End-User Course

🔧 **Field Services**

Equipment Management 2025 R1

Revision: 4/28/2025

Acumatica
The Cloud **ERP**

Contents

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How to Use This Course

This course provides a set of lessons that illustrate equipment management processes in a midsize company. The course consists of lessons that guide you step by step through the examples and explanations of the configuration and business process flow in Acumatica ERP.

To complete the course, you perform the lessons from each part of the course in the order they are presented in, and then you pass the assessment test.

What Is in This Guide

The guide includes the *Company Story* topic and process activities. The *Company Story* topic explains the organizational structure of the company that has been preconfigured in the *U100* dataset, as well as the company's business processes and requirements. Each of the process activities of the course is dedicated to a particular user scenario and consists of processing steps that you complete.

Which Training Environment You Should Use

All lessons of the course should be completed in an instance of Acumatica ERP 2025 R1 with the *U100* training dataset preloaded; this dataset provides the predefined settings and entities you will need as you complete the activities of this course.

You or your system administrator should prepare an instance of Acumatica ERP 2025 R1, as described in the *How to Create a Tenant with the U100 Dataset* section below.

What Is in a Lesson

Each lesson includes a story that describes a specific user scenario, along with a brief overview of the process and step-by-step instructions to guide you in completing the scenario.

> ⚠ The completion of a lesson depends on the steps performed in the previous lessons. We recommend that you complete the lessons in the listed order.

What the Documentation Resources Are

Acumatica ERP provides a wide variety of documentation resources, which you can access from this course, from the system, or from the *Help portal*. Links to related information are provided at relevant places throughout the course. The complete Acumatica ERP documentation is available on *https://help.acumatica.com/* and is included in the Acumatica ERP instance.

While viewing any form used in the course (or any other Acumatica ERP form), you can click the **Open Help** button in the top pane to bring up a form-specific Help menu; you can use the links on this menu to quickly access form-related concepts and activities and to open a reference topic with detailed descriptions of the form elements.

How to Create a Tenant with the U100 Dataset

Before you complete this course, you need to add a tenant with the *U100* dataset to an existing Acumatica ERP instance. You will then prepare the tenant for completing the activities. To complete this preparation, perform the following instructions:

1. Go to *Amazon Storage*.
2. Open the folder that corresponds to the version of your Acumatica ERP instance.
3. In this folder, open the `Snapshots` folder and download the `u100.zip` file.

4. Launch the Acumatica ERP instance and sign in.

5. Open the *Tenants* (SM203520) form and click **Add New Record** on the form toolbar.

6. In the **Login Name** box, type the name to be used for the tenant.

7. On the form toolbar, click **Save**.

> (i) When you create a system tenant, you may be signed out after its creation, depending on how many non-System tenants your Acumatica ERP instance already had:
>
> - If you started with one non-System tenant (to which you are signed in) and you create a new one, the system signs you out to switch from single-tenant mode to multitenant mode.
> - If the instance had multiple non-System tenants and you create another, it is already in multitenant mode. Instead of being signed out, you wait until the system completes the operation and then proceed.

8. On the **Snapshots** tab, click **Import Snapshot**.

9. In the **Upload Snapshot Package** dialog box, select the `u100.zip` file, which you have downloaded, and click **Upload**.

    The system uploads the snapshot and lists it on the **Snapshots** tab of the *Tenants* form.

10. Open the *Apply Updates* (SM203510) form and click **Schedule Lockout**.

11. In the **Schedule Lockout** dialog box, click **OK**.

12. Open the *Tenants* form again.

13. On the form toolbar, click **Restore Snapshot**.

14. If the **Warning** dialog box appears, click **Yes**.

15. In the **Restore Snapshot** dialog box, make sure that the correct snapshot package is being uploaded and click **OK**. The system will restore the snapshot and sign you out.

16. Sign in to the tenant that you have just created.

17. Open the *Apply Updates* form again.

18. On the form toolbar, click **Stop Lockout.**

Which Credentials You Should Use

To complete the lessons, sign in as the following users:

1. Lesson 1: *gibbs*

2. Lesson 2:
    - Activity 1: *gibbs*
    - Activity 2: *gibbs*
    - Activity 3: *gibbs*
    - Activity 4: *gibbs*
    - Activity 5: *davis*

3. Lesson 3: *davis*

4. Lesson 4: *davis*

5. Lesson 5: *davis*

The password for each user is *123*.

Which License You Should Use

For the educational purposes of this course, you use Acumatica ERP under the trial license, which does not require activation and provides all available features. For the production use of this functionality, you have to activate the license your organization has purchased. Each particular feature may be subject to additional licensing; please consult the Acumatica ERP licensing policy for details.

Company Story

This topic explains the organizational structure and operational activities of the company you will work with during this training.

Company Structure

The SweetLife Fruits & Jams company is a midsize company located in New York City. The company consists of the following branches:

- SweetLife Head Office and Wholesale Center: This branch of the company consists of a jam factory and a large warehouse where the company stores fruit (purchased from wholesale vendors) and the jam it produces. Warehouse workers perform warehouse operations by using barcode scanners or mobile devices with barcode scanning support.
- SweetLife Store: This branch has a retail shop with a small warehouse to which the goods to be sold are distributed from the company's main warehouse.
- SweetLife Service and Equipment Sales Center: This branch is a service center with a small warehouse where juicers are stored. This branch assembles, sells, installs, and services juicers, in addition to training customers' employees to operate juicers.

Operational Activity

The company has been operating starting in the *01-2024* financial period. In November 2024, the company started using Acumatica ERP as an ERP and CRM system and migrated all data of the main office and retail store to Acumatica ERP. In response to company growth, the equipment center began its operations in *01-2025*.

SweetLife Company Sales and Services

Each company's branch has its own business processes as follows:

- SweetLife Head Office and Wholesale Center: In this branch, jams and fruit are sold to wholesale customers, such as restaurants and cafes. The company also conducts home canning training at the customer's location and webinars on the company's website.
- SweetLife Store: In the store, retail customers purchase fresh fruit, berries, and jams, or pick up the goods they have ordered on the website. Some of the goods listed in the website catalog are not stored in the retail warehouse, such as tropical fruits (which are purchased on demand) and tea (which is drop-shipped from a third-party vendor).
- SweetLife Service and Equipment Sales Center: This branch assembles juicers, sells juicers, provides training on equipment use, and offers equipment installation, including site review and maintenance services. The branch also performs short-term service provision.

Company Purchases

The company purchases fruits and spices from large fruit vendors for sale and for jam production. For producing jams and packing jams and fruits, the company purchases jars, labels, and paper bags from various vendors. For the internal needs of the main office and store, the company purchases stationery (printing paper, pens, and pencils), computers, and computer accessories from various vendors. The company also purchases juicers and juicer parts for sale from a large juicer vendor and either purchases the installation service for the juicers or provides the installation service on its own, depending on the complexity of the installation.

Overview of Equipment Types

By using the equipment management functionality, you can maintain and track information about the equipment that your company uses to provide services, as well as the equipment for which your company provides services. For equipment that requires regular maintenance, you can create service contracts that include customer visit schedules and specify the billing period for each customer. Additionally, you can manage service orders and appointments associated with equipment maintenance contracts.

Equipment Categories in Acumatica ERP

In Acumatica ERP, equipment is divided into two major categories, based on how the equipment is related to the service:

- Resource equipment is a resource of your company that is used to perform services. In the system, you can easily track the resource equipment that is used during appointments.
- Target equipment is serviced by your company. In Acumatica ERP, you can keep information about target equipment and arrange appointments for its maintenance.

In some cases, one piece of equipment can be both target equipment and resource equipment. For example, when you create appointments for a customer, you might include a drill as resource equipment, but if you want to repair your own drill, you could create an internal appointment and select the same drill as target equipment.

The following sections describe both of these types of equipment in greater detail.

Resource Equipment Creation

In Acumatica ERP, you can enter and keep information about resource equipment. Resource equipment is a physical resource of your company that staff members use to perform services.

You add each specific piece of resource equipment (for example, a specific screwdriver or drill) that will be used to perform services as a record on the *Equipment* (FS205000) form. In the Summary area of the form, you define this record as resource equipment by selecting the **Resource Equipment** check box; you also select the equipment type, and specify that your company owns the equipment by selecting the **Company** option button (under **Owner**). To maintain the relevant details of each equipment record that you add to the system, you can enter additional information, such as general, manufacturing, and purchase settings.

Target Equipment Creation and Tracking

In Acumatica ERP, you can enter and maintain information about target equipment: equipment that needs to be serviced at the customer site or at your company. This equipment can be created in the system in the following ways:

- On the *Stock Items* (IN202500) form, you create stock items based on an item class defined for model equipment—equipment that your company expects to sell and later service. This item class is a class with the **Model Equipment** option button selected on the **Service Management** tab of the *Item Classes* (IN201000) form. When a stock item with an equipment class for model equipment is sold to a customer and the corresponding invoice is released, the system automatically creates an equipment record on the *Equipment* form.
- On the *Equipment* (FS205000) form, you create a record for each piece of equipment that will be either serviced (target equipment) or used to perform a service (resource equipment). This may include equipment purchased from a third party.

A piece of target equipment may have components for which stock items with the **Component** equipment class are created on the *Stock Items* (IN202500) form. A component is a part of a piece of equipment that may have its own warranty and serial number.

In Acumatica ERP, you can track the serial numbers of equipment after it is sold. You can track the warranties, upgrades, and other pertinent information for the equipment. You can also track its service history, including every part that has been added to it. The system also supports the tracking of multiple serial numbers for the same equipment record and the tracking of serial numbers for different components.

Lesson 1: Basic Equipment Management Configuration

This lesson describes the minimum configuration of the equipment management functionality that is required so that you can start working with it.

Equipment Management: General Information

You configure the equipment management functionality if the company you are setting up sells or plans to sell equipment to customers and later provides maintenance for it.

Learning Objectives

In this lesson, you will learn how to perform the initial configuration for the equipment management functionality. In particular, you will do the following:

- Enable the *Equipment Management* feature
- Review the minimum required configuration settings for the equipment management functionality

Applicable Scenarios

You configure the equipment management functionality in the following scenarios:

- You have initially implemented Acumatica ERP, and the *Service Management* and *Equipment Management* features are included in your license.
- You need to configure equipment management in an already-configured, fully functioning environment because your company plans to provide services for customers' equipment and create service contracts for regular service visits.

Prerequisites

To prepare the system for implementing equipment management, the following general tasks must be performed:

- A new Acumatica ERP instance must be activated, features that are included in your license must be enabled, the initial security policy must be configured, and user accounts for people involved in the implementation must be created. For details, see *Preparing an Instance: General Information*
- The configuration of a company in a new Acumatica ERP instance must be completed. For details, see *Company Without Branches: General Information* or *Company with Branches that Do Not Require Balancing: General Information*.
- The minimum configuration of the order management functionality must be completed for Acumatica ERP users to process the sales and purchases of stock items through sales orders and purchase orders. For details, see *Configuration of Order Management: General Information*.
- The minimum required configuration of the service management functionality must be completed. For details, see *Basic Service Management Configuration: General Information*.
- On the *Numbering Sequences* (CS201010) form, the numbering sequence for equipment entities must be created.

Once all prerequisites are met and the necessary entities are created, you can configure equipment management preferences, including warranty and billing settings.

Configuration of Warranty Calculation

On the *Equipment Management Preferences* (FS100300) form, you select one of the following option buttons under **Calculate Warranty From** in the **Equipment Settings** section to specify how the system determines the start date for calculating warranty periods for equipment:

- **Sales Order Date**: The sales order document date will be used as the start date for the warranty period.
- **Installation Date**: The actual installation date will be used as the start date for the warranty period.
- **The Earliest of Both Dates**: The earlier date between the sales date and the installation date will be used as the start date for the warranty period.
- **The Latest of Both Dates**: The later date between the sales date and the installation date will be used as the start date for the warranty period.

Configuration of Billing Settings for Service Contracts

In the **Billing Settings** section of the *Equipment Management Preferences* (FS100300) form, you have to specify the type of the billing document to be generated for service contracts of the *End-Period Plus* billing type. You do one of the following under **Generated Billing Documents**:

- If your company provides services only, you select the **AR Documents** option button.
- If your company sells both services and inventory items, you select the **Sales Orders** option button. With this option selected, you can create shipments, if needed, and add additional freight costs.

To configure the system to automatically activate the next period when an invoice is generated for the previous one, you select the **Automatically Activate Upcoming Period** check box.

In the *U100* dataset, which is used for this training, the equipment management preferences have already been preconfigured.

Equipment Management: Implementation Activity

In this activity, you will enable the *Equipment Management* feature, which activates the equipment management functionality. You will also review the minimum required settings to use this functionality.

Story

Suppose that you are an administrative user of the SweetLife Service and Equipment Sales Center. You need to prepare the system for using the equipment management functionality.

Process Overview

On the *Enable/Disable Features* (CS100000) form, you will enable the *Equipment Management* feature. Then you will review the general equipment management settings on the *Equipment Management Preferences* (FS100300) form.

System Preparation

To prepare for completing the instructions in this activity, sign in to the system as a system administrator by using the *gibbs* username and the *123* password.

Step 1: Enabling the Equipment Management Feature

To enable the *Equipment Management* feature, do the following:

1. On the form toolbar of the *Enable/Disable Features* (CS100000) form, click **Modify**.

2. Select the **Service Management** check box, and then select the **Equipment Management** check box, which becomes available.

3. On the toolbar, click **Enable**. The *Equipment Management* feature is now enabled.

Step 2: Reviewing the Equipment Management Settings

Normally, while preparing to use equipment management, you plan and define the numbering rules for equipment (which determine how the automatic numbering is configured); you then specify the needed numbering sequences in the equipment settings. For this training, the numbering sequence and other settings have been specified in the *U100* dataset.

To review the settings related to equipment management, do the following:

1. Open the *Equipment Management Preferences* (FS100300) form.

2. On the **General** tab, ensure that the following settings are specified (as shown in the following screenshot):

   - **Equipment Numbering Sequence**: *FSEQUIP - FS Equipment* (Item 1)
   - **Generated Billing Documents**: *AR Documents* (Item 2)
   - **Default Terms**: *30D - 30 days* (Item 3)
   - Under **Calculate Warranty From**: **Sales Order Date** (Item 4)

Figure: Numbering sequence for equipment

Now you can use the equipment management functionality.

Lesson 2: Configuration of Stock Items to Be Tracked Post-Sale

This lesson explains how to create stock items with the necessary settings for equipment that your company plans to sell and service in the future.

Stock Items to Be Tracked Post-Sale: General Information

To track equipment after a sale in Acumatica ERP, on the *Stock Items* (IN202500) form, you need to create a stock item of an equipment class that is designated for model equipment. A stock item of this class represents a piece of equipment that can be sold to a customer and subsequently tracked by your company.

A piece of equipment may or may not include components, which are stock items that belong to an equipment class that is designated for components. You can sell these components along with the equipment or separately, such as when a component of the equipment needs to be replaced or upgraded.

Learning Objectives

In this lesson, you will learn how to do the following:

- Create a manufacturer record, which will be specified in the stock item settings.
- Create a stock item of a model equipment class without components (that is, a record for a piece of equipment to be sold without components).
- Create a stock item of a model equipment class with components (that is, a record for a piece of equipment to be sold with components). You will also create components (stock items of a component equipment class).
- Record the receipt of stock items to add them to the warehouse inventory.

Applicable Scenarios

You configure stock items for post-sale tracking in the following scenarios:

- Your company needs to track equipment after it has been sold to a customer, ensuring proper maintenance, service, or warranty handling.
- You sell equipment that includes components and need to manage the sale and tracking of these components as part of the equipment.
- A customer requires the replacement or upgrade of a component in existing equipment, and the components must be created and managed as separate stock items.
- Components are sold separately from the equipment—such as for repairs, upgrades, or replacements—and need to be properly recorded in the system.

Equipment-Related Options of a Stock Item
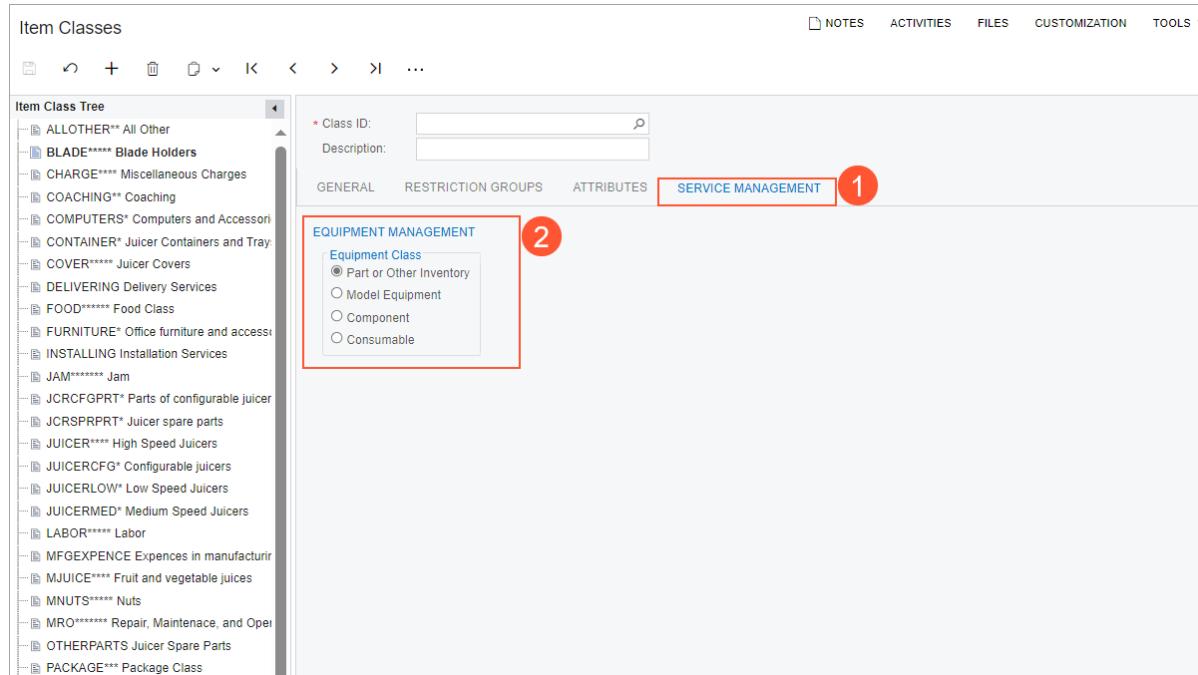
Before you can create a stock item of a model equipment or component equipment class, you first have to create the applicable item classes on the *Item Classes* (IN201000) form.

In Acumatica ERP, item classes are used to group stock or non-stock items with similar properties and to provide default settings for new items. When you create a new stock or non-stock item, you select the appropriate item class, and the item's settings are populated with those defined by the item class.

