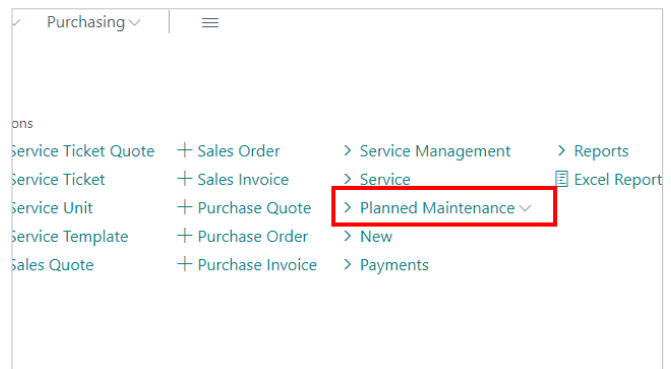
If an entry has a Planned Maintenance Ticket assigned to it, you can view it by clicking the View Completed Planned Maintenance Ticket button.



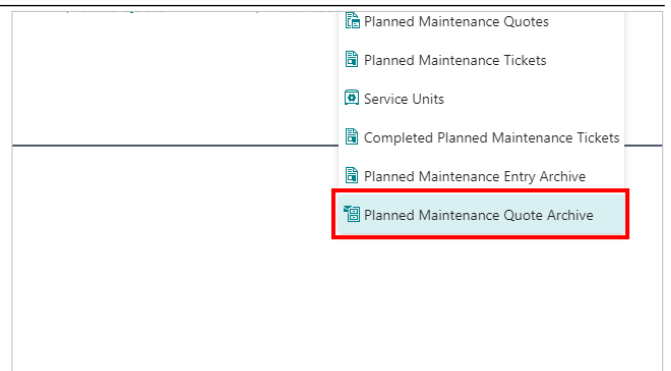
## 5.3.2. How to view Planned Maintenance Quote Archive

The following demonstrates how to view the Planned Maintenance Quote Archive.

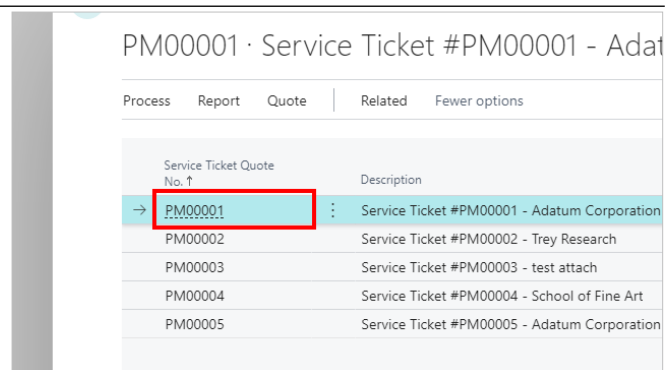
### Click on the navigation menu item popup **Planned Maintenance**



### Click on the navigation menu item **Planned Maintenance Quote Archive**



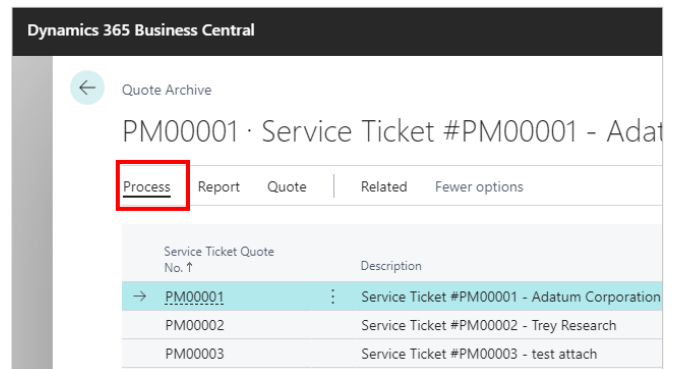
Select the quote you wish to view.  
Click on the cell **Service Ticket Quote No.** with the value **PM00001**



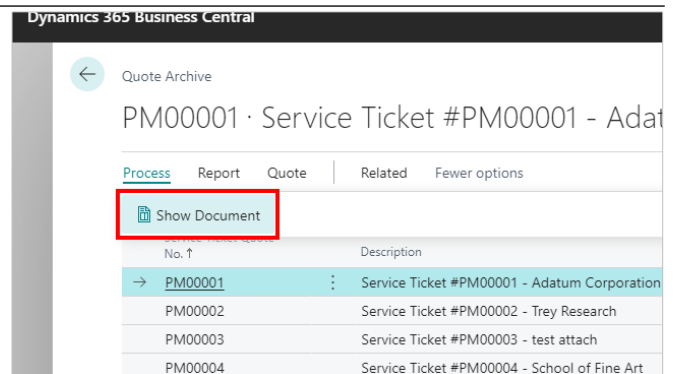


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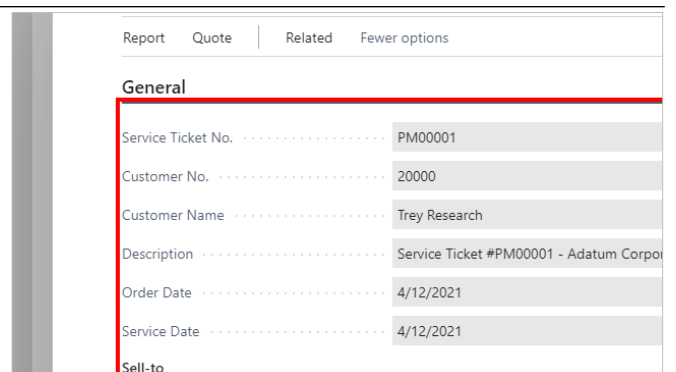
Click on the navigation menu item popup **Process**



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



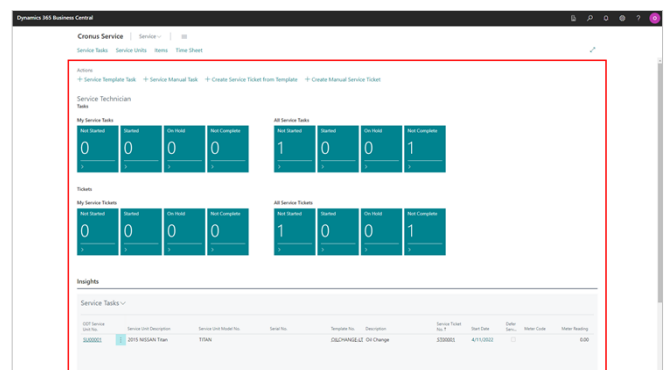
You can now view details of the complete Planned Maintenance Quote



## 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.



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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.

General

Customer No.	10000
Customer Name	Adatum Corporation
Description	Service Ticket #ST00016 - Adatum Corpora
Order Date	4/11/2022
Service Date	4/11/2022
Sell-to	
Address	192 Market Square

To release the ticket, the status must be changed to a status with the Released type

Starting Date 4/11/2022

Ending Date 4/11/2022

Location Code

Your Reference

Open PO Lines Exist No

Service Ticket Status PENDING

Apply Maintenance Expense

Salesperson

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

4/11/2022

4/11/2022

No

PENDING

Warranty

Warranty Policy No. ↑

Warranty Type ↑

WR00001 GENERAL

Choose a value for Service Ticket Status

Comments

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

Apply Maintenance Expense

Salesperson

Code	Description
COMPLETE	Complete
IN PROCESS	In Process
ON HOLD	On Hold
PENDING	Pending
RELEASED	Release

+ New

Defer Serv...	Start Date	End Date	Budget (Total Cost)	Actual (Total Cost)	Billable (Total Price)	Bi
<input type="checkbox"/>	-	-	-	-	-	-





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Click on the button **Yes**

The screenshot shows a service ticket form with fields for Assigned Technician (KATHERINE), Starting Date (4/11/2022), Service Ticket Status (PENDING), Apply Maintenance Expense (toggle), and Salesperson. A confirmation dialog box is overlaid on the form, asking: "Service ticket status changed from pending to released. Do you want to update the lines?". The "Yes" button in the dialog is highlighted with a red rectangle.

