End-User Course

Field Services

Service Management Implementation and Processing 2025 R1

Revision: 4/2/2025

Acumatica
The Cloud ERP

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How to Use This Course

This course provides a set of lessons that illustrate service 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.

What Is in This Guide

The guide includes the *Company Story* topic, implementation activities, process activities, and *Additional Materials* topics. The *Company Story* topic explains the organizational structure of the company preconfigured in the *U100* dataset, as well as the company's business processes and requirements. The primary content of the guide is configuration lessons and process lessons.

> The process activities are independent and can be completed in any order.

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 provides a story describing a particular user scenario and an overview of the relevant features that have been enabled in the system; configuration settings that are related to the described scenario are also listed. The lesson provides a brief overview of the process that should be performed to complete the described scenario, and instructions that guide you through the process in Acumatica ERP.

> The values in the screenshots (such as reference numbers of documents) may differ from the values that the system shows during completing the activities.

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**.

   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 1.1: *gibbs*
2. Lesson 1.2: *gibbs*
3. Lesson 1.3: *gibbs*
4. Lesson 1.4: *gibbs*
5. Lesson 1.5: *gibbs*
6. Lesson 1.6: *gibbs*
7. Lesson 1.7: *gibbs*
8. Lesson 1.8: *gibbs*
9. Lesson 1.9: *gibbs*
10. Lesson 1.10, Activity 1: *gibbs*

11. Lesson 1.10, Activity 2: *davis*
12. Lesson 1.11: *gibbs*
13. Lesson 1.12: *gibbs*
14. Lesson 2.1: *davis*
15. Lesson 2.2: *davis*
16. Lesson 2.3: *jones*
17. Lesson 2.4: *davis*
18. Lesson 2.5: *davis*
19. Lesson 2.6: *davis*
20. Lesson 2.7: *jones*
21. Lesson 2.8: *jones*
22. Lesson 2.9: *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.

How to Install the Acumatica Mobile App

In the last lesson of this training, you will use the Acumatica mobile app. You can install the Acumatica mobile app on any mobile device that is running Android 4.0 or later. You can instead install the application on a device that is running iOS 8.0 or later, but the appearance and functionality of the application may differ somewhat from what is shown and described in the course.

To install the Acumatica mobile app on an Android device, do the following:

1. On your mobile device, open the Play Store app.
2. Find the Acumatica mobile app.
3. Tap **Install**.

   After the app installation is finished, you can open it.

To install the Acumatica mobile app on an iOS device, do the following:

1. On your mobile device, open the App Store app.
2. Find the Acumatica mobile app.
3. Tap **Get**.
4. Confirm the installation.

   After the app installation is finished, you can open it.

Company Story

This topic explains the organizational structure and operational activities of the company with which you will work 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. This branch is also planning on selling goods via a website created on an e-commerce platform to accept orders online. The e-commerce integration project is underway.
- 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. The equipment center began its operations in *01-2025* in response to the company's growth.

The base currency of the company and its subsidiaries is the US dollar (USD). All amounts in documents and reports are expressed in US dollars unless otherwise indicated.

SweetLife Company Sales and Services

Each SweetLife 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 performs short-term service provision.

The company has local and international customers. The ordered items are delivered by drivers using the company's own vehicle. Customers can pay for orders by using various payment methods (cash, checks, or credit cards).

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 from large juicer vendors, and it either purchases the installation service for the juicers or provides the installation service on its own, depending on the complexity of the installation.

Part 1: Configuring Service Management

This part of the course contains lessons that will walk you through the process of reviewing the minimum required settings for the service management functionality and configuring the entities that are necessary for performing field services.

Lesson 1.1: Reviewing the Basic Service Management Configuration

In this lesson, you will review the basic service management settings and enable the *Service Management* feature.

Basic Service Management Configuration: General Information

This topic provides a general overview of the configuration steps that you have to perform before you can start using the service management functionality in Acumatica ERP. You perform this minimum configuration of service management if the company is going to create service orders, schedule appointments, manage staff members that attend appointments, and sell services (and possibly stock items).

Learning Objectives

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

- Learn about the settings that have to be specified
- Enable the needed system features
- Review the minimum required settings for the service management functionality

Applicable Scenarios

You configure the service management functionality in the following cases:

- You have initially implemented Acumatica ERP, and the *Service Management* feature is included in your license.
- You need to configure service management in a previously configured, fully functioning environment.
- Optionally, you want to include sales of inventory items in the provision of field services.

Prerequisites

To prepare the system for the implementation of service management, you perform the following general steps:

1. You prepare an instance of Acumatica ERP for further implementation by enabling the default set of features, activating the product license, and configuring system-wide security policies. For details, see *Preparing an Instance for Implementation*.

   > Make sure that the license for Acumatica ERP includes the *Service Management* feature.

2. You complete the initial system configuration and implement the minimum general ledger functionality. The service management functionality can be tightly integrated with other Acumatica ERP functional areas, including general ledger, accounts payable, and organization structure. These areas do not require any change in their configuration when service management is implemented. For details about performing the

initial system configuration, see *Company Without Branches*, *Company with Branches that Do Not Require Balancing: General Information*, or *Company with Branches that Require Balancing* (depending on your company's structure).

Workflow of the Implementation of Service Management

To prepare the system for service management functionality, you first perform the following general steps, which are described in this lesson:

1. On the *Enable/Disable Features* (CS100000) form, you enable the *Service Management* feature.
2. On the *Work Calendar* (CS209000) form, you define the work calendar. The work calendar reflects the work days, the work times for each day, and the unpaid break time of staff members (that is, employees that are involved in field service processes).
3. On the *Numbering Sequences* (CS201010) form, you create the numbering sequence for billing batches, the numbering sequences to be used to number documents generated by service management, and the numbering sequence to be used to assign identifiers to the staff schedule rules.

   We recommend that you use naming conventions for numbering sequences to differentiate service management documents from other documents generated in the system. For details about numbering sequences, see *Use of Numbering Sequences*.
4. On the *Service Management Preferences* (FS100100) form, you specify the numbering sequences and the work calendar to be used for service management.

Other lessons of this part of the guide describe the additional steps you perform to configure service management functionality, which include the following steps:

1. On the *Branch Locations* (FS202500) form, you create at least one branch location that represents the company office of the field service personnel. For details, see *Branch Locations: General Information*.
2. On the *Service Order Types* (FS202300) form, you create the service order types that suit the company's processes. These types will be used to define the general settings for service orders and appointments of the particular type. For details, see *Service Order Types for Inventory Sales*.
3. You create the needed billing cycles, which define the way billing documents are generated for the services and inventory items provided to customers, on the *Billing Cycles* (FS206000) form. Then on the *Customers* (AR303000) form, you add the customers that are expected to request the company's services (if they are not already defined in the system), and you assign the necessary billing cycles to these customers. For details, see *Billing Cycles: General Information*.
4. On the *Service Classes* (FS400900) form, you create at least one item class to be used for creating the services provided by your company. For details, see *Service Classes: General Information*
5. On the *Services* (FS400800) form, you create the service-related items that your company is going to provide and assign a service-specific item class to each service. For details, see *Services: General Information*
6. On the *Employees* (EP203000) form, you define the employees to be involved in field service processes and define them as service management staff members. For details, see *Staff Members: General Information*.

Basic Service Management Configuration: Implementation Activity

In this implementation activity, you will learn how to enable the *Service Management* feature and review the basic service management settings.

Story

Suppose that you are an administrative user of the SweetLife Service and Equipment Sales Center. You are configuring the minimum required functionality to prepare the system for the processing of service orders and the scheduling and processing of appointments.

Configuration Overview

In the *U100* dataset, the following tasks have been performed for the purposes of this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.
- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.
- On the *Numbering Sequences* (CS201010) form, the *FSPOST - SM Posting Batches*, *FSSO - Service Orders*, and *FSSCHEDULE - Staff Members' Schedules* numbering sequences have been created.
- On the *Work Calendar* (CS209000) form, the *MAIN* work calendar has been created to reflect the work days and times, and the unpaid break time of staff members.
- On the *Service Management Preferences* (FS100100) form, the needed numbering sequences and work calendar have been specified.

Process Overview

To set up the basic service management settings, you will do the following:

1. On the *Enable/Disable Features* (CS100000) form, you will enable the *Service Management* feature.
2. On the *Numbering Sequences* (CS201010) form, you will review the following numbering sequences for service management entities: the numbering sequence to be used to assign identifiers to batches of billing documents, and the numbering sequence to be used for the reference numbers of the service orders of the service order types to be created in other activities of this part of the guide.
3. On the *Work Calendar* (CS209000) form, you will review the calendar with the staff members' work days and work times for each day.
4. On the *Service Management Preferences* (FS100100) form, you will ensure that the numbering sequences and the work calendar are specified.

System Preparation

Before you start performing the initial configuration of the service management functionality, launch the Acumatica ERP website, and sign in to a company with the *U100* dataset preloaded. You should sign in as a system administrator by using the *gibbs* username and the *123* password.

Step 1: Enabling the Service Management Feature

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

1. Open the *Enable/Disable Features* (CS100000) form.
2. On the form toolbar, click **Modify**, which gives you the ability to change the set of selected features.
3. Select the **Service Management** check box.
4. On the form toolbar, click **Enable**. This saves your changes and enables the currently selected features.

Step 2: Reviewing Numbering Sequences

To review the numbering sequences that have been created for service management batches, do the following:

1. Open the *Numbering Sequences* (CS201010) form.
2. In the **Numbering ID** box, select the *FSPOST* numbering sequence ID. The system uses this numbering sequence to automatically generate an ID for each GL batch created for a service document.

   Notice that this numbering sequence has the following settings:

   - **Start Number**: `SM000001`
   - **End Number**: `SM999999`
3. In the **Numbering ID** box, select the *FSSO* numbering sequence ID. The system uses this numbering sequence to automatically generate a reference number for each new service order.

   Notice that this numbering sequence has the following settings:

   - **Start Number**: `000001`
   - **End Number**: `999999`
4. In the **Numbering ID** box, select the *FSSCHEDULE* numbering sequence and review its settings. The system uses this numbering sequence to automatically generate an ID for each new staff members' schedule.

In Step 4 of this activity, you will make sure that the *FSPOST - SM Posting Batches* and *FSSCHEDULE - Staff Members' Schedules* sequences are specified on the *Service Management Preferences* (FS100100) form. You will specify the *FSSO - Service Orders* sequence on the *Service Order Types* (FS202300) form when you create the service order types.

Step 3: Reviewing the Work Calendar

To review the work calendar, do the following:

1. On the *Work Calendar* (CS209000) form, select *MAIN* in the **Calendar ID** box.
2. Make sure that the following settings are specified for the calendar:

   a. **Calendar ID**: `MAIN`

   b. **Description**: `Main Calendar`

   c. **Time Zone**: *(GMT-05:00) Eastern Time (US & Canada)*
3. On the **Calendar** tab, ensure that the **Monday**, **Tuesday**, **Wednesday**, **Thursday**, and **Friday** check boxes are selected, and the **Sunday** and **Saturday** check boxes are cleared.
4. In the boxes of the **Start Time** column, ensure that *10:00 AM* is specified for all the selected days of the week.
5. In the boxes of the **End Time** column, ensure that *6:00 PM* is specified for all the selected days of the week.

Step 4: Reviewing the Service Management Preferences

To make it possible for the service management functionality to be used, the numbering sequences and work calendar need to be specified in the service management preferences. Do the following:

1. Open the *Service Management Preferences* (FS100100) form.
2. On the **General** tab, in the **Numbering Settings** section, ensure that the following settings are specified (as shown in the following screenshot):

   - **Batch Numbering Sequence**: *FSPOST - SM Posting Batches* (see Item 1 in the screenshot)
   - **Staff Schedule Numbering Sequence**: *FSSCHEDULE - Staff Members' Schedules* (Item 2)

3. On the **Calendars & Maps** tab (Item 3), in the **Calendar Settings** section, make sure that *MAIN - Main Calendar* is selected in the **Work Calendar** box.

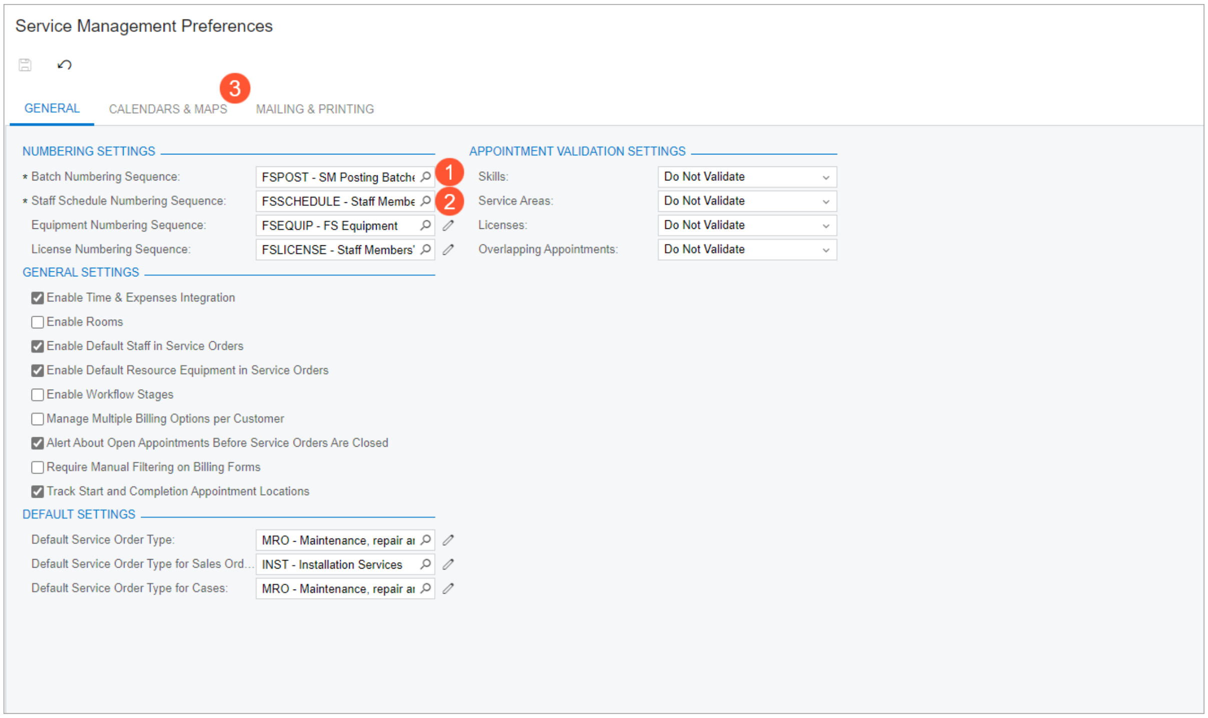


Figure: Service management settings

If these configuration steps have been performed, the service management forms are available, and the system is set up for the use of the service management capabilities.

Lesson 1.2: Creating Branch Locations

In this lesson, you will create a branch location.

Branch Locations: General Information

In Acumatica ERP, branch locations represent physical locations (such as offices) from which your staff members depart to attend appointments. A branch of your company can have multiple branch locations or only one branch location.

Learning Objectives

In this lesson, you will learn how a branch location is used in service management, and you will review and create branch locations to become familiar with their settings.

Applicable Scenarios

You create a branch location in the system in the following cases:

- When you initially implement the service management functionality

- When your company has opened a new office within a branch, and you need to create the new office (branch location) in the system

Branch Locations: Implementation Activity

In this implementation activity, you will learn how to create a branch location in the system.

Story

Suppose that an administrative user of the SweetLife Service and Equipment Sales Center previously created the *WEST BRIGHTON* branch location in Acumatica ERP. This branch location represents the main office of the Service and Equipment Sales Center, which is the *SWEETEQUIP* branch in the system. The company is now opening a new office for this branch, which will provide services.

Acting as an administrative user, you will create a new branch location in the system.

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.
- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.
- On the *Service Management Preferences* (FS100100) form, the minimum settings have been specified, including specifying the numbering sequences and work calendar, for the service management functionality to be used.

Process Overview

On the *Branch Locations* (FS202500) form, you will specify the settings of the new branch location.

Step: Creating a Branch Location

To create a new branch location, do the following:

1. Open the *Branch Locations* (FS202500) form.
2. On the form toolbar, click **Add New Record**.
3. In the **Branch Location ID** box, type `BROOKLYN`.
4. In the **Description** box, enter `Brooklyn Office`.
5. In the **Branch** box, select *SWEETEQUIP*.
6. On the **General** tab, in the **Main Address** section, specify the following settings:
   - **Address Line 1**: `1230 Surf Ave`
   - **City**: `Brooklyn`
   - **Country**: *US*
   - **State**: *NY*
   - **Postal Code**: `11224`
7. In the **Inventory Defaults** section, in the **Default Warehouse** box, select *EQUIPHOUSE*.

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

Now the *SWEETEQUIP* branch has two branch locations that will be providing services: *WEST BRIGHTON* and *BROOKLYN*.

Lesson 1.3: Creating Service Order Types

In this lesson, you will create service order types with different settings.

Service Order Types: General Information

Service documents can serve a variety of purposes across different companies. For example, a service order or appointment can be created to provide standard services, such as repair or maintenance, at a customer's location. Additionally, service documents like service orders or appointments can be used for internal purposes, such as scheduling internal appointments or generating service quotes for potential customers. In each case, different general and billing settings need to be specified in the service document to reflect the purpose of the service.

In Acumatica ERP, you create service order types with various settings. When you create a service order or appointment and select a specific type, the general settings from that service order type are copied to the service order or appointment.

Learning Objectives

In this lesson, you will learn how to create a service order type and specify the necessary settings.

Applicable Scenarios

You configure service order types in the following cases:

- When you are initially configuring service management in Acumatica ERP. In this case, you create the service order types that support your company's business processes. The use of service order types makes it easier for users to create and process service orders and their appointments in the system.
- When you need to create a new service order type to support a new business process.

Service Order Types: General Settings

This topic describes the specific settings that you specify when you are creating a service order type on the *Service Order Types* (FS202300) form.

Behavior of the Service Order Type

Depending on the option that you select for the service order type in the **Behavior** box on the **General** tab of the *Service Order Types* (FS202300) form, the system makes particular UI elements and tabs available or unavailable on the current form, as well as on the following forms:

- The *Service Orders* (FS300100) form for service orders of the type
- The *Appointments* (FS300200) form for appointments of the type

You can select one of the following behaviors for the service order type:

- *Regular*: Service orders and appointments of the type will include the usual services, such as repair, maintenance, installation, and training. For this behavior, you can specify all the settings except the route-related settings.
- *Internal*: The type includes service orders of your own company, and appointments take place inside the company. Because there is no customer involved with the service orders and appointments of a type with this behavior, the posting, customer, and route settings are unavailable for service orders and appointments of this type.
- *Quote*: The type is designed for quotes (any of which can be converted into a service order if the customer agrees to the quote). For types with this behavior, billing settings are unavailable on the *Service Order Types* form.
- *Route*: Service orders of the type include the settings of the route between the locations where services are performed. For service order types with this behavior, the route can be specified on the *Appointments* form. For details on routes, see the Route Management guide.

Default Contact Information Settings

For service orders and appointments of the service order type, you can define the default source of the address and contact information. In the **Default Settings** section of the **General** tab of the *Service Order Types* (FS202300) form, you select one of the following options in the **Take Address and Contact Information From** box:

- *Business Account*: By default, the address and contact settings are copied from the *Customers* (AR303000) form. Note that before the settings are copied, the customer must be selected in the **Customer** box of the Summary area of the *Appointments* (FS300200) or *Service Orders* (FS300100) form.
- *Contact*: By default, the address and contact settings are copied from the **Contact** section of the *Contacts* (CR302000) form. Note that before the settings are copied, the contact person must be selected in the **Contact** box on the **Settings** tab of the *Appointments* or *Service Orders* form.
- *Branch Location*: By default, the address and contact settings are copied from the **General** tab (the **Main Contact** and **Main Address** section, respectively) of the *Branch Locations* (FS202500) form. You select this option when appointments of the service order usually take place at the address of your branch location.

Billing Settings

The billing settings determine the type of a document or record generated for appointments or service orders of a specific service order type during the billing process. You specify these settings in the **Billing Settings** section of the **General** tab of the *Service Order Types* (FS202300) form. In the **Generated Billing Documents** box of this section, you select one of the following options:

- *AR Documents*. When this option is selected, the system generates an accounts receivable invoice when billing is run for a service order or appointment of the specified type. The accounts receivable invoice can include only services and non-stock items, which can then be processed, and payment collected.

  The **Create AP Bills for Negative Balances** check box becomes available if you select this option. If you select this check box, for a service order or appointment with a negative balance, the system instead creates an accounts payable bill.
- *Sales Orders*. When this option is selected, the system generates a sales order when billing is run for a service order or appointment of the specified type. Optionally, you can create shipments and add freight costs to the sales order before generating the sales invoice.

  If you configure quick processing for the service order type, the invoice can be generated automatically along with the sales order.

> To enable the generation of sales orders from field service-related forms, the *Inventory and Order Management* feature has to be included in your license and enabled on the *Enable/ Disable Features* (CS100000) form. Additionally, integration with field services must be activated for the sales order type. That is, the **Enable Field Services Integration** check box must be selected for the relevant order type on the **General** tab of the *Order Types* (SO201000) form.

- *SO Invoices*. When this option is selected, the system generates a sales invoice when billing is run for a service order or appointment of the specified type. The sales invoice can include both services and stock items (which do not require shipping) sold to customers along with the services.

  If you configure quick processing for the service order type, the invoice can be processed automatically in the system.
- *Project Transactions*. When this option is selected, the system generates a project transaction (and an issue, if the appointment or service order includes stock items) when billing is run for a service order or appointment. Service order types with this setting are used for service documents linked to projects. Project transactions generated for these service documents are tracked and allocated to the associated project.

  This functionality is beyond the scope of this course.
- *None*. When this option is selected, the system does not generate billing documents for service documents of the service order type.

After you select the appropriate option in the **Generated Billing Documents** box, you specify the other settings of the section. The option you select in the **Generated Billing Documents** box determines the set of elements in the section. The settings you specify for these elements determine the generation of these billing documents.

Service Order Types Without Inventory Sales: To Create a Service Order Type

In this implementation activity, you will learn how to create a service order type for service orders and appointments that provide services only, with accounts receivable invoices generated as the billing documents.

Story

Suppose that the SweetLife Service and Equipment Sales Center receives an order for consulting services. Acting as an administrative user, you need to create a service order type for service orders and appointments that include only services (that is, no inventory items can be included). Accounts receivable invoices will be used to bill the customers.

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.
- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.
- On the *Service Management Preferences* (FS100100) form, the minimum settings have been specified, including specifying the numbering sequences and work calendar, for the service management functionality to be used.
- On the *Credit Terms* (CS206500) form, the *30D - 30 Days* credit terms have been created.

Process Overview

You will create a new service order type on the *Service Order Types* (FS202300) form and specify the needed settings to cause account receivable invoices to be generated for billing.

Step: Creating the Service Order Type

To create the new service order type for service orders and appointments for which accounts receivable invoices will be generated as billing documents, do the following:

1. On the *Service Order Types* (FS202300) form, add a new record.
2. In the Summary area, enter the following settings:
    - **Service Order Type**: `CNLS`
    - **Description**: `Consulting`
3. On the **General** tab, in the **Numbering Sequence** box of the **General Settings** section, select *FSSO*.
4. In the **Behavior** box, make sure *Regular* is selected.
5. In the **Default Settings** section, in the **Take Address and Contact Information From** box, make sure *Business Account* is selected.
6. In the **Billing Settings** section, select *AR Documents* in the **Generated Billing Documents** box.
7. In the **Default Terms for AR and SO** box, select *30D - 30 Days*.
8. Select the **Bill Only Closed Appointments** check box.
9. On the form toolbar, click **Save**.

Service Order Types for Inventory Sales: General Information

In Acumatica ERP, for service orders and appointments that may include inventory items, you need to define service order types that have particular settings specified.

Learning Objectives

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

- Review the settings of the order types required for sales orders that are used in service management
- Create a service order type intended to generate sales orders for service orders and appointments associated with this type that may include both services and inventory items
- Create a service order type intended to generate SO invoices for service orders and appointments associated with this type that may include both services and inventory items to be shipped

Applicable Scenarios

You configure service order types for inventory sales in the following cases:

- When you are initially configuring service management in Acumatica ERP. In this case, you create the service order types that support your company's business processes (which may include sales of inventory items). The use of service order types makes it easier for users to create and process service orders and their appointments in the system.
- When you need to create a new service order type to support a new business process that involves your company selling inventory items while providing services in appointments.

Service Order Types for Inventory Sales: To Review Sales Order Types

If your company plans to sell inventory items as part of providing field services, you must define the necessary sales order types to be used in service management. With the appropriate settings specified for the relevant sales order types, you will be able to generate sales orders of these types from service documents.

This activity will walk you through the process of reviewing the settings of the order types required for service management purposes.

Story

Suppose that SweetLife Service and Equipment Sales Center plans to sell inventory items along with the services on the appointments. Acting as the administrative user of the company, you need to configure the system for processing the sales of services and stock items, as well as for scheduling and processing appointments in which services are performed and associated stock items may be sold. Specifically, you need to review the sales order types to be used for sales orders related to service orders and appointments, to be sure their settings are appropriate for sales orders to be used in service management.