For an item class intended for equipment to be tracked after the sale, you select one of the following option buttons (see Item 2 in the following screenshot) on the **Service Management** tab (Item 1) of the *Item Classes* form:

- **Part or Other Inventory** (default): Stock items are either equipment parts without warranty and maintenance tracking or stock items not related to equipment records.
- **Model Equipment**: Stock items that are tracked after the sale, either for preventive maintenance or for warranty purposes.
- **Component**: Stock items that can be sold as equipment parts. Components may have warranties, serial numbers, and other settings that are independent from those of the equipment.
- **Consumable**: Stock items that are sold as equipment parts but are not covered by a warranty.

By selecting one of these option buttons, you define the item class as an equipment class.

Figure: An equipment item class

Warranty Settings

For a stock item with warranties, you can specify the warranty settings on the **Service Management** tab of the *Stock Items* (IN202500) form. You can specify the following warranty durations:

- **Company Warranty**: The duration of the warranty that your company provides to the customer for the stock item
- **Vendor Warranty**: The duration of the warranty that the vendor provides to your company for the stock item

For each stock item of an equipment class with the **Model Equipment** or **Component** option button selected, you can specify the duration for either of the warranties, both of them, or neither of them.

Also, on the *Equipment Management Preferences* (FS100300) form, you can select whether the warranty duration is calculated based on the sales order date, the installation date, the earliest of these dates, or the latest of these dates.

Manufacturers: To Create a Manufacturer

To keep information about the company that produced certain stock items, you specify the manufacturer in the stock item settings during item creation. In this activity, you will create a manufacturer record in the system.

Story

Suppose that SweetLife Service and Equipment Sales Center has in stocks equipment of the *Juice Appliances Co.* manufacturer, a producer of the juicers, and sells this equipment to its customers. Acting as an administrative user, you will create a manufacturer record in the system.

Process Overview

On the *Manufacturers* (FS204400) form, you will create a manufacturer.

System Preparation

To prepare for completing the instructions in this activity, sign in to the system as a system administrator by using the *gibbs* username and the *123* password.

Step: Creating a Manufacturer

To create a manufacturer, do the following:

1. On the *Manufacturers* (FS204400) form, add a new record and specify the following settings:

    - **Manufacturer ID**: `JuiceApp` (see Item 1 in the following screenshot)
    - **Description**: `Juice Appliances Co.` (Item 2)
    - **Country** (in the **Main Address** section): *US* (Item 3)

Figure: Creation of a manufacturer

2. On the form toolbar, click **Save**.

Stock Items to Be Tracked Post-Sale: To Create a Stock Item with No Components

In this activity, you will create a stock item with no components that will be tracked after the item is sold. To do this, you will first create an item class with the **Model Equipment** equipment class specified, which indicates that the stock items of this class will be tracked post-sale. Then you will create a piece of equipment—a stock item of an equipment class designed for model equipment without components—based on the newly created item class.

Story

Suppose that the SweetLife Service and Equipment Sales Center is planning to sell a range of centrifugal juicers, including models with features like automatic pulp ejection, and to track these items after the sale. Acting as an administrative user, you will create the *CENTRIFJUC - Centrifugal Juicers* item class with the **Model Equipment** option button selected. Various centrifugal juicer models will belong to this equipment class, which is intended for items sold without components.

You will then create a specific stock item, *JUICE_J22C - Multifruit Centrifugal Juicer J22C*, based on this item class. This juicer model, featuring automatic pulp ejection, will be tracked after the sale.

Process Overview

On the *Item Classes* (IN201000) form, you will create an item class with the **Model Equipment** option button selected. Then on the *Stock Items* (IN202500) form, you will create a piece of equipment with no components based on the created item class.

System Preparation

To prepare for completing the instructions in this activity, sign in to the system as a system administrator by using the *gibbs* username and the *123* password.

Step 1: Creating an Item Class for Equipment

To create an item class, do the following:

1. On the *Item Classes* (IN201000) form, add a new record and specify the following settings in the Summary area:

   - **Class ID**: CENTRIFJUC
   - **Description**: Centrifugal Juicers

2. On the **General** tab (**General Settings** section), specify the following settings:

   - **Stock Item**: Selected
   - **Item Type**: *Finished Good*
   - **Tax Category**: *EXEMPT*
   - **Posting Class**: *AOL*
   - **Default Warehouse**: *EQUIPHOUSE*
   - **Availability Calculation Rule**: *ALLOTHER*

3. In the **Unit of Measure** section of the tab, specify the following settings:

   - **Base Unit**: *ITEM*
   - **Sales Unit**: *ITEM*
   - **Purchase Unit**: *ITEM*

4. On the **Service Management** tab, select **Model Equipment** under **Equipment Class**. A stock item of the *CENTRIFJUC* item class will be tracked after it is sold.

5. On the form toolbar, click **Save**.

Step 2: Creating a Stock Item with No Components

To create a stock item with no components that will be tracked after it is sold, do the following:

1. On the *Stock Items* (IN202500) form, add a new record and specify the following settings in the Summary area:

   - **Inventory ID**: `JUICE_J22C`
   - **Item Status**: *Active*
   - **Description**: `Multifruit Centrifugal Juicer J22C`

2. On the **General** tab (**Item Defaults** section), select *CENTRIFJUC* as the **Item Class**.

   The **Type**, **Tax Category**, **Posting Class**, and **Default Warehouse** boxes, as well as the boxes in the **Unit of Measure** section, have been populated with the values from the item class you selected.

3. On the **Service Management** tab, in the **Manufacturer** box, select *JUICEAPP*.

   Notice that the **Model Equipment** option button on this tab (under **Equipment Class**) has been selected because this option button is selected for the item class. Unlike most settings specified for the item class, this setting cannot be overridden.

4. On the form toolbar, click **Save**.

Stock Items to Be Tracked Post-Sale: To Create Components

In this activity, you will create components for a stock item. To do this, you will first create an item class that is intended to group and provide similar settings to components (that is, stock items of a component equipment class). Then you will create stock items based on this item class. You will also specify warranty settings for these components.

Story

Suppose that the SweetLife Service and Equipment Sales Center is planning to sell cold press juicers with components. Acting as an administrative user, you will create the *CPRESSCOMP - Cold press juicer components* item class designed for components, which will group the components of cold press juicers. You will then create stock items based on this item class to represent the individual components for the cold press juicers.

Process Overview

On the *Item Classes* (IN201000) form, you will create an item class with the **Component** option button selected on the **Service Management** tab. Then on the *Stock Items* (IN202500) form, you will create stock items based on the newly created item class.

System Preparation

To prepare for completing the instructions in this activity, sign in to the system as a system administrator by using the *gibbs* username and the *123* password.

Step 1: Creating an Item Class for Components

To create an item class for components, do the following:

1. On the *Item Classes* (IN201000) form, add a new record and specify the following settings in the Summary area:

   - **Class ID**: CPRESSCOMP
   - **Description**: Cold press juicer components

2. On the **General** tab (**General Settings** section), specify the following settings:

   - **Stock Item**: Selected
   - **Item Type**: *Finished Good*
   - **Tax Category**: *EXEMPT*
   - **Posting Class**: *AOL*
   - **Default Warehouse**: *EQUIPHOUSE*
   - **Availability Calculation Rule**: *ALLOTHER*

3. In the **Unit of Measure** section, specify the following settings:

   - **Base Unit**: *ITEM*
   - **Sales Unit**: *ITEM*
   - **Purchase Unit**: *ITEM*

4. On the **Service Management** tab, select **Component** under **Equipment Class**.

5. On the form toolbar, click **Save**.

Now you can create the stock items (that is, the individual components) in the item class that you have created.

Step 2: Creating Components

In this step, you will create the components listed in the table below.

Description	Inventory ID	Company Warranty	Vendor Warranty
Juice Cup H30J	*CUPH300J*	6 months	3 months
Hopper for cold press juicers (plastic)	*HOPPERH3*	3 months	N/A
Hopper H30J metallic	*30HOPPERJK*	3 months	N/A
Plunger H30J	*PLUNGERH30J*	6 months	12 months
Auger H30J	*AUGERH30J*	12 months	12 months
Drum H30J	*DRUMH30J*	12 months	6 months

To create the components, do the following:

1. On the *Stock Items* (IN202500) form, add a new record and specify the following settings in the Summary area:

   - **Inventory ID**: CUPH300J
   - **Item Status**: *Active*

   - **Description**: `Juice Cup H30J`

2. On the **General** tab, in the **Item Class** box (**Item Defaults** section), select *CPRESSCOMP*.

   The **Type**, **Tax Category**, **Posting Class**, and **Default Warehouse** boxes, as well as those in the **Unit of Measure** section, have been populated with the values from the selected item class.

3. On the **Price/Cost** tab, set the **Default Price** to `50`.

4. On the **Service Management** tab, do the following:

   - In the **Manufacturer** box, select *JUICEAPP*.

   - In the **Equipment General Warranty** section, set **Company Warranty** to 6 *Months* and **Vendor Warranty** to 3 *Months*.

     Notice that the **Component** option button (under **Equipment Class**) has been selected based on the settings of the item class you selected, and you cannot change this setting.

5. On the form toolbar, click **Save**.

6. On the form toolbar, click **Add New Record** to create a new component and specify the following settings:

   - **Inventory ID**: `HOPPERH3`

   - **Item Status**: *Active*

   - **Description**: `Hopper for cold press juicers (plastic)`

7. On the **General** tab, select *CPRESSCOMP* as the **Item Class**.

8. On the **Price/Cost** tab, set the **Default Price** to `40`.

9. On the **Service Management** tab, do the following:

   - In the **Manufacturer** box, select *JUICEAPP*.

   - In the **Company Warranty** box, specify 3 *Months*, and in the **Vendor Warranty** box, leave *0*.

     Notice that the **Component** option button is again selected and unavailable.

10. On the form toolbar, click **Save**.

11. On the form toolbar, click **Add New Record** to create a new component and specify the following settings in the Summary area:

    - **Inventory ID**: `30HOPPERJK`

    - **Item Status**: *Active*

    - **Description**: `Hopper H30J metallic`

12. On the **General** tab, select *CPRESSCOMP* as the **Item Class**.

13. On the **Price/Cost** tab, set the **Default Price** to `50`.

14. On the **Service Management** tab, do the following:

    - In the **Manufacturer** box, select *JUICEAPP*.

    - In the **Company Warranty** box, specify 3 *Months*, and in the **Vendor Warranty** box, leave *0*.

      Notice that the **Component** option button is again selected and unavailable.

15. On the form toolbar, click **Save**.

16. On the form toolbar, click **Add New Record** to create a new component and specify the following settings:

    - **Inventory ID**: `PLUNGERH30J`

    - **Item Status**: *Active*

    - **Description**: `Plunger H30J`

17. On the **General** tab, select *CPRESSCOMP* as the **Item Class**.

18. On the **Price/Cost** tab, set the **Default Price** to `25`.

19. On the **Service Management** tab, do the following:

    - In the **Manufacturer** box, select *JUICEAPP*.

- In the **Company Warranty** box, specify 6 *Months*, and in the **Vendor Warranty** box, specify 12 *Months*. Notice that the **Component** option button is again selected and unavailable.

20. On the form toolbar, click **Save**.

21. On the form toolbar, click **Add New Record** to create a new component, and specify the following settings:
    - **Inventory ID**: AUGERH30J
    - **Item Status**: *Active*
    - **Description**: Auger H30J

22. On the **General** tab, select *CPRESSCOMP* as the **Item Class**.

23. On the **Price/Cost** tab, set the **Default Price** to 70.

24. On the **Service Management** tab, do the following:
    - In the **Manufacturer** box, select *JUICEAPP*.
    - In the **Company Warranty** box, specify 12 *Months*, and in the **Vendor Warranty** box, specify 12 *Months*. Notice that the **Component** option button is again selected and unavailable.

25. On the form toolbar, click **Save**.

26. On the form toolbar, click **Add New Record** to create a new component and specify the following settings in the Summary area:
    - **Inventory ID**: DRUMH30J
    - **Item Status**: *Active*
    - **Description**: Drum H30J

27. On the **General** tab, select *CPRESSCOMP* as the **Item Class**.

28. On the **Price/Cost** tab, set the **Default Price** to 100.

29. On the **Service Management** tab, do the following:
    - In the **Manufacturer** box, select *JUICEAPP*.
    - In the **Company Warranty** box, specify 12 *Months*, and in the **Vendor Warranty** box, specify 6 *Months*. Notice that the Component option button is again selected and unavailable.

30. On the form toolbar, click **Save**.

Now you can create a piece of equipment with components, but first, you need to create the appropriate item class for it.

Stock Items to Be Tracked Post-Sale: To Create Stock Items with Components

In this activity, you will create a piece of equipment with components that will be tracked after the equipment is sold. To accomplish this, you will first create an item class to group similar equipment with components. For the item class, you will define the components, including one optional component (that is, the equipment can be sold without this particular component). You will also specify the quantity required for each component in each piece of equipment.

You will then create a stock item for a piece of equipment with components, based on the newly created item class.

Story

Suppose the SweetLife Service and Equipment Sales Center plans to sell commercial cold press juicers with various components and to track these juicers after they are sold. As the administrative user, you will create the *COLDPRESS - Commercial Cold Press Juicers* item class for model equipment; this class is specifically designed to manage equipment with components. Next, you will create the *CPRESS30J - Cold Press Juicer H30J* stock item based on this item class and define the components included with this piece of equipment.

Process Overview

On the *Item Classes* (IN201000) form, you will create an item class with the **Model Equipment** setting and specify the necessary components for this class. Then on the *Stock Items* (IN202500) form, you will create a piece of equipment with components based on the newly created item class.

System Preparation

To prepare for completing the instructions in this activity, sign in to the system as a system administrator by using the *gibbs* username and the *123* password.

Step 1: Creating an Item Class for Equipment with Components

To create an item class for equipment that has components, do the following:

1. On the *Item Classes* (IN201000) form, add a new record and specify the following settings in the Summary area:

    - **Class ID**: COLDPRESS
    - **Description**: Commercial Cold Press Juicers

2. On the **General** tab (**General Settings** section), specify the following settings:

    - **Stock Item**: Selected
    - **Item Type**: *Finished Good*
    - **Tax Category**: *EXEMPT*
    - **Posting Class**: *AOL*
    - **Default Warehouse**: *EQUIPHOUSE*
    - **Availability Calculation Rule**: *ALLOTHER*

3. In the **Unit of Measure** section of the tab, specify the following settings:

    - **Base Unit**: *ITEM*
    - **Sales Unit**: *ITEM*
    - **Purchase Unit**: *ITEM*

4. On the **Service Management** tab, select **Model Equipment** under **Equipment Class**.

5. On the form toolbar, click **Save**.

6. On the table toolbar of the table on the **Service Management** tab, click **Add Row**, and specify the following settings in the added row to add a component to the item class:

    - **Component ID**: JUICECUP
    - **Active**: Selected
    - **Optional**: Cleared
    - **Quantity**: 1
    - **Description**: Juice Cup
    - **Item Class ID**: *CPRESSCOMP*

7. On the table toolbar, click **Add Row** again, and specify the following settings in the added row to add another component to the item class:

    - **Component ID**: HOPPER
    - **Active**: Selected
    - **Optional**: Cleared
    - **Quantity**: 1

- **Description**: `Hopper`
- **Item Class ID**: *CPRESSCOMP*

8. On the table toolbar, click **Add Row** again, and specify the following settings in the added row to add the third component to the item class:

- **Component ID**: `HOPPER_O`
- **Active**: Selected
- **Optional**: Selected

  With this check box selected, you can sell equipment of the class without this component.

- **Quantity**: 1
- **Description**: `Hopper (optional)`
- **Item Class ID**: *CPRESSCOMP*

9. On the table toolbar, click **Add Row** again, and specify the following settings in the row to add the fourth component to the item class:

- **Component ID**: `PLUNGER`
- **Active**: Selected
- **Optional**: Cleared
- **Quantity**: 1
- **Description**: `Plunger`
- **Item Class ID**: *CPRESSCOMP*

10. Click **Add Row**, and specify the following settings in the row to add the fifth component to the item class:

- **Component ID**: `AUGER`
- **Active**: Selected
- **Optional**: Cleared
- **Quantity**: 1
- **Description**: `Auger`
- **Item Class ID**: *CPRESSCOMP*

11. Click **Add Row**, and specify the following settings to add the sixth component to the item class:

- **Component ID**: `DRUM`
- **Active**: Selected
- **Optional**: Cleared
- **Quantity**: 1
- **Description**: `Drum`
- **Class ID**: *CPRESSCOMP*

12. On the form toolbar, click **Save**.

   You have added the components to the *COLDPRESS* item class, as shown in the following screenshot.
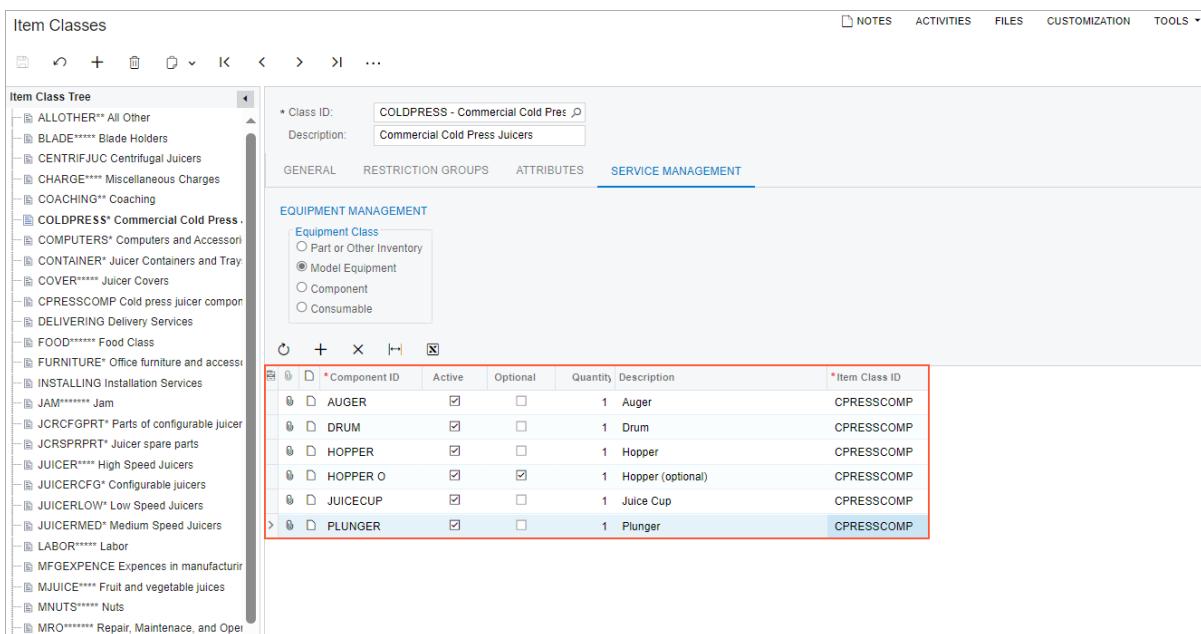
Figure: The item class with components

Step 2: Creating a Piece of Equipment with Components

To create a piece of model equipment with components, do the following:

1. On the *Stock Items* (IN202500) form, add a new record and specify the following settings in the Summary area:

   - **Inventory ID**: CPRESS30J
   - **Item Status**: *Active*
   - **Description**: Cold Press Juicer H30J

2. On the **General** tab, select *COLDPRESS* as the **Item Class**.

   The **Type**, **Tax Category**, **Posting Class**, and **Default Warehouse** boxes, as well as the boxes in the **Unit of Measure** section, have been populated with the values from the selected item class.