## 6.2.2. How to Process a Service Ticket Task

Service Tasks in the Technician role center are sorted based on their status.

The screenshot shows the "Service Technician" dashboard. Under the "My Service Tasks" section, there are four status cards: "Not Started" (1), "Started" (0), "On Hold" (0), and "Not Complete" (1). The "Not Started" card is highlighted with a red rectangle. Below the cards is a "Tickets" section.

Click on the link **Not Started**

This screenshot is similar to the previous one, but with a tooltip visible over the "Not Started" card. The tooltip text reads: "Specifies the value of the Service Ticket Tasks - Released field." The "Not Started" card is highlighted with a red rectangle.

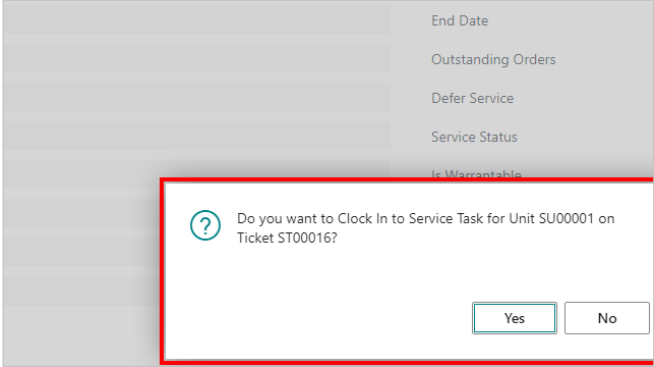
A list of Service Tasks will be displayed  
Click on the link in cell **ODT Service Unit No.** with the value **SU00001**

The screenshot shows a list of service units. The first row is highlighted with a light blue background. The "ODT Service Unit No." column contains the value "SU00001", which is highlighted with a red rectangle. The "Service Unit Description" column contains the value "2015 NISSAN Titan".

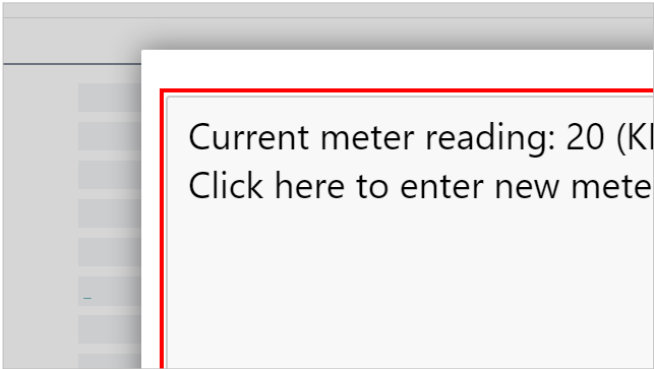


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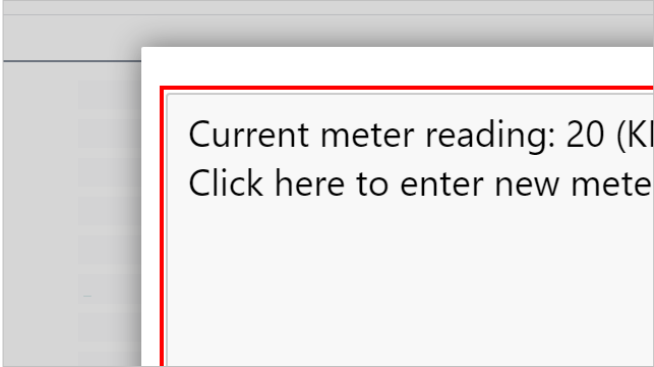
There will be an option to clock in if you wish to use time tracking. Please refer to the Time Tracking documentation for additional information on this feature.



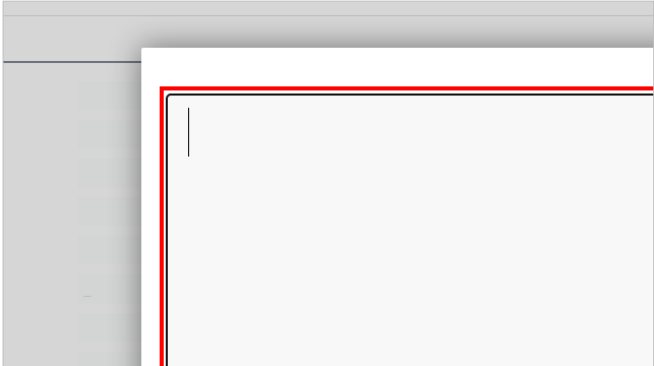
If the unit has a Service Meter, you will prompted to update the meter reading.



Click on the textarea



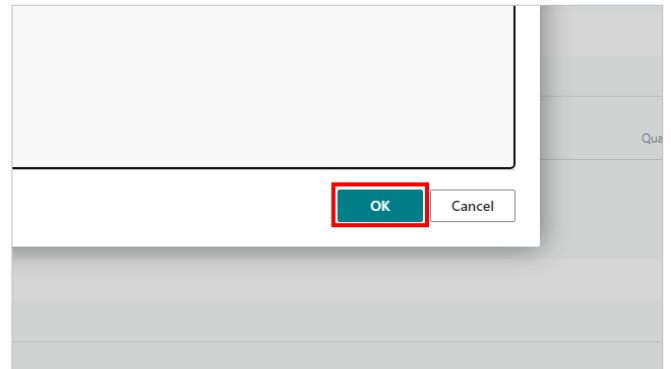
Enter the text **50**.





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Click on the button **OK**



The General Tab displays details about the Service Unit and Service Ticket the task is related to.

[Add Service Template](#) [Service Unit Meters](#) [Checklist](#)

**General**

ODT Service Unit No. ....	SU00001
Service Unit Description .....	2015 NISSAN Titan
Service Unit Model No. ....	TITAN
Serial No. ....	
Template No. ....	REPLACEAIRFILTER-LT
Service Unit Manufacturer Code .....	-
Job No. ....	ST00016

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.

**Tasks Parts/Items Lines** | **Manage**

No.	Description
→ AIRFILTER	Filter, Air

**Labour Lines** | **Manage**

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

Service Unit Manufacturer Code ..... -

Job No. .... ST00009

Start Date ..... 4/11/2022

**Tasks Parts/Items Lines** | **Manage**

No.	Description
→ AIRFILTER	Filter, Air



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Click on the navigation menu item **Add Parts/Item**

Job No. .... ST00009

Start Date ..... 4/11/2022

Tasks Parts/Items Lines | Manage

+ New Line -X Delete Line + Add Parts/Item Comments

→ AIREILTER Filter, Air

Select the Part or Item you want to add to the task

Change Status Automate Fewer options

Service Unit Meters Check

Items | Search + New

No. ↑	Description	Type
→ 1896-S	ATHENS Desk	Ir
1900-S	PARIS Guest Chair, black	Ir
1906-S	ATHENS Mobile Pedestal	Ir
1908-S	LONDON Swivel Chair, blue	Ir
1920-S	ANTWERP Conference Table	Ir
1925-W	Conference Bundle 1-6	Ir
1928-S	AMSTERDAM Lamp	Ir

SU00001

2015 NISSAN Titan

TITAN

REPLACEAIRFILTER-LT

Code .....