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.
- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.
- On the *Service Management Preferences* (FS100100) form, the minimum settings have been specified, including specifying the numbering sequences and work calendar, for the service management functionality to be used.
- On the *Enable/Disable Features* (CS100000) form, the *Inventory and Order Management* and *Inventory* features have been enabled.
- On the *Order Types* (SO201000) form, the predefined *SO*, *IN* and *CM* order types have been created and defined to be used with the field services functionality. That is, the **Enable Field Services Integration** check box has been selected in the **Field Services Settings** section on the **General** tab of the form.

Process Overview

On the *Order Types* (SO201000) form, you will review the sales order type settings to be sure that sales orders of the type can be used for service management.

Step: Reviewing Order Types for Field Service Functionality

In this step, you will review the *SO*, *IN*, and *CM* order types to be sure that they are defined for use with the field service functionality. Do the following:

1. On the *Order Types* (SO201000) form, open the *SO* order type. The documents of this type can be created on the *Sales Orders* (SO301000) form to record customer requests to purchase goods.
2. In the **Field Services Settings** section of the **General** tab, ensure that the **Enable Field Services Integration** check box is selected.

3. In the **Order Type** box, select *IN*. Sales orders of this type can be created on the *Sales Orders* (SO301000) form and used to bill a customer for delivered goods.
4. In the **Field Services Settings** section of the **General** tab, ensure that the **Enable Field Services Integration** check box is selected.
5. In the **Order Type** box, select *CM*. Sales orders of this type can be created on the *Sales Orders* (SO301000) form and used as adjustments to already-completed sales orders.
6. In the **Field Services Settings** section of the **General** tab, ensure that the **Enable Field Services Integration** check box is selected.

You have reviewed the *SO*, *IN*, and *CM* order types to ensure their settings are appropriate for sales orders used in field service processes.

Service Order Types for Inventory Sales (Without Shipping Involved): To Create a Service Order Type

In this implementation activity, you will learn how to create a service order type for service orders and appointments where sales invoices will be generated as billing documents. When billing is run for a service order or appointment of this type, the system generates a sales invoice that can include both services and inventory items (which do not require shipping).

Story

Suppose that the SweetLife Service and Equipment Sales Center provides the juicer maintenance and repair services to its customers. Along with these services, the company also sells stock items. Acting as an administrative user, you need to create a service order type for service orders and appointments that include services and may also include stock items; these service orders and appointments will be billed by using sales invoices.

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.
- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.
- On the *Service Management Preferences* (FS100100) form, the minimum settings have been specified, including specifying the numbering sequences and work calendar, for the service management functionality to be used.
- On the *Credit Terms* (CS206500) form, the *30D - 30 Days* credit terms have been created.
- On the *Enable/Disable Features* (CS100000) form, the *Inventory and Order Management* and *Inventory* features have been enabled.
- On the *Order Types* (SO201000) form, the predefined *SO* order type has been modified to be used with field services functionality. That is, the **Enable Field Services Integration** check box has been selected in the **Field Services Settings** section on the **General** tab of the form.

Process Overview

In this activity, you will use the *Service Order Types* (FS202300) form to create a service order type for service orders and appointments that will be billed using sales invoices.

Step: Creating the Service Order Type

To create a new service order type for service orders and appointments, where sales invoices will be generated as billing documents, follow these steps:

1. On the *Service Order Types* (FS202300) form, add a new record.
2. In the Summary area, enter the following settings:
   - **Service Order Type**: `REP`
   - **Description**: `Repair and maintenance`
3. On the **General** tab, in the **Numbering Sequence** box of the **General Settings** section, select *FSSO*.
4. In the **Behavior** box, make sure that *Regular* is selected.
5. In the **Default Settings** section, in the **Take Address and Contact Information From** box, make sure *Business Account* is selected.
6. In the **Billing Settings** section, select *SO Invoices* in the **Generated Billing Documents** box.
7. In the **Order Type for Allocation** box, ensure that *SO* is selected.
8. In the **Default Terms for AR and SO** box, select *30D - 30 Days*.
9. Select the **Bill Only Closed Appointments** check box.
10. On the form toolbar, click **Save**.

Service Order Types for Inventory Sales That May Involve Shipping: To Create a Service Order Type

In this implementation activity, you will learn how to create a service order type for service orders and appointments where sales orders are generated during the billing process. The sales order may include both services and inventory items, which may require shipping.

Story

Suppose that the SweetLife Service and Equipment Sales Center provides juicer installation services to its customers. Along with these services, the company sells stock items. Acting as an administrative user, you need to create a service order type for service orders and appointments that include installation services and may also include stock items. Sales orders will be generated for these service orders and appointments during the billing process.

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.
- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.
- On the *Service Management Preferences* (FS100100) form, the minimum settings have been specified, including specifying the numbering sequences and work calendar, for the service management functionality to be used.
- On the *Credit Terms* (CS206500) form, the *30D - 30 Days* credit terms have been created.

- On the *Enable/Disable Features* (CS100000) form, the *Inventory and Order Management* and *Inventory* features have been enabled.
- On the *Order Types* (SO201000) form, the predefined *SO*, *IN* and *CM* order types have been modified to be used with field services functionality. That is, the **Enable Field Services Integration** check box has been selected in the **Field Services Settings** section on the **General** tab of the form.

Process Overview

In this activity, you will create a new service order type on the *Service Order Types* (FS202300) form and specify the needed settings for sales orders to be generated during the billing process.

Step: Creating the Service Order Type

To create a new service order type for service documents for which sales orders will be generated during the billing process, do the following:

1. On the *Service Order Types* (FS202300) form, add a new record.
2. In the Summary area, enter the following settings:
   - **Service Order Type**: `EQP`
   - **Description**: `Equipment installation services`
3. On the **General** tab, in the **Numbering Sequence** box, select *FSSO*.
4. In the **Behavior** box, make sure that *Regular* is selected.
5. In the **Default Settings** section, in the **Take Address and Contact Information From** box, make sure that *Business Account* is selected.
6. In the **Billing Settings** section, select *Sales Orders* in the **Generated Billing Documents** box.
7. In the **Order Type for Billing** box, select *IN*.
8. In the **Order Type for Negative Balance Billing** box, select *CM*.
9. In the **Order Type for Allocation** box, ensure that *SO* is selected.
10. In the **Default Terms for AR and SO** box, select *30D - 30 Days*.
11. Select the **Bill Only Closed Appointments** check box.
12. On the form toolbar, click **Save**.

Service Order Types: To Create a Service Order Type for Quotes

In this implementation activity, you will learn how to create a service order type for quotes. A quote can be converted into a service order if the customer agrees to the terms.

Story

Suppose that the SweetLife Service and Equipment Sales Center sends quotes with the details of the services and the stock items that will be used during the appointments. These quotes can later be converted into service orders. Acting as an administrative user, you need to create a service order type specifically for quotes.

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.
- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.
- On the *Service Management Preferences* (FS100100) form, the minimum settings have been specified, including specifying the numbering sequences and work calendar, for the service management functionality to be used.

Process Overview

In this activity, you will create a service order type for quotes on the *Service Order Types* (FS202300) form and specify the needed settings.

Step: Creating a Service Order Type for Quotes

To create a new service order type for quotes, do the following:

1. On the *Service Order Types* (FS202300) form, add a new record.
2. In the Summary area, enter the following settings:
   - **Service Order Type**: `QUOT`
   - **Description**: `Quotes`
3. On the **General** tab, in the **Numbering Sequence** box, select *FSSO*.
4. In the **Behavior** box, select *Quote*.

   The system removes the **Billing Settings** section from the tab.
5. In the **Default Settings** section, in the **Take Address and Contact Information From** box, make sure that *Business Account* is selected.
6. On the form toolbar, click **Save**.

Service Order Types: Quick Processing Settings

In Acumatica ERP, you can streamline the standard multistep processing of service orders and appointments by configuring quick processing for a specific service order type. With service orders and appointments of this type, a user can perform actions such as closing a service document, preparing and releasing billing documents, and emailing those documents to the customer—all with a single click.

> Quick processing can be configured for service order types that are set to generate sales orders or sales invoices when billing service documents. That is, the *Sales Orders* or *SO Invoice* option is selected in the **Generated Billing Documents** box of the **General** tab (**Billing Settings** section) of the *Service Order Types* (FS202300) form.

Configuration of Quick Processing for a Service Order Type

For quick processing to be used for service orders and appointments of a particular service order type, you must allow quick processing for this service order type and specify the actions to be performed during quick processing. To allow quick processing for the service order type, you select the **Allow Quick Process** check box on the **General** tab (**Billing Settings** section) of the *Service Order Types* (FS202300) form. This causes the **Quick Processing** tab to appear on the form. On this tab, you specify the settings that determine how the system should process the service orders and appointments of this type.

For each particular service order or appointment of the type being processed on the *Service Orders* (FS300100) or *Appointments* (FS300200) form, the user can change the list of actions to be performed before initiating processing.

Service Order Types: To Configure Quick Processing for a Service Order Type

In this implementation activity, you will learn how to configure quick processing for a service order type.

Story

Acting as an administrative user of the SweetLife Service and Equipment Sales Center, you need to configure quick processing for a service order type that has already been created in the system. During quick processing for a service document of this type, the system must perform the following actions:

- Run billing for the service document
- Complete and close the service document
- Prepare and release the sales invoice, and send it by email to the customer

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.
- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.
- On the *Service Management Preferences* (FS100100) form, the minimum settings have been specified, including specifying the numbering sequences and work calendar, for the service management functionality to be used.
- On the *Enable/Disable Features* (CS100000) form, the *Inventory and Order Management* and *Inventory* features have been enabled.

Process Overview

In this activity, you will set up quick processing for an existing service order type by modifying it on the *Service Order Types* (FS202300) form and specifying the required settings on the **Quick Processing** tab.

Step: Configuring Quick Processing

To configure quick processing for a service order type, do the following:

1. On the *Service Order Types* (FS202300) form, open the *CSLT* service order type.
2. In the **Billing Settings** section of the **General** tab, select the **Allow Quick Process** check box.
3. On the **Quick Processing** tab, which appears on the form, do the following to specify the settings that determine which actions the system will perform when a user is quickly processing a service order or appointment of this type:
   a. In the **Appointment Actions** section, make sure that the **Run Billing** check box is selected.
   b. In the **Service Order Actions** section, do the following:
      a. Select the **Close** check box.
      b. Make sure that the **Run Billing** check box is selected.

c. In the **Invoice Actions** section, do the following:
   - Select the **Release Invoice** check box.
   - Select the **Email Invoice** check box.

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

Lesson 1.4: Creating Service Classes

In this lesson, you will create service classes with different billing rule settings.

Service Classes: General Information

A service class in Acumatica ERP is an item class of the *Service* type. Service classes are used to group services with similar properties and to provide default settings for new services.

When creating a service, on the *Non-Stock Items* (IN202000) form, you select an item class of the *Service* type. Based on the settings of the item class, the system fills in default settings for the service, such as the posting class, tax category, units of measure, and billing rules. Any of these default values can be overridden.

Learning Objectives

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

- Create a service class
- Select a billing rule for a service class

Applicable Scenarios

You create a new service class in the system in the following cases:

- When you are initially configuring service management in the system, and need to create service classes to group the services the company provides or plans to provide
- When your company plans to provide a new service or multiple services of the same type, and you need to add them to the system under a new service class

Creation of Service Classes

On the *Item Classes* (IN201000) form, you create a service class by selecting *Service* as the item type on the **General** tab. On this form, you specify the settings that you want to be applied to the services of the class, such as the tax category, posting class, or price class.

You can view the list of service classes (and their default billing rules, which are described in the following section) on the *Service Classes* (FS400900) form.

Selection of Billing Rules

In addition to specifying the general settings of the item class on the *Item Classes* (IN201000) form, you have to specify the default billing rule for services of the class on the **Service Management** tab. The billing rule determines the method used to calculate the total prices for services provided to customers. You can select one of the following options:

- *Time*: The service price is calculated based on the time that staff members spent delivering the service. The unit price of the service is defined per unit of time, and to calculate the transaction amount, the system multiplies the unit price by the quantity of units of time.
- *Flat Rate*: The service price is a fixed price for performing the service, regardless of the time that was spent to perform the service.
- *None*: No service price is calculated, and the customer is not billed. (This option is used when the service is provided to a customer for free or to your own company).

At least one service class should be defined in the system. When you create a service on the *Non-Stock Items* (IN202000) form, the system inserts the billing rule specified for the selected service class. You can override the default billing rule when you create the service or when you add the service to a service order or appointment on the *Service Orders* (FS300100) or *Appointments* (FS300200) form, respectively.

Service Classes: To Create a Service Class for Services with Fixed Prices

In this implementation activity, you will learn how to create a service class that is intended to group services for which a flat rate is charged—that is, the services of the class will have fixed prices, regardless of the time that was spent to perform a service.

Story

Suppose that SweetLife Service and Equipment Sales Center has decided to provide business consulting services related to juicing, such as developing recipes that are unique to customers' business or establishing a profitable menu pricing system. Acting as an administrative user, you will create a new service class in the system, which will group the consulting services with similar settings.

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- The minimum system configuration is performed as described in *Company Without Branches: General Information*.
- The minimum configuration of the service management functionality is performed as described in *Basic Service Management Configuration: Implementation Activity*.
- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:
  - *Inventory and Order Management*: Enables you to process sales and purchase orders that include non-stock items of the *Service* type.
    - *Inventory*: Enables you to process the sales and purchase orders that include non-stock items with shipments and PO receipts.
    - *Multiple Units of Measure*: Enables you to configure multiple units of measure.
- On the *Posting Classes* (IN206000) form, the *NONSTOCK* has been created.
- On the *Units of Measure* (CS203500) form, the *ITEM*, and *HOUR* units have been created.
- On the *Tax Categories* (TX205500) form, the definition of the necessary tax categories, which you will assign to the new non-stock item.

Process Overview

On the *Item Classes* (IN201000) form, you will create a new service class.

Step: Creating a Service Class

To create a service class, do the following:

1. Open the *Service Classes* (FS400900) form.
2. On the form toolbar, click **New Record**.

   The *Item Classes* (IN201000) form opens in a new window.
3. In the **Class ID** box of the Summary area, type `CONSULTING`.
4. In the **Description** box, enter `Juice Business Consulting Services`.
5. In the **General Settings** section of the **General** tab, do the following:
   - Clear the **Stock Item** check box.
   - In the **Item Type** box, select *Service*.
   - In the **Tax Category** box, select *EXEMPT*.
   - In the **Posting Class**, select *NONSTOCK*.
6. In the **Unit of Measure** section, select *ITEM* in the **Base Unit**, **Sales Unit**, and **Purchase Unit** boxes.
7. On the **Service Management** tab, in the **Default Billing Rule** box, select *Flat Rate*.
8. Save your changes and close the window with the item class.
9. On the *Service Classes* form, make sure that the *CONSULTING* service class is now displayed in the table.

You have created the new service class. When you create a new service on the *Non-Stock Items*(IN202000) form and select this service class, the system will populate relevant elements of the service with the values you have specified for the class.

Service Classes: To Create a Service Class for Services Billed by Time

In this implementation activity, you will learn how to create a service class intended to group services that are billed by time.

Story

Suppose that SweetLife Service and Equipment Sales Center has decided to sell a set of educational services that will include teaching, coaching, and instructing. All these services are going to be billed by time. Acting as an administrative user, you need to create a service class that will contain the general settings of this group of services.

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.
- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.
- On the *Service Management Preferences* (FS100100) form, the minimum settings have been specified, including specifying the numbering sequences and work calendar, for the service management functionality to be used.
- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:

    - *Inventory and Order Management*: Makes it possible to process sales and purchase orders that include non-stock items of the *Service* type.
        - *Inventory*: Provides the ability to process sales and purchase orders that include non-stock items with shipments and PO receipts.
        - *Multiple Units of Measure*: Gives you the ability to defined multiple units of measure.
- On the *Posting Classes* (IN206000) form, the *NONSTOCK* posting class has been created.
- On the *Units of Measure* (CS203500) form, the *HOUR* unit has been created.
- On the *Tax Categories* (TX205500) form, the *EXEMPT* tax category has been created.

Process Overview

On the *Item Classes* (IN201000) form, you will create a service class that is used to group services that are billed by the number of hours spent while providing a service.

Step: Creating a Service Class

To create the service class, do the following:

1. Open the *Service Classes* (FS400900) form.
2. On the form toolbar, click **New Record**.

   The *Item Classes* (IN201000) form opens in a new window.
3. In the **Class ID** box of the Summary area, type `EDU`.
4. In the **Description** box, enter `Educational Services (Billed by Time).`
5. In the **General Settings** section of the **General** tab, do the following:
    - Clear the **Stock Item** check box.
    - In the **Item Type** box, select *Service*.
    - In the **Tax Category** box, select *EXEMPT*.
    - In the **Posting Class**, select *NONSTOCK*.
6. In the **Unit of Measure** section, select *HOUR* in the **Base Unit**, **Sales Unit**, and **Purchase Unit** boxes.
7. On the **Service Management** tab, in the **Default Billing Rule** box, select *Time*.
8. Save your changes and close the window with the item class.
9. On the *Service Classes* form, make sure that the *EDU* service class is now displayed in the table.

You have created the new service class. When you create a new service on the *Non-Stock Items* (IN202000) form and select this service class, the system will populate relevant elements of the service with the values you have specified for the class.

Lesson 1.5: Creating Services

In this lesson, you will create two services with different billing rule settings.

Services: General Information

In Acumatica ERP, a service is a non-stock item of the *Service* type representing a particular type of work provided by the company. The settings of a service can include its estimated duration, the skills and license types required for employees to provide the service, and the equipment needed to deliver this service.

You can enter, store, and manage information about the services your company provides to customers. This information can help your employees to select the right staff member to perform services.

Learning Objectives

In this chapter, you will learn how to create a new service in Acumatica ERP.

Applicable Scenarios

You create services in the system in the following cases:

- You are initially configuring the system according to your company's needs, and need to define the services that your company provides to its customers.
- You need to add a new service to the already configured and functioning system.

Creation of Services

Services are defined in the system as non-stock items created on the *Non-Stock Items* (IN202000) form with *Service* selected as the type on the **General** tab.

Before you create services, you need to create service classes—that is, item classes created on the *Item Classes* (IN201000) form with the *Service* item type—as described in *Service Classes*. When you select an item class on the **General** tab of the *Non-Stock Items* form, the system automatically populates the item settings with the *Service* type and other settings based on the settings you have specified for the item class. You also specify the estimated duration of service execution, the default billing rule (if it is different than the one specified for the class), and the posting class and tax category, if they were not specified for the selected service class or if you want to override the class settings. Optionally, you can specify price information, skills, license types, and resource equipment types.

On the *Services* (FS400800) form, you can view the list of services along with their key settings, including the service class, estimated duration, and default billing rule.

Skills and License Types

If a service requires special skills or knowledge, after the service has been created in the system, you can assign any necessary skills and license types to the service. The system will then give you the ability to select the right person to perform a service once you assign a staff member to an appointment.

Before you start adding services to the system, we recommend that you make sure that the required skills and license types have been entered into the system on the *Skills* (FS200600) and *License Types* (FS200900) forms. If the required skills and license types are defined in the system, you assign skills on the **Service Skills** tab of the *Non-Stock Items* (IN201000) form and license types on the **Service License Types** tab of this form. For details, see *Skills* and *Licenses*.

Resource Equipment Types

If special equipment must be used to perform the services you are entering, we recommend that you make sure that all necessary equipment types have been created on the *Equipment Types* (FS200800) form. You can then assign these types to the appropriate services on the **Resource Equipment Types** tab of the *Non-Stock Items* (IN201000) form. For details, see *Creating and Using Resource Equipment*.

Services: To Create a Service with a Fixed Price

In this implementation activity, you will learn how to create a service that has the fixed price regardless of the time spent while providing the service. You will still specify the typical duration of the service; this estimation will be helping the service manager in planning the workload in the future.

Story

Suppose that SweetLife Service and Equipment Sales Center has hired a chef who has worked at some of the finest dining restaurants, and the company recruited him to work as a full-time consultant to develop recipes unique to each particular business. Thus, SweetLife has decided to provide a recipe development service, which will have a fixed price. Acting as an administrative user, you will create the service in the system.

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- The minimum system configuration is performed as described in *Company Without Branches: General Information*.
- The minimum configuration of the service management functionality is performed as described in *Basic Service Management Configuration: Implementation Activity*.
- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:
  - *Inventory and Order Management*: Enables you to process sales and purchase orders that include non-stock items of the *Service* type.
  - *Multiple Units of Measure*: Enables you to configure multiple units of measure.
- On the *Posting Classes* (IN206000) form, the *NONSTOCK* has been created.
- On the *Units of Measure* (CS203500) form, the *ITEM* unit has been created.
- On the *Tax Categories* (TX205500) form, the *EXEMPT* tax category has been created.
- On the *Item Classes* (IN201000) form, the *TRAINING* service class, that is an item class with the *Service* item type has been created.

Process Overview

By using the *Services* (FS400800) form as a starting point, you will add a new record. The system will open the *Non-Stock Items* (IN202000) form, on which you will specify the settings of the new service. Then you will confirm that the service has been added to the list on the *Services* (FS400800) form.

Step: Creating a Service with a Fixed Price

To create the fixed-price recipe development service, do the following:

1. Open the *Services* (FS400800) form.
2. On the form toolbar, click **New Record**.

   The *Non-Stock Items* (IN202000) form opens in a new window.
3. In the **Inventory ID** box of the Summary area, type `RECIPE DEV`.
4. In the **Description** box, enter `Developing unique recipes`.
5. In the **Item Defaults** section of the **General** tab, in the **Item Class** box, select *COACHING*.

After you select the service class, the billing rule on the **Price/Cost** tab and the units of measure on the **General** tab are filled in automatically with the settings of the service class. The posting class and tax category are also automatically assigned to the service.

6. In the **Estimated Duration** box (the **Field Service Defaults** section) of the **General** tab, type `2 h 00 m`.
7. In the **Units of Measure** section, make sure that *ITEM* is selected in the **Base Unit**, **Sales Unit**, and **Purchase Unit** boxes.
8. On the **Price/Cost** tab, do the following:
   - In the **Default Price** box, type `200.00`.
   - In the **Billing Rule** box, make sure that *Flat Rate* is selected.
9. Save your changes, and close the window with the item.
10. On the *Services* (FS400800) form, verify that the *RECIPE DEV* service has appeared in the list of services.

Services: To Create a Service Billed by Time

In this implementation activity, you will learn how to create a service billed by time.

Story

Suppose that SweetLife Service and Equipment Sales Center has decided to sell a set of educational services that are going to be billed by time. These services will include teaching, coaching, and instructing. Acting as an administrative user, you will create the *Training course* service and specify its typical duration and price per hour.

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.
- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.
- On the *Service Management Preferences* (FS100100) form, the minimum settings have been specified, including specifying the numbering sequences and work calendar, for the service management functionality to be used.
- On the *Enable/Disable Features* (CS100000) form, the following features have been enabled:
  - *Inventory and Order Management*: Provides the ability to process sales and purchase orders that include non-stock items of the *Service* type.
  - *Multiple Units of Measure*: Gives you the ability to define multiple units of measure.
- On the *Posting Classes* (IN206000) form, the *NONSTOCK* posting class has been created.
- On the *Units of Measure* (CS203500) form, the *ITEM* unit has been created.
- On the *Tax Categories* (TX205500) form, the *EXEMPT* tax category has been created.
- On the *Item Classes* (IN201000) form, the *TRAINING* service class (that is, an item class with the *Service* item type) has been created.

Process Overview

By using the *Services* (FS400800) form as a starting point, you will add a new record. The system will open the *Non-Stock Items* (IN202000) form, on which you will specify the settings of the new *Training course* service. Then you will confirm that the service has been added to the list on the *Services* (FS400800) form.

Step: Creating a Service Billed by Time

To create a service that is billed by time, do the following:

1. Open the *Services* (FS400800) form.
2. On the form toolbar, click **New Record**.

   The *Non-Stock Items* (IN202000) form opens in a new window.
3. In the **Inventory ID** box of the Summary area, type `TRAINING CRS`.
4. In the **Description** box, enter `Courses on Juicer Usage: Theory and Practice`.
5. In the **Item Defaults** section of the **General** tab, in the **Item Class** box, select *TRAINING*.

   After you select the service class, the billing rule on the **Price/Cost** tab and the units of measure on the **General** tab are filled in automatically with the settings of the service class. The posting class and tax category are also automatically assigned to the service.
6. In the **Estimated Duration** box (**Field Service Defaults** section) of the **General** tab, type `3 h 00 m`.
7. In the **Units of Measure** section, make sure that *HOUR* is selected in the **Base Unit**, **Sales Unit**, and **Purchase Unit** boxes.
8. On the **Price/Cost** tab, do the following:
   - In the **Default Price** box, type `70.00`.
   - In the **Billing Rule** box, make sure that *Time* is selected.
9. Save your changes, and close the window with the *Non-Stock Items* form.
10. On the *Services* form, verify that the *TRAINING CRS* service has appeared in the list of services.

Lesson 1.6: Creating Staff Members

In this lesson, you will learn how to create staff members.

Staff Members: General Information

In Acumatica ERP, a staff member is an employee or a vendor who performs the services specified in a service document, typically by visiting a customer's location.

Learning Objectives

In this chapter, you will learn how to define an employee as a staff member.