3. On the **Price/Cost** tab, set the **Default Price** to 800.

4. On the **Service Management** tab, do the following:

   - In the **Manufacturer** box, select *JUICEAPP*.
   - In the **Company Warranty** box, specify 12 *Months*, and in the **Vendor Warranty** box, specify 6 *Months*.

     Notice that the **Model Equipment** option button has been selected based on the settings of the item class, and you cannot change this setting.

5. On the form toolbar, click **Save**.

6. In the table of the **Service Management** tab, specify the following identifiers in the **Inventory ID** column for the rows with the mentioned **Component ID** values, so that you are specifying the stock items corresponding to the required components:

   - *AUGERH30J* in the row with the *AUGER* component
   - *DRUMH30J* in the row with the *DRUM* component
   - *HOPPERH3* in the row with the *HOPPER* component
   - *30HOPPERJK* in the row with the *HOPPER_O* component
   - *CUPH300J* in the row with the *JUICECUP* component

- *PLUNGERH30J* in the row with the *PLUNGER* component

Notice that as you select the inventory IDs, the system updates the warranty settings.

7. Clear the **Requires Serial** check box in all rows except the row with the *DRUM* component.

8. In the row with the *AUGERH30J* component, select *SQUEEZO* in the **Vendor ID** column.

9. On the form toolbar, click **Save**.

10. Navigate to the *Model Equipment and Component Summary* (FS400400) form, and verify that both pieces of model equipment that you have created are listed. Notice that all the components you have created are also listed here.

			Inventory ID	Equipment Class	Item Status	Class ID	Manufacturer ID	Manufacturer Model
>			30HOPPERJK	Component	Active	CPRESSCOMP	JUICEAPP	
			AUGERH30J	Component	Active	CPRESSCOMP	JUICEAPP	
			BASKET	Component	Active	OTHERPARTS		
			BLADE12	Component	Active	BLADE		
			BLADE20	Component	Active	BLADE		
			CONTAINER	Component	Active	CONTAINER		
			COVERPRO	Component	Active	COVER		
			CPRESS30J	Model Equipment	Active	COLDPRESS	JUICEAPP	
			CUPH300J	Component	Active	CPRESSCOMP	JUICEAPP	
			DRUMH30J	Component	Active	CPRESSCOMP	JUICEAPP	
			EJECTOR03	Component	Active	OTHERPARTS		
			EJECTOR05	Component	Active	OTHERPARTS		
			HOPPERH3	Component	Active	CPRESSCOMP	JUICEAPP	
			JUICE J22C	Model Equipment	Active	CENTRIFJUC	JUICEAPP	
			JUICER05	Model Equipment	Active	JUICERLOW	SQUEEZO	
			JUICER05C	Model Equipment	Active	JUICERLOW		
			JUICER10	Model Equipment	Active	JUICERMED	SQUEEZO	
			JUICER10C	Model Equipment	Active	JUICERMED		
			JUICER15	Model Equipment	Active	JUICER	SQUEEZO	

1-19 of 28 records

Figure: The defined model equipment

Stock Items to Be Tracked Post-Sale: To Record the Receipt of Stock Items

When new stock items are created in Acumatica ERP, you enter a purchase order (optional) and a receipt to record the items in the warehouse, making them available for further processing and sale.

In this activity, you will record the receipt of stock items with the **Model Equipment** and **Component** equipment types that have been created in previous steps.

Story

Suppose that the SweetLife Service and Equipment Sales Center purchased equipment from the vendor and needs to register the purchase in the system so that the items will be reflected in the warehouse.

Acting as an accountant, you will add a receipt to the system indicating the purchase of the equipment. (To keep this training streamlined, you do not need to sign in as the accountant; you will complete this step while signed in to the service manager's user account.)

Process Overview

On the *Receipts* (IN301000) form, you will create and release a receipt listing purchased items so that the items are available in your warehouse.

System Preparation

To prepare for completing the instructions in this activity, do the following:

1. Sign in to the system as a service manager by using the *davis* username and the *123* password
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, set the business date to *1/30/2025*.

Step: Recording the Receipt of Stock Items

Perform the following instructions:

1. On the *Receipts* (IN301000) form, click **Add New Record**.
2. On the **Details** tab, add a new row with the following settings:
   - **Inventory ID**: *CPRESS30J*
   - **Quantity**: 20
   - **Unit Cost**: 800
3. Again click **Add Row**, and specify the following settings in the row:
   - **Inventory ID**: *JUICE_J22C*
   - **Quantity**: 20
   - **Unit Cost**: 700
4. Again click **Add Row**, and specify the following settings in the row:
   - **Inventory ID**: *CUPH300J*
   - **Quantity**: 20
   - **Unit Cost**: 50
5. Click **Add Row** again, and specify the following settings in the row:
   - **Inventory ID**: *HOPPERH3*
   - **Quantity**: 20
   - **Unit Cost**: 40
6. Click **Add Row** again, and specify the following settings in the row:
   - **Inventory ID**: *30HOPPERJK*
   - **Quantity**: 20
   - **Unit Cost**: 50
7. Again click **Add Row**, and specify the following settings in the row:
   - **Inventory ID**: *PLUNGERH30J*
   - **Quantity**: 20
   - **Unit Cost**: 25
8. Click **Add Row** once again, and specify the following settings in the row:
   - **Inventory ID**: *AUGERH30J*
   - **Quantity**: 20
   - **Unit Cost**: 70

9. Click **Add Row** once again, and specify the following settings in the row:
    - **Inventory ID**: *DRUMH30J*
    - **Quantity**: 20
    - **Unit Cost**: 100
10. On the form toolbar, click **Save**.

    You have created the receipt for the model equipment in the system.
11. On the form toolbar, click **Release**.

Once the receipt is released, the items of each row are available in your warehouse, as the following screenshot shows.

Figure: The receipt for the equipment items

Now you can proceed to creating a sales order for equipment.

Lesson 3: Creating Target Equipment

In Acumatica ERP, target equipment is equipment that your staff members will service at the customer site or at your company.

This lesson explains how target equipment can be created on the *Equipment* (FS205000) form—either manually on the form or automatically when a stock item with the appropriate settings is sold to a customer, causing the system to create it.

Target Equipment: General Information

In this lesson, you will learn how to work with target equipment in Acumatica ERP. Target equipment refers to items that your company tracks for maintenance, service, or warranty purposes. This includes equipment sold directly to customers and equipment purchased from third parties but serviced by your company.

Learning Objectives

In this lesson, you will learn how to do the following:

- Create a sales order and an invoice to record the sale of a stock item. On release of the invoice related to the sales order, the system automatically creates a target equipment record.
- Create a piece of target equipment manually.
- Create an appointment for services performed on the customer's target equipment.

Applicable Scenarios

You create target equipment in the following scenarios:

- A customer requests to purchase equipment along with installation services, with plans for ongoing regular maintenance services on this equipment.
- Your company needs to service equipment that was originally purchased from a third party, requiring the entry of the equipment record in Acumatica ERP to enable tracking, scheduling, and servicing.

Target Equipment Creation

You can create target equipment in the following ways:

- By selling a stock item with the **Model Equipment** equipment class, which causes the system to create the corresponding target equipment record on the *Equipment* (FS205000) form. The record is created when you release the invoice associated with this sale on the *Invoices* (SO303000) form.
- By creating a target equipment record directly on the *Equipment* form (when your company plans to provide services for equipment purchased by a customer from another company).
- By modifying the item class of the stock items that you have already sold to indicate that these stock items will now be handled as model equipment, and then converting these stock items into target equipment on the *Create Equipment for Sold Items* (FS500900) form.

  This method is outside of the scope of this training.

Workflow of Sales Order Processing

The steps involved in the sale of a piece of model equipment are shown in the diagram below.
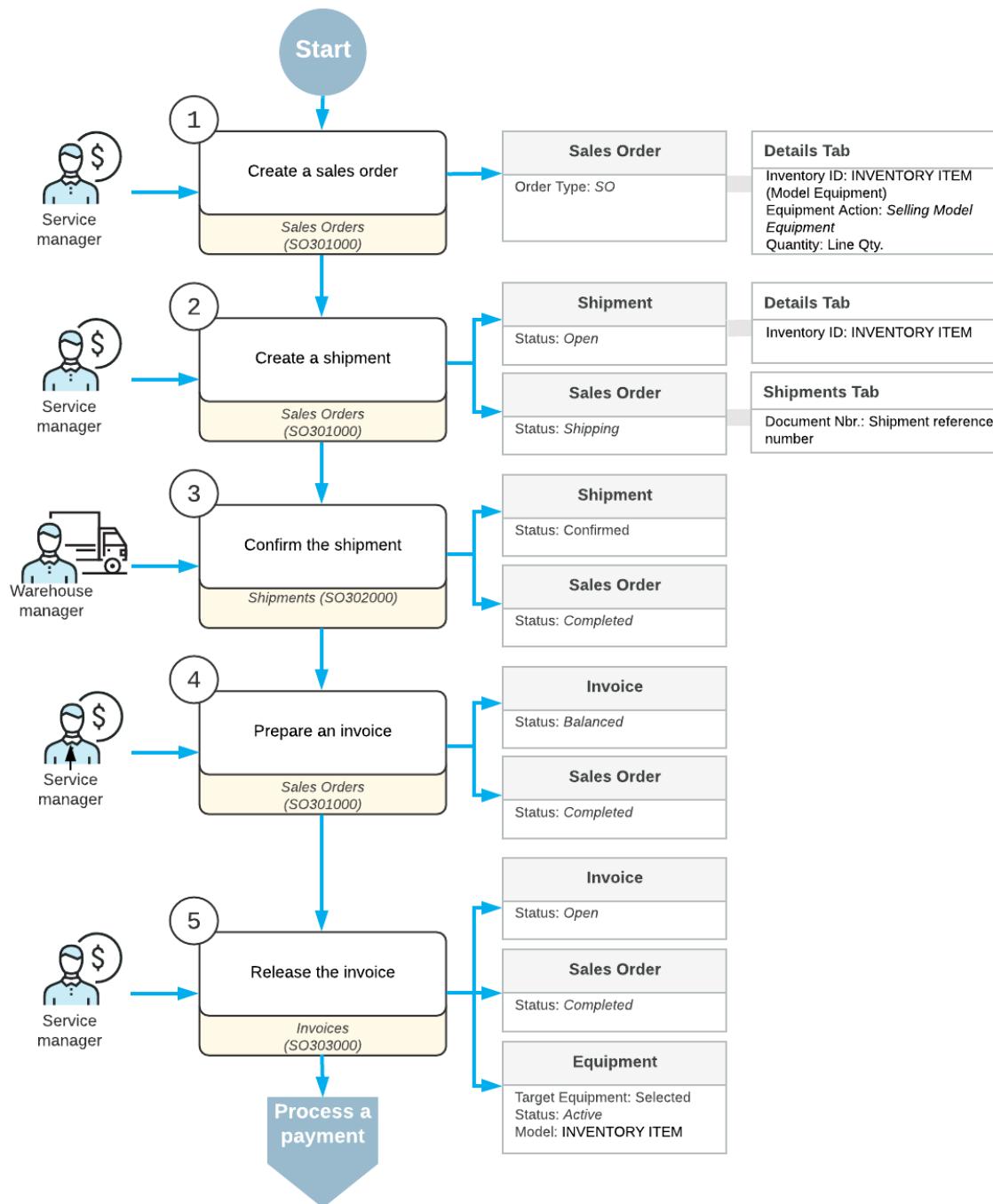
Figure: Selling a piece of model equipment from a sales order

Target Equipment: To Sell a Stock Item as Target Equipment

The following activity will walk you through the process of selling two stock items with the **Model Equipment** equipment class. When you release the invoice for the sale, the system will automatically create a target equipment record. You will then verify that the stock items sold to the customer are listed as target equipment owned by this customer.

Story

Suppose that the *GOODFOOD (GoodFood One Restaurant)* customer would like to purchase two pieces of equipment, along with installation services, from the SweetLife Service and Equipment Sales Center.

Acting as a service manager, you will receive the request and create a sales order. Then acting as an accountant, you will prepare and release an invoice. (To keep this training simple, you will perform all instructions by using the user account of the service manager, Maia Davis.)

Process Overview

On the *Sales Orders* (SO301000) form, you will create a new sales order. In this sales order, you will add stock items and specify the *Selling Model Equipment* equipment action for them. Then you will prepare and release a sales invoice. By releasing the invoice, the system will create the target equipment.

System Preparation

To prepare for completing the instructions in this activity, do the following:

1. Sign in to the system as a service manager by using the *davis* username and the *123* password

2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, set the business date to *1/30/2025*. For simplicity, in this activity, you will create and process all documents in the system on this business date.

Step 1: Creating a Sales Order for Equipment

To create a sales order, perform the following instructions:

1. On the *Sales Orders* (SO301000) form, add a new sales order and specify the following settings in the Summary area:

   - **Order Type**: *SO*
   - **Customer**: *GOODFOOD - GoodFood One Restaurant*

2. On the form toolbar, click **Save**.

3. On the **Details** tab, click **Add Row** on the table toolbar, and add a piece of model equipment to the sales order by specifying the following settings in the row:

   - **Inventory ID**: *JUICE_J22C*
   - **Equipment Action**: *Selling Model Equipment*
   - **Quantity**: `1.00`
   - **Unit Price**: `700.0000`

4. On the table toolbar, again click **Add Row**, and specify the following settings in the row to add another piece of model equipment to the sales order:

   - **Inventory ID**: *CPRESS30J*
   - **Equipment Action**: *Selling Model Equipment*
   - **Quantity**: `1.00`
   - **Unit Price**: `800.0000`

5. On the form toolbar, click **Save**.

6. On the form toolbar, click **Create Shipment**.

7. In the **Specify Shipment Parameters** dialog box, click **OK** to create a shipment for the business date (*1/30/2025*) and the default warehouse of your branch location (which is *EQUIPHOUSE*).

The system has opened the *Shipments* (SO302000) form with the details copied from the corresponding sales order.

8. On the form toolbar, click **Confirm Shipment** to change the shipment's status to *Confirmed*.

9. On the form toolbar, click **Prepare Invoice**; the system has opened the *Invoices* (SO303000) form with the details copied from the shipment.

10. On the form toolbar of the opened form, click **Release**.

    By releasing the invoice related to the sales order that included the items for which you specified the *Selling Model Equipment* action, you cause the system to create the target equipment in the system that corresponds to the stock items. The system inserts the reference numbers of the equipment in the **Target Equipment ID** column.

Figure: Target equipment created on release of the invoice

Step 2: Reviewing the Target Equipment List

To verify that the equipment has been created, perform the following instructions:

1. Open the *Equipment Summary* (FS400200) form.

    This form shows you all the equipment that has been created in the system. Notice that the **Target Equipment** check boxes are selected for the pieces of equipment you have created in the previous step, meaning that your company expects to service this equipment. In the **Model Equipment** column, you can view the inventory ID of the stock item corresponding to the target equipment.

    Notice that the **Customer ID** column displays *GOODFOOD* for both pieces of equipment.

2. In the table row with *Multifruit Centrifugal Juicer J22C*, click the *FSE00010* link in the **Equipment Nbr.** column.

    The *Equipment* (FS205000) form has been opened in a new window with this target equipment selected.

3. On the **General** tab, notice that the **Installation Date** box has been filled with the date of the sales invoice (as shown in the following screenshot).

Figure: Settings of the target equipment

4. On the **Components and Warranties** tab, verify that no settings have been filled in. This is because this target equipment has no parts or warranties.

5. On the **Source** tab, verify that the **Document Ref. Nbr.** and **Sales Order Nbr.** boxes contain links to the documents, which confirm the purchase of this equipment by the customer.

6. Close the window with the *Equipment* form.

7. On the *Equipment Summary* form, for the row with *Cold Press Juicer H30J*, click the *FSE00011* link in the **Equipment Nbr.** column.

8. On the *Equipment* form, which the system has opened, click the **Components and Warranties** tab.

   Notice that the components of the *Cold Press Juicer H30J* equipment are listed on this tab, as shown in the following screenshot. The warranty end dates for the components that have warranties are automatically calculated based on the equipment invoice date and the warranty duration that you defined for the corresponding model equipment. You entered these components and their warranty durations in Lesson 1.2.

Figure: Components and warranties of the equipment

9. Close the window with the *Equipment* form.

10. On the *Component Summary* (FS400700) form, view the list of components serviced by SweetLife.

   Notice that the target equipment records now all have the *Active* status.

Target Equipment: To Manually Create Equipment

In this activity, you will create in the system a piece of equipment that the customer already has and that SweetLife will be servicing.

Story

Suppose that the SweetLife Service and Equipment Sales Center needs to perform services on the equipment that was sold to the *HMBAKERY - HM's Bakery & Cafe* customer by a third party. Acting as a service manager, you will enter this equipment record in Acumatica ERP.

Process Overview

On the *Equipment* (FS205000) form, you will add a new piece of equipment to be serviced.

System Preparation

To prepare for completing the instructions in this activity, do the following:

1. Sign in to the system as a service manager by using the *davis* username and the *123* password

2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, set the business date to *1/30/2025*.

Step: Creating Target Equipment

To create this piece of target equipment, perform the following instructions:

1. On the *Equipment* (FS205000) form, add a new record and specify the following settings in the Summary area:

    *   **Description**: `Multifruit Centrifugal Juicer J22C` (see Item 1 in the following screenshot)
    *   **Target Equipment**: Selected (Item 2)

2. Under **Owner**, select the **Customer** option button, and in the **Customer** box, select *HMBAKERY - HM's Bakery & Cafe* (Item 3).

3. Under **Location**, in the **Customer** box, select *HMBAKERY - HM's Bakery & Cafe* (Item 4).

4. On the **General** tab (**Installation Info** section), in the **Installation Date** box (Item 5), select the current business date (*1/30/2025*).