Click on the field **Part\Item Qty.**

Outstanding Orders

Task Update | ...

Parts/Items

Code ..... 1896-S Location

Part\Item Qty. .... 0.00

Enter the text **1**.

Outstanding Orders

Task Update | ...

Parts/Items

Code ..... 1896-S Location

Part\Item Qty. .... 1



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Click on the lookup button **Location**

4/11/2022 0.00

Choose a value for Location

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

Location

Code ↑	Name
EAST	East Warehouse
MA	Main Warehouse
NORTH	North Warehouse
OUT. LOG.	Outsourced Logistics
OWN LOG.	Own Logistics

+ New

Click on the button **OK**

1.00

OK Cancel

1 0.00 PCS

Notice that the selected part or item has now been added to the task lines

No.	Description
→ AIREILTER	Filter, Air
1896-S	ATHENS Desk

Labour Lines Manage



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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**

Meter Reading ..... 50.00

Location Code      Estimated Quantity      Quantity Used      Unit of Measure Code

	1	1.00	PCS
EAST	1	1.00	PCS

Enter the text **2**.

Meter Reading ..... 50.00

Location Code      Estimated Quantity      Quantity Used      Unit of Measure Code

	1	1.00	PCS
EAST	1	1.00	PCS

Click on the cell **Estimated Quantity** with the value **2**

Meter Reading ..... 50.00

Comments      Location Code      Estimated Quantity      Quantity Used

No		2	2.00
No	EAST	1	1.00

When you are finished working on the task, you can close the task card.  
Click on the back button

**Dynamics 365 Business Central**

Service Task Card

replace Air Filter

Home   Time Tracking   Change Status   Automate   Fewer options

Add Service Template   Service Unit Meters   Checklist

Template No. .... REPLACEAIRFILTER-LT

Service Unit Manufacturer Code ....

Job No. .... ST00009



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If the status of the task has changed, you can update it when closing the task card.

4/11/2022

Task Update - Update Service Status | ...

Service Status

Current Service Status ... RELEASED Set Ser

Click on the lookup button **Set Service Status**

ice Status ..... RELEASED

Choose a value for Set Service Status

Click on the link in cell **Code** with the value **IN PROCESS**

Set Service Status ..... RELEASED

Code	Description
PENDING	Pending
→ RELEASED	Released
IN PROCESS	In Process
ON HOLD	On Hold
COMPLETE	Complete

+ New

Estimated Quantity      Quantity Used      Unit of Measure Code

Click on the button **OK**

OK

Cancel

Estimated Quantity      Quantity Used      Unit of Measure Code



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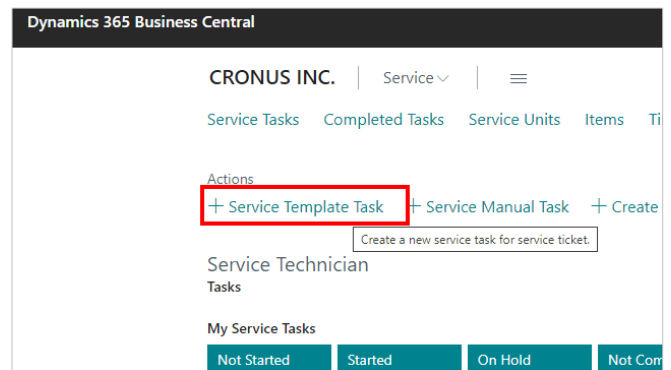
When viewing the service ticket from the Business Manager role center, notice that the status of the task has been updated to match what was specified when closing the task card

(Total Cost)	Billable (Total Price)	Billable (Invoiced Price)	Service Status	Is War...	Comments
-	-	-		<input type="checkbox"/>	0/0
-	1,079.80	-	IN PROCESS	<input type="checkbox"/>	0/3
			IN PROCESS		

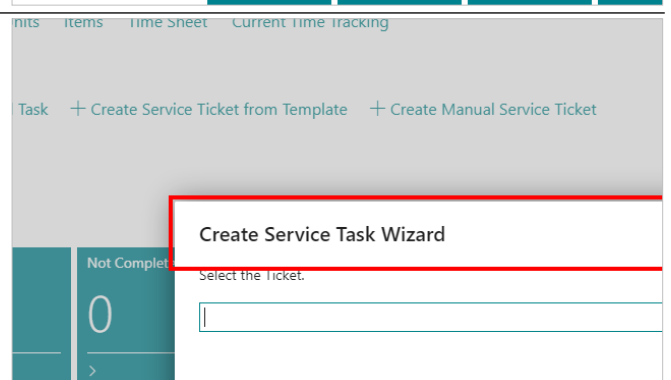
### 6.2.3. How to Create a New Task

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.

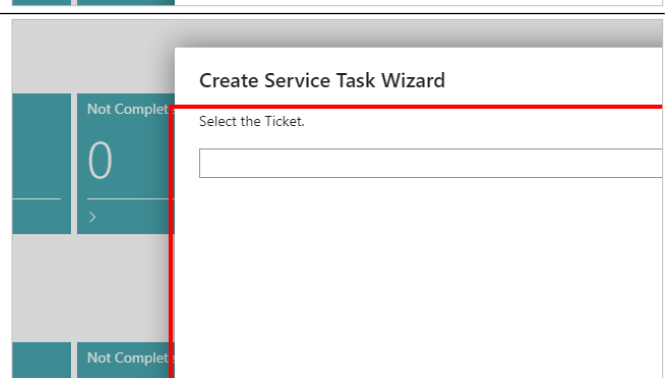
Click on the navigation menu item **Service Template Task**



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.

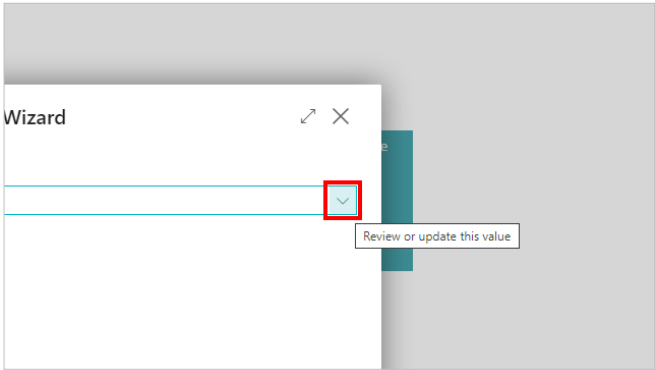




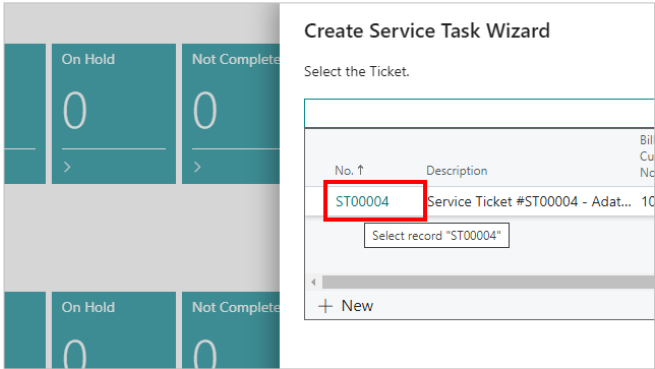


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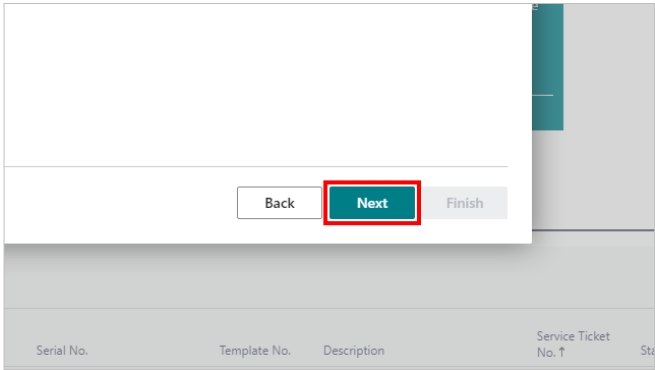
Click on the lookup button **Review or update this value**