Applicable Scenarios

You define employees as staff members in Acumatica ERP in any of the following cases:

- When you initially configure the service management functionality in Acumatica ERP

- When your organization defines a new employee as a staff member in service management

Types of Staff Members

In Acumatica ERP, you can specify any existing employee or a vendor as a staff member, or create a new employee or vendor and specify it as a staff member:

- *Employee*: A staff member of this type is an employee of your company. You use the *Employees* (EP203000) form to add, view, and edit a record for a staff member of this type. For the employee to be defined as a staff member, you must select the **Staff Member in Service Management** check box on the **General Info** tab (**Employee Settings** section) of the form.
- *Vendor*: A staff member of this type is a third party that your company engages to perform services. You use the *Vendors* (AP303000) form to add, view, and edit a vendor account that is a staff member. For the vendor to be defined as a staff member, you must select the **Staff Member in Service Management** check box on the **General** tab (**Vendor Properties** section) of the form.

You can view the list of staff members of both types on the *Staff* (FS205500) form.

Staff Members: Management of Staff Members' Information

Acumatica ERP provides you with the ability to enter, store, and manage information about staff members, which are entered as employees or vendors in the system. This information, which is described further in this topic, includes each staff member's skills, licenses and certifications, location, and work schedule. You can use this information to select the correct staff member to perform a particular service.

Types of Staff Members

On the *Staff* (FS205500) form, you can view the basic settings of each staff member defined in the system, including the type: *Employee* or *Vendor*.

You can enter the employee data manually on the *Employees* (EP203000) form. If you have a larger number of employees, you may want to create an import scenario and upload the data from a file. For details on import scenarios, see *Simple Scenarios for Data Import*.

To add a new staff member of the *Employee* type, you click **Add Employee** on the *Staff* form. The system opens the *Employees* form in a new window, and you can enter the employee's settings. To define the employee as a staff member, you select the **Staff Member in Service Management** check box on the **General** tab (**Employee Settings** section) of the form.

If the employee has already been entered in the system, you open the employee record on the *Employees* form, define the employee as a staff member, and save your changes.

To add a new staff member of the *Vendor* type, you click **Add Vendor** on the *Staff* form. The system opens the *Vendors* (AP303000) form in a new window, and you can enter the vendor's settings. To define the vendor as a staff member, you select the **Staff Member in Service Management** check box on the **General** tab (**Vendor Properties** section) of the form.

If the vendor has already been entered in the system, you open the vendor record on the *Vendors* form, define the vendor as a staff member, and save your changes.

Work Schedules of Staff Members

In Acumatica ERP, you can define the times when each staff member is available to provide services. You first define a staff schedule rule on the *Staff Schedule Rules* (FS202001) form, and then generate a schedule for a specific period of time on the *Generate Staff Schedules* (FS500400) form.

After you generate staff schedules, you can use the calendar boards to assign staff members to appointments or service orders that take place in time periods when the staff member is available for work. For details, see *Staff Schedules*.

Work schedules can be generated for staff members of the *Employee* type only.

Staff Members' Skills

If the services your company offers require specific skills, you should define the relevant skills for each service and assign them to qualified staff members. Once completed, the system will suggest a list of staff members with the appropriate skills to perform the service.

You enter the skills on the *Skills* (FS200600) form. Then, you associate each skill with the relevant services. Finally, you assign these skills to staff members on the *Employees* (EP203000) form. For details, see *Skills: General Information*.

Skills can be assigned to staff members of the *Employee* type only.

Staff Members' Licenses

If the services your company offers must be performed by qualified staff members, only those with the relevant licenses can be assigned to perform the service.

You create all necessary license types on the *License Types* (FS200900) form. Then, you associate the license types with each relevant service. Next, you create licenses of the specified types in the system and assign them to staff members who hold the corresponding licenses.

Licenses can be assigned directly to a staff member when creating a new license on the *Licenses* form, or they can be assigned on the *Employees* form. For details, see *Licenses: General Information*.

Licenses can be assigned to staff members of the *Employee* type only.

Service Areas of Staff Members

You can divide the region where your company offers services into multiple service areas, defined by postal codes. In this case, if a staff member can provide services only in specific service areas, you assign these service areas to this staff member on the *Service Areas* (FS201900) or *Employees* (EP203000) form. For details, see *Service Areas*.

Service areas can be assigned to the staff members of the *Employee* type only.

Staff Members: Implementation Activity

Only staff members can be assigned to appointments. To be able to use particular employees on service management forms, you have to define these employees as staff members.

You can also define vendors as staff members if this may be needed for any particular services in your company. In these cases, the vendor performs these services on behalf of your company rather than an employee of your company doing so.

In this activity, you will learn how to define an employee as a staff member. You will change the settings of an employee so that it becomes available on the service management forms.

Story

Suppose that the SweetLife Service and Equipment Sales Center needs to define a new employee as a staff member, so that it can be assigned to appointments in Acumatica ERP.

Configuration Overview

In the *U100* dataset, the following tasks have been performed for the purposes of this activity:

- The minimum system configuration is performed as described in *Company Without Branches: General Information*.
- The minimum configuration of the service management functionality is performed as described in *Basic Service Management Configuration: Implementation Activity*.
- On the *Users* (SM201010) form, the *myers* user account has been created, and the *EP00000041 (Mason Randall)* employee has been associated with the user account. That is, the employee name has been selected in the **Linked Entity** box.
- On the *Employees* (EP203000) form, *EP00000041 - Mason Randall* has been defined.

Process Overview

On the *Employees* (EP203000) form, you will define an employee who will perform services in your company as a service management staff member.

> You can go directly to this form, as described in the step below, or open the *Staff* (FS205500) form, click **Add Employee** on the table toolbar, and then perform Instructions 2–4 of the step below.

Step: Defining Employee as a Staff Member

To define the *EP00000041 - Mason Randall* employee as a staff member that can perform services, do the following:

1. On the *Employees* (EP203000) form, open the *EP00000041 - Mason Randall* employee.
2. In the **Employee Settings** section of the **General** tab, select the **Staff Member in Service Management** check box.
3. On the form toolbar, click **Save**.
4. On the *Staff* (FS205500) form, view the list of staff members who can deliver the services of the SweetLife Fruits & Jams company, and be sure the list includes the employee whose settings you have changed.

Lesson 1.7: Creating Skills

In this lesson, you will learn how to create skills in the system.

Skills: General Information

Acumatica ERP offers multiple capabilities to help you ensure that the right staff member of your company performs each service. That is, if the staff member needs to have special skills or knowledge to perform a particular service, the system automatically suggests to you the list of staff members with the specific skills required for your service.

A skill is a characteristic that can be assigned to an employee and that can be used as an employee requirement to perform a service. Unlike licenses, skills don't have issue dates and expiration dates, and they are not issued by agencies.

In this topic, you will learn how to create skills in the system and then assign them to staff members and to services.

Learning Objectives

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

- Create a skill
- Assign a skill to a staff member
- Assign a skill to a service

Applicable Scenarios

You create skill records in the system when you need to have an ability to filter staff members for appointments according to their skills.

Assignment of Skills to a Staff Member

Before you start creating a list of all the skills to be used for services by your company, you should gather information about the skills that are required for all of the services your company is going to perform. You then create the list of all required skills for performing services on the *Skills* (FS200600) form.

When the list of all skills that may be needed for performing services is defined, you need to assign the needed skills to appropriate staff members and to particular services. You assign skills to a particular staff member on the **Skills** tab of the *Employees* (EP203000) form.

Assignment of Skills to a Service

On the *Non-Stock Items* (IN202000) form, you specify the skills that are required to perform the selected service—that is, assign the skills to the service. To do this, you select the service (which is a non-stock item of the *Service* type), and on the **Service Skills** tab, you add a row for each skill needed for the service.

Once you assign skills to a service, Acumatica ERP can check whether the staff member assigned to fulfill this service also has the assigned skills.

To define what validation (if any) the system should use to determine whether the service's skills match the assigned employee's skills, on the *Service Management Preferences* (FS100100) form, in the **Skills** box of the **General** tab (**Appointment Validation Settings** section), you can select one of the following options :

- *Do Not Validate* (default): The system does not perform validation (that is, it does not check whether the service's skills match the assigned employee's skills).
- *Warn*: If the staff member does not have the skills specified for the service, the system displays a warning message about the staff member not having the necessary skill or skills.
- *Prevent*: If the staff member does not have the skills specified for the service, the system prevents the assignment of this staff member.

Skills: To Create a Skill

In this implementation activity, you will learn how to create a skill.

Story

Suppose that the SweetLife Service and Equipment Sales Center provides multiple services. Each service requires the staff members to have certain skills, and the manager should assign a qualified person to each service. Acting as an administrative user, you will create the skills that are needed for the provided services. As a result, the scheduler will be able to assign appointments to the staff members whose skills match the included service or services.

Configuration Overview

In the *U100* dataset, the following tasks have been performed for the purposes of this activity:

- The minimum system configuration is performed as described in *Company Without Branches: General Information*.
- The minimum configuration of the service management functionality is performed as described in *Basic Service Management Configuration: Implementation Activity*.

Process Overview

On the *Skills* (FS200600), you will add skill records to the system.

Step: Creating Skills

To create a skill, do the following:

1. Open the *Skills* (FS200600) form.
2. On the table toolbar, click **Add Row**.
3. In the **Skill ID** column of the row that was added, enter the identifier of the skill: `COOKING`.
4. In the **Description** column, enter `Culinary Skills`.
5. On the form toolbar, click **Save**.
6. As you did in Instructions 2–5, create a skill with the following settings, and save your changes:
   - **Skill ID**: `TRANSLATING`
   - **Description**: `English to Spanish Translator`

Skills: To Assign a Skill to a Service

In this implementation activity, you will learn how to assign skills to a service.

Story

Suppose that the SweetLife Service and Equipment Sales Center has started to provide a cleaning service, which is billed by hours. The staff member who conducts this type of service must have strong skills related to using and cleaning the juicers, so the manager has to be able to assign the right person to provide the service. Acting as an administrative user, you will assign the cleaning skill to the cleaning service. As a result, the scheduler can assign staff members whose skills match the service or services included in the appointment.

Configuration Overview

In the *U100* dataset, the following tasks have been performed for the purposes of this activity:

- The minimum system configuration is performed as described in *Company Without Branches: General Information*.
- The minimum configuration of the service management functionality is performed as described in *Basic Service Management Configuration: Implementation Activity*.
- On the *Services* (FS400800) form, the *CLEANING* service has been created.
- On the *Skills* (FS200600) form, the *CLEANING* skill has been created.

Process Overview

On the *Services* (FS400800) form, you click the service name link, and the system opens the *Non-Stock Items* (IN202000) form, which displays the non-stock item of the *Service* type. On this form, you assign the skill to the service.

Step: Assigning a Skill to a Service

To assign a skill to a service, do the following:

1. On the *Services* (FS400800) form, click *CLEANING* in the **Inventory ID** column.

   This opens the *Non-Stock Items* (IN202000) form, which displays the *CLEANING* non-stock item of the *Service* type.
2. On the table toolbar of the **Service Skills** tab, click **Add Row**.
3. In the **Skill ID** column of the new row, select *CLEANING - Juicer cleaning skills*.
4. On the form toolbar, click **Save**.

Now the *CLEANING - Juicer cleaning skills* skill is assigned to the *CLEANING* service.

When you attempt to assign staff members to this service, the validation (described in *Skills: General Information*) is performed, and the system suggests the employees who have the skill to deliver this service.

Skills: To Assign a Skill to a Staff Member

In the following implementation activity, you will learn how to assign a skill or skill to employees.

Story

Suppose that SweetLife Service and Equipment Sales Center provides multiple services, so that assigning staff to appointments becomes more complex. The services require the staff members to have certain skills, and the manager wants to assign the right person for each service. Acting as an administrative user, you will add certain skills to staff members. As a result, the scheduler will be able to assign appointments to the staff members whose skills match the skills of the included service or services.

Configuration Overview

In the *U100* dataset, the following tasks have been performed for the purposes of this activity:

- The minimum system configuration is performed as described in *Company Without Branches: General Information*.
- The minimum configuration of the service management functionality is performed as described in *Basic Service Management Configuration: Implementation Activity*.
- On the *Employees* (EP203000) form, the *EP00000042 - Chase Frank*, *EP00000044 - Ricardo Martinez* and *EP00000045 - Luke Cole* employees have been created, and have been defined as a service management staff members, that is the **Staff Member in Service Management** check box has been selected on the **General** tab for each employee.
- On the *Skills* (FS200600) form, the *TRAINING*, *REPAIRING* and *DRIVING* skills have been created.

Process Overview

On the *Employees* (EP203000) form, you will select an employee, and on the **Skills** tab of the form, you will add a skill to each selected employee.

Step: Assigning a Skill to a Staff Member

You can assign skills to staff members of the *Employee* type. To assign a skill to a staff member, do the following:

1. Open the *Employees* (EP203000) form.
2. In the **Employee ID** box of the Summary area, select *EP00000041 - Mason Randall*.
3. On the table toolbar of the **Skills** tab, click **Add Row**, and in the new row, select *TRAINING*.
4. On the form toolbar, click **Save**.

Lesson 1.8: Adding and Assigning Licenses

In this lesson, you will learn how to create license types and licenses in the system and how to assign licenses to staff members.

Licenses: General Information

A license is a document proving that a particular person has permission to perform work of a certain kind or has knowledge in a particular area. To track licenses in the system, you first create license types, which are categories of licenses that are used for grouping licenses and associating a group of licenses with a service. You then enter all licenses (and assign license types to them when you enter them) and specify the staff members or branches of your company (or both) to which each license belongs. You can then easily select the right staff member to perform a service for which a license of a particular type is needed.

In this topic, you will read about how license types and licenses are created in the system and assigned to staff members.

Learning Objectives

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

- Create a license type
- Assign a license type to a service
- Add a license
- Assign a license to an employee

Applicable Scenarios

You create licenses in Acumatica ERP when your company provides services that require specific skills that are proven by licenses or certificates. With licenses tracked in the system, you can assign staff members with the needed licenses to appointments.

License Application

Before you create the license types, you should gather information about which license types are required for the services that your company is going to perform. Once you have created the license types, you specify a license type for each license of a staff member that you enter into the system. One license is owned by only one staff member, although any staff member can have multiple licenses. You can then assign the needed license types to services.

With this configuration performed, when you select a staff member to perform a particular service of a service order or appointment by using the **Add Staff** dialog box on the *Service Orders* (FS300100) or *Appointments* (FS300200) form, the system automatically suggests to you staff members that have licenses of the type that is required to provide the service. When you schedule appointments by using calendar boards, you can filter the staff members by the types of the licenses that are needed for services.

When you save a newly created license, the system assigns it a reference number based on the numbering sequence specified for licenses in the **License Numbering Sequence** box on the *Service Management Preferences* (FS100100) form.

License Validation

By assigning license types to services, you optimize the staff selection process. For an appointment, the system suggests only those staff members who own the required license. You can set up validation so that the system will determine whether the license type specified for a service matches the assigned employee's licenses.

For this validation, in the **Licenses** box of the **General** tab (**Appointment Validation Settings** section) of the *Service Management Preferences* (FS100100) form, you can select one of the following options:

- *Do Not Validate* (default): The system does not perform license validation.
- *Warn*: If the validation is not passed, the system displays a warning message notifying you that the staff member does not have the required active licenses.
- *Prevent*: If the validation is not passed, the system prevents the assignment of the staff member who does not have the required active license or licenses.

License: To Create a License Type and Assign It to a Service

In this implementation activity, you will learn how to create a license type and then assign the license type to a service.

Story

Suppose that the SweetLife Service and Equipment Sales Center wants to keep track of the licenses its employees have. This will give service managers the ability to assign the right employee to each appointment, because for some services, a license can be a requirement for performing this service. Before adding license information to the system, you need to create the appropriate license types based on which the licenses will be added for individual users.

Acting as an administrative user, you will create a license type and then assign this license type to a service to represent which license is required for a staff member who can perform this service.

Configuration Overview

In the *U100* dataset, the following tasks have been performed for the purposes of this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.
- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.
- On the *Service Management Preferences* (FS100100) form, the minimum settings have been specified, including specifying the numbering sequences and work calendar, for the service management functionality to be used.
- On the *Services* (FS400800) form, the *DELIVERY* service has been created.

Process Overview

On the *License Types* (FS200900) form, you will add a new type for a license that is required for performing the delivery service. Then on the *Non-Stock Items* (IN202000) form, which you will open from the *Services* (FS400800) form, you will assign the newly created license type to the *DELIVERY* non-stock item of the *Service* type.

Step 1: Creating a License Type

To create a license type, do the following:

1. Open the *License Types* (FS200900) form.
2. On the table toolbar, click **Add Row**.
3. In the new row, enter the following settings:
   - **License Type ID**: `FOOD DELIVERY`
   - **Description**: `Driver's License`
4. On the form toolbar, click **Save**.

Now that you have added a license type to the system, you will assign this license type to a service that requires the person who performs the service to have a license of this type.

Step 2: Assigning a License Type to a Service

To assign a license type to a service, do the following:

1. On the *Services* (FS400800) form, click *DELIVERY* in the **Inventory ID** column.

   This opens the *Non-Stock Items* (IN202000) form with the *DELIVERY* non-stock item of the *Service* type selected.
2. On the **Service License Types** tab, add a row.
3. In the **License Type ID** column, select *FOOD DELIVERY*.
4. Save your changes and close the *Non-Stock Items* form.

You have defined the license type whose license is required for performing the delivery service. Now you can proceed to adding license information to the system.

License: To Create a License and Assign It to a Staff Member

Each license is associated with a specific employee. In this implementation activity, you will learn how to create a license record in the system and specify the staff member who owns the license in the record's settings.

Story

Suppose that SweetLife Service and Equipment Sales Center tracks the licenses its employees have. The company also provides services that can be performed only by staff members with licenses. In Acumatica ERP, each license and its settings should be entered, including the employee who owns this license.

Acting as an administrative user, you will create a license record in the system, and assign it to an employee who has the license.

Configuration Overview

In the *U100* dataset, the following tasks have been performed for the purposes of this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.
- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.
- On the *Service Management Preferences* (FS100100) form, the minimum settings have been specified, including specifying the numbering sequences and work calendar, for the service management functionality to be used.
- On the *Services* (FS400800) form, the *DELIVERY* service has been created.
- On the *Employees* (EP203000) form, the *EP00000045 (Luke Cole)* employee has been created, and has been defined as a service management staff member. That is, the **Staff Member in Service Management** check box has been selected on the **General** tab for the employee.

Process Overview

On the *Licenses* (FS201000) form, you will add license settings, including the staff member who has the license. Then on the *Employees* (EP203000) form, you will confirm that the license has been defined for the employee.

System Preparation

Make sure that you have performed the *License: To Create a License Type and Assign It to a Service* activity.

Step: Creating a License

To create a license, do the following:

1. On the *Licenses* (FS201000) form, add a new record.
2. In the Summary area, specify the following settings:
   - **License Type**: *FOOD DELIVERY*
   - **Description**: *Driver's License* (added by default)
   - **Staff Member**: *EP00000045 - Luke Cole*
   - **Issue Date**: `01/01/2020`

- **Expiration Date**: `01/01/2030`

3. On the form toolbar, click **Save**.
4. In the Licenses (FS4020PL) list of records, make sure that the license you have created is displayed.
5. Open the *Employees* (EP203000) form.
6. In the **Employee ID** box, select *EP00000045*.
7. On the **Licenses** tab, confirm that you see the license that you added for the employee.

   On this tab, you can also add licenses for the employee.

Lesson 1.9: Creating Service Areas

In this lesson, you will learn how to create service areas in the system.

Service Areas: General Information

A service area is a region that is defined by a set of postal codes and represents the territory where the company's services can be delivered. By maintaining service areas, you can assign certain areas to certain employees, so that you can control which employees serve a given territory and which areas a given staff member can serve.

In this topic, you will learn how to add service areas and assign a service area to a staff member.

Learning Objectives

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

- Create service areas
- Assign a service area to a staff member

Applicable Scenarios

You create service areas in the system when the territory where your company delivers services is large. Service areas give you the ability to quickly sort staff members by geographical area and assign the appropriate employee to perform services.

Creation of a Service Area

You add a new service area by using the *Service Areas* (FS201900) form. On this form, you enter the service area identifier and description; then on the **Postal Codes** tab, you specify the ZIP codes that belong to the service area. To simplify the entry of multiple zip codes, we recommend that you prepare an Excel file with the list of ZIP codes and then upload the records from the file.

After you save the information you have entered, you can assign the service areas to the appropriate staff members.

Assignment of a Service Area to a Staff Member

You assign service areas to staff members on one of the following forms:

- On the *Service Areas* (FS201900) form, you can assign a particular service area to multiple staff members.
- On the *Employees* (EP203000) form, you can assign any number of service areas to a particular staff member.

Service areas can be assigned to staff members of the *Employee* type only. For details on staff member types, see *Staff Members: General Information*.

Once you have assigned service areas to staff members, you can select a staff member for performing services by geographical area.

Service Areas: To Add a Service Area and Assign a Staff Member to It

A service area in the system represents the geographical areas where your company can provide services for customers. The coverage area of each service area is determined by the postal codes specified for the service area.

In this implementation activity, you will learn how to add a service area to the system.

Story

Suppose that you are an administrative user of the SweetLife Service and Equipment Sales Center, and you are adding to the system a new service area where the company plans to provide services for customers.

Configuration Overview

In the *U100* dataset, the following tasks have been performed for the purposes of this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.
- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.
- On the *Service Management Preferences* (FS100100) form, the minimum settings have been specified, including specifying the numbering sequences and work calendar, for the service management functionality to be used.
- On the *Employees* (EP203000) form, the *EP00000043 (Edward Smith)* and *EP00000044 - Ricardo Martinez* employees have been created and have been defined as a service management staff members. That is, the **Staff Member in Service Management** check box has been selected on the **General** tab for each employee.

Process Overview

On the *Service Areas* (FS201900) form, you will create a new service area record; on the **Postal Codes** tab, you will add the list of ZIP codes related to the service area. Then on the **Employees** tab of this form, you will add the staff members who can perform services in the service area.

System Preparation

In this activity, you will use the *GeoZones_JAMAICA* file provided with your training materials, which includes the list of postal codes.

Step 1: Adding a Service Area

To add a service area to the system, do the following:

1. Open the *Service Areas* (FS201900) form.
2. On the form toolbar, click **Add New Record**.

3. In the Summary area of the form, specify the following settings:
   - **Service Area ID**: `JAMAICA`
   - **Description**: `Jamaica`
   - **Country**: *US - United States of America*
4. On the form toolbar, click **Save**.
5. On the table toolbar of the **Postal Codes** tab, click **Load Records from File**; then upload the postal codes from the `GeoZones_JAMAICA.xlsx` file.

   In the **Common Settings** dialog box, which opens when you click **Load Records from File**, leave the default values, and click **OK**. In the **Columns** dialog box, again click **OK**.

   The list of postal codes appears on the **Postal Codes** tab. Together they define the area to be served.

   > For a service area with just a few postal codes, you would have instead done the following for each postal code included in the service area: On the **Postal Codes** tab, click **Add Row** on the table toolbar, and enter a postal code included in the service area.

6. On the form toolbar, click **Save**.
7. In the **Service Area ID** box of the Summary area, click the magnifier button. In the lookup table that opens, you can see the list of service areas created in the system, including the *JAMAICA* service area, which you have created in this step.

Step 2: Assigning Employees to the New Service Area

To assign staff members to particular geographical areas, you can assign each staff member to the service area where they are available for performing services.

To assign multiple staff members to the service area you created, do the following:

1. While you are still viewing the *Service Areas* (FS201900) form, in the **Service Area ID** box, select *JAMAICA*.
2. On the **Employees** tab, add rows for the following employees, and save your changes:
   - *EP00000043 (Edward Smith)*
   - *EP00000044 (Ricardo Martinez)*
3. On the form toolbar, click **Save**.

> You can also assign any number of service areas to a particular staff member on the **Service Areas** tab of the *Employees* (EP203000) form.

Lesson 1.10: Creating Staff Schedules

In this lesson, you will learn how to create work schedule rules and how to generate work schedules for employees based on the schedule rules.

Staff Schedules: General Information

To be able to assign an appropriate staff member to an appointment, you have to create a staff schedule, in which you enter the working days and hours of a staff member who delivers the company's services. Each staff member can have a different working schedule based on their employment contract; planned time off work should also be reflected in these working schedules.

In Acumatica ERP, you maintain information about staff availability by using staff schedule rules. A staff schedule rule indicates how the working (or non-working) days and hours are calculated for this person. You can define any number of schedules for one employee. For example, you can create a new rule that defines unavailable days each time an employee takes days off for a vacation.

To apply the rules you create to the system (and thus make them effective), you must generate the work schedule.

Learning Objectives

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

- Create a schedule rule for a particular staff member
- Generate a schedule for a certain period of time

Applicable Scenarios

You create schedule rules and then generate schedules for staff members when you need the ability to accurately assign the staff members to appointments. That is, you want to be able to assign staff members to appointments for performing services and be sure that the staff members are available during the assigned times.

Staff Schedules: To Create a Schedule Rule and Generate the Work Schedule

In the following implementation activity, you will learn how to create a schedule rule for a staff member and generate the work schedule.

Story

Suppose that an employee of the SweetLife Service and Equipment Sales Center works from Monday through Friday, 9 AM to 6 PM. Acting as an administrative user, you need to create a schedule rule based on which a particular employee's schedule will be generated in the system and available on the schedule boards.

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.
- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.
- On the *Service Management Preferences* (FS100100) form, the minimum settings have been specified, including specifying the numbering sequences and work calendar, for the service management functionality to be used.
- On the *Branch Locations* (FS202500) form, the *WEST BRIGHTON* branch location of the *SWEETEQUIP* (*Service and Equipment Sales Center*) branch has been defined.
- On the *Users* (SM201010) form, the *frank* user account has been created. The *EP00000042 (Chase Frank)* employee has been associated with the user account. That is, the employee name has been selected in the **Linked Entity** box.
- On the *Employees* (EP203000) form, *EP00000042 (Chase Frank)* has been defined. On the **General** tab (**Employee Settings** section), the **Staff Member in Service Management** check box has been selected, so you can assign this employee to perform services.