5. In the **Model Equipment** box of the **Inventory Info** section, select *JUICE_J22C* (Item 6).

Figure: Manual creation of target equipment

6. On the form toolbar, click **Save**.

7. On the *Equipment Summary* (FS400200) form, in the **Customer** box of the Summary area, select *HMBAKERY*.

8. In the table, make sure the *FSE00012* equipment record is listed, as shown in the screenshot below.

Figure: The created target equipment

If you click the *FSE00012* link in the **Equipment Nbr.** column, the system will open the *Equipment* form, where you just created the target equipment.

Target Equipment: To Create a Service Appointment

In this activity, you will create an appointment to deliver setup services for target equipment located at the customer's premises.

Story

Suppose that the *GOODFOOD (GoodFood One Restaurant)* customer wants the SweetLife Service and Equipment Sales Center to perform installation and repair services at the customer's location on the cold press and centrifugal juicers it has purchased. Acting as a service manager, you will receive the request and create and process an appointment.

Process Overview

On the *Appointments* (FS300200) form, you will create a new appointment. In this appointment, you will specify the services and the target equipment that will be serviced. You will also assign a staff member with the appropriate skills and, on behalf of a staff member, process the appointment.

System Preparation

To prepare for completing the instructions in this activity, do the following:

1. Sign in to the system as a service manager by using the *davis* username and the *123* password
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, set the business date to *1/30/2025*.

Step: Creating an Appointment for the Servicing of Target Equipment

Do the following:

1. On the *Appointments* (FS300200) form, click **Add New Record**.
2. Specify the following settings in the Summary area:
   - **Service Order Type**: *INST*
   - **Customer**: *GOODFOOD (GoodFood One Restaurant)*
   - **Description**: `Installation and training services`
3. On the form toolbar, click **Save**.

4. On the **Details** tab, click **Add Row** and specify the following settings in the row:

   - **Inventory ID**: *INSTALL*
   - **Target Equipment ID**: *FSE00010* (this target equipment is the *Multifruit Centrifugal Juicer J22C* stock item)

5. On the form toolbar, click **Save**.

6. Click **Add Row** again and specify the following settings in the row:

   - **Inventory ID**: *REPAIR*
   - **Target Equipment ID**: *FSE00011* (this target equipment is the *Cold Press Juicer H30J* stock item)

7. On the form toolbar, click **Save**.

8. On the **Staff** tab, click **Add Row**, and in the **Staff Member** column, select *EP00000003 - Jon Waite*. This staff member has the *INSTALLING - Juicer installation skills* and *REPAIRING - Repair of juicers* skills assigned on the **Skills** tab on the *Employees* (EP203000) form.

9. On the form toolbar, click **Save**.

10. On the form toolbar, click **Start**. In this instruction, you are acting as Jon Waite arriving at the appointment.

11. On the **Details** tab, click the *FSE00010* link in the **Target Equipment ID** column.

    The system has opened the *Equipment* (FS205000) form, where the staff member attending the appointment can view the settings of the equipment scheduled for service.

12. On the More menu (under **Inquiries**), click **Target Equipment History**.

    The system opens the *Appointment Details* (FS400500) form. You can see the appointment created for the selected piece of equipment. (See the following screenshot.)

Figure: Appointment history for the target equipment

13. Return to the *Appointments* (FS300200) form.

14. On the **Details** tab, click the *FSE00011* link in the **Target Equipment ID** column to view the settings of the *Cold Press Juicer H30J* to be assembled.

15. On the *Equipment* form, which the system opens, click the **Components and Warranties** tab.

16. In the **Serial Nbr.** column of the components table, enter `12345` for the *DRUM* component (which has a warning indicating that the serial number is missing).

17. On the form toolbar, click **Save**.

18. Close the window with the *Equipment* form and return to the *Appointments* form.

19. On the **Settings** tab, in the **Actual Date and Time** section, enter the actual start and end times (for simplicity in this training, set them to match the scheduled start and end times). Select the **Finished** check box.

20. On the form toolbar, click **Complete** and then **Close**.

    Now an accountant can run billing for the appointment.

Lesson 4: Servicing Target Equipment

With Acumatica ERP, you can sell, upgrade, or replace a piece of target equipment or its components. To accomplish this, in an appointment created on the *Appointments* (FS300200) form, you will specify the equipment-related action to be applied to the selected stock item.

Equipment-Related Actions

When you need to sell a piece of equipment or provide service maintenance of equipment, in Acumatica ERP, you can create a sales order, a service order, or an appointment and specify an equipment-related action that needs to be applied to the included item.

On the **Details** tab of the *Sales Orders* (SO301000), *Service Orders* (FS300100), or *Appointments* (FS300200) form, the following options are available in the **Equipment Action** column:

- *Selling Model Equipment*: Registers the sale of a stock item of the **Model Equipment** type whose identifier is selected in the **Inventory ID** column for the applicable row. When the invoice related to the sales order, service order, or appointment is released, the system creates a target equipment record corresponding to the stock item in the system.
- *Replacing Target Equipment*: Registers the replacement of the target equipment record specified in the **Target Equipment ID** column of the row with a new stock item of the **Model Equipment** type whose identifier is selected in the **Inventory ID** column.
- *Selling Optional Component*: Registers the sale of an optional stock item of the **Component** type.
- *Upgrading Component*: Registers the upgraded component (which replaces the default component) of a piece of model equipment during a sale of the model equipment.
- *Replacing Component*: Registers the replacement of a component of the specified piece of target equipment.
- *N/A*: Registers the sale of the inventory item selected in the row to the customer. If model equipment, target equipment, or a component is specified for the line, no record will be created or modified on the *Equipment* (FS205000) form.

You will learn how to apply these actions in appointments in the next activities of this lesson.

Selling a Piece of Equipment and an Optional Component: General Information

With Acumatica ERP, you can sell a piece of equipment along with services and continue to provide services for the equipment after the sale.

Learning Objectives

In this lesson, you will learn how to sell a piece of equipment, an optional component, and installation services through an appointment.

Applicable Scenarios

You sell a piece of equipment and an optional component in the following scenarios:

- A customer has asked your company to sell a new piece of equipment.
- A customer has requested optional components for equipment serviced by your company, along with installation services.

Workflow of Model Equipment Sale with Optional Component

In the diagram below, you can see the process of selling a piece of equipment and its optional component by using a service order.
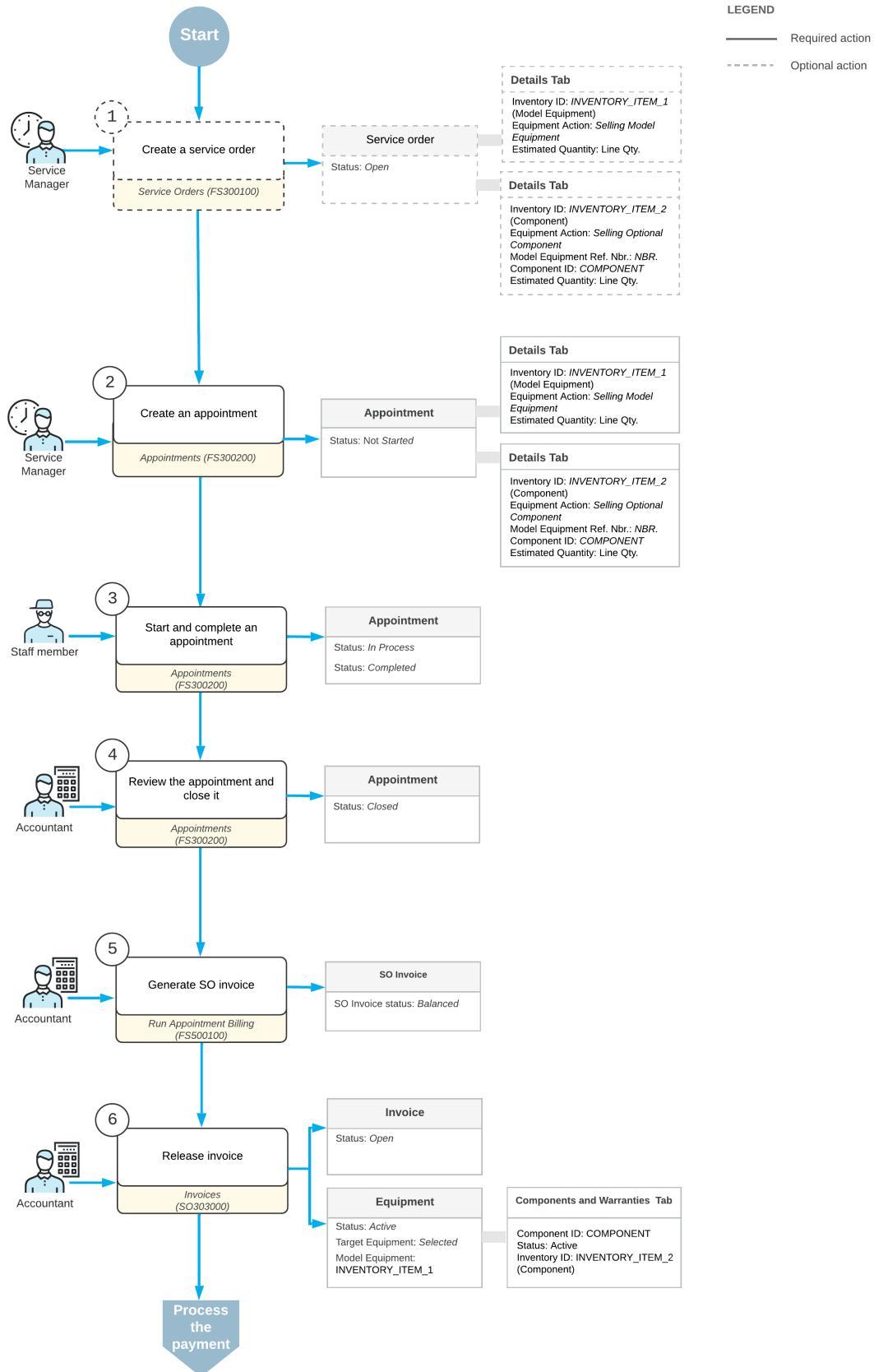
Figure: The sale of model equipment and its optional component in a service order

When a customer request is received, a service manager enters a service order by using the *Service Orders* (FS300100) form. In the service order, the service manager specifies the customer from which the request has been received, the branch and branch location to provide services, and the services that should be performed.

The service manager can instead start by creating an appointment with all these settings, and the service order will be created automatically. In *Selling a Piece of Equipment and an Optional Component: Process Activity*, the appointment will be created first.

On the **Details** tab of the *Appointments* (FS300200) form, the service manager does the following to add the model equipment record and the optional component to be sold:

1. In the row with the equipment record (*CPRESS30J*), the service manager selects *Selling Model Equipment* in the **Equipment Action** column.

2. In the row with the optional component (*30HOPPERJK*), the service manager selects *Selling Optional Component* in the **Equipment Action** column, specifies the related equipment in the **Model Equipment Ref. Nbr.** column, and selects the identifier of the equipment component in the **Component ID** column.

Selling a Piece of Equipment and an Optional Component: Process Activity

The following activity will walk you through the process of selling a piece of equipment, an optional component, and the associated installation service.

Story

Suppose that the customer has contacted the SweetLife Service and Equipment Sales Center to request the following:

- A cold press juicer—that is, the *CPRESS30J - Cold Press Juicer H30J* equipment (a stock item of the *Model Equipment* type)
- An optional component for the juicer—the *30HOPPERJK - Hopper H30J metallic* component (a stock item of the *Component* type)
- Installation services

Acting as a service manager, you will create an appointment. Further processing will then be performed by the assigned staff member and the accountant, who will prepare and process the billing documents for the customer. To keep this training simple, you will perform all instructions while you are signed in to the user account of the service manager (Maia Davis).

Process Overview

On the *Appointments* (FS300200) form, you will create a new appointment, add the required items, specify the equipment-related actions for each item, and process the appointment.

System Preparation

To prepare for completing the instructions in this activity, do the following:

1. Sign in to the system as a service manager by using the *davis* username and the *123* password
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, set the business date to *1/30/2025*.

Step: Selling a Piece of Model Equipment and an Optional Component

In this step, you will create an appointment (causing the system to create the corresponding service order) that includes the installation service *INST*, the *CPRESS30J - Cold Press Juicer H30J* equipment, and the optional *30HOPPERJK - Hopper H30J metallic* component. You will go through the whole process until you generate an invoice for both the service and the sold equipment.

Perform the following instructions:

1. On the *Appointments* (FS300200) form, click **Add New Record**.

2. In the Summary area, specify the following settings:

   • **Service Order Type**: *INST*
   • **Customer**: *TOMYUM - Thai Food Restaurant*
   • **Description**: `Selling a juicer with optional component`

3. On the form toolbar, click **Save**.

4. On the **Details** tab, add a row, and in the **Inventory ID** column of the row, select *INSTALL*.

   Notice that you do not specify target equipment IDs because the corresponding records in the system have not yet been created.

5. On the **Details** tab, add a row, and specify the following settings in the row to add a piece of model equipment (a juicer) to the appointment:

   • **Inventory ID**: *CPRESS30J*
   • **Equipment Action**: *Selling Model Equipment*
   • **Estimated Quantity**: `1.00`
   • **Unit Price**: `800.0000`

6. On the form toolbar, click **Save**.

7. Click **Add Row** again, and specify the following settings in the row to add another piece of equipment (an additional component) to the appointment:

   • **Inventory ID**: *30HOPPERJK*
   • **Equipment Action**: *Selling Optional Component*
   • **Model Equipment Ref. Nbr.**: *0002*
   • **Component ID**: *HOPPER O*
   • **Estimated Quantity**: `1.00`
   • **Unit Price**: `50.0000`

8. On the form toolbar, click **Save**.

   Notice that for the optional component, you have specified the related model equipment number in the **Model Equipment Ref. Nbr.** column and selected the identifier of the equipment component in the **Component ID** column.

   Now you can assign the appointment and proceed with the services. At this stage, the target equipment corresponding to the model equipment has not yet been created.

9. On the **Staff** tab, click **Add Row**, and specify *EP00000043 - Edward Smith* as the **Staff Member**.

10. On the form toolbar, click **Save**.

11. On the form toolbar, click **Start**.

    As you perform this instruction and the next two, you are acting as Edward Smith at the appointment.

12. On the **Settings** tab, in the **Actual Date and Time** section, enter the actual start and end times (for simplicity in this training, set them to match the scheduled start and end times). Select **Finished**.

13. Click **Complete**.

As you perform the remaining instructions in this step, you are now acting as an accountant.

14. On the form toolbar, click **Close**.

15. On the form toolbar, click **Run Billing**. The *Invoices* (SO303000) form opens with the details of the invoice.

    Notice that the **Related Svc. Doc. Nbr.** column contains the link to the appointment document from which the sales invoice has originated.

> (i) You can also open the *Invoices* form by clicking the link of the invoice in the **Reference Nbr.** column of the **Billing Documents** tab on the *Appointments* form.

16. On the form toolbar of the *Invoices* form, click **Remove Hold** and then **Release**.

    When the invoice was released, the target equipment record was created (as shown in the following screenshot).

Figure: Released invoice showing the created target equipment

17. In the **Target Equipment ID** column, click the equipment reference number link to open the *Equipment* (FS205000) form.

18. On the **Components and Warranties** tab (see Item 1 in the following screenshot), verify that the system has added the additional component of the model equipment record that has been sold within the same order (Item 2).

Figure: The equipment record with the additional component

Selling an Optional Component of Target Equipment: General Information

With Acumatica ERP, you can install optional components for existing equipment at a customer site and provide associated installation services as requested.

Learning Objectives

In this lesson, you will learn how to sell an optional component that will upgrade target equipment.

Applicable Scenarios

You sell an optional component that can become target equipment in the following scenarios:

- When a customer requests the installation of an optional component for existing equipment already in use at their site.
- When a customer requires both the component installation and associated installation services to be provided by your company.

In these situations, the service manager initiates the appointment, assigns necessary staff, and coordinates with the accountant to prepare and process billing documents for the customer.

Workflow of a Sales of an Optional Component for Target Equipment

In the following diagram, you can see the process of selling an optional component for target equipment.

LEGEND

Required action

Optional action

Start

1

Service Manager

Create a service order

Service Orders (FS300100)

Service order

Service Order Type: A type with the **Allow Quick Process** check box selected

Status: *Open*

Details Tab

Inventory ID: *INVENTORY_ID* (Component)
Equipment Action: *Selling Optional Component*
Target Equipment ID: TARGET EQUIPMENT ID
Component ID: COMPONENT
Estimated Quantity: Line Qty.

2

Service Manager

Create an appointment

Appointments (FS300200)

Appointment

Service Order Type: A type with the **Allow Quick Process** check box selected

Status: *Not Started*

Details Tab

Inventory ID: *INVENTORY_ID* (Component)
Equipment Action: *Selling Optional Component*
Target Equipment ID: TARGET EQUIPMENT ID
Component ID: COMPONENT
Estimated Quantity: Line Qty.

3

Staff member

Start and complete the appointment

Appointments (FS300200)

Appointment

Status: *In Process*

Status: *Completed*

Appointment

Status: *Billed*

4

Accountant

Initiate quick processing of the appointment

Appointments (FS300200)

Sales Order

Status: *Completed*

Invoice

Status: *Open*

Process the payment

Equipment

Equipment ID: TARGET EQUIPMENT ID

Components and Warranties Tab

Component ID: COMPONENT
Status: Active
Inventory ID: *INVENTORY_ID* (Component)

Figure: The sale of an optional component of target equipment

When a customer request is received, a service manager enters a service order by using the *Service Orders* (FS300100) form; see 1 in the diagram above. In the service order, the service manager specifies the customer from which the request has been received, the branch and branch location to provide services, and the services that should be performed.

The service manager can instead start by creating an appointment with all these settings; the service order will be created automatically.

On the *Appointments* (FS300200) form, the service manager adds the general setting. On the **Details** tab, the service manager adds the optional component to be sold. In the row of this component, the service manager selects *Selling Optional Component* in the **Equipment Action** column, specifies the related target equipment in the **Target Equipment ID** column, and selects the identifier of the equipment component in the **Component ID** column.

Selling an Optional Component of Target Equipment: Process Activity

The following activity will guide you through the process of installing an optional component for existing equipment at a customer site and providing the related installation service.

Story

Suppose that the customer has requested that an optional component (*30HOPPERJK*) of target equipment (*CPRESS30J - Cold Press Juicer H30J*, which the company already has) be installed at the customer site, along with installation services from SweetLife Service and Equipment Sales Center.

Acting as a service manager, you will create an appointment. The assigned staff member will process it further, and the accountant will prepare billing documents for the customer and process them in the system. To simplify this training, you will perform all instructions while signed in to the user account of the service manager (Maia Davis).