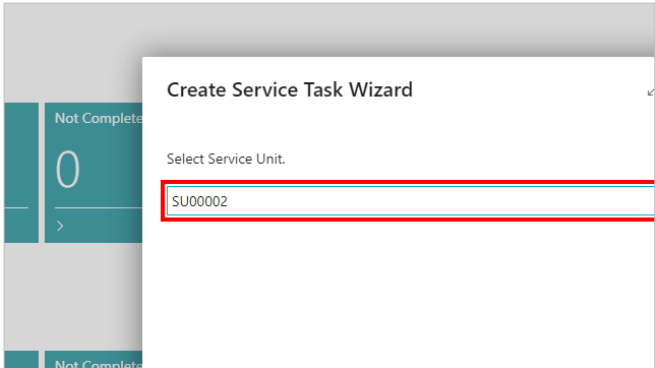
Click on **No.**



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.





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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.**



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Click on the button **Next**

Back Next Finish

Serial No. Template No. Description Service Ticket No. ↑ Sta

Select the Service Template you want to use to create the task.

Create Service Task Wizard

Service Ticket Line

Select Service Template (Required).

Select Service Template (Required).

Click on the lookup button **Review or update this value**

Wizard

Review or update this value

Click on **Template No.**

Service Templates

Template No. ↑	Template Type ▼	Description
→ 20KSERVICE	All	20,000 KM Se
40KSERVICE	All	40,000 KM Se
50POINTINS...	All	50 point inspe
OILCHANGE...	All	Oil Change
REPLAC	Select record "OILCHANGE-LT"	Replace Air Fi
ROTATETIRES	All	Rotate Tires



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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



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Click on **ODT Service Unit No.**

ODT Service Unit No.	Service Unit Description	Service Unit Model No.	Serial No.
SU00002	2016 NISSAN Titan	TITAN	
SU00002	2016 NISSAN Titan	TITAN	

Open record "SU00002"

Notice that the new task has all the details that were specified in the creation wizard

**General**

ODT Service Unit No.	SU00002
Service Unit Description	2016 NISSAN Titan
Service Unit Model No.	TITAN
Serial No.	
Template No.	OILCHANGE-LT
Service Unit Manufacturer Code	-
Job No.	ST00004

## 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**

US INC. | Service |

Tasks | Completed Tasks | Service Units | Items | Time Sheet | Current Time Tracking

Service Template Task | + Service Manual Task | **+ Create Service Ticket from Template** | + Create Manual Service Ticket

Service Technician

Service Tasks

Started | Started | On Hold | Not Complete | All Service Tasks | Not Started

This will open the Service Ticket Create Wizard

Task | + Create Service Ticket from Template | + Create Manual Service Ticket

**Service Ticket Create Wizard**

Service Ticket Header

Select a Sell-To Customer for the Service Ticket.

0



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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

The screenshot shows the 'Service Ticket Create Wizard' window. The 'Service Ticket Header' section has a 'Select Service Date' field highlighted with a red rectangular box. Below the field, the date '4/10/2023' is visible.

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

The screenshot shows the 'Service Ticket Create Wizard' window. A small icon representing a calendar is highlighted with a red rectangular box. A tooltip labeled 'Open the date picker' is visible next to the icon.

Click on a date in the calendar

The screenshot shows the 'Service Ticket Create Wizard' window with the 'Select Service Date' field. A calendar date picker is open, showing the month of April 2023. The date '4/10/2023' is selected and highlighted with a red rectangular box. The calendar interface includes days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and a 'Go to today' button.

Click on the button **Next**

The screenshot shows the 'Service Ticket Create Wizard' window. At the bottom, there are three buttons: 'Back', 'Next', and 'Finish'. The 'Next' button is highlighted with a red rectangular box.



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Select the Service Unit that will be used to perform service

Service Ticket Create Wizard

Service Ticket Header

Select Service Unit.

Select Service Unit.

Click on the lookup button **Review or update this value**

Service Ticket Create Wizard

Review or update this value

Click on **Service Unit No.**

Select Service Unit.

Service Unit No. ↑	Description
SU00001	2015 NISSAN Titan
SU00002	2016 NISSAN Titan
SU00003	2015 NISSAN Frontier
SU00004	Select record "SU00003" NISSAN Frontier
SU00005	2015 Ford F150
+ New	

Click on the button **Next**

Back Next Finish

Serial No. Template No. Description Service Ticket No. ↑ Sta





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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.

Service Ticket Create Wizard

Service Ticket Header

Enter a Service Ticket Description.

Service Ticket #ST00005    Enter a Service Ticket Description.

Click on the button **Next**

Back    **Next**    Finish

Serial No.    Template No.    Description    Service Ticket No. ↑    Sta

You may select a Technician to be assigned to this ticket.

Service Ticket Create Wizard

Service Ticket Header

Select Service Technician (Optional).

Select Service Technician (Optional).

Click on the lookup button **Review or update this value**

Service Ticket Create Wizard

Select Service Technician (Optional).

Review or update this value



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Click on **No**.

On Hold0

Not Complete0

Select Service Technician (Optional).

No. ↑	Name
KATHERINE	KATHERINE HULL
LABOR	Labor
LINA	Lina Townsend
MAR	Select record "LINA" ist
TERRY	Terry Dodds
+ New	

Click on the button **Next**

BackNextFinish

Serial No.      Template No.      Description      Service Ticket No. ↑      Sta

You may select a Location Code for this ticket.

Not Complete0

Service Ticket Create Wizard

Service Ticket Header

Select Location Code (Optional).

Select Location Code (Optional).

Click on the lookup button **Review or update this value**

Service Ticket Create Wizard

Select Location Code (Optional).

Review or update this value



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Click on East

0  
>

0  
>

On Hold  
0  
>

Not Complete  
0  
>

Service Ticket Header

Select Location Code (Optional).

Code ↑

Name

EAST

East Warehouse

MAIN

Select record "EAST" Main Warehouse

NORTH

North Warehouse

OUT. LOG.

Outsourced Logistics

OWN LOG.

Own Logistics

+ New

...

Click on the button **Next**

Back

Next

Finish

Serial No.

Template No.

Description

Service Ticket No. ↑

Sta

You may select a Service Ticket Type

Not Complete  
0  
>

Not Complete  
0  
>

Service Ticket Create Wizard

Service Ticket Header

Select Service Ticket Type (Optional).

Select Service Ticket Type (Optional).

Click on the lookup button **Review or update this value**

Service Ticket Create Wizard

Service Ticket Header

Select Service Ticket Type (Optional).

Select Service Ticket Type (Optional).