Process Overview

On the *Staff Schedule Rules* (FS202001) form, you will create a work schedule rule. Once the rule is generated, you will generate the work schedule on the *Generate Staff Schedules* (FS500400) form.

System Preparation

Before you start creating a schedule rule and schedule, in the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, click the Business Date menu button, and select *1/1/2025* on the calendar. In this activity, you will create a work schedule rule on this business date.

Step 1: Creating a Schedule Rule

To create a work schedule rule for the *EP00000042 - Chase Frank* employee, do the following:

1. Open the *Staff Schedule Rules* (FS202001) form, and click **Add New Record**.
2. In the **Staff Member** box of the Summary area, select *EP00000042 - Chase Frank*.
3. In the **Branch** box, notice that *SWEETEQUIP* is selected.
4. In the **Branch Location** box, select *WEST BRIGHTON*.
5. In the **Description** box, enter `Working hours`.
6. In the **Start Date** box, leave the business date, which was inserted by default.
7. In the **Scheduling Time** section, specify the following settings:
   - **Start Time**: *9:00 AM*
   - **End Time**: *6:00 PM*
8. Under **Scheduling Settings**, leave **Availability** selected. This means that a schedule rule defines the days and times when the staff member is available to work.
9. On the **Recurrence** tab, specify the settings as follows:
   - **Frequency** : *Weekly*.
   - **Weekly Settings** section:
     - Select the following check boxes: **Monday**, **Tuesday**, **Wednesday**, **Thursday**, and **Friday**.
     - Clear the **Sunday** check box.
10. On the form toolbar, click **Save**.
11. In the warning dialog box, click **OK**.

    The schedule rule for *EP00000042 - Chase Frank* has been created. However, it has not been processed yet and it does not affect the working schedule. The rule will come into effect only after you apply it to the system by generating the staff working schedule.

Step 2: Generating the Staff Schedule

The staff schedule rules you create in the system are not applied automatically; you must generate the work schedule explicitly. You should generate the working schedule again if you later change the employee's working hours in the existing schedule rule, add another schedule rule to reflect a planned vacation, or hire a new staff member.

To generate the work schedule for the employee, do the following:

1. While you are still viewing the *Staff Schedule Rules* (FS202001) form with the schedule rule that you have just created, on the form toolbar, click **Generate Staff Schedules**. The *Generate Staff Schedules* (FS500400) form opens.

2. In the **Employee Name** box of the Selection area, ensure that *Chase Frank* is selected.
3. In the **Generate Up To** box of the **Generation Options** section, ensure that the date that is one year from the current business date is specified.
4. On the **Schedules** tab, select the unlabeled check box in the row with *Chase Frank* specified in the **Employee Name** column.
5. On the form toolbar, click **Process**.

   The system opens the **Processing** dialog box, in which you can see the status of the processing. After the processing has successfully completed, click **Processed**. The table with the processed records is shown in the window. The work schedule has been generated.

Once the schedule is generated, you can assign the staff member to appointments and service orders.

Staff Schedules: Modifying Working Hours on the Schedule Board

The staff working schedule board is a dashboard that displays the available and unavailable time of the selected staff member. On this two-dimensional board, the horizontal dimension displays dates, and the vertical dimension displays times within the dates. The system places the elements appropriately with regard to the two dimensions of the board. Unspecified time (such as nighttime hours) has a plain white background, available working time is shaded in blue, and occupied time (when appointments are planned to take place) is shaded in red.

You use the staff working schedule board to modify the generated working schedules of the staff members by deleting working time slots or adjusting the starting and ending times of work.

Story

Suppose that the SweetLife Service and Equipment Sales Center needs to more effectively manage the availability of staff members. The service manager wants to know every staff member's working and unavailable hours, as well as to be able to schedule appointments and adjust a staff member's working schedule on the staff schedule board.

Acting as a service manager, you will modify the working hours for a particular day. (In this activity, you will also remove working hours for a specific day, for educational purposes.)

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.
- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.
- On the *Service Management Preferences* (FS100100) form, the minimum settings have been specified, including specifying the numbering sequences and work calendar, for the service management functionality to be used.
- On the *Branch Locations* (FS202500) form, the *WEST BRIGHTON* branch location of the *SWEETEQUIP* (*Service and Equipment Sales Center*) branch has been created.
- On the *Users* (SM201010) form, the *frank* user account has been created, and the *EP00000042 (Chase Frank)* employee has been associated with the user account. That is, the employee name has been selected in the **Linked Entity** box.
- On the *Employees* (EP203000) form, *EP00000042 (Chase Frank)* has been defined. On the **General** tab (**Employee Settings** section), the **Staff Member in Service Management** check box has been selected, so you can assign this employee to perform services.

- On the *Staff Schedule Rules* (FS202001) form, the work schedule rule has been defined for *EP00000042 - Chase Frank*, and on the *Generate Staff Schedules* (FS500400) form, the work schedule has been generated.

Process Overview

On the *Staff Working Schedule Board* (FS300500) form, you will review a staff member's schedule for the next month, modify the working hours for a specific day, and then remove the working hours for a particular day.

System Preparation

Before you begin modifying working hours, do the following:

- Sign in to a company with the *U100* dataset preloaded as a service manager by using the ***davis*** username and the *123* password.
- In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, click the Business Date menu button, and select ***1/1/2025*** on the calendar. In this activity, you will create a work schedule rule on this business date.
- Make sure that you have completed the following prerequisite activity: *Staff Schedules: To Create a Schedule Rule and Generate the Work Schedule*.

Step: Modifying a Staff Schedule on the Schedule Board

To view and adjust the working schedule for a staff member, do the following:

1. Open the *Staff Working Schedule Board* (FS300500) form.
2. In the Date box on the upper right corner of the dashboard, select *1/1/2025* (see Item 1 in the following screenshot).
3. In the **Staff** box on the upper pane of the dashboard, select *Chase Frank* (Item 2). By default, the signed-in staff member is selected in the **Staff** box.

   The dashboard displays Chase Frank's working hours (shaded in blue), as shown in the following screenshot.

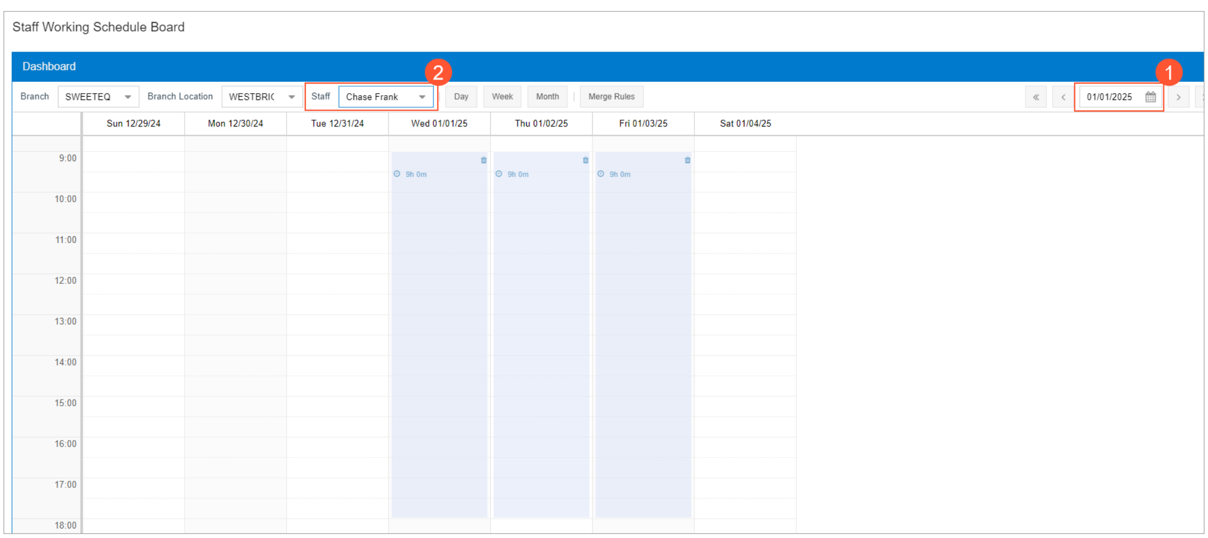
   

   Figure: The Staff Working Schedule Board form

   Notice that the available and unavailable hours in the calendar start from the date that you selected when you created the schedule rule for this staff member.

4. On the toolbar, click the **Month** button (see Item 1 in the following screenshot) to view Chase Frank's working calendar from the current date until the end of the current month.

   Identify Chase Frank's next working day. (If necessary, move between dates by using the arrows in the top right corner of the toolbar.)

5. Change Frank's working hours for the next working day to be from 8:00 AM to 11:00 AM (Item 2), by dragging the time slot borders. When you move the cursor onto the schedule, the double-sided arrow appears on the edges of the time slot. Click this arrow on the bottom edge of the time slot and move it vertically in the same day until the button edge aligns with 11:00 AM. You can adjust the time slot of any schedule by changing its starting and ending time.

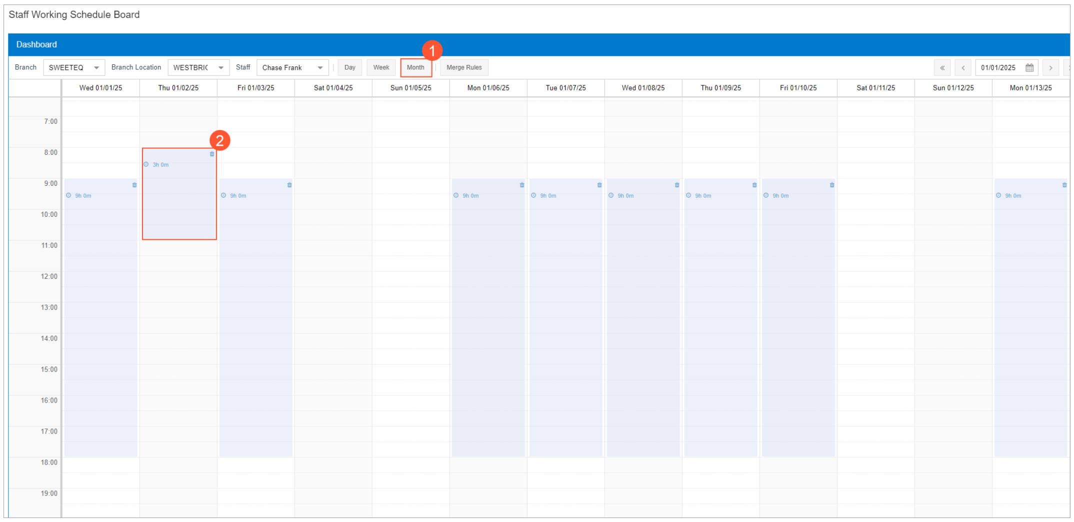


Figure: Changed working hours

6. Remove that working day from Chase Frank's working calendar by clicking the trash can icon in the top right corner of the corresponding time slot.

Lesson 1.11: Creating Billing Cycles

In this lesson, you will learn how to configure billing cycles and how to assign a cycle to a customer.

Billing Cycles: General Information

In Acumatica ERP, a billing cycle defines how the customer's service documents are billed and how billing documents are grouped in relation to a service document. You create billing cycles on the *Billing Cycles* (FS206000) form and assign them to each customer that can potentially buy any services.

Learning Objectives

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

- Create a billing cycle
- Assign a billing cycle to a customer

Applicable Scenarios

You create a billing cycle or multiple billing cycles when you plan to provide services to your customers, and want to be able to generate billing documents for the services that are provided, based on both the customer's preferences and your company's business practices.

Billing Cycle Settings

You create a billing cycle on the *Billing Cycles* (FS206000) form. In the **Run Billing For** section, you select an option button that determines which customer's service document (either a service order or appointment) will be billed.

- **Appointments** (default): The billing will be available for appointments. We recommend that you select this option button when you bill a customer for the actual work time after the appointments have occurred.
- **Service Orders**: The billing will be available for service orders. We recommend that you select this option button when you want to bill a customer for the estimated time and price before any appointments occur.

Then in the **Group Billing Documents By** section, you select one of the following option buttons, which will determine how the generated documents will be grouped in relation to appointments or service orders:

- **Appointments**: For each appointment billed, a single billing document will be generated.

  > In the context of Acumatica ERP's service management functionality, a *billing document* refers to a document or transaction that is generated when the billing process is executed for a service document. Depending on the settings of the service order type, it can be a sales order, sales invoice, AR invoice or project transaction.

- **Service Orders**: The generated billing documents will be grouped by service order. That is, one billing document is generated for all the appointments corresponding to the same service order.

  If the appointments are billed and grouped by service orders, one service order with multiple appointments will result in one billing document being generated. If the services are billed by service orders and grouped by service orders, a single billing document is generated for each service order.
- **Customer Order**: The generated billing documents will be grouped by the customer's order number, which is specified in the **Customer Order** box of the Summary area of the *Service Orders* (FS300100) form.
- **External Reference**: The generated billing documents will be grouped by the purchase order provided by the customer, which is specified in the **External Reference** box of the Summary area of the *Service Orders* (FS300100) form.
- **Time Frame** (default): Billing documents will be grouped on the day of each week or month that you specify under **Prepare On** in the **Time Frame Grouping Settings** section of the form. If the services are billed by appointments, for one customer, a single document is generated containing all of the appointments' services performed up to the specified day.

On the **Billing** tab of the *Customers* (AR303000) form, you assign at least one billing cycle to each customer account to which the services can be potentially provided.

Multiple Billing Cycles

In Acumatica ERP, you can specify multiple billing cycles for a single customer by associating different billing cycles with various service order types. The system will utilize the specific billing cycle based on the service order type indicated in the customer's service document.

To use multiple billing cycles, you select the **Manage Multiple Billing Options per Customer** check box on the **General** tab (the **General Settings** section) of the *Service Order Types* (FS202300) form. When this check box is selected, the **Service Billing** tab appears on the *Customers* (AR303000) form.

On the **Service Billing** tab, you add a row and select a service order type along with the billing cycle to associate with that service order type. You add a row for each required pair of service order type and billing cycle. When a service document with a particular service order type specified is created for the customer, the system will apply the billing cycle linked to that type to manage the billing process.

Billing Cycles: Examples

The system uses billing cycles, which are defined on the *Billing Cycles* (FS206000) form, to determine how customers will be billed after their service orders and appointments have been processed in the system. On the *Customers* (AR303000) form, you assign one billing cycle or multiple billing cycles to a particular customer. (For details on the ability to specify multiple billing cycles for a customer, see *Billing Cycles: Assignment of Multiple Billing Cycles*.) A billing cycle can be assigned to any number of customers.

This topic presents examples with diagrams that show the different ways billing is performed depending on the billing cycle's settings for the generation and grouping of billing documents. The diagrams are all based on the same service orders and appointments. The last service order in the examples has no associated appointment.

> In the context of Acumatica ERP's service management functionality, a *billing document* refers to a document or transaction that is generated when the billing process is executed for a service document. Depending on the settings of the service order type, it can be a sales order, sales invoice, AR invoice or project transaction.

Generating Billing Documents from Appointments; Grouping by Appointment

Suppose that you have defined a billing cycle with the following settings on the *Billing Cycles* (FS206000) form and assigned it to a customer:

- **Run Billing For**: **Appointments**
- **Group Billing Documents By**: **Appointment**

The following diagram demonstrates how the customer is billed based on these settings. The system generates a separate billing document for each appointment. The billing document contains the details of each service of the appointment.

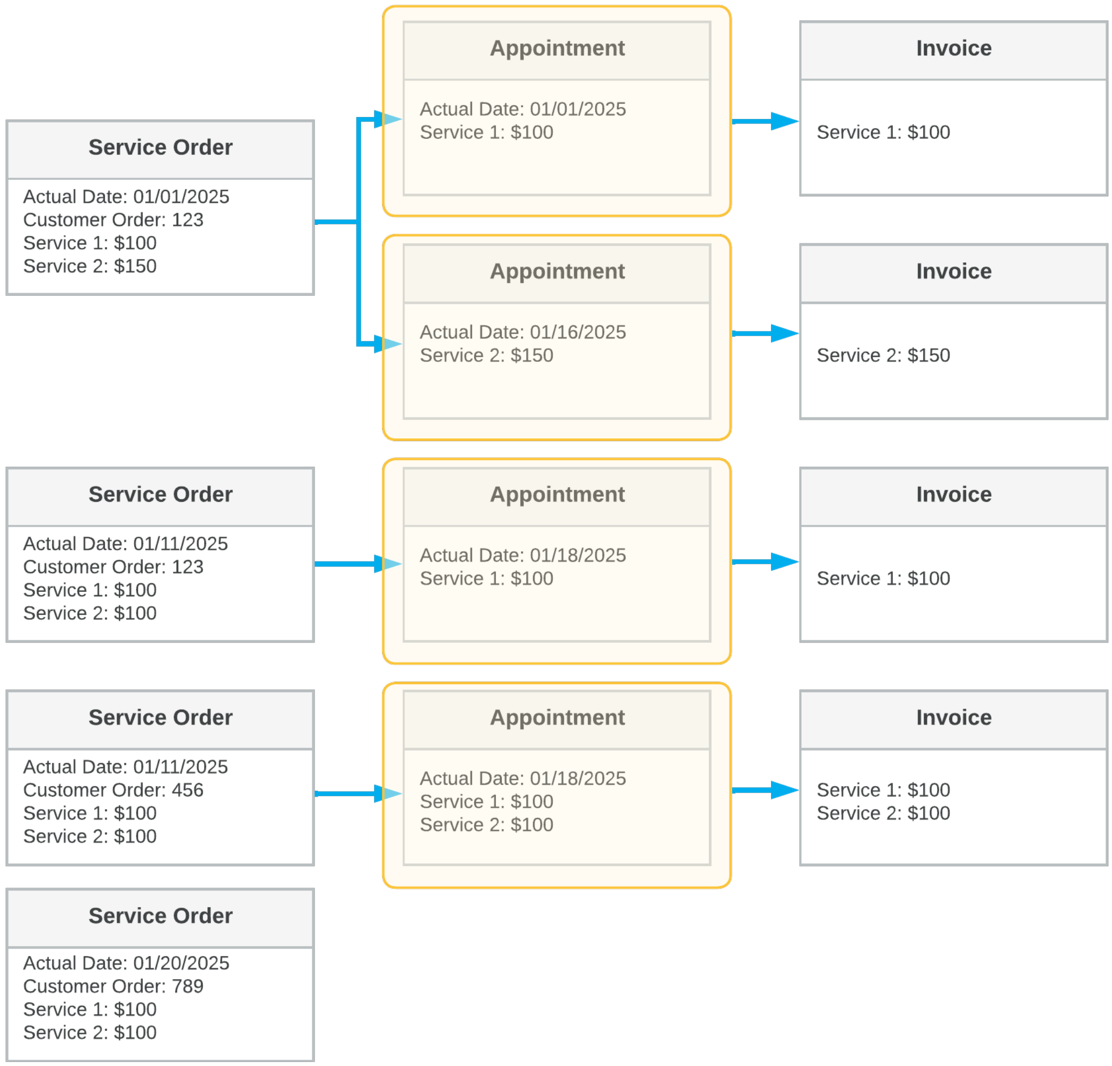


Figure: Generation for appointments and grouping by appointment

In the diagram, you can see the details and key settings of the following: the service orders (in the first column), the appointments (in the second column), and the generated billing documents (in the third column). Each yellow box shows the grouping of the documents included in the generated billing documents.

Generating Billing Documents from Appointments; Grouping by Service Order

Suppose that you have defined a billing cycle with the following settings on the *Billing Cycles* form and assigned it to a customer:

- **Run Billing For**: **Appointments**
- **Group Billing Documents By**: **Service Order**

The following diagram demonstrates how the customer is billed based on these settings. The system generates a single billing document for all appointments of each service order. The billing document contains the details on each service for each appointment.

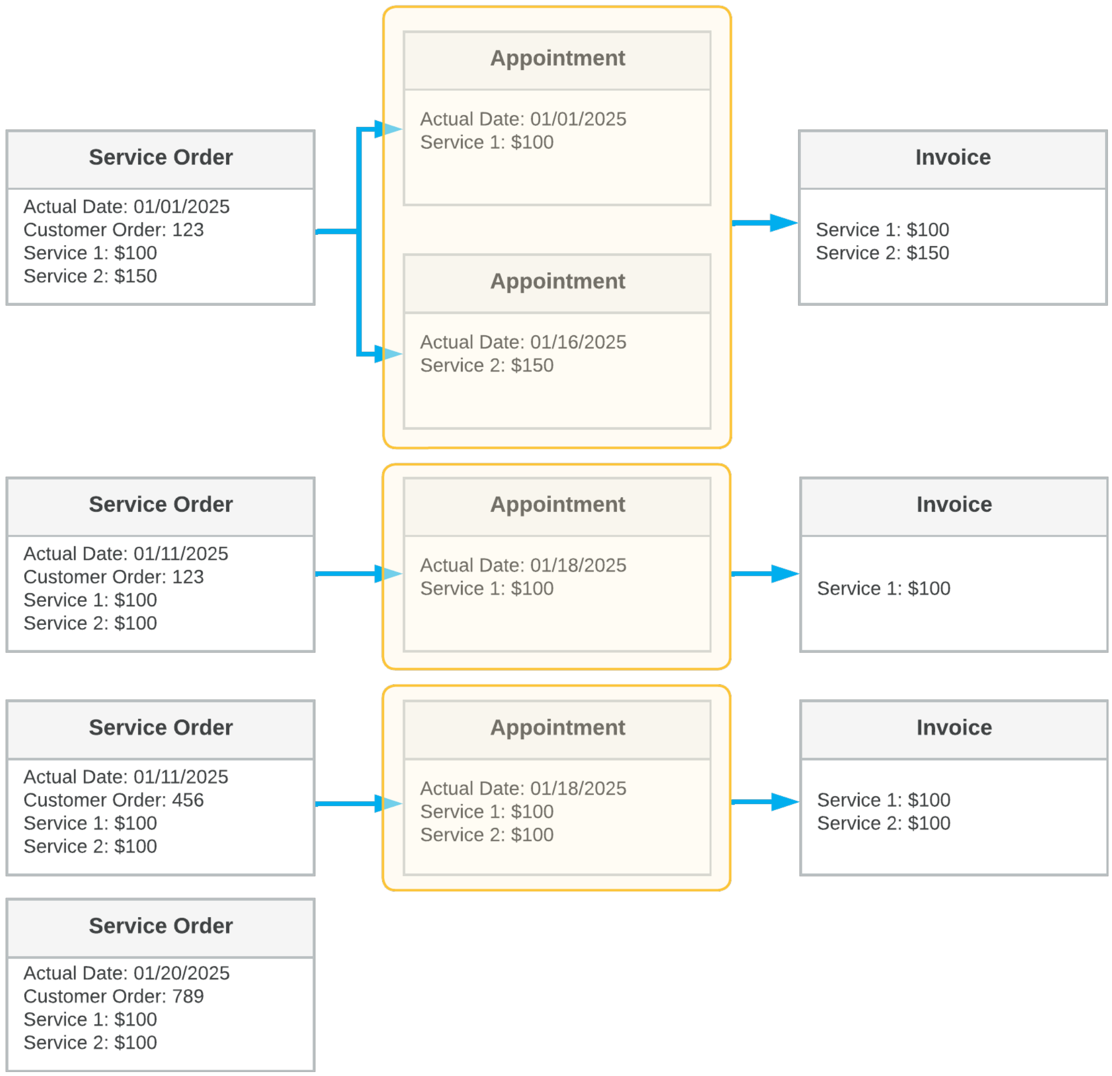


Figure: Generating billing documents for appointments; grouping by service order

In the diagram, you can see the details and key settings of the following: the service orders (in the first column), the appointments (in the second column), and the generated billing documents (in the third column). Each yellow box shows the grouping of the documents included in the generated billing documents.

Generating Billing Documents from Appointments; Grouping by Customer Order or External Reference

Suppose that you have defined a billing cycle with the following settings on the *Billing Cycles* (FS206000) form and assigned it to a customer:

- **Run Billing For**: **Appointments**
- **Group Billing Documents By**: **Customer Order**

The following diagram demonstrates how the customer is billed based on these settings. The system generates a single document for the appointments of each customer order. When billing documents are grouped by customer order or external reference, the system uses the number specified in the **Customer Order** or **External Reference** box, respectively, of the Summary area of the *Service Orders* (FS300100) form.