Process Overview

On the *Appointments* (FS300200) form, you will create a new appointment, add the service along with the required stock item of a component equipment class, specify the equipment-related action for this item, and process the appointment.

System Preparation

To prepare for completing the instructions in this activity, do the following:

1. Sign in to the system as a service manager by using the *davis* username and the *123* password

2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, set the business date to *1/30/2025*.

Step: Selling an Optional Component of Target Equipment

In this step, you will create an appointment (causing the system to create the corresponding service order) that includes the installation service (*INSTALL*) and an additional component, *30HOPPERJK*. You will then generate a sales invoice by using the **Quick Process** button.

Perform the following instructions:

1. On the *Appointments* (FS300200) form, click **Add New Record**.

2. Specify the following settings in the Summary area:

   - **Service Order Type**: *EQUP*
   - **Customer**: *TOMYUM - Thai Food Restaurant*
   - **Description**: `Selling optional component`

3. On the form toolbar, click **Save**.

4. On the **Details** tab, add a row, and in the **Inventory ID** column of the row, select the *INSTALL* service.

5. Add another row, and specify the following settings in the row to add a component (a hopper) to the appointment:

   - **Inventory ID**: *30HOPPERJK*
   - **Equipment Action**: *Selling Optional Component*
   - **Target Equipment ID**: *FSE00013* (*Cold Press Juicer H30J*)

- **Component ID**: *HOPPER_O*
- **Estimated Quantity**: 1.00
- **Unit Price**: 50.0000

6. Save your changes.

7. On the table toolbar of the **Staff** tab, click **Add Row**; specify *EP00000003 - Jon Waite* as the **Staff Member**.

8. Save your changes.

9. On the form toolbar, click **Start**.

   As you perform this instruction (and the next three instructions), you are acting as Jon Waite at the appointment.

10. On the **Settings** tab, in the **Actual Date and Time** section, enter the actual start and end times (for simplicity in this training, set them to match the scheduled start and end times). Select the **Finished** check box.

11. On the form toolbar, click **Complete**.

12. On the form toolbar, click **Close**.

13. On the form toolbar, click **Quick Process**.

   You are now acting as an accountant.

14. In the **Process Appointment** dialog box, which opens, ensure that the following check boxes are selected:

   - **Prepare Invoice**
   - **Release Invoice**

15. Click **OK**. Once the billing process has completed, the billing document reference numbers appear in the **Processing Results** dialog box. Close the dialog box, and notice that the appointment now has the *Billed* status.

16. On the **Billing Documents** tab, review the list of generated documents, and click the reference number of the sales invoice in the **Reference Nbr.** column.

   The system opens the *Invoices* (SO303000) form. Review the details of the generated invoice. Notice that the invoice has been released and has the *Open* status, which means that the target equipment record has been updated.

17. In the **Target Equipment** column, click the reference number link of the equipment to open the *Equipment* (FS205000) form.

18. Click the **Components and Warranties** tab to verify that the system has added the optional component to the target equipment record (see the following screenshot).

Figure: Equipment record with the additional component

Upgrading a Default Component of Equipment to Be Sold: General Information

With Acumatica ERP, you can handle customer requests for purchasing and installing equipment, upgrading default components (as described in this topic), and providing on-site installation services.

Learning Objectives

In this lesson, you will learn how to upgrade a default component of a piece of equipment being sold.
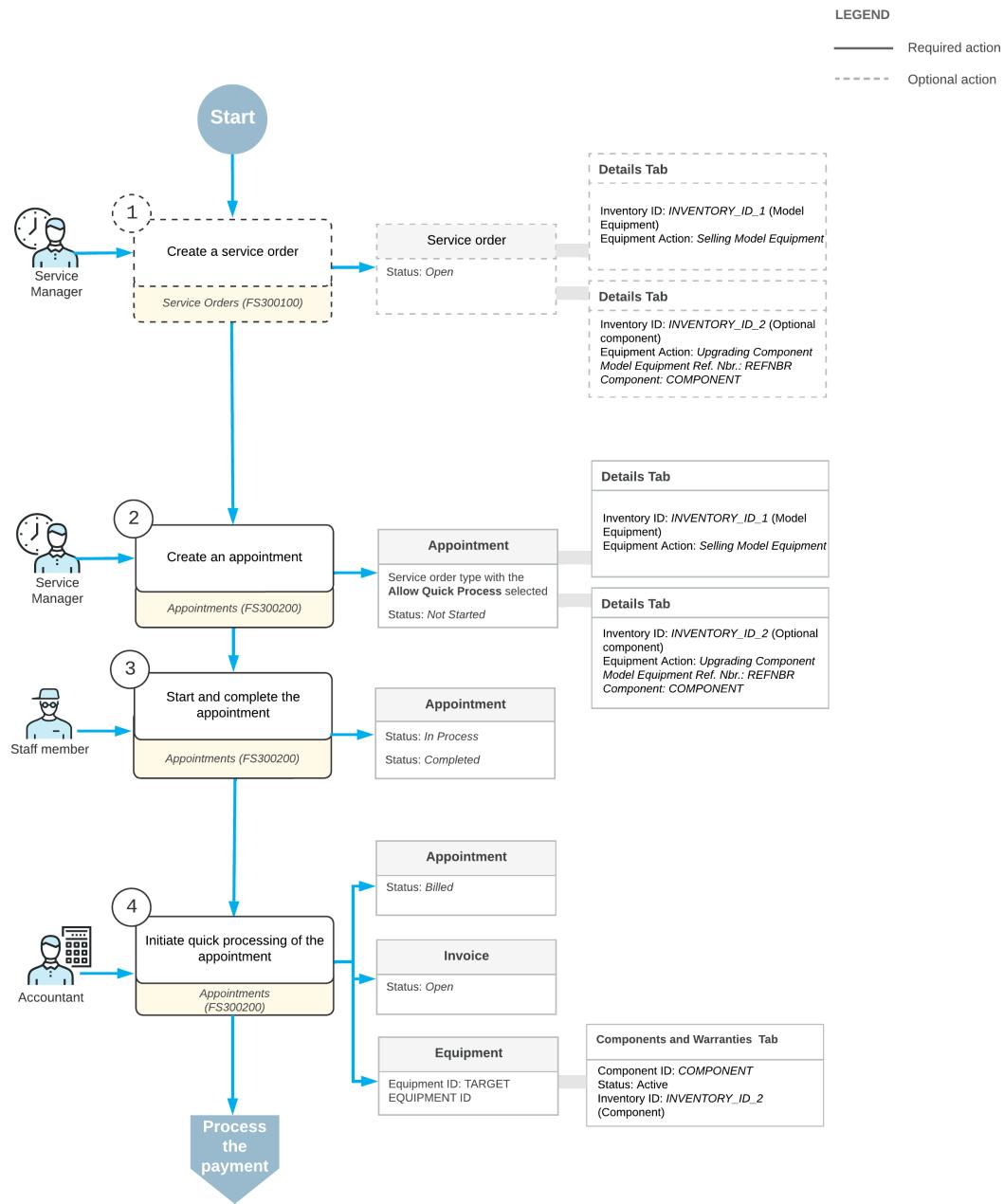
Applicable Scenarios

You upgrade a default component of equipment in the following cases:

- A customer requests the sale and installation of a piece of equipment, including an upgrade of one of its default components.
- A customer requests an upgrade to a component of equipment they already own.

Workflow of Model Equipment Sale and Default Component Upgrade

In the diagram below, you can see the process of selling a piece of equipment and upgrading one of its default components.

Figure: The sale of model equipment and the upgrading of a default component

When a customer request is received, a service manager enters a service order on the *Service Orders* (FS300100) form. In the service order, the service manager specifies the customer from which the request has been received, the branch and branch location to provide services, and the services that should be performed.

The service manager can instead start by creating an appointment with all these settings, and the service order will be created automatically. In *Upgrading a Default Component of Equipment to Be Sold: Process Activity*, the appointment will be created first.

On the *Appointments* (FS300200) form, in addition to specifying the general settings, the service manager does the following on the **Details** tab to add the model equipment record and the optional component to be sold:

1. In the row with the model equipment record, the service manager selects *Selling Model Equipment* in the **Equipment Action** column.

2. In the row with the component, the service manager selects *Upgrading Component* in the **Equipment Action** column, specifies the related model equipment in the **Model Equipment Ref. Nbr.** column, and selects the identifier of the equipment component in the **Component ID** column.

Upgrading a Default Component of Equipment to Be Sold: Process Activity

The following activity will walk you through the process of selling model equipment, upgrading a default component, and providing installation services at the customer site.

Story

Suppose that the customer has requested the following from the SweetLife Service and Equipment Sales Center:

- The *CPRESS30J - Cold Press Masticating Juicer H3000J* model equipment.
- A replacement of one of the default components of the juicer. The customer wants the *30HOPPERJK - Hopper H30J metallic* component instead of the *HOPPERH3 - Hopper for cold press juicers (plastic)* component.
- Installation services for the juicer and component.

Acting as a service manager, you will create an appointment. You will then perform further processing, acting as the assigned staff member and then as the accountant who will prepare billing documents for the customer and will process them in the system. To keep this training simple, you will perform all instructions while signed in to the account of the service manager (Maia Davis).

Process Overview

On the *Appointments* (FS300200) form, you will create a new appointment, add the service along with the model equipment and component stock items, specify the equipment-related actions for each item, and process the appointment.

System Preparation

To prepare for completing the instructions in this activity, do the following:

1. Sign in to the system as a service manager by using the *davis* username and the *123* password
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, set the business date to *1/30/2025*.

Step: Upgrading a Default Component of Equipment to Be Sold

In this step, you will create an appointment (causing the system to create the corresponding service order) that includes the following items:

- The *INSTALL* installation service
- The *CPRESS30J* inventory item
- The *30HOPPERJK - Hopper H30J metallic hopper*, which replaces the *HOPPERH3 - Hopper for cold press juicers (plastic)* default hopper

You will go through the whole process until you release the corresponding invoice for both the service and the sold equipment.

Perform the following instructions:

1. On the *Appointments* (FS300200) form, click **Add New Record**.

2. Specify the following settings in the Summary area:

    •   **Service Order Type**: *INST*
    •   **Customer ID**: *HMBAKERY - HM's Bakery & Cafe*
    •   **Description**: `Selling a juicer with upgraded hopper`

3. On the form toolbar, click **Save**.

4. On the **Details** tab, add a row and select the *INSTALL* service in the **Inventory ID** column of the row.

5. To add a piece of equipment to this appointment, add another row and specify the following settings in the row:

    •   **Inventory ID**: *CPRESS30J*
    •   **Equipment Action**: *Selling Model Equipment*
    •   **Estimated Quantity**: `1.00`
    •   **Unit Price**: `800.0000`

6. On the form toolbar, click **Save**.

7. To add another piece of equipment (an optional component) to the appointment, click **Add Row** again and specify the following settings in the row:

    •   **Inventory ID**: *30HOPPERJK*
    •   **Equipment Action**: *Upgrading Component*

        This action registers the component (which replaces the default component) of the piece of model equipment.

    •   **Model Equipment Ref. Nbr.**: *0002*

        This is the piece of model equipment that is being upgraded during the sale of the model equipment.

    •   **Component ID**: *HOPPER*

        This is the identifier of the component being upgraded in the model equipment.

    •   **Estimated Quantity**: `1.00`
    •   **Unit Price**: `50.0000`

8. On the form toolbar, click **Save**.

9. On the **Staff** tab, click **Add Row** and specify *EP00000003 - Jon Waite* as the **Staff Member**.

10. On the form toolbar, click **Save**.

11. On the form toolbar, click **Start**.

    As you perform this instruction and the next two instructions, you are acting as Jon Waite at the appointment.

12. On the **Settings** tab, in the **Actual Date and Time** section, enter the actual start and end times (for simplicity in this training, set them to match the scheduled start and end times). Select the **Finished** check box.

13. Click **Complete**.

14. Click **Close**.

    As you perform this instruction and the remaining instructions of the activity, you are now acting as an accountant.

15. On the form toolbar, click **Quick Process**.

    In the **Process Appointment** dialog box, which opens, ensure that the following check boxes are selected:

    •   **Run Billing**
    •   **Release Invoice**

16. Click **OK**.

Once the billing process is completed, the reference numbers of the billing documents appear in the **Processing Results** dialog box. Click **OK**.

Notice that the appointment now has the *Billed* status.

17. On the **Billing Documents** tab, click the reference number of the sales invoice in the **Reference Nbr.** column. The system opens the *Invoices* (SO303000) form. Review the details of the generated invoice. Notice that the invoice has been released and has the *Open* status, which means that the target equipment record has been created.

18. In the **Target Equipment** column, click the reference number (which is also a link) of the equipment to open the *Equipment* (FS205000) form.

19. On the **Components and Warranties** tab, verify that the system has replaced the default hopper with the component (*30HOPPERJK - Hopper H30J metallic*) that you selected when you created the appointment (see the following screenshot).

Figure: The equipment record with the non-default component

Replacing Target Equipment: General Information

With Acumatica ERP, you can efficiently manage customer requests for replacing old target equipment with new models and performing the associated services.

Learning Objectives

In this lesson, you will learn how to replace target equipment.

Applicable Scenarios
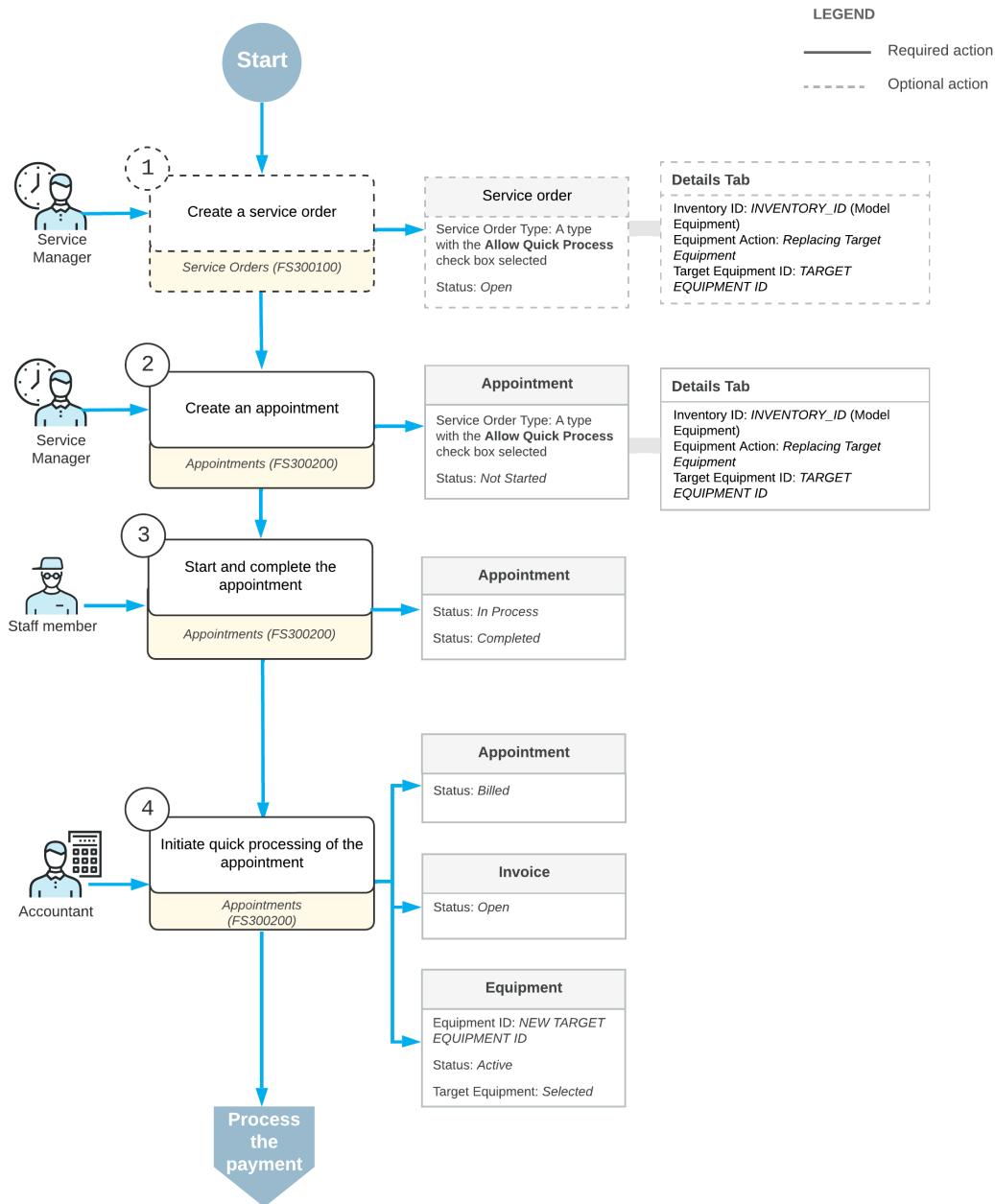
You process the replacement of target equipment in the following scenarios:

- A customer requests a new piece of equipment to replace an older model that is already in use.
- Replacement services are required to ensure seamless equipment transition at the customer's location.

In these situations, the service manager schedules an appointment, coordinates service actions, and collaborates with accounting to prepare and process billing documents for the customer.

Workflow of Target Equipment Replacement

In the following diagram, you can see the complete process of replacing target equipment.

Figure: Replacement of target equipment

When a customer request is received, a service manager enters a service order by using the *Service Orders* (FS300100) form. In the service order, the service manager specifies the customer from which the request has been received, the branch and branch location to provide services, and the services that should be performed.

The service manager can instead start by creating an appointment with all these settings; the service order will be created automatically. In *Replacing Target Equipment: Process Activity*, the appointment will be created first.

On the *Appointments* (FS300200) form, the service manager enters the general settings. On the **Details** tab, the service manager adds the equipment record that will replace the old target equipment record. To specify that the replacement is being performed, for the equipment record, the service manager selects *Replacing Target Equipment* in the **Equipment Action** column and specifies the target equipment record to be replaced in the **Target Equipment ID** column.

Replacing Target Equipment: Process Activity

The following activity will walk you through the process of replacing old equipment with a new model and managing the associated service.

Story

Suppose that the HM's Bakery & Cafe customer has requested a new piece of equipment (*J22C Multifruit Centrifugal Juicer*) to replace an old one, along with replacement services from SweetLife Service and Equipment Sales Center.

Acting as a service manager, you will create an appointment. You will then perform further processing, acting as the assigned staff member and then as the accountant who will prepare billing documents for the customer and will process them in the system. To keep this training simple, you will perform all instructions while signed in to the user account of the service manager (Maia Davis).

Process Overview

On the *Appointments* (FS300200) form, you will create a new appointment, add the service along with the necessary stock item (which is defined as model equipment), specify the required equipment-related action for the item, and then process the appointment.