Review or update this value



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Click on **Code**

0

>

0

>

On Hold

Not Complete

0

>

0

>

Service Ticket Header

Select Service Ticket Type (Optional).

Code ↑

Description

REGULAR SERVICERegular Service

WALK INSelect record "REGULAR SERVICE"

+ New

Click on the button **Next**

Back

Next

Finish

Serial No.

Template No.

Description

Service Ticket No. ↑

Sta

Next, select the Service Template that will be used for the ticket

Not Complete

0

>

Not Complete

Not Complete

Service Ticket Create Wizard

Service Ticket Line

Select Service Template.

Select Service Template.

Click on the lookup button **Review or update this value**

Service Ticket Create Wizard

...

Review or update this value



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Click on **Template No.**

Template No.	Template Type	Description
→ 20KSERVICE	All	20,000 KM Se
40KSERVICE	All	40,000 KM Se
50POINTINS...	All	50 point inspe
OILCHANGE...	All	Oil Change
REPLACEAIR...	All	Replace Air Fi
ROTATETIRE		Select record "REPLACEAIRFILTER-LT" res

Click on the button **Finish**

Back

Next

Finish

Notice that the new ticket has now been added to the Service Ticket Queue

On Hold	Not Complete	Not Started	Started	On Hold
0	0	1	0	0

### 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.



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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

Report Service Items as	Parts
Report Non-Inventory Items as	Parts
Restrict closing service ticket if open PO lines exist.	<input type="radio"/>
Archive quotes when the user runs action "Make Ti...	<input type="radio"/>
Show Completed Task Queue	<input type="radio"/>
Allow Multiple Clocking	<input checked="" type="checkbox"/>
Auto Assign User on Clock In	<input checked="" type="checkbox"/>
Prompt to Clock In/Out on Task	Always
Prompt to Change Status	Always

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.

Report Non-Inventory Items as	Parts
Restrict closing service ticket if open PO lines exist.	<input type="radio"/>
Archive quotes when the user runs action "Make Ti...	<input type="radio"/>
Show Completed Task Queue	<input type="radio"/>
Allow Multiple Clocking	<input checked="" type="checkbox"/>
Auto Assign User on Clock In	<input checked="" type="checkbox"/>
Prompt to Clock In/Out on Task	Always
Prompt to Change Status	Always

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.

Restrict closing service ticket if open PO lines exist.	<input type="radio"/>
Archive quotes when the user runs action "Make Ti...	<input type="radio"/>
Show Completed Task Queue	<input type="radio"/>
Allow Multiple Clocking	<input checked="" type="checkbox"/>
Auto Assign User on Clock In	<input checked="" type="checkbox"/>
Prompt to Clock In/Out on Task	Always
Prompt to Change Status	Always

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.

Archive quotes when the user runs action "Make Ti...	<input type="radio"/>
Show Completed Task Queue	<input type="radio"/>
Allow Multiple Clocking	<input checked="" type="checkbox"/>
Auto Assign User on Clock In	<input checked="" type="checkbox"/>
Prompt to Clock In/Out on Task	Always
Prompt to Change Status	Always



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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.

A screenshot of a settings menu. It features several toggle switches at the top, some of which are turned on. Below the toggles is a dropdown menu that is currently open, showing options: 'Always', 'On Open Task', 'On Close Task', and 'Never'. The 'On Open Task' option is highlighted in blue. A red rectangular box is drawn around the entire dropdown menu area.

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.

A screenshot of a settings list. It contains several rows, each with a dropdown menu on the left and a control on the right. The row 'Show Completed Task Queue' is highlighted with a red rectangular box. In this row, the dropdown is set to 'Always' and the toggle switch is turned on. Other rows include 'Report Service Items as', 'Report Non-Inventory Items as', 'Restrict closing service ticket if open PO lines exist.', 'Archive quotes when the user runs action "Make Ti...', 'Allow Multiple Clocking', 'Auto Assign User on Clock In', 'Prompt to Clock In/Out on Task', and 'Prompt to Change Status'.

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**

A screenshot of a software interface showing a table of 'Service Units'. The table has two columns: 'ODT Service Unit No.' and 'Service Unit Description'. The first row is highlighted in light blue and contains the values 'SU00001' and '2015 NISSAN Titan'. A red rectangular box is drawn around the 'SU00001' value. Below the table, there is a button labeled 'Open record "SU00001"'. The interface also shows a sidebar with 'Service Tasks' and 'Service Units' tabs, and a top navigation bar with 'approvals' and 'Service' dropdowns.

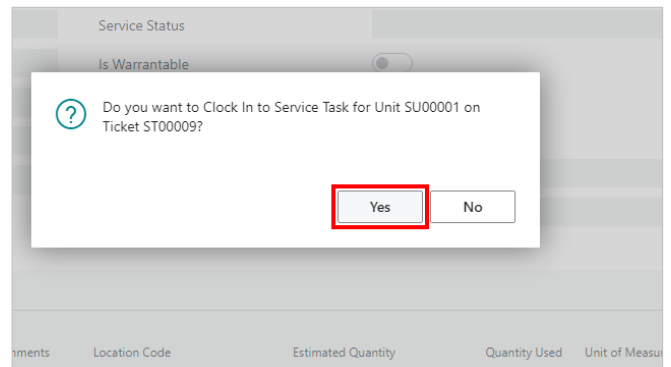
When opening the Service Ticket Task, you will be prompted to Clock In.

A screenshot of a confirmation dialog box. It has a question mark icon and the text: 'Do you want to Clock In to Service Task for Unit SU00001 on Ticket ST00009?'. At the bottom right, there are two buttons: 'Yes' and 'No'. A red rectangular box is drawn around the entire dialog box.

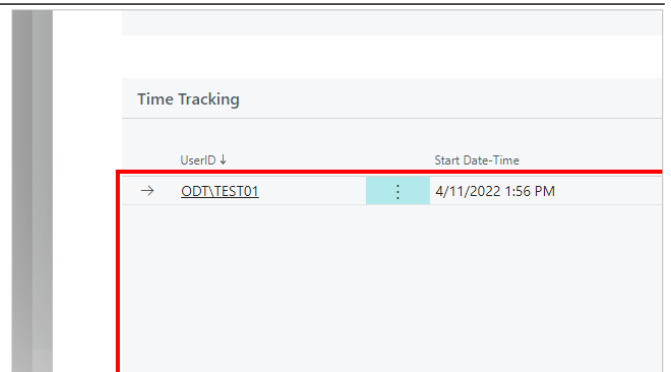


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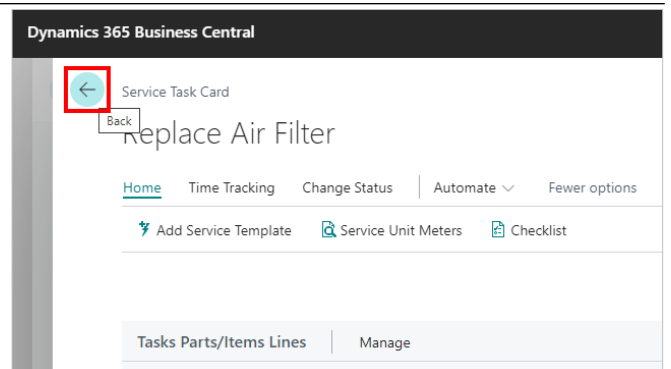
Click on the button **Yes**



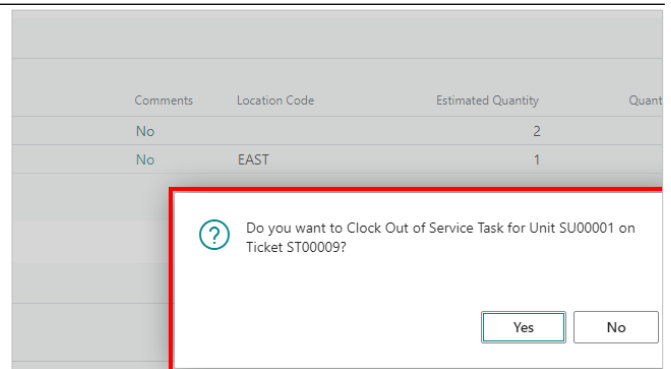
The Time Tracking tab on the Task Card will display the list of time tracking entries



Click on the back button



When closing the Task Card, you will be prompted if you want to Clock Out.