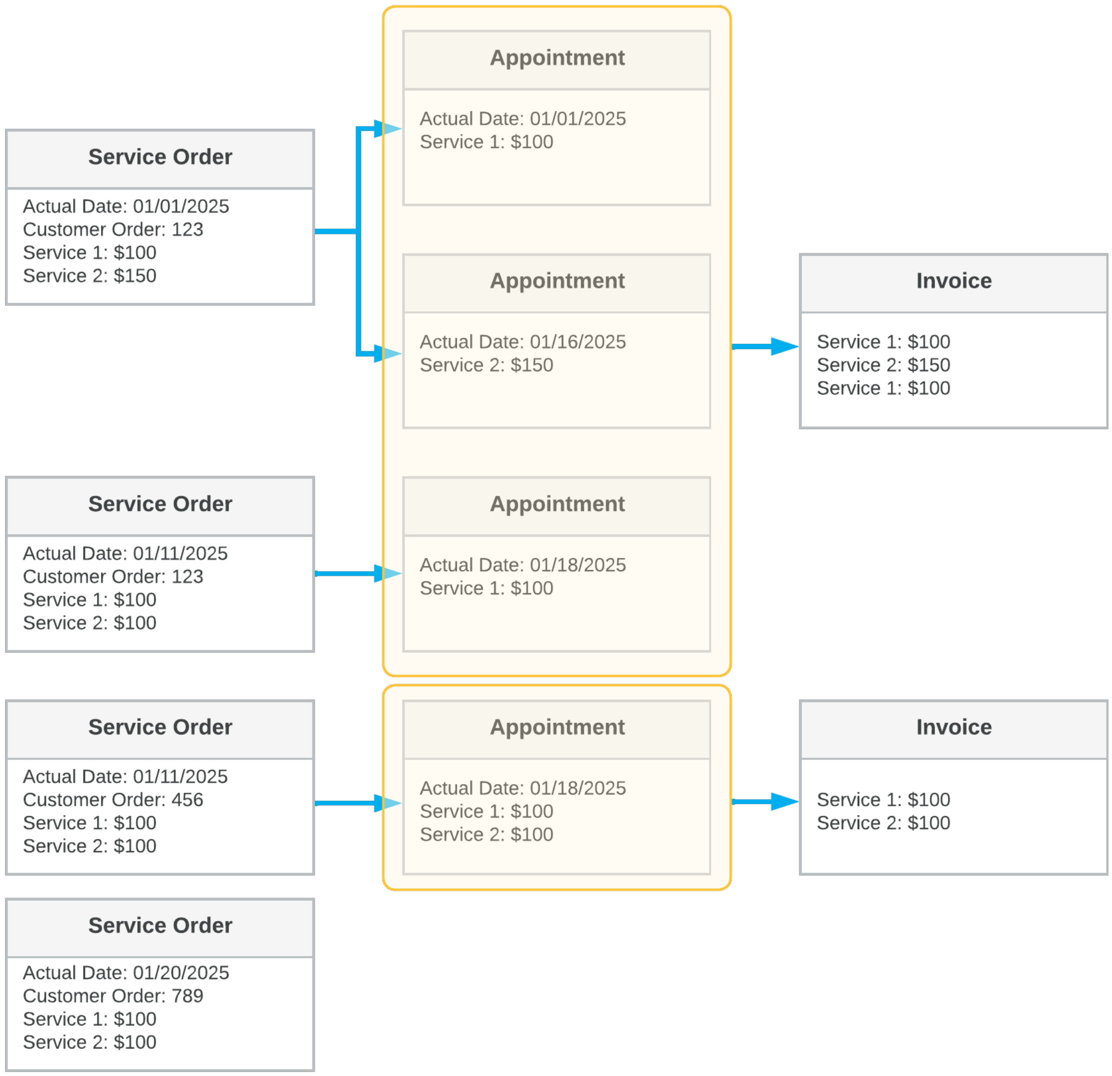


Figure: Generating billing documents for appointments; grouping by customer order or external reference

In the diagram, you can see the details and key settings of the following: the service orders (in the first column), the appointments (in the second column), and the generated billing documents (in the third column). Each yellow box shows the grouping of the documents included in the generated billing documents.

Generating Billing Documents from Appointments; Grouping by Time Frame

Suppose that you have defined a billing cycle with the following settings on the *Billing Cycles* form and assigned it to a customer:

- **Run Billing For**: **Appointments**
- **Group Billing Documents By**: **Time Frame** (on the 15th of every month)

The following diagram demonstrates how the customer is billed based on these settings. A single document is generated for the appointment that took place before January 15, and another document is generated for the three appointments that occurred before February 15.

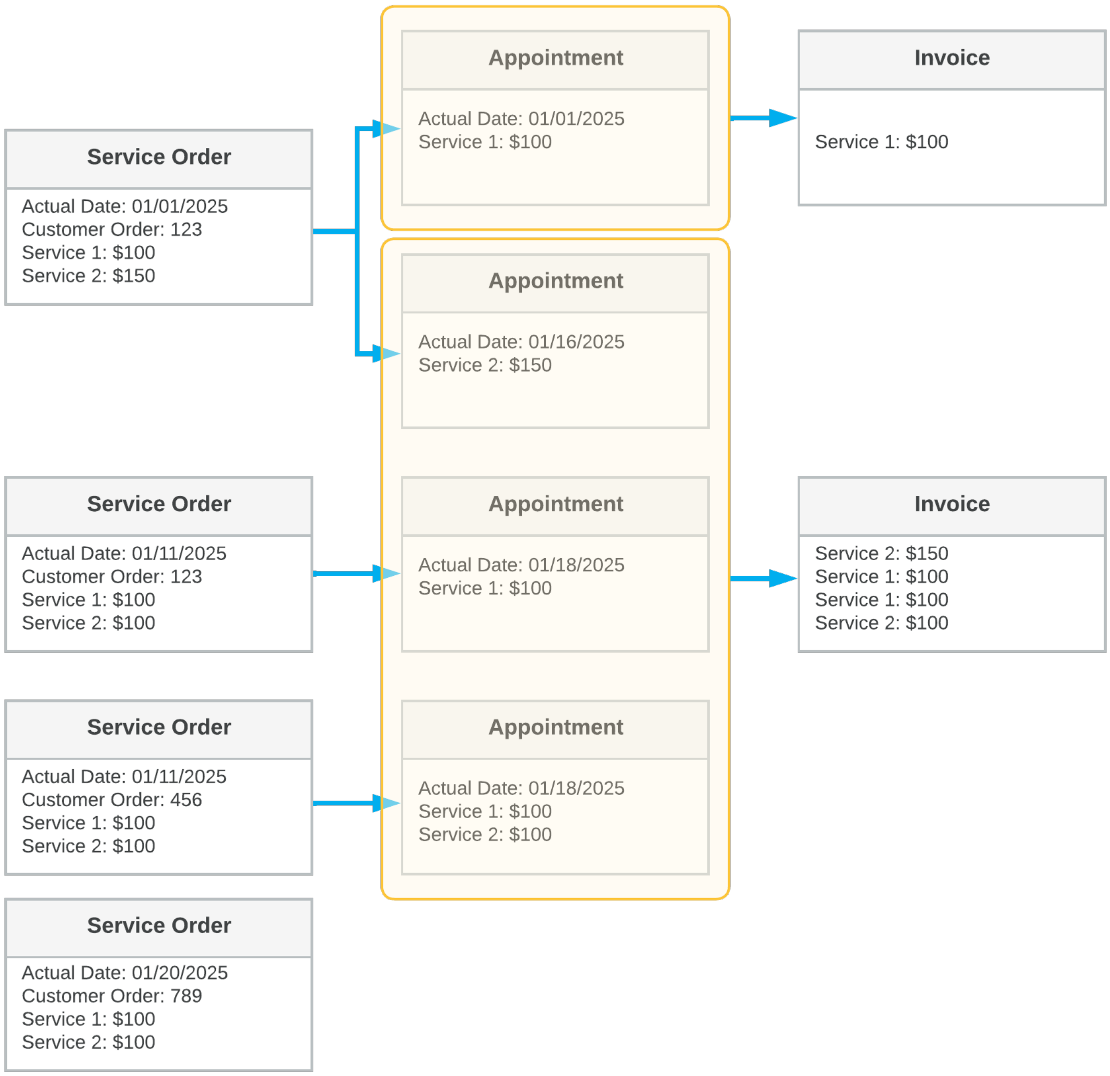


Figure: Generating billing documents for appointments; grouping by time frame (15th of each month)

In the diagram, you can see the details and key settings of the following: the service orders (in the first column), the appointments (in the second column), and the generated billing documents (in the third column). Each yellow box shows the grouping of the documents included in the generated billing documents.

Generating Billing Documents from Service Orders; Grouping by Service Order

Suppose that you have defined a billing cycle with the following settings and assigned it to a customer:

- **Run Billing For**: **Service Orders**
- **Group Billing Documents By**: **Service Order**

The following diagram demonstrates how the customer is billed based on these settings. The system generates a single billing document for each service order, whether or not appointments are created and processed for the service order.

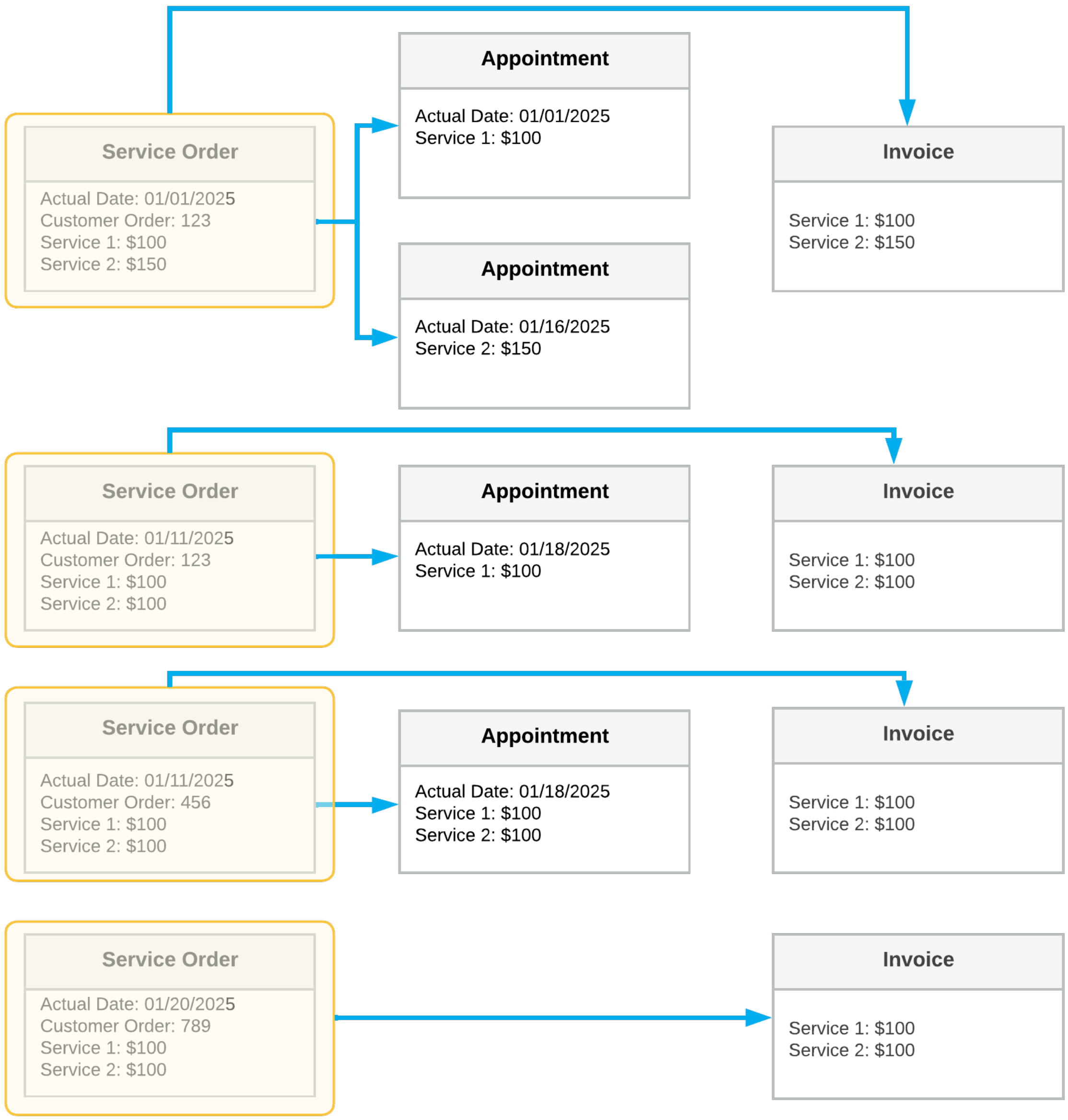


Figure: Generating billing documents for service orders; grouping by service order

In the diagram, you can see the details and key settings of the following: the service orders (in the first column), the appointments (in the second column), and the generated billing documents (in the third column). Each yellow box shows the grouping of the documents included in the generated billing documents.

Generating Billing Documents from Service Orders; Grouping by Customer Order or External Reference

Suppose that you have defined a billing cycle with the following settings and assigned it to a customer:

- **Run Billing For**: **Service Orders**
- **Group Billing Documents By**: **Customer Order**

The following diagram demonstrates how the customer is billed based on these settings. The system generates a single document for the service orders of each customer order, whether or not appointments have been created and processed for these customer orders.

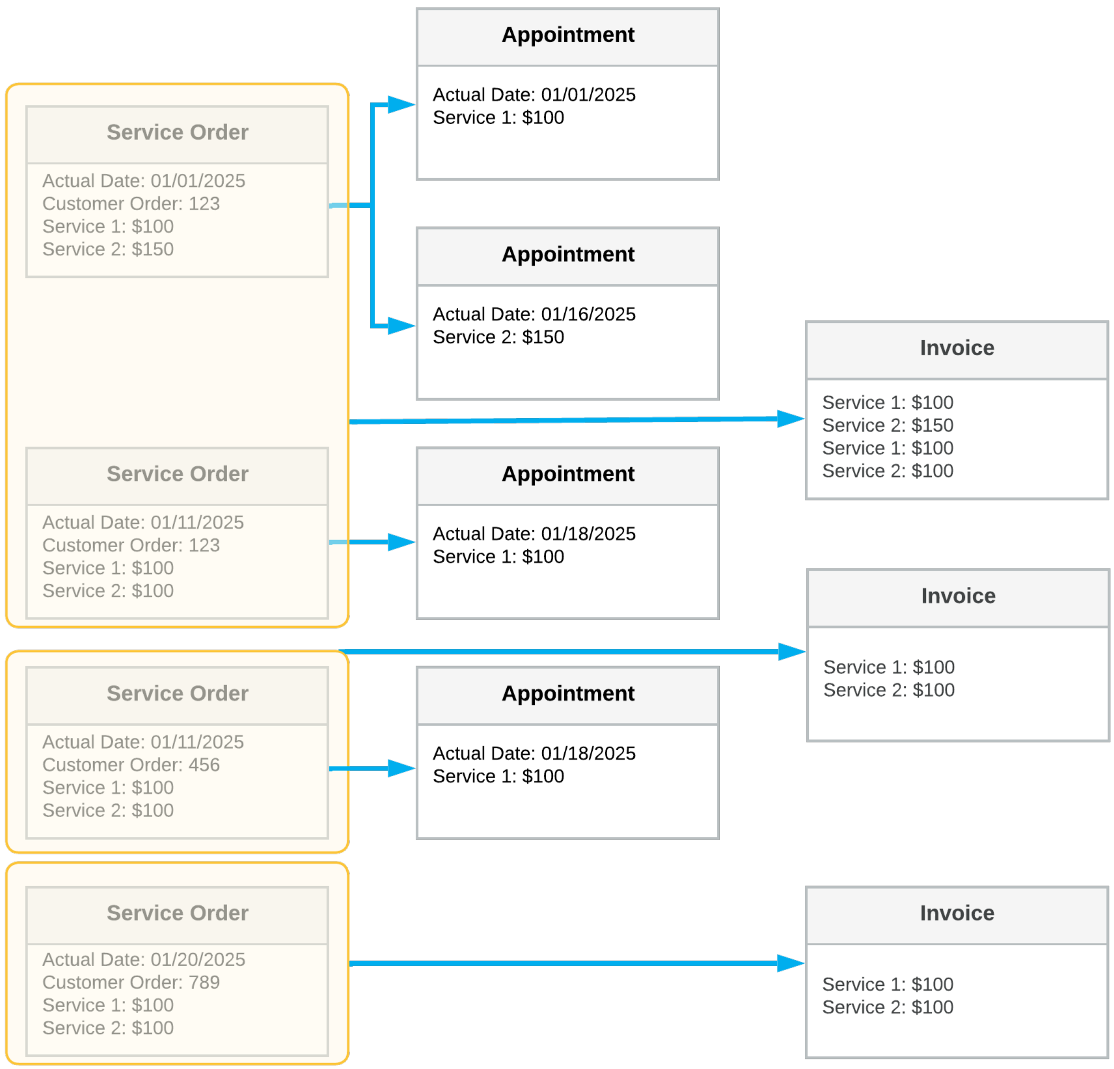


Figure: Generation for service orders; grouping by customer order or external reference

In the diagram, you can see the details and key settings of the following: the service orders (in the first column), the appointments (in the second column), and the generated billing documents (in the third column). Each yellow box shows the grouping of the documents included in the generated billing documents.

Generating Billing Documents from Service Orders; Grouping by Time Frame

Suppose you have defined a billing cycle with the following settings and assigned it to a customer:

- **Run Billing For**: **Service Orders**
- **Group Billing Documents By**: **Time Frame** (on the 15th of every month)

The following diagram demonstrates how the customer is billed based on these settings. The system generates a single document for any service orders that have been created before the 15th of each month, whether or not appointments have been created and processed for the service orders.

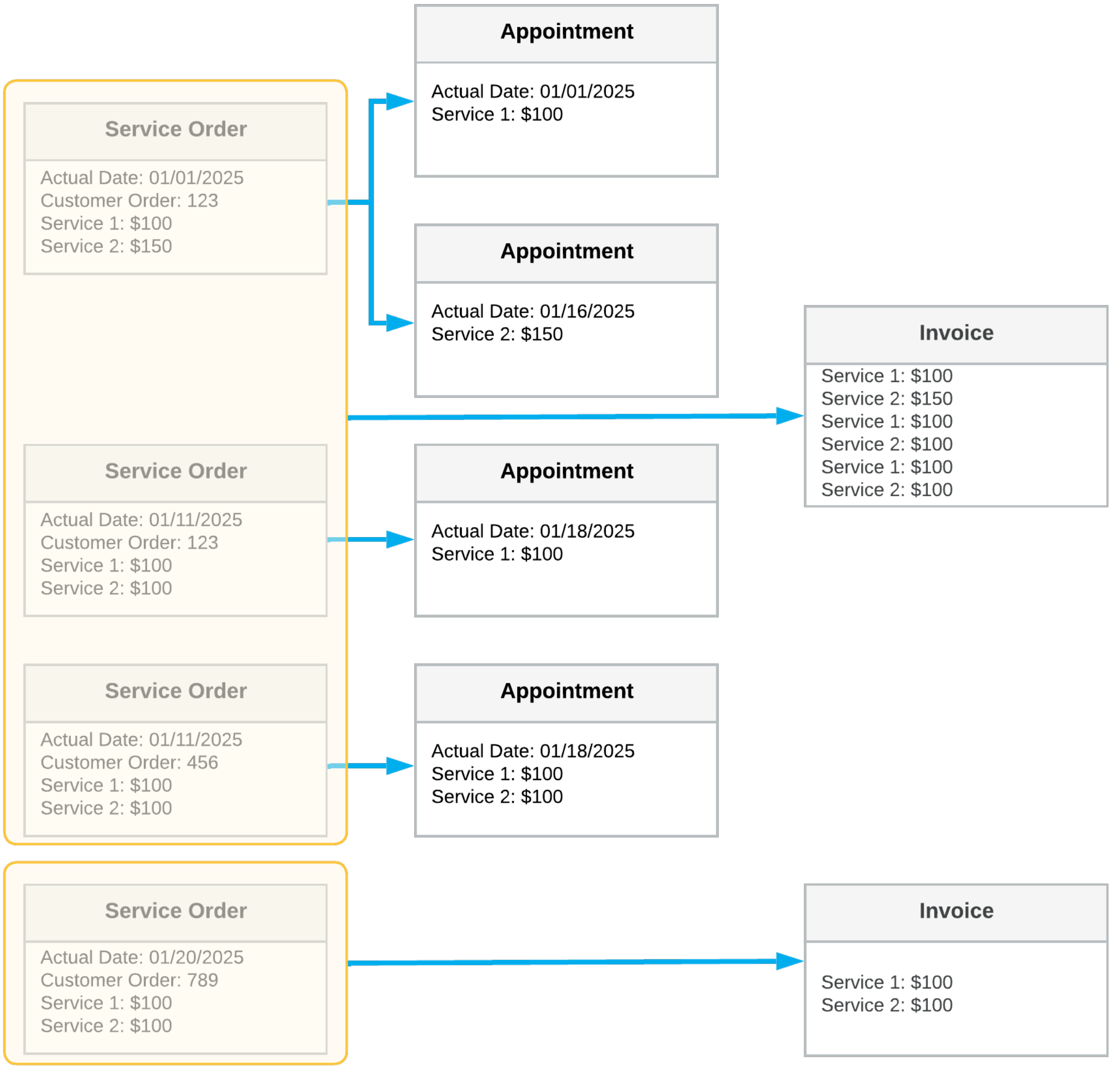


Figure: Generation for service orders; grouping by time frame

In the diagram, you can see the details and key settings of the following: the service orders (in the first column), the appointments (in the second column), and the generated billing documents (in the third column). Each yellow box shows the grouping of the documents included in the generated billing documents.

Generating Billing Documents for Multiple Billing Cycles

Suppose that you provide service orders of different service order types to a customer. You provide the service orders of the first type regularly, so you have decided to generate one billing document for all appointments of these service orders that took place in a certain period of time. You provide the service orders of the second type rarely to the customer, so you have decided that for each appointment of a service order of the second type, you will generate one document right after appointment completion.

You have defined billing cycles with the following settings and assigned them to the customer for the service order types:

- Settings of the billing cycle for Service Order Type 1:
  - **Run Billing For**: **Appointments**
  - **Group Billing Documents By**: **Time Frame** (on the 15th of every month)

- Settings of the billing cycle for Service Order Type 2:
  - **Run Billing For**: **Appointments**
  - **Group Billing Documents By**: **Appointment**

Based on the billing cycle settings, the system generates a separate billing document for each appointment for service orders of Service Order Type 1. For each service order of Service Order Type 2, a separate billing document is generated. The billing documents for service orders of Service Order Type 1 contain details on each service for each appointment. In the billing documents for service orders of Service Order Type 2, details on each service for each service order are included, whether or not appointments have been created and processed in the system.

The following diagram shows the details of the service orders of different service order types created for one customer (in the first column). You can also see the details of the appointments (in the second column) and the billing documents generated based on the settings of the billing cycles. Each yellow box shows the grouping of the documents included in the generated invoices.

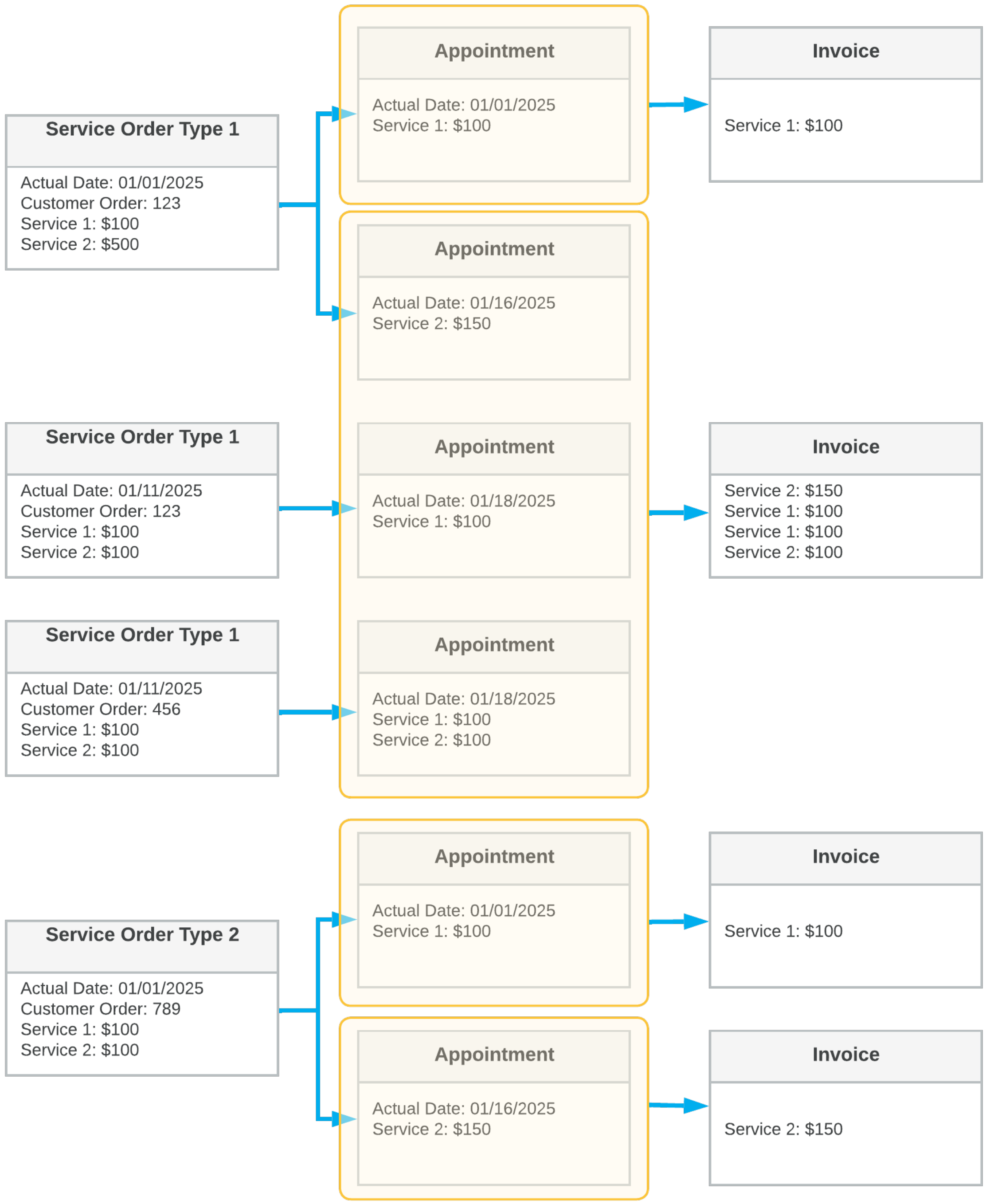


Figure: Multiple billing cycles

Billing Cycles: To Create a Billing Cycle and Assign It to a Customer

In this implementation activity, you will learn how to create a billing cycle in the system and assign this billing cycle to the customer.