System Preparation

To prepare for completing the instructions in this activity, do the following:

1. Sign in to the system as a service manager by using the *davis* username and the *123* password
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, set the business date to *1/30/2025*.

Step: Replacing Target Equipment

In this step, you will create an appointment (which causes the system to create the corresponding service order) that includes the *INSTALL* service and the *Multifruit Centrifugal Juicer J22C* inventory item, which replaces the target equipment. You will go through the whole process until you release the corresponding invoice for both the service and the sold equipment.

Perform the following instructions:

1. On the *Appointments* (FS300200) form, click **Add New Record**.
2. Specify the following settings in the Summary area:
   - **Service Order Type**: *INST*
   - **Customer**: *HMBAKERY - HM's Bakery & Cafe*
   - **Description**: `Replacing a juicer`
3. On the form toolbar, click **Save**.
4. On the **Details** tab, do the following:
   a. Add a row and select *INSTALL* in the **Inventory ID** column.

b. To add model equipment to this appointment, add another row and specify the following settings in the row:

- **Inventory ID**: *JUICE_J22C*
- **Equipment Action**: *Replacing Target Equipment*
- **Target Equipment ID**: *FSE00012* (*Multifruit Centrifugal Juicer J22C*)
- **Estimated Quantity**: 1.00
- **Unit Price**: 700.0000

5. On the form toolbar, click **Save**.

   Now you can assign the appointment and proceed with the service.

6. On the **Staff** tab, click **Add Row** and specify *EP00000003 - Jon Waite* as the **Staff Member**.

7. On the form toolbar, click **Save**.

8. On the form toolbar, click **Start**.

   As you perform this instruction and the next two instructions, you are acting as Jon Waite at the appointment.

9. On the **Settings** tab, in the **Actual Date and Time** section, enter the actual start and end times (for simplicity in this training, set them to match the scheduled start and end times). Select the **Finished** check box.

10. On the form toolbar, click **Complete**.

11. On the form toolbar, click **Close**.

    As you perform this instruction and the remaining instructions of the activity, you are now acting as an accountant.

12. On the form toolbar, click **Quick Process**.

    In the **Process Appointment** dialog box, which opens, ensure that the following check boxes are selected:

- **Run Billing**
- **Release Invoice**

13. In the dialog box, click **OK**.

    Once the billing process is completed, the reference number of the invoice appears in the **Processing Results** dialog box.

    Notice that the appointment now has the *Billed* status.

14. In the **Processing Results** dialog box, click the reference number of the invoice. The *Invoices* (SO303000) form opens. Notice that the invoice has been released and has the *Open* status, which means that the target equipment record has been assigned the *Disposed* status and the new equipment has been created.

15. On the *Invoices* form, in the **Suspended Target Equipment ID** column, click the reference number of the equipment (which is a link) to open the *Equipment* (FS205000) form.

16. Verify that the status of the equipment is *Disposed* (see the following screenshot).

Figure: Disposed equipment

17. Close the *Equipment* form.

18. On the *Invoices* form, click the equipment reference number in the **Target Equipment ID** column.

19. On the *Equipment* that opens, review the details of the created equipment. In the **Installation Info** section of the **General** tab, you can find the reference numbers of the related service order and appointment.

20. Go to the **Source** tab (see Item 1 in the following screenshot). In the **Equipment Replaced** box (Item 2), you can find the reference number of the equipment that was replaced with the current one.

Figure: Settings related to the replaced equipment

Replacing a Component of Target Equipment: General Information

With Acumatica ERP, you can manage customer requests for replacing components in existing equipment and performing the necessary replacement services on-site.

Learning Objectives

In this lesson, you will learn how to replace a component of target equipment.

Applicable Scenarios

You replace a component of target equipment in the following cases:

- A customer requests the replacement of a specific component within existing target equipment they already own.
- Replacement services are required to install the new component in the equipment at the customer's site.

Workflow of Target Equipment Component Replacement

In the following diagram, you can see the entire process of a component of target equipment being replaced.
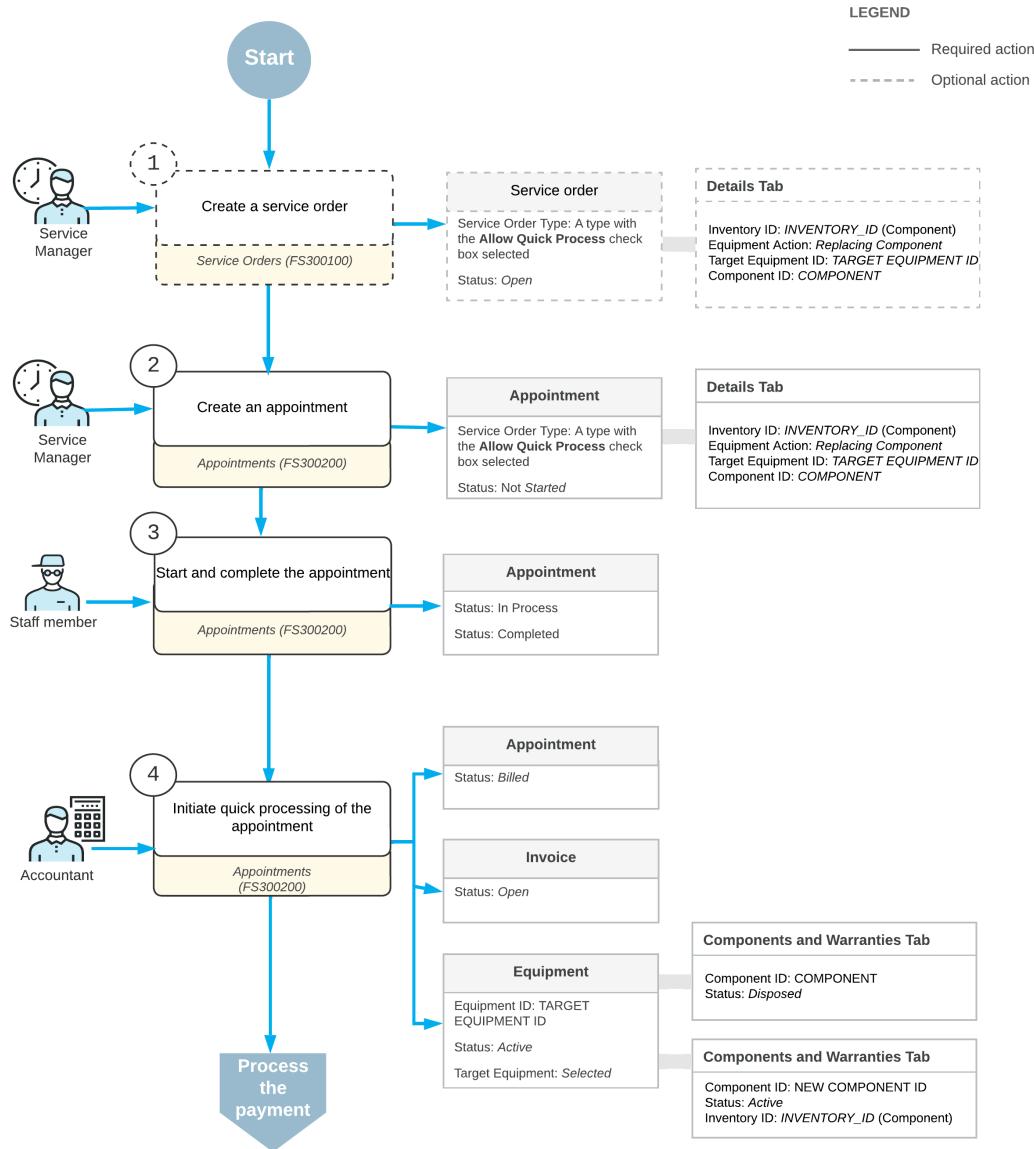
Figure: Replacement of a component of target equipment

When a customer request is received, a service manager enters a service order by using the *Service Orders* (FS300100) form. In the service order, the service manager specifies the customer from which the request has been received, the branch and branch location to provide services, and the services that should be performed.

The service manager can instead start by creating an appointment with all these settings; the service order will be created automatically. In *Replacing a Component of Target Equipment: Process Activity*, the appointment will be created first.

On the *Appointments* (FS300200) form, the service manager enters the general settings. On the **Details** tab, the service manager adds the component that will replace the old component. To specify that the replacement is being performed, for the new component, the service manager selects *Replacing Component* in the **Equipment Action** column, specifies the target equipment record in which the component has to be replaced in the **Target Equipment ID** column and specifies the component to be replaced in the **Component Ref. Nbr.** column.

The remainder of the process of target equipment being replaced is identical to the process of model equipment being replaced.

Replacing a Component of Target Equipment: Process Activity

The following activity will walk you through the process of replacing a component in existing equipment and coordinating the associated replacement services.

Story

Suppose that the GoodFood One Restaurant customer has requested a new component (a new drum) to replace an old one in the existing target equipment (*CPRESS30J - Cold Press Juicer H30J*), along with replacement services from SweetLife Service and Equipment Sales Center.

Acting as a service manager, you will create an appointment. You will then perform further processing, acting as the assigned staff member and then as the accountant who will prepare billing documents for the customer and will process them in the system. To keep this training simple, you will perform all instructions while signed in to the user account of the service manager (Maia Davis).

Process Overview

On the *Appointments* (FS300200) form, you will create a new appointment, add the service along with the stock item of the **Component** equipment class, specify the required equipment-related action for the item, and then process the appointment.

System Preparation

To prepare for completing the instructions in this activity, do the following:

1. Sign in to the system as a service manager by using the *davis* username and the *123* password

2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, set the business date to *1/30/2025*.

Step: Replacing a Component of Target Equipment

In this step, you will create an appointment (causing the system to create the corresponding service order) that includes the *REPAIR* service and the *DRUMH30J* inventory item, which replaces the target equipment. You will go through the whole process until you release the corresponding invoice for both the service and the replaced component.

Perform the following instructions:

1. On the *Appointments* (FS300200) form, click **Add New Record**.

2. Specify the following settings in the Summary areas:
   - **Service Order Type**: *INST*
   - **Customer ID**: *GOODFOOD - GoodFood One Restaurant*
   - **Description**: `Replacing a part of a juicer`

3. On the form toolbar, click **Save**.

4. On the **Details** tab, add a row with the following settings:
   - **Inventory ID**: *REPAIR*
   - **Target Equipment ID**: *FSE00011* (Cold Press Juicer H30J)

5. On the form toolbar, click **Save**.

6. To add a component to this appointment, add another row, and specify the following settings in the row:

- **Inventory ID**: *DRUMH30J*
- **Equipment Action**: *Replacing Component*
- **Target Equipment ID**: *FSE00011* (Cold Press Juicer H30J)
- **Component ID**: *DRUM*
- **Component Ref. Nbr.**: *00005*
- **Estimated Quantity**: `1.00`
- **Unit Price**: `100.0000`

7. On the form toolbar, click **Save**.

   Notice that the **Warranty** check box is selected in the *DRUM* row, meaning that it is under warranty.

8. On the **Staff** tab, click **Add Row**, and specify *EP00000044 - Ricardo Martinez* as the **Staff Member**.

9. On the form toolbar, click **Save**.

10. On the form toolbar, click **Start**.

    (As you perform this instruction, you are acting as Ricardo Martinez at the appointment.)

11. On the **Settings** tab, in the **Actual Date and Time** section, enter the actual start and end times (for simplicity in this training, set them to match the scheduled start and end times). Select the **Finished** check box.

12. On the form toolbar, click **Complete**.

13. On the form toolbar, click **Close**.

    (As you perform this instruction, you are now acting as an accountant.)

14. On the form toolbar, click **Quick Process**.

    In the **Process Appointment** dialog box, which opens, ensure that the following check boxes are selected:

    - **Run Billing**
    - **Release Invoice**

15. In the dialog box, click **OK**.

    Once the billing process is completed, the reference number of the invoice appears in the **Processing Results** dialog box.

    Notice that the appointment now has the *Billed* status.

16. In the **Processing Results** dialog box, click the reference number of the invoice. The *Invoices* (SO303000) form opens. Notice the invoice has been released and has the *Open* status, which means that the target equipment record has been updated.

17. In the **Target Equipment** column on the **Details** tab, click the equipment reference number (which is a link) to open the *Equipment* (FS205000) form.

18. On the **Components and Warranties** tab, verify that the status of the *00005* line is *Disposed* (see the following screenshot). It has been replaced with line *00006*.

> (i) You can also replace a component of a piece of target equipment by clicking the **Replace Component** button on the table toolbar of the **Components and Warranties** tab on the *Equipment* form. In the dialog box that opens, you can manually select the installation and sales dates of the component being replaced.

Figure: Disposed component

19. On the More menu (under **Inquiries**), click **Target Equipment History**. On the *Appointment Details* (FS400500) form, which has opened, verify that the information about the replaced drum is in the list, along with other details related to this equipment.

Lesson 5: Management of Service Contracts

For frequently maintained target equipment, in Acumatica ERP, you can create schedules of the services to be provided. These schedules will be included in the *service contract*—an agreement between a customer and your company about the predefined services performed at the predefined frequency. A service contract contains basic information—such as the branch, customer, and dates—and the associated schedule or schedules.

A contract schedule defines the settings of each service order and appointment to be generated for the contract and the frequency of service order or appointment generation. After a service contract and its schedules have been created and activated, the service orders or appointments based on the settings of the contract and its schedules can be generated and processed.

Service Contracts: General Information

Service Contracts: Billing Type Setup

In Acumatica ERP, you can create and process contracts for the services requested by your company's customers. A service contract is a document that contains information about the customer, the services to be provided, and the schedule or schedules determining when your service staff will perform these services. You can use service contracts for creating appointment schedules for a piece of target equipment and generating periodic appointments.

In Acumatica ERP, you can create service contracts with different billing options, which you set up depending on the company's needs.

Learning Objectives

In this lesson, you will learn how to create and process a service contract by doing the following:

- Creating a service contract that is billed at the time of service
- Creating a service contract that is billed at the end of the billing period and processing an appointment with no additional items (those that are not covered by a service contract)
- Creating and processing a service contract that is billed at the beginning of the billing period

Applicable Scenarios

You create a service contract when a customer requires services to be performed periodically at the customer's place.

Processing Workflow

The following steps and optional steps are involved in the creation and processing of a service contract:

1. Creating the service contract: On the *Service Contracts* (FS305700) form, a service manager enters the service contract.
2. Creating at least one schedule: By using the *Service Contract Schedules* (FS305100) form, the service manager creates a schedule (or multiple schedules) for the delivery of the services covered by the contract.
3. Activating the service contract: The service manager activates the service contract so that service orders or appointments can be generated for the contract schedules.
4. Generating the service orders or appointments: The service manager generates service orders or appointments, which can then be processed.

5. Generating and processing billing documents: An accountant approves the service orders or appointments of the service contract for the generation of billing documents. The accountant then generates billing documents for the service documents and processes them in the system.

6. Suspending the contract (optional): If it is necessary to pause the service delivery and billing for the contract temporarily, the service manager can suspend the contract.

7. Canceling the contract (optional): If the service manager has activated the contract but the services for the contract will no longer be provided for some reason, the contract can be canceled. This step can be performed before or after your company has started to provide services according to the contract.

LEGEND

——————— Required action

- - - - - - - Optional action

Start

1 Create a service contract

Service Contracts (FS305700)

Service Contract

Status: *Draft*

2 Create at least one schedule for the service contract

Service Contract Schedules (FS305100)

Service Contract Schedule

Status: *Active*

3 Activate the service contract

Service Contracts (FS305700)

Service Contract

Status: *Active*

6 Suspend the service contract

Service Contracts (FS305700)

Service Contract

Status: *Suspended*

7 Cancel the service contract

Service Contracts (FS305700)

Service Contract

Status: *Canceled*

Service Contract

Status: *Expired*

Yes

Has the expiration date passed?

No

4 Generate service orders or appointments

Multiple forms

Service Order/ Appointment

Status: *Open/Scheduled by System*

5 Generate billing documents

Run Appointment Billing (FS500100)
Run Service Order Billing (FS500600)

Run Service Contract Billing (FS501300)

Sales Orders/ Invoices

Includes the items specified in the service order or appointment

End

Figure: Processing a service contract billed at the time of service

Service Contract Billing Types

When you create a service contract, you can select how its billing is performed. On the *Service Contracts* (FS305700) form, four options are available in the **Billing Type** box:

- *At Time of Service*: The billing is performed after each appointment based on what was done during the appointment (that is, the service contract is billed at the time when the services are performed).
- *End-Period Plus*: The billing is performed based on what is covered by the contract at the end of the billing period, plus any overage items.
- *Beginning-Period Fixed*: The billing is performed at the beginning of the billing period at the fixed price specified in the contract. Any usage and overage items used in appointments are covered by the fixed contract price.
- *Beginning-Period Plus*: The billing is performed at the beginning of the billing period at the fixed price specified in the contract. The overage items used in appointments are billed separately at the time of service.

Service Contracts Billed at the Time of Service

You can create service contracts to be billed at the time of service. You perform the contract billing based on what was done in each particular appointment or based on what was estimated in the service order. For this type of service contract, on the **Summary** tab of the *Service Contracts* (FS305700) form, you select *At Time of Service* in the **Billing Type** box.

When creating a service contract, you specify that either appointments or service orders will be generated for the service contract. In the **Schedule Generation Type** box of the **Summary** tab on the *Service Contracts* form, you select one of the following options:

- *Appointments*: Appointments will be generated for the service contract. You select this option if you know the date and time when the visit to a customer should occur. After the system generates an appointment, the date and time can be changed.
- *Service Orders*: Service orders will be generated for the service contract. You select this option if you do not know the exact date and time when the visit to a customer should happen, but you know the time frame. After the service order is generated, you specify the date and time when the visit will occur according to the employees' availability, and you indicate when the customer has confirmed the timing.

Then you indicate which prices will be used for the items specified in the service contract. In the **Take Prices From** box on the **Summary** tab of the *Service Contracts* form, you specify one of the following options:

- *Contract*: When you select this option, the system copies the rows from the **Details** tab of the *Service Contract Schedules* (FS305100) form to the **Prices** tab of the *Service Contracts* form. On this tab, you can manually specify the price for each item in the contract.
- *Regular Price*: When you select this option, the system performs automatic price selection, selecting the prices specified for a service or inventory item in a price list on the *Sales Prices* (AR202000) form or in the **Default Price** box of the *Non-Stock Items* (IN202000) or *Stock Items* (IN202500) form. The system uses the prices that are active on the date when an appointment or a service order is created.

> (i) The prices specified in the service contract will only be applied to the line items added to the **Details** tab on the *Service Contract Schedules* form. If an additional item is added manually to a service order or appointment that has already been generated, the system will use the price selected according to the standard rules of automatic price selection.