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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**



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Click on the field **Quantity**

Additional Labor and quantity

onds 248 millise

Labor Code ..... LABOR

Quantity ..... 0.00

OK Cancel

Enter the text **1**.

Additional Labor and quantity

onds 248 millise

Labor Code ..... LABOR

Quantity ..... 1

OK Cancel

Click on the button **OK**

8 millise

Labor Code ..... LABOR

Quantity ..... 1

OK Cancel

Actual Time Recorded Time

When reopening the Task Card, notice that the Time Tracking tab has been updated to show the previous time recorded.

Time Tracking

UserID ↓ Start Date-Time

→ ODTTEST01 4/11/2022 4:00 PM

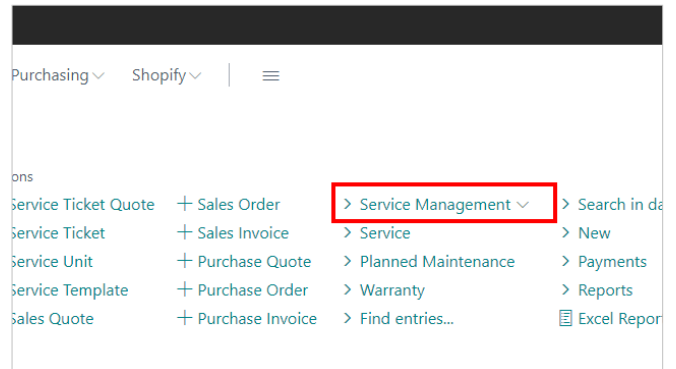
### 6.3.3. How to use Time Sheet Integration

The following demonstrates how to use the Time Sheet Integration feature.

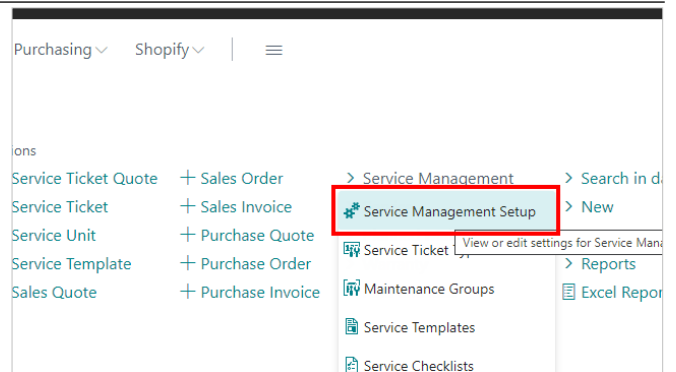


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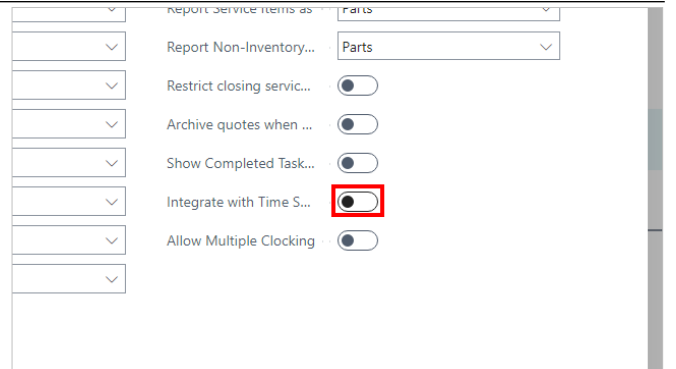
To use Time Sheet Integration, it must first be enabled in Service Management Setup.  
Click on the navigation menu item popup **Service Management**



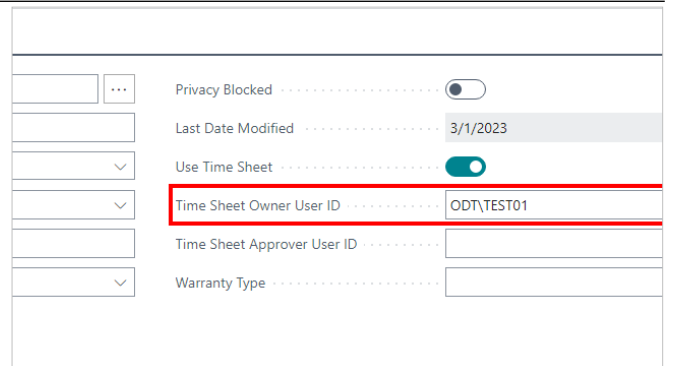
Click on the navigation menu item **Service Management Setup**



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





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Click on the button **Yes**

Is Warrantable ☐

Apply Maintenance Expense ☐

Do you want to Clock In to Service Task for Unit SU00001 on Ticket ST00001?

Yes No

Comments Location Code Estimated Quantity Quantity Used Unit of Measure

Notice that a Time Tracking line has been started for the user that has Clocked In

Time Tracking

UserID ↓	Start Date-Time
→ ODT\TEST01	4/11/2022 2:06 PM

Click on the back button

Dynamics 365 Business Central

Service Task Card

Back

Oil Change

Home Time Tracking Change Status

Add Service Template Service Unit Meters Checklist

Start Date 4/11/2022

Tasks Parts/Items Lines Manage

Click on the button **Yes**

Do you want to Clock Out of Service Task for Unit SU00001 on Ticket ST00001?

Yes No

Unit of Measure C

is nothing to show in this view)



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You will be given an option to adjust the recorded time.

Task Update | ...

Resource

Adjust Time

Recorded Time ..... 11 minutes 49 seconds 645 milliseconds

Click on the field **Recorded Time**

Task Update | ...

Resource

Adjust Time

Recorded Time ..... 11 minutes 49 seconds 645 milliseconds

Enter the text **1 hour**.

Task Update | ...

Resource

Adjust Time

Recorded Time ..... 1

Click on the button **OK**

Time ..... 1 hour

OK Cancel

Time Actual Time Recorded Time



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You will be given the option to update the task status if needed.

ption  
Oil  
et, Oil  
I 1 5W30  
  
Description

Task Update - Update Service Status | ...

Service Status

Current Service Status ... RELEASED Set Ser

Click on the button **OK**

OK

Cancel

Actual Time  
Recorded Time

When viewing the standard BC timesheet, notice that an entry has been created for the service performed.

Resource No. .... TEST01

Lines

Manage

Line

Fewer options

Type

Status

Description

→ Job ... Open Oil Change

Unit of Measure ..... HOUR

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

Reopen Submit Comments

General

Resource No. .... TEST01

Lines

Manage

Line

Fewer options

New Line

Delete Line

→ Job ... Open Oil Change



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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.