Story

Suppose that SweetLife Service and Equipment Sales Center is starting to provide the service of cleaning the juicers. The *FRBUN - Cafe French Bun* customer is going to order juicer cleaning periodically. The SweetLife Service and Equipment Sales Center wants to bill the customer right after each appointment is performed.

Acting as an administrative user Kimberly Gibbs, you will create a billing cycle that will cause a billing document to be generated for each appointment; each billing document will contain the details of each service of the appointment. Then you will assign the billing cycle to the customer.

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.
- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.
- On the *Service Management Preferences* (FS100100) form, the minimum settings have been specified, including specifying the numbering sequences and work calendar, for the service management functionality to be used.
- On the *Customers* (AR303000) form, the *FRBUN - Cafe French Bun* customer has been created.
- On the *Service Order Types* (FS202300) form, the **Manage Multiple Billing Options per Customer** check box is cleared.

Process Overview

On the *Billing Cycles* (FS206000) form, you will create a new billing cycle, *APP2APP*. Then on the **Billing** tab of the *Customers* (AR303000) form, you will assign the billing cycle that you have created to the *FRBUN - Cafe French Bun* customer.

System Preparation

Launch the Acumatica ERP website, and sign in to a company with the *U100* dataset preloaded as a system administrator with the *gibbs* username and the *123* password.

Step 1: Creating a Billing Cycle

To create a billing cycle, do the following:

1. On the *Billing Cycles* (FS206000) form, add a new record.
2. In the **Billing Cycle ID** box, enter `APP2APP`. This will serve as the identifier of this billing cycle in the system.
3. In the **Description** box, enter `Billing by Appointments, Grouping by Appointments`.
4. Under **Run Billing For**, leave **Appointments** selected.
5. Under **Group Billing Documents By**, select **Appointments**.
6. Leave the **Bill Only Completed or Closed Service Orders** check box cleared.
7. On the form toolbar, click **Save**.

You have created the billing cycle. Now it can be assigned to a customer to define how this customer is going to be billed for the services.

Step 2: Assigning the Billing Cycle to a Customer

To assign the new billing cycle to a customer, do the following:

1. On the *Customers* (AR303000) form, open the *FRBUN - Cafe French Bun* customer.
2. On the **Billing** tab, in the **Service Management** section, select *APP2APP* in the **Billing Cycle** box.
3. On the form toolbar, click **Save**.

Lesson 1.12: Creating Resource Equipment

In this lesson, you will learn how to create equipment types, assign an equipment type to a service, and how to create an equipment records in the system.

Resource Equipment: General Information

In Acumatica ERP, you can enter and keep information about equipment that staff members use to perform services—resource equipment. Resource equipment is a physical resource of your company. You can enter the equipment's parameters, such as its serial number, registration information, manufacturing settings, purchase information, owner, and location.

Equipment types are categories that are used for grouping equipment and associating a group of equipment with a service. You create equipment types, specify the appropriate type for each resource equipment, and assign equipment types to services. This ensures that the right equipment will later be selected to perform these services.

In this chapter, you will learn how to create equipment types, and assign them to equipment and services in the system, how to add resource equipment to the system, and how to assign it to appointments.

Learning Objectives

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

- Create equipment types
- Assign the equipment types to services
- Create equipment records
- View the equipment history

Applicable Scenarios

You create resource equipment records in the system if your company wants to keep information about equipment that staff members use to perform services.

Creating Equipment Types

Equipment types structure the data in the system and make it easier to select the right equipment for performing services. Equipment of one equipment type is used to perform similar types of work. For instance, if your company provides installation services, you might create the first equipment type for all drills of the company and the second equipment type for screwdrivers. You assign an equipment type to every piece of resource equipment in the system, so that when you create a service document, the system automatically sorts the list of resource equipment by the types assigned to services, and you can easily select the necessary equipment from the list.

Creation of Resource Equipment

You add each specific piece of resource equipment (for example, a specific screwdriver or drill) that you are going to use to perform services on the *Equipment* (FS205000) form. You have to specify to the system that this item is resource equipment by selecting the **Resource Equipment** check box in the Summary area of the form. Then you specify the type of equipment and indicate that you are an owner by selecting the **Company** option button on the form (under **Owner** in the Summary area).

All the equipment recorded in the system with the *Active* status can be assigned to an appointment.

Specification of Attributes

To give users the ability to specify additional information for a piece of equipment so that your company can track this information, attributes have to be defined for the related equipment type on the *Equipment Types* (FS200800) form.

When you create a piece of equipment on the *Equipment* (FS205000) form and select its equipment type, the system populates the **Attributes** tab with the attributes (and any default values) defined for the equipment type on the *Equipment Types* form. You can specify or modify equipment attribute values in the **Values** column. If the **Required** check box is selected for an attribute, the value has to be specified before you save the new equipment you are creating.

Also on the **Attributes** tab of the *Equipment* form are the **Image** set of elements, which you can use to attach an image of the piece of equipment.

Assignment of Equipment Types to Services

You can specify which equipment types are needed for each service. Services are defined in the system as non-stock items of the *Service* type on the *Non-Stock Items* (IN202000) form. You assign the appropriate equipment types to the service on the **Resource Equipment Types** tab of this form.

Assignment of Resource Equipment to Appointments

You can assign the necessary equipment to the appointments of a particular service order on the *Service Orders* (FS300100) form or to a particular appointment on the *Appointments* (FS300200) form. You assign the resource equipment on the **Default Resource Equipment** tab of the *Service Orders* form and on the **Resource Equipment** tab of the *Appointments* form. On these tabs, for each piece of equipment that you want to add, you add a row and select the necessary equipment identifier from the list in the **Equipment ID** column.

Viewing of Equipment Details

On the *Equipment Summary* (FS400200) form, you can view the list of all equipment added to the system and its key settings, such as type, description, serial number, owner information, model, and installation date. You can filter the list by equipment type, customer (for equipment that customers own), customer location, and model (stock item ID).

To view the details of particular equipment, you can click an equipment number in the **Equipment Nbr.** column, which causes the system to bring up its details on the *Equipment* (FS205000) form.

Resource Equipment: To Create an Equipment Type and Assign It to a Service

In this activity, you will learn how to create in Acumatica ERP the types of equipment that your company has and that could be necessary for employees to perform repair services. You will also assign an equipment type to a service for informational purposes, to indicate the type of equipment that is generally needed to perform the particular service.

Story

Suppose the SweetLife Service and Equipment Sales Center wants to start to keep track of its resource equipment —that is, equipment that staff members use to perform services. Acting as an administrative user of the company, you will create the needed equipment type, which will then be assigned to a service for which staff members providers need special equipment.

Configuration Overview

In the *U100* dataset, the following tasks have been performed for the purposes of this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.
- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.
- On the *Service Management Preferences* (FS100100) form, the minimum settings have been specified, including specifying the numbering sequences and work calendar, for the service management functionality to be used.
- On the *Numbering Sequences* (CS201010) form, the *SMEQUIPMN* sequence has been created. It has then been specified in the **Equipment Numbering Sequence** box (**Numbering Settings** section) of the *Service Management Preferences* (FS100100) form.
- On the *Non-Stock Items* (IN202000) form, the *REPAIR* non-stock item of the *Service* type has been created.

Process Overview

On the *Equipment Types* (FS200800) form, you will create a new equipment type. Then on the *Non-Stock Items* (IN202000) form, which you will go to from the *Services* (FS400800) form, you will specify the new equipment type for the service.

Step 1: Creating an Equipment Type

To create an equipment type, do the following:

1. Open the *Equipment Types* (FS200800) form.
2. In the Summary area of the form, specify the following settings:
   - **Equipment Type**: `DRILL`
   - **Description**: `Drills`
   - **Require Branch Location**: Cleared
3. On the form toolbar, click **Save**.

   The new equipment type can now be assigned to services, and a particular piece of equipment with this type can be created. This gives you the ability to track equipment that is used for performing services.

Step 2: Assigning the Equipment Type to a Service

To assign the equipment type to a service, do the following:

1. Open the *Services* (FS400800) form, and click *REPAIR* in the **Inventory ID** column. The *Non-Stock Items* (IN202000) form opens with this service selected.

2. On the **Resource Equipment Types** tab (see Item 1 in the following screenshot), click **Add Row**, and select the *DRILL* equipment type (Item 2).

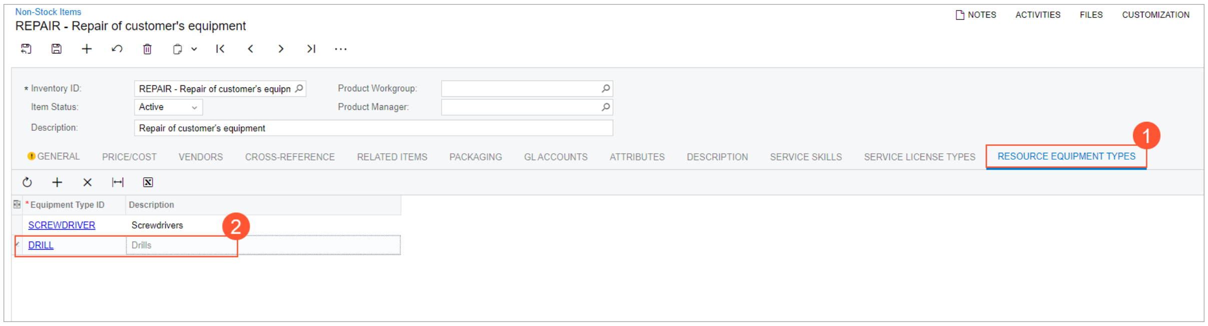


Figure: The equipment type assigned to the service

The *DRILL* and *SCREWDRIVER* equipment types have been defined for the *REPAIR* service.

3. Save your changes, and close the window.

Resource Equipment: To Create Resource Equipment

In this activity, you will learn how to create a resource equipment record in the system.

Story

Suppose that you are an administrative user of the SweetLife Service and Equipment Sales Center, and you need to add resource equipment used in appointments to Acumatica ERP.

Configuration Overview

In the *U100* dataset, the following tasks have been performed for the purposes of this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.
- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.
- On the *Service Management Preferences* (FS100100) form, the minimum settings have been specified, including specifying the numbering sequences and work calendar, for the service management functionality to be used.
- On the *Numbering Sequences* (CS201010) form, the *SMEQUIPMN* sequence has been created. It has then been specified in the **Equipment Numbering Sequence** box (**Numbering Settings** section) of the *Service Management Preferences* (FS100100) form.
- On the *Non-Stock Items* (IN202000) form, the *REPAIR* non-stock item of the *Service* type has been created.

Process Overview

On the *Equipment* (FS205000) form, you will create two equipment records. You will then make sure that the records are displayed on the *Equipment Summary* (FS400200) form

System Preparation

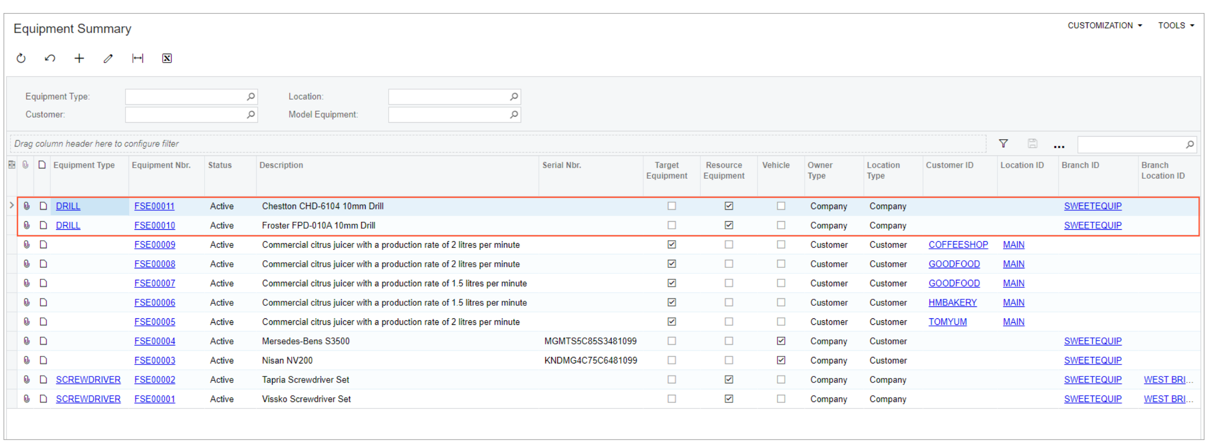
As a prerequisite activity, be sure that you have created the equipment type, as described in *Resource Equipment: To Create an Equipment Type and Assign It to a Service*.

Step: Creating a Equipment Record

To create an equipment record, do the following:

1. On the *Equipment* (FS205000) form, add a new record.
2. In the Summary area of the form, specify the following settings:
   - **Equipment Type**: *DRILL*
   - **Status**: *Active*
   - **Description**: `Froster FPD-010A 10mm Drill`
   - **Target Equipment**: Cleared
   - **Resource Equipment**: Selected
3. Under **Owner**, select **Company**.
4. Under **Location**, select **Company**, and select *SWEETEQUIP* in the **Branch** box.
5. On the form toolbar, click **Save**.
6. On the form toolbar, click **Add New Record**, and specify the following settings:
   - **Equipment Type**: *DRILL*
   - **Status**: *Active*
   - **Description**: `Chestton CHD-6104 10mm Drill`
   - **Target Equipment**: Cleared
   - **Resource Equipment**: Selected
   - **Owner**: **Company**
   - **Location**: **Company**
   - **Branch**: *SWEETEQUIP*
7. On the form toolbar, click **Save**.
8. Open the *Equipment Summary* (FS400200) form, and make sure that the pieces of equipment you have created are displayed in the table (as shown in the following screenshot).

Figure: The pieces of equipment you have created



Lesson 1.13: Configuring Calendar Boards

This lesson provides information about the configuration settings that can be applied to the calendar board forms in the classic UI of Acumatica ERP. No activities are required for this lesson.

Calendar Board Configuration Options

In Acumatica ERP, the calendar board forms—that is, *Calendar Board* (FS300300), *Staff Calendar Board* (FS300400), and *Room Calendar Board* (FS300700)—have similar layouts. These calendar boards consist of the pane with the **Service Orders** and **Unassigned Appointments** tabs, which is on the left side of the form, and the **Dashboard** pane, which is on the right side and provides a visual representation of the appointments.

This topic describes the configuration options for the following parts or entities of the calendar board forms:

- The horizontal axis and the vertical axis of the calendar dashboard (see Item 1 in the following screenshot, which shows the *Calendar Board* form)
- The number of staff members that can be displayed simultaneously on the calendar board (Item 2)
- The time range on the time axis (Item 3)
- The pane with the **Service Orders** and **Unassigned Appointments** tabs (Item 4)
- The appointment boxes representing scheduled appointments (Item 5)
- The view mode button (Item 6)

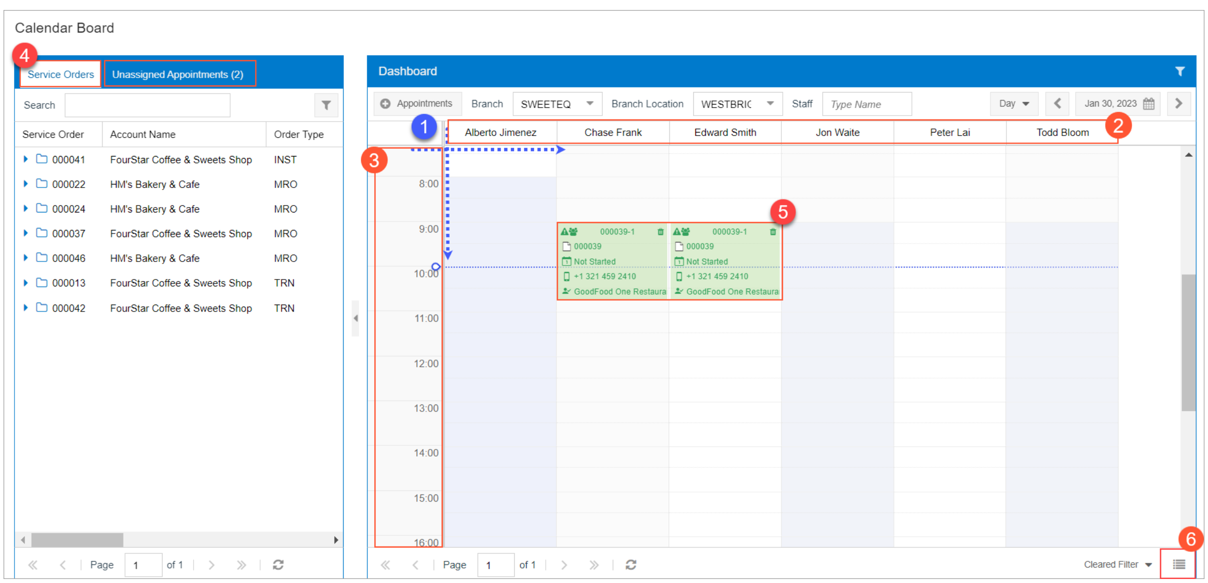


Figure: The calendar board layout

Users can change configuration options while they are working on a calendar board form. Also, default configuration options can be specified at the system level.

Modifying the Calendar Board View Mode

The view mode (that is, the orientation of the information) can be changed on the *Calendar Board* (FS300300) and *Room Calendar Board* (FS300700) forms.

The default view mode can be modified, so that the calendar board will initially be displayed in this mode any time you open it. On the *Service Management Preferences* (FS100100) form, on the **Calendars & Maps** tab (**Default Calendar Settings** section), an administrative user selects *Vertical* or *Horizontal* in the **View Mode** box. With the *Vertical* mode, staff members (on the *Calendar Board* form) or rooms (on the *Room Calendar Board* form) are shown on the horizontal axis of the board, and times are shown on the vertical axis. In *Horizontal* mode, the axes are reversed.

You can modify the calendar board orientation view on-the-fly by clicking the orientation mode button (Item 6 in the screenshot above) so that the default orientation view will be changed while you are working with the calendar board.

Modifying the Number of Staff Members Shown

The maximum number of staff members that may be shown on a calendar's vertical or horizontal axis can be modified. To do this, on the *Service Management Preferences* form, on the **Calendars & Maps** tab (**Calendar Settings** section), in the **Number of Staff Members** box, an administrative user specifies the maximum number of staff members to be displayed on the calendar.

By default, *10* is specified in the box. If the box is cleared and saved, all staff members available in the system will be shown on the calendar board.

If a large number of staff members are displayed, this can lead to system performance issues.

Changing the Default Time Range

You can modify the time range on the time axis while you are working on any calendar board by selecting *Day*, *Week*, or *Month* in the drop-down menu on the dashboard toolbar (Item 1 in the following screenshot). This affects only your view of the calendar board during this user session.

Also, an administrative user can change the default time range setting, which is applied each time you opens a calendar board. To change the default time range setting, on the **Calendars & Maps** tab of the *Service Management Preferences* (FS100100) form, in the **Time Range** box of the **Default Calendar Settings** section, an administrative user selects *Day*, *Week*, or *Month*. The specified time range is initially used for all users when they open the calendar board form. The following screenshot shows the view if the *Week* option is specified (Item 2).

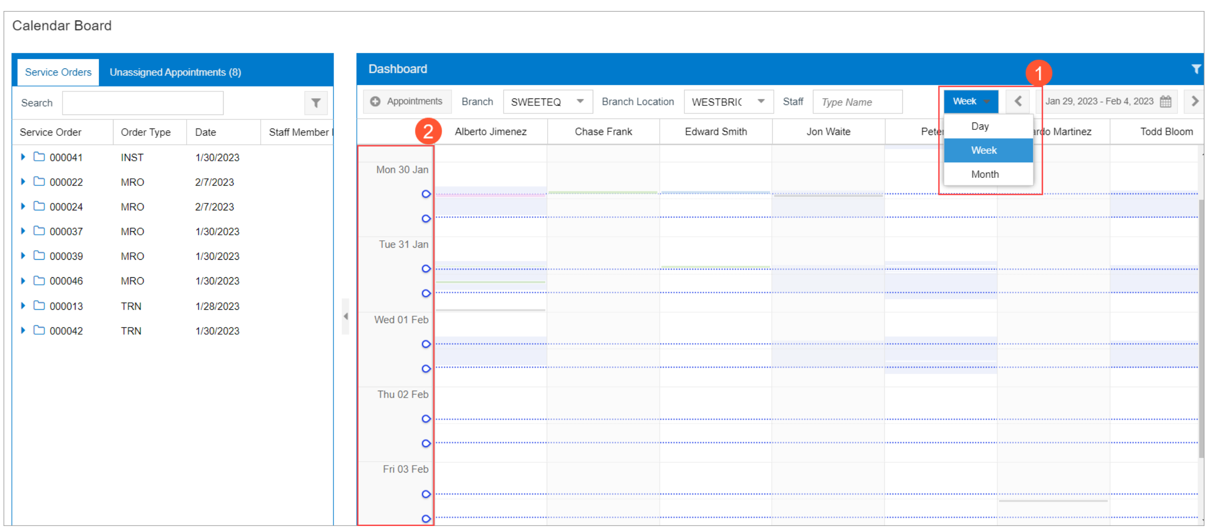


Figure: The Week time range specified for the calendar dashboard

Adjusting the Precision of Appointments' Duration

The precision, which is applied to the duration of each appointment being created on the calendar boards, can be adjusted. The precision defines the minimum interval in minutes in which the duration of appointments can be specified. For example, if the precision is set to 30 minutes, then the minimum duration of a created appointment can be 30 minutes, and can be increased by only 30-minute intervals (for example, to 60 minutes or 90 minutes). An adinistrative user specifies this setting on the *Service Management Preferences* (FS100100) form. On the **Calendars & Maps** tab of this form, one of the following options can be selected in the **Appointment Resize Precision** box:

- *10 minutes*
- *15 minutes*
- *30 minutes*
- *60 minutes*

The selected precision is applicable to all three calendar boards for all users. (That is, it cannot be overridden by an individual user viewing a calendar board.)

The following screenshot shows the creation of an appointment with a precision of 60 minutes. A user created this appointment by clicking the staff member column area and dragging the shaded area downward (from 12:00 to 13:00).

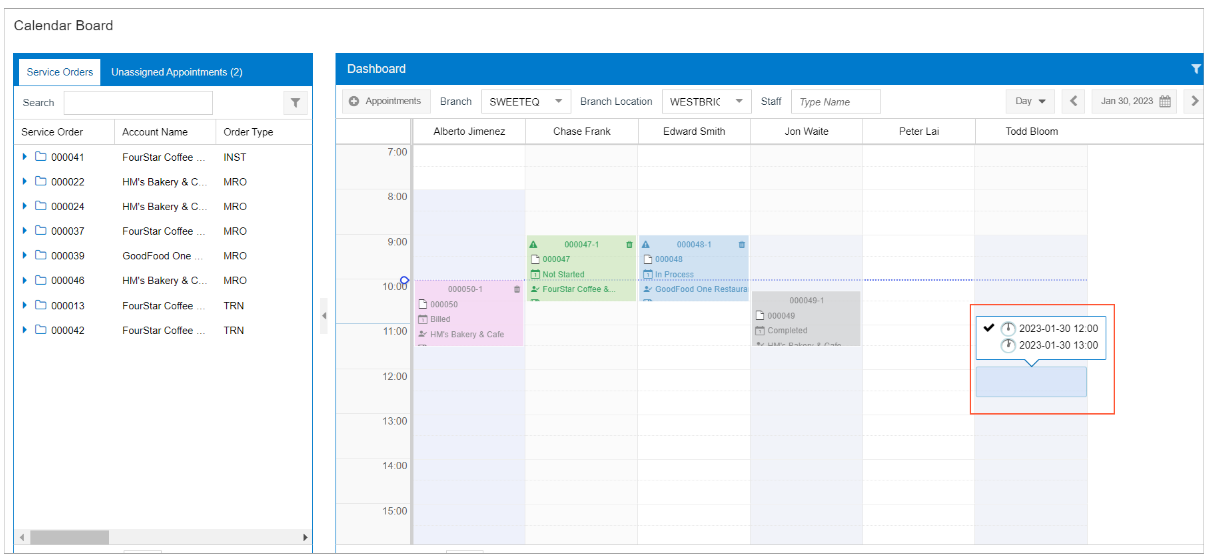


Figure: An appointment being created with a 60-minute precision

Changing the Color and Content of the Appointment Boxes

The color of the appointment boxes that are displayed on the calendar and the text inside these boxes can be customized. An administrative user can specify any color for the background of appointment boxes and for the text in the box with a particular appointment status. They can also specify which information is displayed in the appointment boxes.

The colors of appointment boxes and of the text inside the boxes are specified on the **Status Color** tab of the *Calendar Preferences* (FS100500) form. On this form, in the table, all possible appointment statuses are listed along with their colors and the **Visible** check box, which you can select or clear to make appointment boxes of the status visible or hidden, respectively..