On the **Schedules** tab, you create a schedule for generating appointments or service orders. On the table toolbar, you click **Add Schedule**, and the system opens the *Service Contract Schedules* form. On the **Details** tab of this form, you specify the services and inventory items to be included in the appointments or services, and on the

Recurrence tab, you specify the schedule settings. When you save the schedule and close the form, the system returns you to the *Service Contracts* form and adds a line with the created schedule on the **Schedules** tab.

You click **Activate** on the More menu to assign the service contract the *Active* status.

Billing can be performed on the *Service Orders* (FS300100), *Appointments* (FS300200), *Run Service Order Billing* (FS500600), or *Run Appointment Billing* (FS500100) form.

Service Contracts: To Create and Process a Service Contract Billed at Time of Service

In this activity, you will create and process a service contract that is billed after each appointment has taken place based on what was done during the appointment.

Story

Suppose that the GoodFood One Restaurant customer requires appointments on Mondays and Fridays of each week for one year, starting next week, and is willing to sign a contract. The service to be performed is the cleaning of the customer's equipment. The service manager of the SweetLife Service and Equipment Sales Center (Maia Davis) needs to create a service contract in Acumatica ERP, and create a schedule of appointments, which will allow employees to generate appointments for each upcoming week.

Acting as the service manager, you need to create a contract, create a schedule for the appointment generation, activate the contract, and generate the appointments for the first two weeks.

Process Overview

In this activity, you will create a service contract on the *Service Contracts* (FS305700) form, create an appointment schedule on the *Service Contract Schedules* (FS305100) form, and then activate the contract on the *Service Contracts* form. You will then generate appointments for the contract on the *Generate Maintenance from Contract Schedules* (FS500300) form.

System Preparation

To prepare for completing the instructions in this activity, do the following:

1. Sign in to the system as a service manager by using the *davis* username and the *123* password

2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, set the business date to *1/30/2025*.

Step 1: Creating the Service Contract

To create the service contract billed at the time of service for the GoodFood One Restaurant, do the following:

1. On the *Service Contracts* (FS305700) form, click **Add New Record**.

2. In the Summary area, specify the following settings:
   - **Customer**: *GOODFOOD - GoodFood One Restaurant*
   - **Description**: Cleaning contract

3. On the **Summary** tab (**Contract Settings** section), specify the following settings for the contract:
   - **Start Date**: 1/30/2025
   - **Expiration Type**: *Expiring*
   - **Duration**: 1 *Year*

- **Schedule Generation Type**: *Appointments*

4. In the **Billing Type** box of the **Billing Settings** section, make sure that *At Time of Service* is selected. This setting means that the service contract will be billed after an appointment generated for it has taken place, based on what was done during the appointment.

5. On the form toolbar, click **Save**.

Step 2: Creating an Appointment Schedule and Activating the Contract

Add a schedule to the service contract and activate the contract as follows:

1. While you are still viewing the service contract on the *Service Contracts* (FS305700) form, on the **Schedules** tab, click **Add Schedule**.

   The *Service Contract Schedules* (FS305100) form opens in a pop-up window.

2. In the Summary area, in the **Service Order Type** box, make sure that *MRO* is selected.

3. In the **Scheduled Start Time** box, select *10:00 AM*.

4. On the **Details** tab, add a row and specify the following settings in the row:

   - **Inventory ID**: *CLEANING*
   - **Target Equipment ID**: *FSE00007*

5. On the **Recurrence** tab, in the **Frequency** box, select **Weekly** and do the following in the **Weekly Settings** section:

   - Leave **Every** *1* **Week(s)**.
   - Select the **Monday** and **Friday** check boxes. Clear **Sunday**.
   - Leave the check boxes cleared for the remaining days of the week.

6. Save your changes and close the pop-up window.

   The system has created the schedule and added it to the **Schedules** tab of the *Service Contracts* form.

7. On the *Service Contracts* form (to which you returned when you closed the window with the *Service Contract Schedules* form), on the More menu, click **Activate**.

   The system changes the status of the contract from *Draft* to *Active*.

Step 3: Generating Appointments from the Contract

To generate appointments from the service contract, do the following:

1. Open the *Generate Maintenance from Contract Schedules* (FS500300) form.

2. In the Summary area, specify the following settings:

   - **Customer**: *GOODFOOD - GoodFood One Restaurant*
   - **Generate Up To**: *2/13/2025*

3. In the table, select the check box in the row with the schedule that you have created in the previous step.

4. On the form toolbar, click **Process**.

   The system opens the **Processing** dialog box, in which you can see the status of the process.

5. After the processing has successfully completed, in the **Processing** dialog box, click **Close**.

The appointments have been generated for the service contract until *2/13/2025*.

Step 4: Reviewing the Appointments Generated for the Service Contract

Review the appointments that have been generated for the service contract as follows:

1. On the *Service Contracts* (FS305700) form, open the service contract that you created in the previous step.

2. On the More menu (under **Inquiries**), click **Appointment History**.

3. On the *Appointment Summary* (FS400100) form, which opens, clear the **Staff Member** box in the Selection area.

4. In the **To Scheduled Date** box, select *2/13/2025*.

   The list of appointments generated for the selected service contract is displayed in the table (see the following screenshot).

Figure: The appointments generated for the service contract

5. Click an appointment reference number in the **Appointment Nbr.** column. The system opens the *Appointments* (FS300200) form. On the **Details** tab, confirm that the system has added the line from the **Details** tab of the *Service Contract Schedules* (FS305100) form. On the **Other** tab, notice that the reference numbers of the source service contract and source schedule are specified.

Service Contracts Billed at the End of the Period

You can create and process service contracts that are billed at the end of the billing period. At the end of each billing period, for the service contract, you generate an invoice that includes a fixed price for each service (for example, for a fixed number of hours or visits) specified in the contract plus an amount for an overage number of hours, visits, or materials that has been added to the appointment or service order during the billing period but has not been covered by the service contract.

For this type of service contract, on the **Summary** tab of the *Service Contracts* (FS305700) form, you select *End-Period Plus* in the **Billing Type** box. In the **Billing Type Settings** section, you specify the billing period (*Week*, *Month*, *Quarter*, *Half a Year*, or *Year*) in the **Period** box.

On the **Services per Period** tab of the *Service Contracts* form, you add a line for each service to be provided during each billing period. In the line, you select a service or non-stock item; you specify the quantity in the **Value** column and the price that is paid for each unit of the item in the **Recurring Item Price** column. In the **Overage Item Price** column, you also specify the price to be used when the specified quantity has been exceeded during the period.

On the **Schedules** tab, you create a schedule for generating appointments or service orders. On the table toolbar, you click **Add Schedule**, and the system opens the *Service Contract Schedules* (FS305100) form. On the **Details** tab of this form, you specify the services and inventory items to be included in the appointments or service orders, and on the **Recurrence** tab, you specify the schedule settings. When you save the schedule and close the form, the system returns you to the *Service Contracts* form and adds a line with the created schedule on the **Schedules** tab.

In addition to appointments and service orders generated from a schedule, a service order or an appointment can also be created on the fly and assigned to the service contract.

At the end of each billing period, you generate an invoice for a service contract. The invoice includes a fixed number of hours or visits at the prices that have been predefined in the service contract. If the number of hours or visits defined in the service contract has been exceeded during the billing period, the price that has been

specified for overage items is applied. The items that are not covered by the service contract but have been used in appointments or service orders during the billing period are also included in the invoice generated at the end of the period.

Billing is performed on the *Run Service Contract Billing* (FS501300) form.

Service Contracts: To Create and Process an End-Period Billing Service Contract (Appointment with No Overage Items)

In this activity, you will create a service contract that is billed at the end of each billing period for the following:

- The services and inventory items specified in the contract
- An overage number of services (or inventory items) that has been added to the service document during the billing period but was not covered by the service contract

You will also create a schedule for this service contract and generate appointments from the schedule.

Story

Suppose that the HM's Bakery and Cafe customer has agreed to enter into a contract with the SweetLife Service and Equipment Sales Center for one hour of cleaning a juicer every week. The contract states that one hour of service is paid every week at a price of $70; for overage cleaning services (which are occasionally required), a price of $85 per hour should be paid. The customer will pay at the end of each week based on the prices that are defined in the contract.

The appointment schedule needs to be specified for the contract, and an appointment for the next week should be generated. You will perform the needed actions in the system, acting as the service manager, Maia Davis.

Process Overview

You will create a service contract with the *End-Period Plus* billing type on the *Service Contracts* (FS305700) form. In this service contract, you will specify the services to be provided during each billing period, along with the prices for the items covered by the contract and for any overage items. Next, on the *Service Contract Schedules* (FS305100) form, you will create a contract schedule that includes the services to be provided in appointments. Finally, you will generate an appointment based on the schedule by using the *Generate Maintenance from Contract Schedules* (FS500300) form.

System Preparation

To prepare for completing the instructions in this activity, do the following:

1. Sign in to the system as a service manager by using the *davis* username and the *123* password
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, set the business date to *1/30/2025*.

Step 1: Creating a Service Contract with End-Period Billing

To create the service contract with end-period billing for HM's Bakery and Cafe, do the following:

1. On the *Service Contracts* (FS305700) form, click **Add New Record**.
2. In the Summary area, specify the following settings:
   - **Customer**: *HMBAKERY - HM's Bakery and Cafe*
   - **Description**: `Cleaning contract`

3. On the **Summary** tab (**Contract Settings** section), specify the following settings for the contract:
   - **Start Date**: 1/30/2025
   - **Expiration Type**: *Expiring*
   - **Duration**: 1 *Year*
   - **Schedule Generation Type**: *Appointments*
4. In the **Billing Type** box of the **Billing Settings** section, select *End-Period Plus*.
5. In the **Period** box of the **Billing Type Settings** section, select *Week*.
6. On the form toolbar, click **Save**.
7. On the **Services per Period** tab, add a row and specify the following settings in the added row:
   - **Inventory ID**: *CLEANING*
   - **Target Equipment ID**: *FSE00006*
   - **Value**: 1h 00m
   - **Recurring Item Price**: 70
   - **Overage Item Price**: 85
8. On the form toolbar, click **Save**.
9. On the More menu (under **Processing**), click **Activate**.

   The first billing period (1/30/2025 - 02/05/2025) has been activated during contract activation, as the following screenshot shows.

Figure: The service contract

Step 2: Creating a Contract Schedule and Generating Appointments from the Schedule

Now you will add a schedule for the service contract and generate the first two appointments of that schedule. Do the following:

1. While you are still viewing the service contract on the *Service Contracts* (FS305700) form, on the **Schedules** tab, click **Add Schedule**.

   The *Service Contract Schedules* (FS305100) form opens.
2. In the Summary area, do the following:
   - In the **Service Order Type** box, ensure that *MRO* is selected.
   - In the **Scheduled Start Time** box, select *11:00 AM*.
3. On the **Details** tab, add a row and specify the following settings in the row:
   - **Line Type**: *Service*
   - **Inventory ID**: *CLEANING*
   - **Target Equipment ID**: *FSE00006*

4. On the **Recurrence** tab, in the **Frequency** box, select **Weekly** and do the following in the **Weekly Settings** section:

   - Specify **Every** *1* **Weeks**.
   - Select the **Tuesday** check box. Clear **Sunday**.
   - Leave the check boxes cleared for the remaining days of the week.

5. On the form toolbar, click **Save**.

6. On the form toolbar, click **Generate from Service Contracts**.

   The *Generate Maintenance from Contract Schedules* (FS500300) form opens.

7. In the **Generate Up To** box of the Summary area, select *2/12/2025*.

8. In the table, select the unlabeled check box in the row with the schedule you have created.

9. On the form toolbar, click **Process**.

   The system opens the **Processing** dialog box, in which you can see the status of the processing.

10. After the processing has successfully completed, in the **Processing** dialog box, click **Close**.

11. Close the *Generate Maintenance from Contract Schedules* (FS500300) form.

12. Close the *Service Contract Schedules* (FS305100) form.

13. On the **Services Per Period** tab of the *Service Contracts* (FS305700) form, notice that the **Scheduled Period Value** is now *1 h 00 m* (as the following screenshot shows). This means that 1 hour of services has been scheduled for the selected billing period.

Figure: One hour of service scheduled for the billing period

Step 3: Reviewing the Generated Appointments

Review the appointments generated from the schedule on the previous step by doing the following:

1. While you are still viewing the service contract on the *Service Contracts* (FS305700) form, on the More menu, click **Appointment History**. The *Appointment Summary* (FS400100) form opens.

2. Clear the **Staff Member** box in the Selection area.

3. In the **From Scheduled Date** box, ensure that 1/30/2025 is selected.

4. In the **To Scheduled Date** box, select *2/12/2025*.

   The form displays the appointments generated from the service contract. Notice that the appointment generated for the active billing period has the *Not Started* status, and the appointment generated for the future billing period has the *Awaiting* status (see the following screenshot).

Figure: The appointments generated from the contract schedule

Step 4: Processing an Appointment

To process an appointment, do the following:

1. On the *Appointment Summary* (FS400100) form, click the reference number of the appointment with the *Not Started* status. The *Appointments* (FS300200) form opens.

2. On the form toolbar, click **Start**.

   (As you perform this instruction and the next two instructions, you are acting as a staff member at the appointment.)

3. On the **Settings** tab, in the **Actual Date and Time** section, enter the actual start and end times (for simplicity in this training, set them to match the scheduled start and end times). Select **Finished**.

4. On the form toolbar, click **Complete**.

5. On the form toolbar, click **Close**.

   (As you perform this instruction and the remaining instructions in this activity, you are now acting as an accountant.)

6. Open the *Run Service Contract Billing* (FS501300) form.

7. In the **Up to Date** box, specify *2/12/2025*.

8. In the list, select a service contract related to an appointment that you have completed, and click **Process** on the form toolbar.

9. Once the billing process is completed, in the **Processing** dialog box, click the reference number in the **Batch Nbr.** column. The *Service Contract Billing Batches* (FS306100) form opens in a pop-up window.

10. In the **Document Nbr.** column, click the reference number link. The *Invoices and Memos* (AR301000) form opens, and you can review the generated invoice. Notice that the line in the invoice is for the service covered by the contract. It includes a fixed number of hours at a predefined price, and the number of hours defined in the service contract has not been exceeded, so the invoice amount is equal to the contract's predefined price.

Service Contracts Billed at the Beginning of the Period

In Acumatica ERP, you can create two types of service contracts that are billed at the beginning of the billing period. These types are described in detail in the next sections of this topic.

Service Contracts with Beginning-Period Fixed Billing

You can create and manage service contracts with fixed billing at the beginning of the billing period. At the beginning of the billing period, you generate an invoice that includes the fixed price specified in the contract. This fixed price covers all services and inventory items that are listed in the contract and provided to the customer

during the billing period. If any additional services or materials are used in appointments (that is, are added to service documents) during the billing period, these items are not billed. That is, once you have run billing for an appointment or a service order, the generated invoice will have a total amount of *0* specified.

For this type of service contract, on the **Summary** tab of the *Service Contracts* (FS305700) form, you select *Beginning-Period Fixed* in the **Billing Type** box and specify the billing period (*Week*, *Month*, *Quarter*, *Half a Year*, or *Year*) in the **Period** box. On the **Services per Period** tab of the form, for each service to be provided during each period, you add the item (for example, a non-stock item that represents a contract deposit) and specify the flat-rate price that has to be paid at the beginning of each billing period.

On the **Schedules** tab, you create a schedule for generating appointments or service orders. On the table toolbar, you click **Add Schedule**, and the system opens the *Service Contract Schedules* (FS305100) form. On the **Details** tab of this form, you specify the services or inventory items (or both) to be included in the appointments or service orders, and on the **Recurrence** tab, you specify the schedule settings. When you save the schedule and close the form, the system returns you on the *Service Contracts* form and adds a line with the created schedule on the **Schedules** tab.

Note that for a service contract with the *Beginning-Period Fixed* billing type, you can do both of the following:

- Generate appointments or service orders based on a schedule
- Create a service document (appointment or service order) on the fly and associate it with the service contract by specifying the service contract's reference number in the **Service Contract** box in the Summary area of the *Appointments* (FS300200) or *Service Orders* (FS300100) form

You can set up the deferral of the invoice amount by specifying the code in the **Deferral Code** column so that after the service contract invoice has been released, the system creates a deferral schedule.

At the beginning of each billing period, on the *Run Service Contract Billing* (FS501300) form, you generate an invoice that contains the fixed contract price.

When you run billing for a service order or an appointment during the billing period, the system generates an invoice with a total amount of *0* because the items specified in the service order or appointment linked to the service contract are covered by the contract price.

On occasion, a service may be needed that is not covered by the fixed contract price. If this happens, you can edit the appointment or service order by clearing the **Free Item** check box in the needed detail line on the **Details** tab of the *Appointments* or *Service Orders* form. This causes the system to update the total amount of the appointment (and thus update the related billing document).

Service Contracts with Beginning-Period Plus Billing

You can create and manage service contracts with fixed billing at the beginning of the billing period for the items specified in the service contract only. With this billing type, at the beginning of the billing period, you generate an invoice that includes the fixed price specified in the contract. This fixed price covers all services and inventory items listed in the contract and provided to the customer during the billing period. If any additional items (those that are not included in the service contract) have been used in appointments during the billing period, these items are billed separately.

For this type of service contract, on the *Service Contracts* (FS305700) form, you specify the *Beginning-Period Plus* option in the **Billing Type** box. On the **Services per Period** tab, you add an item (for example, a non-stock item that represents a contract deposit) and specify its flat-rate price that has to be paid at the beginning of each billing period. On the **Billing Type Settings** section of the **Summary** tab, you specify the length of the billing period.

On the **Schedules** tab, you create a schedule for generating appointments or service orders. On the table toolbar, you click **Add Schedule**, and the system opens the *Service Contract Schedules* (FS305100) form. On the **Details** tab of this form, you specify the services and inventory items to be included in the appointments or service orders, and on the **Recurrence** tab, you specify the schedule settings. When you save the schedule and close the form, the system returns you to the *Service Contracts* form and adds a line with the created schedule on the **Schedules** tab.

For a service contract with the *Beginning-Period Plus* billing type, you can do both of the following:

- Generate appointments or service orders based on a schedule
- Create a service document (appointment or service order) on the fly and associate it with the service contract by specifying the service contract reference number in the **Service Contract** box on the Summary area of the *Appointments* (FS300200) or *Service Orders* (FS300100) form

Note that if you need certain predefined services to occur periodically, on the *Service Contract Schedules* form, you create each needed schedule. On the **Details** tab, you add these services with *None* selected in the **Billing Rule** column for each detail line.

You can set up the deferral of the invoice amount by specifying the code in the **Deferral Code** column so that after the service contract invoice has been released, the system creates a deferral schedule.