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Click on the navigation menu item **Approve**

Manager Time Sheet by Job

Starting Date ..... 4/11/2022

Home Line

✓ Approve ✗ Reject ↺ Reopen

Approve the lines on the time sheet. Choose All t

Description

Oil Change

Click on the button **OK**

Approve for posting

☒ All submitted lines [1 line(s)]

☐ Selected line(s) only

OK Cancel

Click on the back button

Manager Time Sheet by Job

Back

Starting Date ..... 4/11/2022

Home Line

✓ Approve ✗ Reject ↺ Reopen

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**

Service Ticket

ST00001 · Service Ticket #ST00001 - Adatum Corporation

Home Report Ticket Manage Time Sheet Actions Fewer options

Add Service Template Confirm Actuals View Job Journal Create

General

Confirm actuals to post usage for the current

Customer No. .... 10000

Customer Name .... Adatum Corporation





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Notice that in addition to entries related to the service performed, there is an entry for the time that was approved.

Line Type	Posting Date	Document No.	Job No.	Job Task No.	Type
→ Both Budg...	4/11/2022	ST00001	ST00001	0020000	Reso
Both Budg...	4/11/2022	ST00001	ST00001	0020000	Item
Both Budg...	4/11/2022	ST00001	ST00001	0020000	Item
Both Budg...	4/11/2022	ST00001	ST00001	0020000	Item
	4/11/2022	DOCST00001	ST00001	0020000	Reso

### 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**

UserID ↑	Start Date-Time	ODT Service Unit No.
ODTTEST01	4/10/2023 4:41 PM	SU00002

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

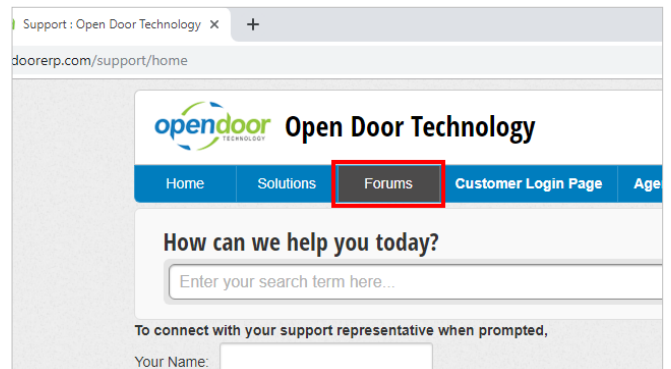
Release Notes are provided with each release of the ODT Service App. The Release Notes can be accessed via the following internet address: <https://support.opendoorerp.com>

The following demonstrates the accessing of the release note documents. First, copy/paste the internet address into an internet browser.



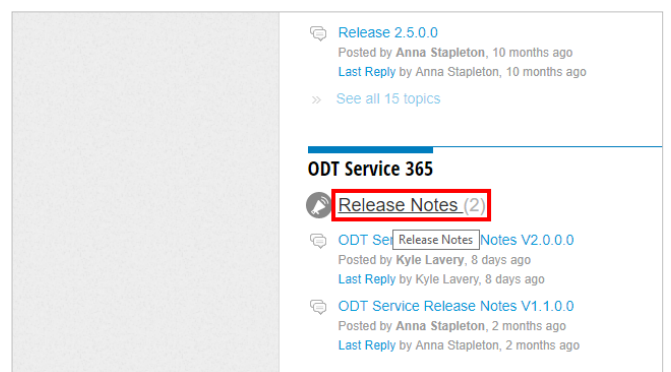
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Click on the link **Forums**

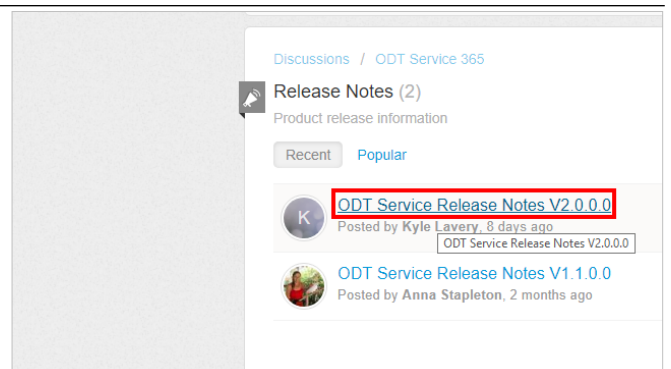


Scroll down to locate the forum on ODT Service.

Click on the link **Release Notes**

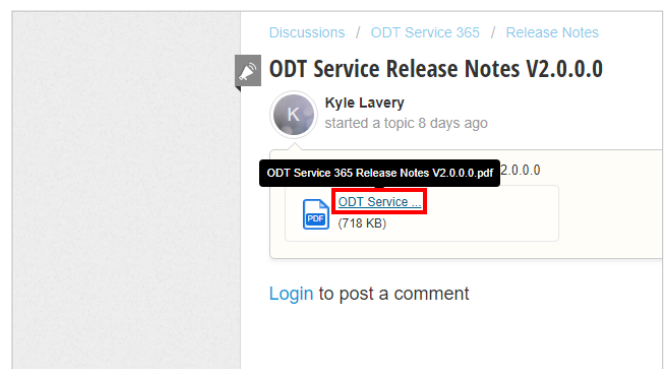


Click on the link **ODT Service Release Notes V2.0.0.0**



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

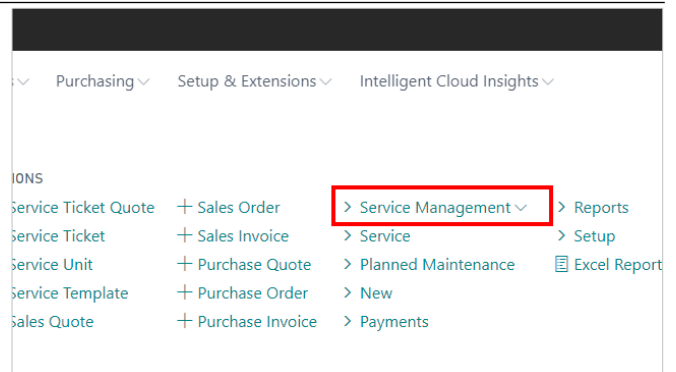
ODT Service Online Help can be directly accessed from an internet browser using the following address:

<http://odtservice365help.opendoorerp.com/>

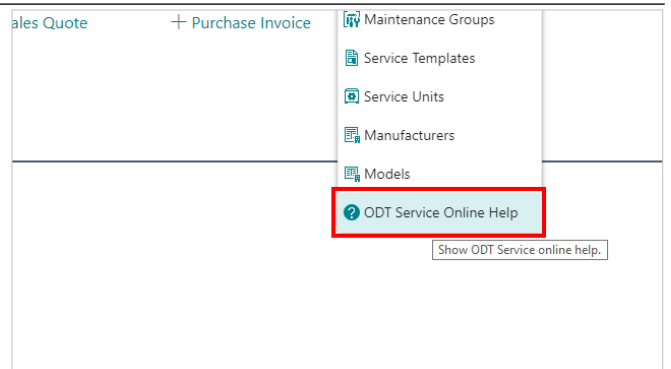
The following steps demonstrate how to access the ODT Service Online Help from the Business Manager Profile.

The same steps are available from the Sales Order Processor Profile.