To select a color for appointment boxes with a particular appointment status, an administrative user first selects the row that represents the needed status. Then in the **Selected Status** section of the tab, a user selects the color for the background and for the text in an box. The administrative user selects a color in the palette dialog window, which is opened when they click within the **Background Color** box or the **Text Color** box.

The following screenshot shows appointment boxes that have different colors based on the status of the appointment.

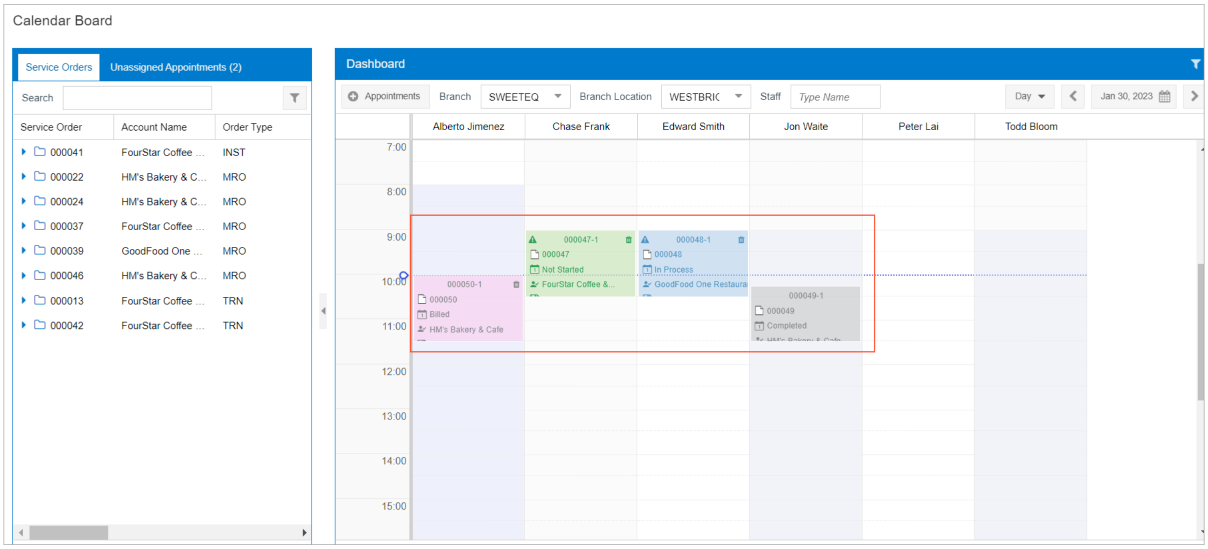


Figure: Different colors in appointment boxes based on the appointment's status

On the **Appointment Box** tab of the *Calendar Preferences* form, an administrative user also can specify what field values will be displayed in appointment boxes.

> The appointment number is always shown at the top of the appointment box. It does not have a corresponding row in the table on the **Appointment Box** tab

The table on this tab contains a list of the fields whose values can be displayed in each appointment box. The field values might include the customer, the appointment's status, and the reference number of the related service order. You can add or delete rows, and you can move the rows up and down to change the order in which the field values are displayed in an appointment box. In each row, you can specify the object and field whose value will be shown, as well as the icon to be shown for it. For each row, you can also specify whether the field value is visible in an appointment box by selecting or clearing the **Visible** check box.

Managing Columns on the Service Orders and Unassigned Appointments Tabs

The number and order of columns displayed on the **Service Orders** tab and **Unassigned Appointments** tab of the calendar board forms can be modified.

On the **Service Order** tab (see Item 1 in the following screenshot) of the *Calendar Preferences* (FS100500) form, each row (Item 3) of the table represents a column that can be shown on the **Service Orders** tab of calendar board forms. An administrative user can specify the columns that can be displayed and manage the visibility of each column by selecting or clearing the **Visible** check box (Item 4) in the row. They can also modify the order in which the columns will be displayed by moving rows up or down in the table.

The columns of the **Unassigned Appointments** tab of calendar forms can be managed in the same ways by using the **Unassigned Appointment** tab (Item 2) of the *Calendar Preferences* form.

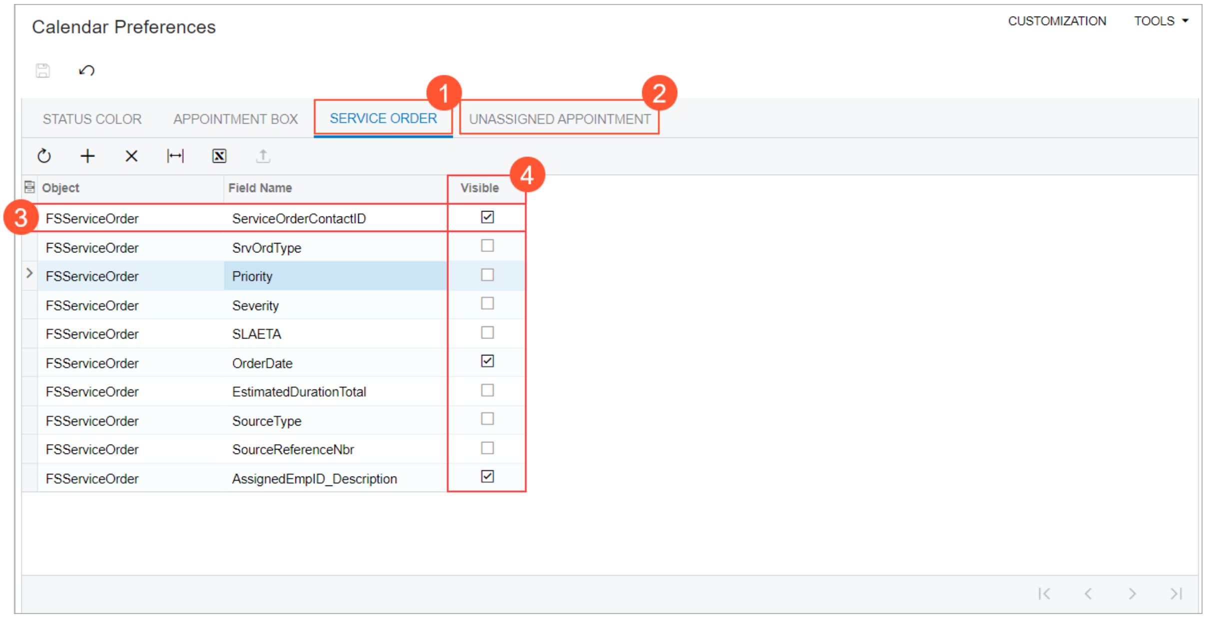


Figure: The Service Order and Unassigned Appointment tabs of the Calendar Preferences form

> ⚠ Displaying a large number of columns can lead to system performance issues.

Part 2: Processing Service Documents

This part of the course contains lessons related to processing service orders and appointments in the system.

Lesson 2.1: Processing Service Orders with a Single Appointment

In this lesson, you will learn how to create a service order in Acumatica ERP, add a service requested by a customer to the service order, and create and process an appointment to provide the service.

Service Orders with a Single Appointment: General Information

A service order is a document created on the *Service Orders* (FS300100) form that contains information about the services planned for a customer and any associated appointments. In Acumatica ERP, you can create service orders, schedule appointments for them, and process billing for each service order.

Learning Objectives

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

- Create a service order based on a customer's service request
- Schedule an appointment and assign a staff member to perform the service
- Start and complete the appointment
- Close the appointment and process billing for the service order

Applicable Scenarios

You create and process a service order with an appointment if your company sells services and has customers that request services from time to time.

Workflow of Service Order Processing

If the customer's billing cycle specifies that billing documents should be generated for service orders instead of appointments, processing a service order with a single appointment involves the following steps: (which are shown in the diagram of the next section):

1. Creating a service order: The service manager receives the order and enters key details on the *Service Orders* (FS300100) form, including customer information, scheduled start and end dates and times, services to be performed, and any other relevant information..
2. Creating an appointment: The service manager creates an appointment by using the following commands on the More menu of the *Service Orders* form.
    - **Create Appointment**: Opens the *Appointments* (FS300200) form, where the service manager reviews and verifies the information copied from the service order before saving the appointment.
    - **Schedule on Calendar**: Opens the *Calendar Board* (FS300300) form, where the service manager assigns an appointment according to staff members' skills and availability.
    - **Schedule on Staff Calendar**: Opens the *Staff Calendar Board* form, where the service manager assigns an appointment based on the availability of the selected staff member.
3. Starting the appointment: A staff member starts the appointment by clicking **Start** on the *Appointments* form.

4. Performing services and updating the appointment: A staff member performs the required services and records the time spent.
5. Completing the appointment: A staff member completes the appointment by clicking **Complete** on the *Appointments* form.
6. Closing an appointment (Optoinal): An accountant reviews the information entered for the completed appointment, including quantities and prices, and closes the verified appointment on the *Appointments* form.
7. Billing an appointment: If the customer's billing cycle is set up to run billing from appointments, the accountant runs the appointment billing process on the *Appointments* form. The system generates a billing document of the type specified in the service order type settings.

   Only closed appointments can be billed, if the **Bill Only Closed Appointments** check box is selected for the appointment's service order type.

8. Billing a service order: If the customer's billing cycle is set up to run billing from service orders, the accountant runs the billing process in the service order on the *Service Orders* form. The system generates a billing document of the type specified in the service order type settings. For details, see *Billing Cycles: General Information*.
9. Completing the service order (optional): After all appointments related to the service order have been completed, the service manager completes the service order in the system by clicking **Complete** on the form toolbar of the *Service Orders* form.

   If the **Complete Service Order When Its Appointments Are Completed** check box is selected on the **General** tab of the *Service Order Types* (FS202300) form, the service order is automatically completed and is assigned the *Completed* status when all related appointments have been completed.

   If any additional service has to be performed or another appointment has to take place, the service manager can reopen the service order by clicking **Reopen** on the More menu of the *Service Orders* form. The service order can again be completed after all work is done.
10. Closing the service order (optional): After all accounting information has been verified, the accountant closes the service order. Billing documents can be generated only after the service order has been closed.

    If the **Close Service Orders When Its Appointments Are Closed** check box is selected on the *Service Order Types* form, the service order is automatically closed and is assigned the *Closed* status when all related appointments have been closed.

    If any additional changes should be made in the service order, the service manager can unclose the service order by clicking **Unclose** on the More menu of the *Service Orders* form. This causes the service order to be assigned the *Completed* status, and information in the service order can be edited.

Billing Documents

In the context of Acumatica ERP's service management functionality, a *billing document* refers to a document or transaction that is generated when the billing process is executed for a service document. Depending on the settings of the service order type, it can be a sales order, sales invoice, AR invoice or project transaction.

When a service order is billed on the *Service Orders* or the *Run Service Order Billing* (FS500600) form, the system creates a billing document of the type specified in the **Generated Billing Documents** box on the **General** tab of the *Service Order Types* (FS202300) form for the service order's order type:

- *AR Documents*: The system generates an AR invoice, which can be viewed on the *Invoices and Memos* (AR301000) form, for the service order or appointment of this service order type. If the service order or appointment has a negative balance, the system generates a credit memo. If the **Create a Bill Document in AP for Negative Balances** check box (which is available if you select this option button) is selected, for a service order or appointment with a negative balance, the system instead creates an accounts payable bill on the *Bills and Adjustments* (AP301000) form.
- *Sales Orders*: The system generates a sales order, which can be viewed on the *Sales Orders* (SO301000) form, for the service order or appointment of this service order type. If needed, you can create any shipments for the sales order and add freight costs; you then generate the sales invoice for the sales order. If quick processing is enabled for a service order type, the system automatically generates the invoice along with the sales order.

  You can select this option only if the *Inventory and Order Management* feature is enabled on the *Enable/Disable Features* (CS100000) form.
- *SO Invoices*: The system generates a sales invoice, which can be viewed on the *Invoices* (SO303000) form, for the service order or appointment of this service order type.

  You can select this option only if the *Advanced SO Invoices* feature is enabled on the *Enable/Disable Features* form.
- *Project Transactions*: The system generates a project transaction, which can be viewed on the *Project Transactions* (PM304000) form, for the service order or appointment of this service order type. The service order and appointment must be linked to a project, which must be specified in the **Project** box in the Summary area of the corresponding service form. If the service order or appointment of this service order type contains stock items, the related issue is also generated and can be viewed on the *Issues* (IN302000) form.

  You can select this option only if the *Projects* feature is enabled on the *Enable/Disable Features* form and the *Regular* option is selected in the **Behavior** box of this form for the service order type.

  > This functionality is out of the scope of this course.
- *None*: No document is generated for a service orders or appointment of this service order type, and the other settings of the **Billing Settings** section do not appear on the form.

Process Diagram

The typical workflow of service order processing is shown in the following diagram.

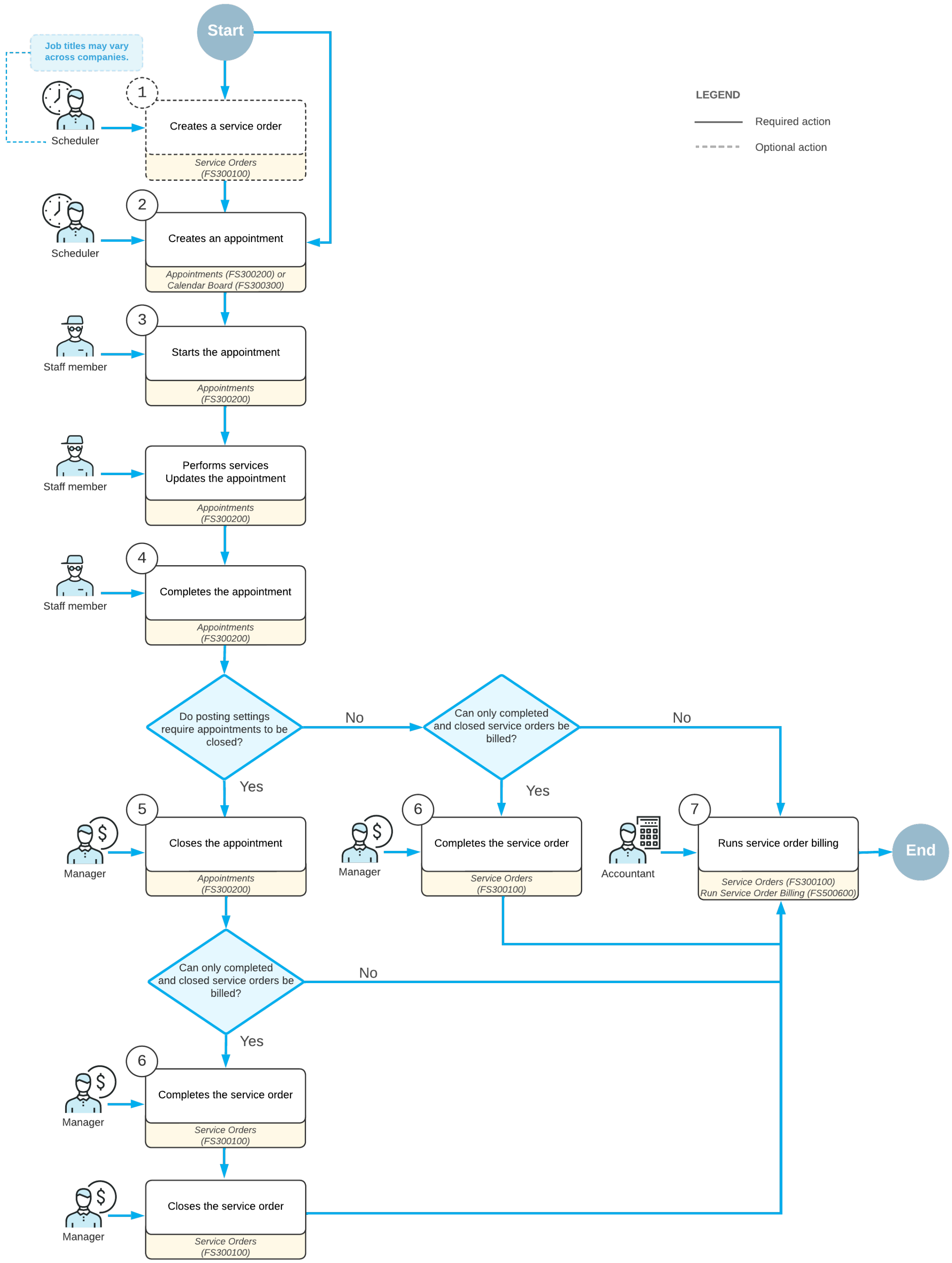


Figure: Processing of a service order

Service Orders with a Single Appointment: Process Activity

The following activity will walk you through the process of creating and processing a service order with one appointment.

Story

Suppose that the SweetLife Service and Equipment Sales Center receives an order for the provision of the training service to a customer of the company, FourStar Coffee & Sweets Shop.

The service manager (Maia Davis) needs to enter the service order into the system, assign a staff member, and schedule an appointment to perform the service. The assigned staff member needs to perform the necessary service at the customer location and complete the appointment in the system. (At this point in learning about the service management process, this assignment will be made without regard to employees' qualifications, working hours, and service areas.) Then the accountant will verify the appointment, close the appointment, and generate an AR invoice to bill the customer. You will perform these actions, acting as the service manager, the staff member, and the accountant.

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.
- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.
- On the *Service Management Preferences* (FS100100) form, the minimum settings have been specified, including specifying the numbering sequences and work calendar, for the service management functionality to be used.
- On the *Users* (SM201010) form, the *davis* and *frank* user accounts have been created. The *EP00000040 - Maia Davis* employee has been associated with the *davis* user account; that is, *Maia Davis* has been selected in the **Linked Entity** box of the Summary area of the form. The *EP00000042 - Chase Frank* employee has been associated with the *frank* user account; that is, *Chase Frank* has been selected in the **Linked Entity** box on the form.
- On the *Branch Locations* (FS202500) form, the *WEST BRIGHTON* branch location of the *SWEETEQUIP* (*Service and Equipment Sales Center*) branch has been created.
- On the *User Profile* (SM203010) form, for the *davis* user, *WEST BRIGHTON* has been specified as the default branch location.
- On the *Service Order Types* (FS202300) form, the *TRN* service order type has been defined. For the type, in the **Billing Settings** section of the **General** tab, **AR Documents** has been selected in the **Generated Billing Documents** box, and the **Bill Only Closed Appointments** check box has been selected.
- On the *Employees* (EP203000) form, on the **General** tab (**Employee Settings** section), the **Staff Member in Service Management** check box has been selected for *EP00000042 (Chase Frank)*, so that you can assign this employee to perform services.
- On the *Billing Cycles* (FS206000) form, the following settings have been specified for the *SO SO* billing cycle:
  - **Run Billing For**: **Service Orders**
  - **Group Billing Documents By**: **Service Orders**
- On the *Customers* (AR303000) form, the *COFFEESHOP - FourStar Coffee & Sweets Shop)* customer has been created, and the *SO SO* billing cycle has been selected in the **Service Management** section of the **Billing** tab.

- On the *Non-Stock Items* (IN202000) form, the *TRAINING* service (that is, a non-stock item of the *Service* type) has been defined. For the *TRAINING* service, on the **Price/Cost** tab, the *Time* billing rule has been selected.

Process Overview

To process a service order with one appointment, acting as the service manager (Maia Davis), you will create a new service order on the *Service Orders* (FS300100) form, add a service to be performed for the order, and create the related appointment on the *Appointments* (FS300200) form. You will then assign a staff member to the appointment. Acting as this staff member, you will start and then complete the appointment.

Acting as an accountant, you will review and close appointment. Then on the *Service Orders* form, you will run billing for the service order.

System Preparation

Before you begin performing the steps of this activity, do the following:

1. Launch the Acumatica ERP website, and sign in to a company with the *U100* dataset preloaded. You should sign in 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, make sure that the business date in your system is set to *1/30/2025*. If a different date is displayed, click the Business Date menu button and select *1/30/2025* on the calendar. For simplicity, in this activity, you will create and process all documents in the system on this business date.

Step 1: Entering a Service Order

When you create a service order, you enter general information about the requested service, including the customer name, promised date, and required service. In this step, you will create a service order for a customer who has requested a training service. You will select the *TRN* order type and specify the *TRAINING* service.

To create a service order, do the following:

1. On the *Service Orders* (FS300100) form, add a new record.
2. In the Summary area, specify the following settings:
   - **Service Order Type**: *TRN*
   - **Customer**: *COFFEESHOP - FourStar Coffee & Sweets Shop*
   - **Description**: `Training for Customer’s Employees`
3. On the table toolbar of the **Details** tab, click **Add Row**, and specify the following settings in the row:
   - **Line Type**: *Service*
   - **Inventory ID**: *TRAINING*
4. Click **Add Row** again, and in the **Line Type** column, select *Comment*.
5. Enter the following comment in the **Description** column: `Training for 4 of the customer's employees is necessary now that the juicer has been installed.`
6. On the form toolbar, click **Save**.

Step 2: Scheduling an Appointment and Assigning a Staff Member

In this step, you will create an appointment to represent the staff member’s actual visit to the customer’s location. You will specify the scheduled start date and time for the appointment and assign a staff member to it.

To create an appointment, do the following:

1. While you are still viewing the service order on the *Service Orders* (FS300100) form, on the form toolbar, click **Create Appointment**.

   The system opens the *Appointments* (FS300200) form with the appropriate settings copied from the service order.
2. On the **Settings** tab, in the **Scheduled Start Date** box, review that 1/30/2025 is selected and specify *11:00 AM*.
3. On the **Staff** tab, assign a staff member to perform the service as follows:
   a. On the table toolbar, click **Add Row**.
   b. In the **Staff Member** column, select *EP00000042 (Chase Frank)*.
4. On the form toolbar, click **Save**.

Step 3: Processing the Appointment

In this step, on behalf of the assigned staff member, you will start the appointment, record the actual start date and time, and complete the appointment.

To process the appointment from its start to its completion, do the following:

1. On the form toolbar of the *Appointments* (FS300200) form, click **Start**.

   You start the appointment to indicate that the appointment is being attended.
2. On the **Settings** tab, in the **Actual Date and Time** section, specify the following settings:
   - **Actual Start Date**: 1/30/2025 *11:00 AM*
   - **Actual End Date**: 1/30/2025 *12:00 PM*
   - **Finished**: Selected

     You select this check box to indicate that the work has been finished during the appointment and that no follow-up appointment is necessary.
3. On the form toolbar, click **Complete**.

   You complete an appointment as a staff member to indicate that the work on the appointment has been done.

Step 4: Generating an AR Invoice

You can generate a billing document once an appointment is completed or closed, depending on the settings of the service order type. In this lesson, once the appointment is assigned the *Closed* status, you can bill the customer for the service delivered. You will generate an AR invoice because this type of the document has been specified for the *TRN* service order type.

To generate an AR invoice on behalf of an accountant, do the following:

1. While you are still viewing the appointment on the *Appointments* (FS300200) form, on the form toolbar, click **Close**.

   You close the appointment to indicate that all information entered into the system about the appointment has been verified and is correct. The appointment is assigned the *Closed* status. Now you can generate the billing document for the related service order, as the customer's billing cycle specifies that billing should be executed at the service order level.
2. Open the service order by clicking the pencil icon next to the **Service Order Nbr.** box in the Summary area of the *Appointments* form. The *Service Orders* (FS300100) form opens in a separate window.
3. On the form toolbar of the *Service Orders* form, click **Run Billing**.

   The system opens the *Invoices and Memos* (AR301000) form with the generated invoice, as the screenshot below shows.

4. Verify the details of the invoice on the form and make sure that they are correct. (In a production environment, the invoice could now be processed in the system.)

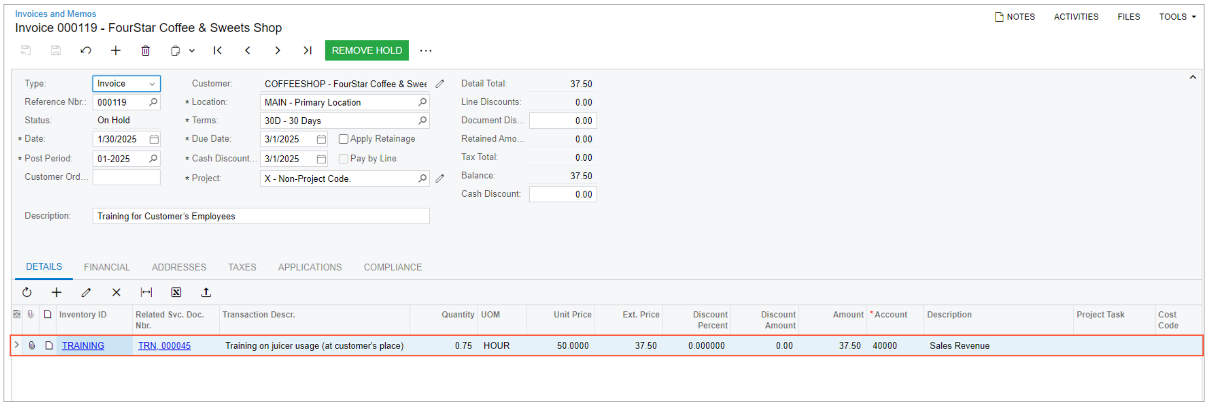


Figure: The invoice generated for the service order

Lesson 2.2: Adding Services and Appointments to Service Orders

In this lesson, you will learn how to add a service to a service order that has already been created in the system, and how to add an extra appointment to the service order to provide the additional service.