At the beginning of the billing period, on the *Run Service Contract Billing* (FS501300) form, you generate an invoice that contains the fixed contract price. During the billing period, for an appointment or a service order (depending on the option specified in the **Schedule Generation Type** box of the *Service Contracts* box), you generate an additional billing document.

Service Contracts: To Create and Process a Service Contract with Beginning-Period Fixed Billing

In this activity, you will create a service contract with fixed billing at the beginning of the period, and you will generate appointments for the service contract.

Story

Suppose that the GoodFood One Restaurant customer has decided to sign an annual maintenance contract with the SweetLife Service and Equipment Sales Center for a fixed price, which will be billed at the beginning of each billing period (a month). The contract will cover the full assistance during the contract period. The list of services covered by the service contract has been agreed upon; it includes the cleaning of a customer's equipment twice a week on Tuesday and Friday.

The service manager (Maia Davis) needs to create a service contract with fixed billing at the beginning of each month, and to add schedules for the generation of appointments.

Process Overview

In this activity, you will create a service contract on the *Service Contracts* (FS305700) form. Next, you will create two schedules for appointment generation on the *Service Contract Schedules* (FS305100) form, and activate the contract on the *Service Contracts* form. You will then generate a billing document for the first billing period on the *Run Service Contract Billing* (FS501300) form. Finally, you will review the scheduled appointments on the *Appointment Summary* (FS400100) form.

System Preparation

To prepare for completing the instructions in this activity, do the following:

1. Sign in to the system as a service manager by using the *davis* username and the *123* password
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, set the business date to *1/30/2025*.

Step 1: Creating a Service Contract with Fixed Billing at the Beginning of the Period

To create the service contract with fixed billing at the beginning of the contract period for the GoodFood One Restaurant, do the following:

1. On the *Service Contracts* (FS305700) form, click **Add New Record**.

2. In the Summary area, specify the following settings:

   - **Customer**: *GOODFOOD - GoodFood One Restaurant*
   - **Description**: `Juicer cleaning contract`

3. On the **Summary** tab (**Contract Settings** section), specify the following settings for the contract:

   - **Start Date**: *1/30/2025*
   - **Expiration Type**: *Expiring*
   - **Duration**: `1` *Year*
   - **Schedule Generation Type**: *Appointments*

4. In the **Billing Type** box of the **Billing Settings** section, select *Beginning-Period Fixed*.

5. In the **Period** of the **Billing Type Settings** section, make sure that *Month* is selected.

6. On the **Services per Period** tab, add a row and specify the following settings in the added row:

   - **Line Type**: *Non-Stock Item*
   - **Inventory ID**: *DEPOSIT*
   - **Recurring Item Price**: `150`

7. On the form toolbar, click **Save**.

8. On the More menu (under **Processing**), click **Activate**.

   The system changes the status of the contract from *Draft* to *Active*.

The first billing period for the contract is *1/30/2025–2/27/2025*, as the following screenshot shows.

Figure: The active billing period

Step 2: Creating an Appointment Schedule for the Cleaning Service and Generating Appointments

To add a schedule for the cleaning service to the contract and generate an appointment for the first billing period, do the following:

1. While you are still viewing the service contract on the *Service Contracts* (FS305700) form, on the **Schedules** tab, click **Add Schedule**.

   The *Service Contract Schedules* (FS305100) form opens.

2. In the Summary area, do the following:

   - In the **Service Order Type** box, ensure that *MRO* is selected.
   - In the **Scheduled Start Time** box, select *12:00 PM*.

3. On the **Details** tab, add a row and specify the following settings in the row:

- **Inventory ID**: *CLEANING*
- **Target Equipment ID**: *FSE00007*

4. On the **Recurrence** tab, in the **Frequency** box, select **Weekly**, and do the following in the **Weekly Settings** section:

   - Leave **Every** *1* **Weeks**.
   - Select the **Tuesday** and **Friday** check boxes. Clear **Sunday**.
   - Leave the check boxes cleared for the remaining days of the week.

5. On the form toolbar, click **Save**.

6. On the form toolbar, click **Generate from Service Contracts**.

   The *Generate Maintenance from Contract Schedules* (FS500300) form opens.

7. In the **Customer** box of the Summary area, select *GOODFOOD - GoodFood One Restaurant*.

8. In the **Generate Up To** box, select *2/27/2025*.

9. In the table, select the check box in the row with the schedule you have created (with the *Juicer cleaning contract* description).

10. On the form toolbar, click **Process**.

    The system opens the **Processing** dialog box, in which you can see the status of the processing.

11. After the processing has successfully completed, in the **Processing** dialog box, click **Close**.

12. Close the *Generate Maintenance from Contract Schedules* form and the *Service Contract Schedules* form.

The system has created a schedule and added it to the **Schedules** tab of the *Service Contracts* form.

Step 3: Reviewing the Generated Appointments

To review the generated appointments for the service contract, do the following:

1. On the *Service Contracts* (FS305700) form (to which you returned), on the More menu (under **Inquiries**), click **Appointment History**.

2. On the *Appointment Summary* (FS400100) form, which opens, in the Selection area, specify the following settings:

   - **Staff Member**: Cleared
   - **To Scheduled Date**: *2/27/2025*

   The list of appointments generated for the selected service contract is shown in the table. The appointments for the cleaning services are generated to be performed each week on Tuesday and Friday during the billing period (*1/30/2025–2/27/2025*). Open the first appointment by clicking its reference number in the **Appointment Nbr.** column. The *Appointments* (FS300200) form opens. In the appointment, notice that the *CLEANING* service has been added on the **Details** tab and the **Free Item** check box is selected for it, indicating that this service is covered by the service contract. Notice that in the **Summary** area, the appointment total is set to *0*.

Step 4: Running the Service Contract Billing

To run service contract billing at the beginning of the contract period, do the following:

1. On the *Run Service Contract Billing* (FS501300) form, in the **Billing Customer** box, select *GOODFOOD - GoodFood One Restaurant*.

2. In the **Up to Date** box of the Summary area, select *1/30/2025*.

3. Select the unlabeled check box next to the *Juicer cleaning contract* you have just created.

4. On the form toolbar, click **Process**.

5. Once the processing is finished, in the **Processing** dialog box, click the link in the **Service Contract ID** column.

6. On the *Service Contracts* (FS305700) form, which opens, on the **Billing Documents** tab, ensure that the generated invoice for the first billing period of the contract is listed.

7. Click the invoice number in the **Reference Nbr.** column. The *Invoices and Memos* (AR301000) form opens.

   In the Summary area, review the invoice's total balance, which is *150.00*. This is the fixed price specified in the service contract to be paid in each billing period for the services covered by the contract.

8. Close the *Invoices and Memos* and *Service Contracts* forms.

Step 5: To Run Billing for the First Appointment of the Billing Period

In this step, you will run billing for the first appointment of the billing period and review the generated billing documents. Do the following:

1. Open the *Appointment Summary* (FS400100) form.

2. In the Summary area, specify the following settings:

   - **Customer**: *GOODFOOD - GoodFood One Restaurant*
   - **Service Contract ID**: *FCT00000007 - Juicer cleaning contract*
   - **Staff Member**: Cleared
   - **To Scheduled Date**: *2/4/2025*

3. In the **Appointment Nbr.** column, click the link of the appointment in the list (the appointment scheduled for *1/31/2025*).

   The appointment opens on the *Appointments* (FS300200) form.

4. On the form toolbar, click **Start**.

5. On the **Details** tab, in the row with the *CLEANING* service, notice that the **Free Item** check box is selected.

6. On the **Settings** tab, in the **Actual Date and Time** section, enter the actual start and end times (for simplicity in this training, set them to match the scheduled start and end times). Select the **Finished** check box.

7. On the form toolbar, click **Complete**. (You perform this action on behalf of a staff member.)

8. On the form toolbar, click **Close**. (You perform this instruction and the remaining instructions on behalf of an accountant.)

9. On the form toolbar, click **Run Billing**.

10. On the *Invoices* (SO303000) form, which opens, notice that the total of the invoice is *0*. Close the form.

Renewal of Service Contracts: General Information

In Acumatica ERP, you can create and process a renewable service contract.

Learning Objectives

In this chapter, you will learn how to do the following:

- Create a renewable service contract
- Renew the service contract
- Update the status of the service contract

Applicable Scenarios

You create or renew a renewable service contract in the following cases:

- When you need to create a long-term service contract that automatically updates its expiration date based on a specified duration.
- When you need to renew an active service contract before or after its expiration, maintaining the original contract settings and schedules.

Creation of a Renewable Service Contract

You create a renewable service contract on the *Service Contracts* (FS305700) form. When creating a service contract, on the **Summary** tab of the form, you select the *Renewable* option in the **Expiration Type** box, which causes the **Duration** box to appear on the form. In this box, you specify the time period until the next expiration date. Once you save and activate the service contract, the system inserts the date in the **Expiration Date** box, which is calculated based on the specified duration.

Renewal of a Service Contract

You can renew a service contract with the *Active* status before or after its expiration date. On the More menu of the *Service Contracts* (FS305700) form, you click the **Renew** command (under **Processing**). This command is available when a renewable service contract—one with *Renewable* selected in the **Expiration Type** box in the **Contract Settings** section—has been activated.

When you renew a service contract, its expiration date is moved forward by the specified duration. A renewed service contract keeps the settings of the original contract, including the schedules that have been generated. When you click **Renew**, the system determines the contract renewal date based on the contract expiration date. The new renewal date is the day after the previous expiration date. The system inserts this date in the **Renewal Date** box and updates the date in the **Expiration Date** box based on the period specified in the **Duration** box.

A service contract can be renewed multiple times. Each time you click **Renew**, the system moves the renewal and expiration dates forward by the amount of time specified in the **Duration** box.

You can renew multiple service contracts at once by using the *Process Service Contracts* (FS501200) form. In the **Action** box of the Selection area, select *Renew*, then in the list of contracts, select service contracts to be renewed, and on the form toolbar, click **Process All**.

Renewal of Service Contracts: Process Activity

The following activity will walk you through the process of renewing a service contract.

Story

Suppose that SweetLife Fruits & Jams company has signed in a service contract with the GoodFood One Restaurant customer. The customer wants to be able to extend the contract for one year after the contract expiration date.

Acting as the service manager of *Service and Equipment Sales Center* (Maia Davis), you need to create a renewable service contract, renew the contract, and then manually update the status of the service contract to *Expired*.

Process Overview

On the *Service Contracts* (FS305700) form, you will create a renewable service contract. Then on the same form, you will renew the service contract so that its expiration date will be moved forward by the duration specified in

the **Duration** box, and its start date will be modified. Once it is done, you will update the service contract status by using the *Process Service Contracts* (FS501200) form.

System Preparation

To prepare for completing the instructions in this activity, do the following:

1. Sign in to the system as a service manager by using the *davis* username and the *123* password

2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, set the business date to *1/30/2025*.

Step 1: Creating a Renewable Service Contract

To create a renewable service contract, do the following:

1. On the *Service Contracts* (FS305700) form, click **Add New Record**.

2. In the Summary area, specify the following settings:

   • **Customer**: *GOODFOOD - GoodFood One Restaurant*
   • **Description**: `Maintenance Contract`

3. On the **Summary** tab (**Contract Settings** section), specify the following settings for the contract:

   • **Start Date**: *1/30/2025*
   • **Expiration Type**: *Renewable*
   • **Duration**: 1 Year
   • **Schedule Generation Type**: *Appointments*

4. In the **Billing Type** box of the **Billing Settings** section, make sure that *At Time of Service* is selected. This setting means that the service contract will be billed after each appointment has taken place, based on what was done during the appointment.

5. In the **Billing Type Settings** section, leave the *Regular Price* in the **Take Prices From** box. This option means that the system will use the price of the service or inventory item specified in the price list on the *Sales Prices* (AR202000) form or in the **Default Price** box on the *Non-Stock Items* (IN202000) or *Stock Items* (IN202500) form.

6. On the form toolbar, click **Save**.

7. On the More menu, click **Activate**. The system has inserted *1/30/2025* in the **Effective From Date** box of the Summary area.

Step 2: Renewing the Service Contract

Assume that one year has passed since contract activation, the contract expiration date has come, and you, acting as a service manager, are renewing the service contract. Do the following:

1. While you are still viewing the service contract, on the More menu, click **Renew**.

   The system has updated the dates in the **Renewal Date** and **Expiration Date** boxes. The system has inserted *1/30/2026* in the **Renewal Date** box; this is the day after the previous expiration date. It has also inserted *1/29/2027* in the **Expiration Date** box—the date calculated based on the new renewal date and the period specified in the **Duration** box.

2. On the **History** tab, review the list of actions that have been performed with the service contract (see the following screenshot).

Figure: The History tab on the Service Contracts form

Step 3: Updating the Status of the Service Contract to Expired

Suppose that once two years have passed, the customer does not want to prolong the service contract. Thus, you need to mark the contract status as *Expired* in the system. In the Summary area of the *Service Contracts* (FS305700) form, notice that the upcoming status of the contract is *Expired*. To update the status of the contract manually, do the following:

1. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, set the business date to *1/29/2027*; this is the contract expiration date.

2. Open the *Process Service Contracts* (FS501200) form.

3. In the **Action** box of the Selection area, select *Update to Upcoming Status*.

4. In the table, select the unlabeled check box in the row of the contract to be updated.

5. Click **Process** on the form toolbar.

6. In the **Processing** dialog box, click the service contract ID in the **Service Contract ID** column.

7. On the *Service Contracts* (FS305700) form, which opens, notice that the status of the contract has changed to *Expired* (see Item 1 in the following screenshot).

8. On the **History** tab of the form, notice that the *Expire* action has been performed on the service contract on *1/29/2027* (Item 2).

Figure: The history of actions performed on the service contract

Service Contracts: Activation, Cancellation, and Suspension of a Contract

In this topic, you will learn how to activate, cancel or suspend a service contract. Please review the information; no further activities will follow after this topic.

In Acumatica ERP, you can activate, cancel, or suspend a service contract.

Activating a Service Contract with the Draft Status

When you create a service contract in the system, the contract is automatically assigned the *Draft* status. When you finish entering the necessary information for the contract, you should activate the contract so that you can generate service orders, appointments, or invoices for it.

You activate the contract on the *Service Contracts* (FS305700) form by clicking **Activate** on the More menu (under **Processing**). The system changes the status of the service contract to *Active*.

Activating a Service Contract with the Suspended Status

Contracts with the *Suspended* status can be activated again starting on a particular date (whether or not it is the current date). To activate a suspended service contract, you open the necessary contract on the *Service Contracts* (FS305700) form and click **Activate** on the More menu (under **Processing**). The system opens the **Activation Contract** dialog box, in which you specify the starting date when the contract has to be activated.

If schedules have been generated for the service contract, you can view them in the table of the **Activation Contract** dialog box. You can change the date of the service orders or appointments to be generated when the contract is active. To do so, for each schedule, you select the check box in the **Change Recurrence** column. You then specify the date since which the service orders or appointments will be generated according to the schedule for the active contract in the **Effective Recurrence Start Date** column. The system recalculates the **Next Execution** date.

If the activation date is later than the current date, when you click **OK** to close the dialog box and return to the form, the **Upcoming Status** box contains *Active* (indicating that the service contract will be active) and the **Effective Until Date** box contains the activation date (indicating that the current status of *Suspended* is effective until the activation date.

Canceling a Service Contract

In Acumatica ERP, if for some reason the services will no longer be provided for the customer, you can cancel the service contract if it has the *Active* or *Suspended* status. When you cancel the service contract, the system deletes any documents that were generated for the dates that are the same as or later than the cancellation date.

To cancel a service contract, you open the necessary contract on the *Service Contracts* (FS305700) form, and on the More menu, click **Cancel**. The system opens the **Terminate Contract** dialog box, where you specify the date since which the contract has to be canceled.

If this date is later than the current date, when you click **OK** in the dialog box to close it and return to the form, the system inserts *Canceled* in the **Upcoming Status** box (to indicate that the contract will be canceled) and inserts the cancellation date in the **Effective Until Date** box (to indicate that the current status is effective until this date). If the cancellation date is the same as the current date, when you click **OK** in the dialog box, the system assigns the *Canceled* status to the service contract.

> ⓘ A contract with the *Canceled* status is read-only and cannot be deleted.

Suspending a Service Contract

In Acumatica ERP, you can suspend an active contract so that it is no longer active during the time it is suspended. When you suspend the contract, the system deletes any documents that were generated on the suspension date or the dates that are after it. You cannot generate service orders, appointments, or invoices from contracts with the *Suspended* status. The suspended contract can then be activated again or canceled.

To suspend the contract, you open the necessary contract on the *Service Contracts* (FS305700) form, and on the More menu, click **Suspend**. The system opens the **Suspend Contract** dialog box, where you specify the date since which the contract has to be suspended.

If this date is later than the current date, when you click **OK** in the dialog box to close the dialog box and return to the form, the system inserts *Suspended* into the **Upcoming Status** box and the suspension date into the **Effective Until Date** box (indicating that the current status is effective until the suspension date). If the suspension date is the same as the current date, when you click **OK** in the dialog box, the system assigns the *Suspended* status to the service contract.

Service Contracts: Status Update

In this topic, you will learn how to change the current status of a service contract. Please review the information; no further activities will follow after this topic.

In Acumatica ERP, the system does not change the current status of a service contract when the effective date has arrived. You can update the status manually on or after the date or use an automation schedule to update the contract status on this date.

If you know the particular date in the future when a service contract is going to be canceled, or suspended, you can specify the cancellation or suspension date on the *Service Contracts* (FS305700) form, so the future status will be shown in the **Upcoming Status** box of the Summary area. Then, on or after the effective date, you can update the contract's status on the *Process Service Contracts* (FS501200) form so that the system automatically changes the status of the contract. If the contract has an expiration date, when you are entering the service contract into the system, the system specifies *Expired* as the upcoming status on that date.

Updating a Status Manually

To change the current status of a service contract (or multiple service contracts) to upcoming (whose effective date came) of one or multiple service contracts, you use the *Process Service Contracts* (FS501200) form. On this form, you select the *Update Upcoming Status* option in the **Action** box of the form; you then specify the selection criteria to display the necessary service contract (or multiple contracts) in the table and process the contract or contracts. The system updates the statuses of the processed contracts.

Acumatica ERP provides an automation schedule to automatically invoke this action, as the section below explains.

Updating the Status by Automation Schedule

To cause the system automatically invoke the *Update Upcoming Status* action on the *Process Service Contracts* (FS501200) form for contracts in the system, the *Update Service Contract Status* automation schedule has been created on the *Automation Schedules* (SM205020) form. To use this schedule, you should ensure that this schedule is active in the system (that is, make sure the **Active** check box is selected for the schedule on the *Automation Schedules* form). This schedule runs daily, and you can modify this schedule if necessary.