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



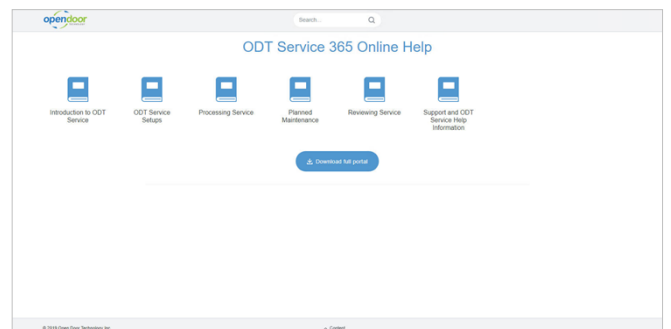
Click on the navigation menu item **ODT Service Online Help**



The following provides information on the ODT Service help site.

The picture provided here is the initial window for the ODT Service Online Help.

There are various categories which group the help to aide users in locating the help needed. In addition 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.

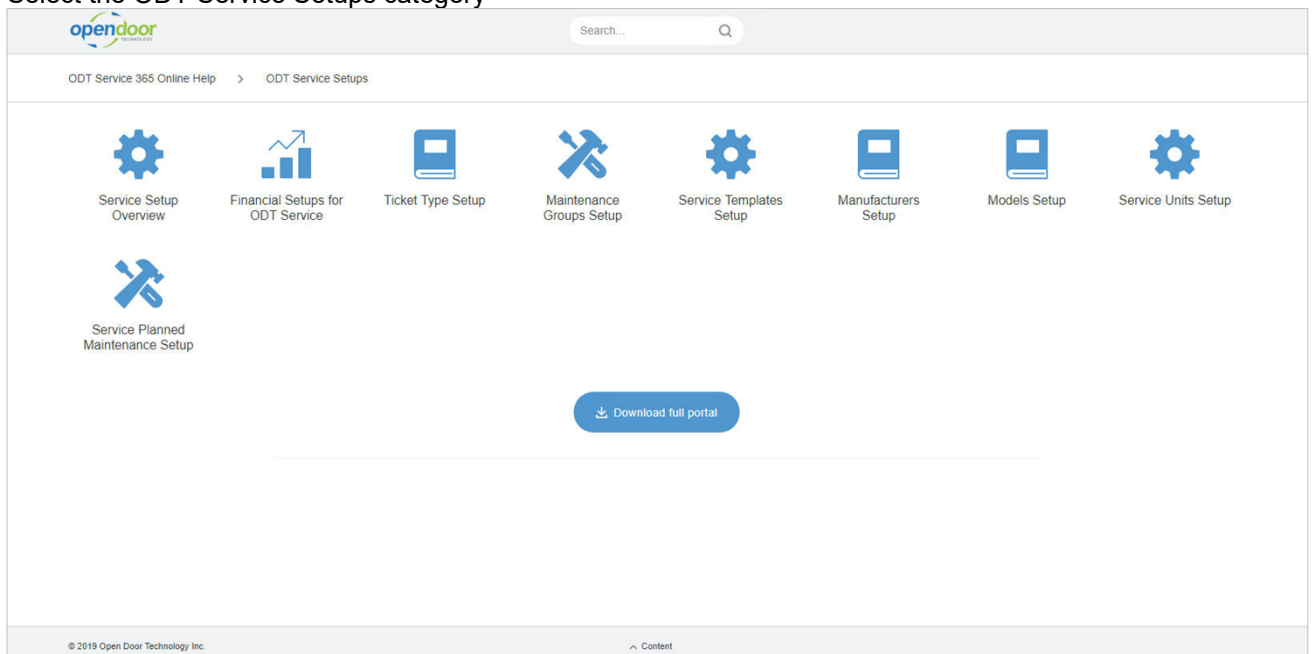


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Introduction to ODT Service
ODT Service Introduction
ODT Service Overview
ODT Service Permissions
ODT Service Setups
Service Setup Overview
ODT Service Setup Overview
Financial Setups for ODT Service
How to Setup Service Management Setup
How to Setup an Internal Customer for Servicing
Ticket Type Setup
How to Setup Service Ticket Types
Maintenance Groups Setup
How to Setup Maintenance Groups
Service Templates Setup
How to Setup Service Templates
Manufacturers Setup
How to Setup Manufacturers
Models Setup
How to Setup Models
Service Units Setup
How to Setup Service Units
Service Planned Maintenance Setup
How to Setup Service Unit Meters
How to Setup Planned Maintenance Schedules
Processing Service
Service Processing Overview
ODT Service Processing Overview
Service Tickets Overview
Service Ticket Overview
Servicing Internal Equipment
Overview of Internal Equipment Servicing
How to Enter and Process an Internal Service Ticket
Processing in ODT Service for External Customers
Overview of External Customer Equipment Servicing
How to Process External Customer Service Quotes
How to Process External Customer Service Tickets
How to Create a Service Ticket from a Service Unit
How to Create a Service Ticket from a Service Unit
Planned Maintenance
Service Planned Maintenance Overview
Planned Maintenance Overview
Service Planned Maintenance Worksheet
How to Use the Planned Maintenance Worksheet
Service Planned Maintenance Quotes
How to Process Planned Maintenance Quotes
Service Planned Maintenance Tickets
How to Process Planned Maintenance Tickets
Reviewing Service
Reviewing Service History
How to Review Service History
How to Review Service Ledger Entries
Support and ODT Service Help Information

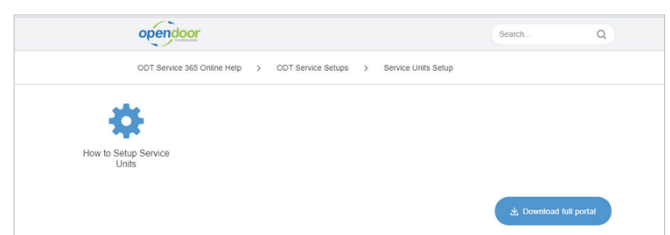
Select the category in which the information you are seeking would logically be located.

Select the ODT Service Setups category



Click on Service Units Setup, then How to Setup Service Units.

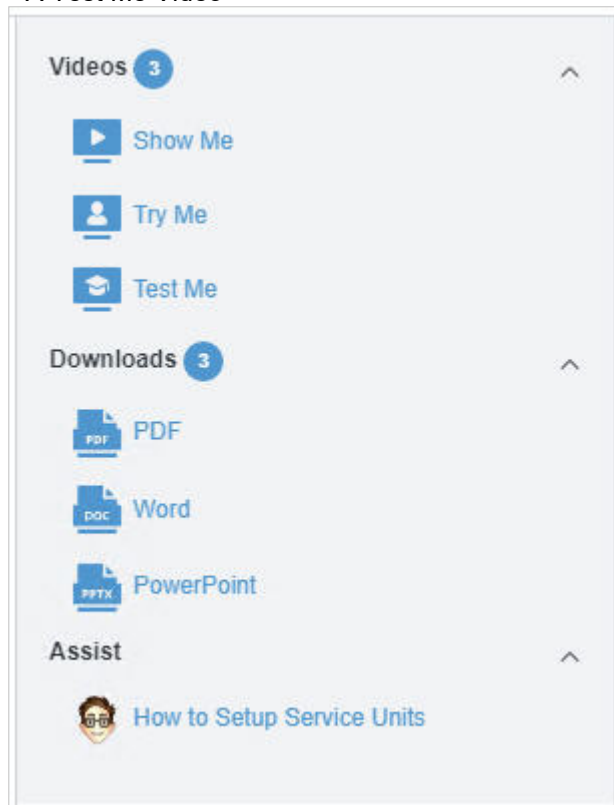
Select the category in which the information you are seeking would logically be located.



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.