Service Orders with Added Services and Appointments: General Information

Sometimes you may need to expand service orders that have already been created in the system on the *Service Orders* (FS300100) form by adding services, appointments, or both services and appointments. This may happen, for example, when a customer has requested an installation service earlier, and then decided to add cleaning of the installed item or training for employees to the service order. In this case, you would open the existing service order and add another required service. You would then create the needed appointments to perform the service.

Learning Objectives

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

- Add to an existing service order a new service to be provided to the customer
- Consider the skills of the staff member assigned to the service order
- Create a new appointment to provide the additional service, and add this appointment to the service order

Applicable Scenarios

You add extra services, additional appointments, or both of these to an existing service order if the work needed by a customer has expanded.

Service Orders with Added Services and Appointments: Process Activity

In this activity, you will learn how to add an appointment and a service to an existing service order.

Story

Suppose that the FourStar Coffee & Sweets Shop customer has contacted the SweetLife Service and Equipment Sales Center to request the training service (*TRAINING*) in addition to the juicer installation service (*INSTALL*), which it had requested earlier. The service manager of the Service and Equipment Sales Center has already created a service order that includes the installation service.

Acting as the service manager (Maia Davis), in the existing service order, you will add another service and create another appointment for the training service.

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.
- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.
- On the *Service Management Preferences* (FS100100) form, the minimum settings have been specified, including specifying the numbering sequences and work calendar, for the service management functionality to be used.
- On the *Users* (SM201010) form, the *davis* and *smith* user accounts have been created. The *EP00000040 - Maia Davis* employee has been associated with the *davis* user account; that is, *Maia Davis* has been selected in the **Linked Entity** box of the Summary area of the form. The *EP00000043 - Edward Smith* employee has been associated with the *smith* user account; that is, *Edward Smith* has been selected in the **Linked Entity** box of the Summary area of the form.
- On the *Branch Locations* (FS202500) form, the *WEST BRIGHTON* branch location of the *SWEETEQUIP* (*Service and Equipment Sales Center*) branch has been created.
- On the *User Profile* (SM203010) form, for the *davis* user, *WEST BRIGHTON* has been specified as the default branch location.
- On the *Employees* (EP203000) form, on the **General** tab (**Employee Settings** section), the **Staff Member in Service Management** check box has been selected for *EP00000043 (Edward Smith)*, so you can assign this employee to perform services. Also, for this employee, the *INSTALLING* skill has been added on the **Skills** tab.
- On the *Service Order Types* (FS202300) form, the *INST* service order type has been defined.
- On the *Customers* (AR303000) form, the *COFFEESHOP (FourStar Coffee & Sweets Shop)* customer has been created.
- On the *Non-Stock Items* (IN202000) form, the following services (that is, non-stock items of the *Service* type) have been defined:
  - *TRAINING*: On the **Price/Cost** tab, the *Time* billing rule is selected.
  - *INSTALL*: On the **Price/Cost** tab, the *Flat Rate* billing rule is selected.
- On the *Service Orders* (FS300100) form, the service order with the *000036* reference number has been created.

Process Overview

On the *Service Orders* (FS300100) form, you will open an existing service order. On the **Details** tab, you will add an extra service. Then from this form, you will create a new appointment for the added service.

Step 1: Adding an Extra Service to the Existing Service Order

To add another service to the service order that already exists in the system, do the following:

1. On the *Service Orders* (FS300100) form, in the Summary area, select *INST* service order type, and then select *000036* in the **Order Nbr.** box.
2. On the **Details** tab, notice that the *INSTALL* service has already been added to the service order, and it has the *Scheduled* status.
3. Click **Add Row** on the table toolbar, and in the new row, do the following:
   - In the **Line Type** column, select *Service*.
   - In the **Inventory ID** column, select *TRAINING*.
4. On the form toolbar, click **Save**.

Step 2: Adding a Staff Member with the Needed Skills

You first need to review the skills of the staff member that has already been assigned to the service order. While you are still viewing the *000036* service order on the *Service Orders* (FS300100) form, do the following:

1. On the **Default Staff** tab, notice that *EP00000043 - Edward Smith* has been assigned to perform the installation service.
2. On the table toolbar, click **Add Staff**.

   The **Add Staff** dialog box opens. In the top left table (below the Selection area), which lists all skills created in the system, the unlabeled check box is selected for the skills preferred to perform the services for the appointment. Notice that the check boxes were selected for the *INSTALLING* and *TRAINING* skills because those skills are associated with the installation and training services. The right table lists only those staff members who have all of the selected skills.
3. Clear the check box in the row with *INSTALLING* in the **Skill ID** column in the top left table, and clear the check box in the row with *INST REP* in the **License Type ID** column in the bottom left table. Leave only the check box in the row with *TRAINING* selected in those tables.

   Notice that *EP00000043 (Edward Smith)* is still listed in the table on the right. This means that he has the required skill and license to provide the training service. Leave the check box selected in the row with *EP00000043 (Edward Smith)*, and click **OK** at the bottom of the dialog box.

EP00000043 (Edward Smith) will perform both services (installation and training) included in the service order.

Step 3: Adding an Extra Appointment to the Service Order

In this step, you will add a second appointment to the service order that was created earlier. This appointment is intended for delivering the *TRAINING* service.

To create another appointment for the existing service order, do the following:

1. While you are still viewing the *000036* service order on the *Service Orders* (FS300100) form, on the **Details** tab, click the row with the *TRAINING* service, which has the *Requiring Scheduling* line status.
2. On the form toolbar, click **Create Appointment**. The *Appointments* (FS300200) form opens.

   On the **Details** tab of the *Appointments* form, make sure that the *TRAINING* service is added.
3. On the **Settings** tab, in the **Scheduled Start Date** box, specify *01/31/2025 10:00 AM*.
4. On the **Staff** tab, make sure that *EP00000043 (Edward Smith)* is assigned to the appointment.
5. On the form toolbar, click **Save**.

6. Return to the *Service Orders* (FS300100) form, and click the **Appointments** tab (see Item 1 in the following screenshot).

   Notice that two appointments (Item 2) are listed for the service order.

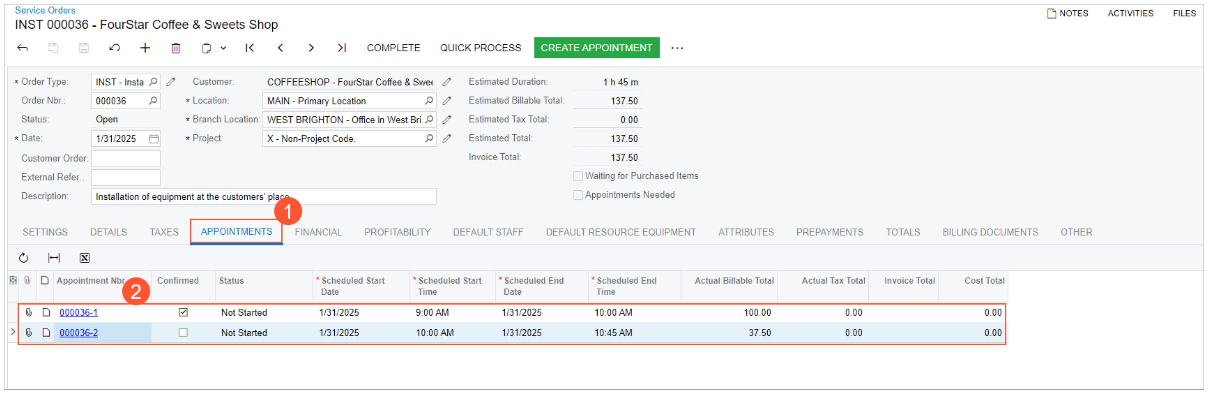


Figure: The two created appointments

Lesson 2.3: Quick Billing of Service Orders

In this lesson, you will learn how to use the quick processing capabilities of the system, which give users the ability to process a service order with just one click.

Quick Billing of Service Orders: General Information

In Acumatica ERP, you can process a service order with just one click if the service order is created based on a service order type for which the quick processing functionality has been configured. For details, see *Service Order Types: Quick Processing Settings*.

Quick processing of a service order involves multiple actions being performed on the service order automatically, such as completing and closing it and generating the billing documents. These actions are described in detail further in this topic.

Learning Objectives

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

- Process a service order by using the **Quick Process** command
- Review the generated billing documents

Applicable Scenarios

You process a service order quickly when you have agreed with the customer to generate billing documents (and possibly send them to the customer by email) before any needed appointments take place.

Actions to Be Applied to a Service Order During Quick Processing

If a service order is created based on a service order type for which quick processing is permitted, you can click the **Quick Process** button on the form toolbar of the *Service Orders* (FS300100) form to process the service order quickly. This opens the **Process Service Order** dialog box, which contains check boxes representing the actions that can be performed on the service order during processing.

As described in the next section, the service order type selected for the service order determines the check boxes that appear and are available in this dialog box, as well as their default states. The dialog box may contain the following check boxes:

- **Allow Billing** (**Service Order Actions** section): Indicates that the generation of billing documents for the service order is allowed during quick processing of service orders of the type. This check box is always read-only and selected.
- **Complete** (**Service Order Actions** section): Indicates whether the system completes this service order during quick processing.
- **Close** (**Service Order Actions** section): Indicates whether the system closes this service order during quick processing.
- **Run Billing** (**Service Order Actions** section): Indicates whether the system generates a billing document during quick processing.
- **Prepare Invoice** (**Sales Order Actions** section): Indicates whether the system creates an SO invoice for the generated sales order during quick processing.
- **Use Sales Order Quick Processing** (**Sales Order Actions**): Indicates whether when quick processing is run for the service order, the system processes the generated sales order by using the quick processing settings specified for the sales order type on the *Order Types* (SO201000) form.
- **Email Sales Order/Quote** (**Sales Order Actions** section): Indicates whether the system emails the sales order to the customer during quick processing.
- **Release Invoice** (**Invoice Actions** section): Indicates whether the system releases the generated invoice during quick processing.
- **Email Invoice** (**Invoice Actions** section): Indicates whether the system emails the generated invoice to the customer during quick processing.

In the dialog box, you review the processing details and make any needed changes to the state of the check boxes. You then click **OK** to close the dialog box, start the quick processing of the service order, and open the **Processing Results** dialog box, which shows the progress of the operations being performed and links to the generated documents.

Service Order Quick Processing

You can run quick processing for a service order on the *Service Orders* (FS300100) form if both of the following conditions are met:

- For the applicable service order type, the **Allow Quick Process** check box is selected on the **General** tab of the *Service Order Types* (FS202300) form (**Billing Settings** section). In this case, on the **Quick Processing** tab, the administrator has specified the default settings for quick processing of a service order of the type.
- The billing cycle assigned to the customer is configured to generate billing documents from service orders—that is, **Service Orders** is selected under **Run Billing For** of the *Billing Cycles* (FS206000) form for the billing cycle.

When you click **Quick Process** on the *Service Orders* form, the system opens the **Process Service Order** dialog box with the specific set of available actions and the default settings based on the service order type assigned to the service order being processed. In this dialog box, you can select additional actions to be performed, or clear the check boxes for the actions selected by default that you do not want to perform.

The available actions in the **Process Service Order** dialog box differ as follows, based on the settings specified on the *Service Order Types* form (**General** tab) for the service order type specified for the service order:

- If *Sales Orders* is selected in the **Generated Billing Documents** box, the **Sales Order Actions** section appears in the **Process Service Order** dialog box, as shown in the following screenshot.

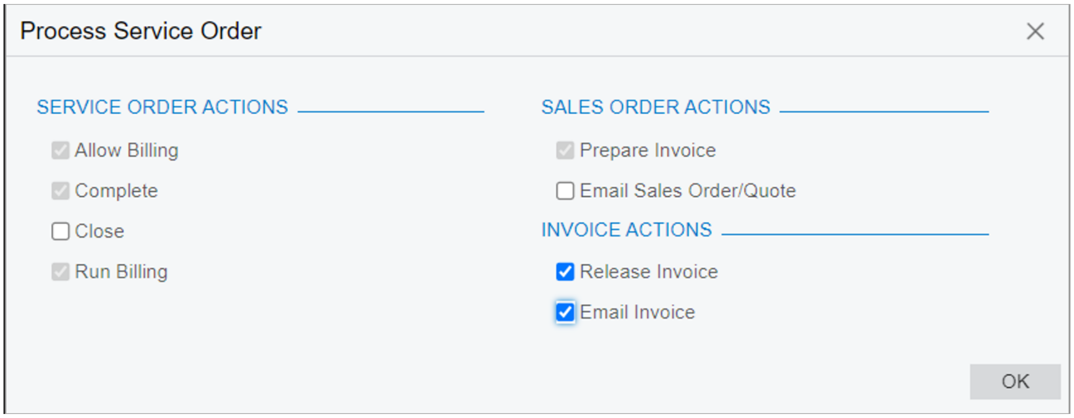


Figure: The quick processing actions for a service order for which a sales order is to be generated

When sales orders are generated during billing, quick processing is also affected by the settings of the sales order type associated with the sales order, which is selected in the **Order Type for Billing** box of the *Service Order Types* form. If the **Allow Quick Process** check box is selected on the **Template** tab on the *Order Types* (SO201000) form for the order type, then the **Use Sales Order Quick Processing** check box is available in the **Sales Order Actions** section of the **Process Service Order** dialog box. When a user selects this check box, the **Prepare Invoice** check box disappears in the dialog box.

- If *SO Invoices* is selected in the **Generated Billing Documents** box for the service order type, the system generates a sales invoice when the service order is billed. This setting causes the **Sales Order Actions** section to disappear in the dialog box, as shown in the following screenshot.

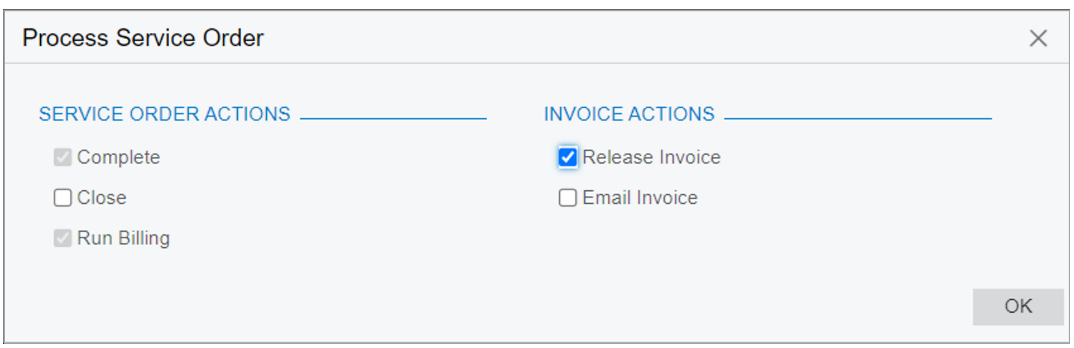


Figure: The quick processing actions for a service order for which an SO invoice is to be generated

Quick Billing of a Service Order: Process Activity

This activity will walk you through the creation of a service order whose type allows quick processing, and then through the quick processing of this service order.

Story

Suppose that the SweetLife Service and Equipment Sales Center received a call from the FourStar Coffee & Sweets Shop customer about a needed repair of one of its orange juicers. The customer and the service manager (Maia Davis) agreed that billing documents will be generated for the service order before the appointment occurs. The customer also asked to receive the billing document by email.

The service manager has entered the service order and selected a service order type for which quick processing settings have been specified. A user can then invoke one-click quick processing, which initiates the generation of an invoice for the service order.

Acting as an accountant (Yona Jones), you will process the service order for the customer.

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.
- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.
- On the *Service Management Preferences* (FS100100) form, the minimum settings have been specified, including specifying the numbering sequences and work calendar, for the service management functionality to be used.
- On the *Users* (SM201010) form, the *jones* user account has been created. The *EP00000012 - Yona Jones* employee has been associated with the *jones* user account; that is, *Yona Jones* has been selected in the **Linked Entity** box of the Summary area of the *Users* form.
- On the *Service Order Types* (FS202300) form, the *MRO* service order type has been defined with the following settings:
  - On the **General** tab (**Billing Settings** section):
    - **Generated Billing Documents**: *SO Invoice*
    - **Allow Quick Process**: Selected
    - **Order Type for Allocation**: *SO - Sales Order*
  - On the **Quick Processing** tab:
    - **Run Billing** (**Appointment Actions** section): Selected
    - **Allow Billing** (**Service Order Actions** section): Selected

      This check box is read-only and selected for all service order types because the generation of billing documents for the service order is allowed during quick processing.
    - **Complete** (**Service Order Actions** section): Cleared
    - **Close** (**Service Order Actions** section): Cleared
    - **Run Billing** (**Service Order Actions** section): Selected
    - **Release Invoice** (**Invoice Actions** section): Selected
    - **Email Invoice** (**Invoice Actions** section): Cleared
- On the *Billing Cycles* (FS206000) form, the following settings have been specified for the *SO SO* billing cycle:
  - **Run Billing For**: **Service Orders**
  - **Group Billing Documents By**: **Service Orders**
- On the *Customers* (AR303000) form, the *COFFEESHOP (FourStar Coffee & Sweets Shop)* customer has been defined, and the *SO SO* billing cycle has been selected in the **Service Management** section of the **Billing** tab.
- On the *Service Orders* (FS300100) form, the *000037* service order has been created.

Process Overview

To quickly process the existing service order, you will open it on the *Service Orders* (FS300100) form and initiate quick processing. You will first change some of the default quick processing settings. You will then review an invoice generated as a result of the quick processing.

System Preparation

Before you begin performing the steps of this activity, do the following:

1. Launch the Acumatica ERP website, and sign in to a company with the *U100* dataset preloaded. You should sign in as an accountant by using the ***jones*** username and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2025*. If a different date is displayed, click the Business Date menu button and select *1/30/2025* on the calendar. For simplicity, in this activity, you will create and process all documents in the system on this business date.

Step 1: Quickly Processing the Service Order

To quickly process a service order, do the following:

1. On the *Service Orders* (FS300100) form, open the *000037* service order.
2. In the **Service Order Type** box of the Summary area, notice that *MRO* is specified.

   Quick processing settings have been specified for this service order type, as described in the *Configuration Overview* section of this activity.
3. On the **Details** tab, notice that the *REPAIR* service is listed.
4. On the form toolbar, click **Quick Process**.

   The **Process Service Order** dialog box opens.
5. In the **Invoice Actions** section of the dialog box, select the **Email Invoice** check box. (See the following screenshot.) You will leave the other default settings, which were specified for the *MRO* service order type.

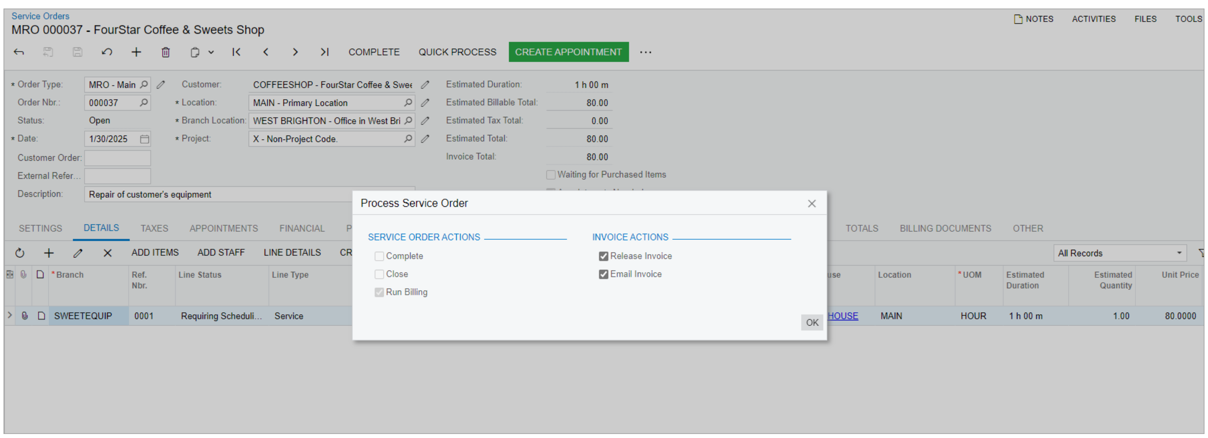


Figure: The Process Service Order dialog box

6. Click **OK**.
7. After the processing has successfully completed, notice that in the **Processing Results** dialog box, you can see the status of the processing and the billing documents generated by the process (see the following screenshot).

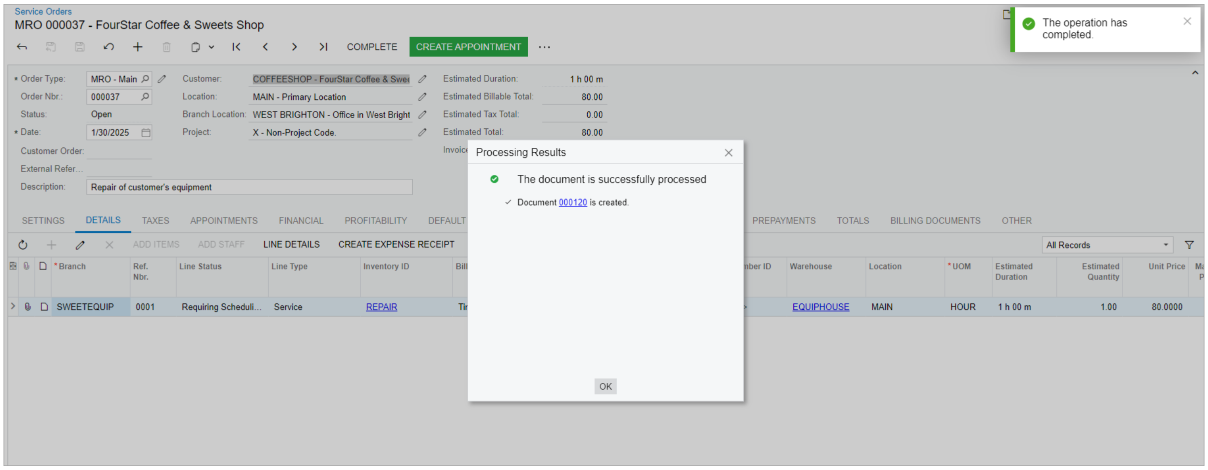


Figure: The results of the service order processing

8. Click **OK** in the **Processing Results** dialog box to close it.

Based on the settings specified for the *MRO* service order type (and the setting you changed to have the invoice emailed to the customer), during the quick processing, the system creates and releases an invoice for the service order, and emails the invoice to the customer by email.

Step 2: Reviewing the Created Documents and the Sent Email

To review the documents that have been generated and the email that has been sent, do the following:

1. While you are still viewing the *000037* service order on the *Service Orders* (FS300100) form, open the **Billing Documents** tab, and notice that the invoice is listed, reflecting that it has been created during the quick processing. (See the following screenshot.)

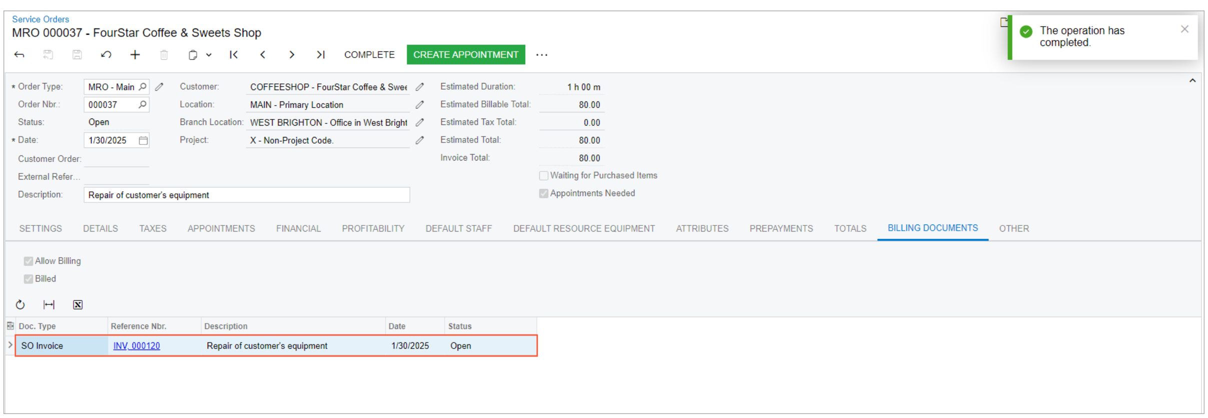


Figure: The billing documents generated for the service order

2. In the **Reference Nbr.** column, click the link to open the invoice.

   The *Invoices* (SO303000) form opens. Notice that the invoice has the *Open* status.
3. On the form title bar (in the top right corner of the form), click **Activities**. The **Tasks & Activities** dialog box opens.
4. In the dialog box, notice that the email sent to the customer with the invoice is listed.
5. Click the link of the email; this brings up the email in a pop-up window so that you can review it.

Lesson 2.4: Creating Appointments

In this lesson, you will discover various methods for creating appointments in the system.

Appointment Creation: General Information

In Acumatica ERP, an appointment is a document that represents one in-person meeting to perform one service or multiple services. You can create an appointment either from a service order or independently. If an appointment is created separately, the system automatically generates a related service order when the appointment is saved.

Typically, you create a service order and include information on the services to be provided to a customer. Based on the details of the service order, you then create each needed appointment, and you schedule the date and time when the service is to be performed.

In some cases, the need for time-critical services (for example, urgent repair service) arises unexpectedly and may originate from a customer call. In such cases, you may need to create and schedule an appointment quickly without the initial creation of a service order.

In this lesson, you will create and schedule an appointment without first creating a service order. You will learn to do this in several ways.

Learning Objectives

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

- Create an appointment directly on the *Appointments* (FS300200) form, add a service to the appointment, assign a staff member to the appointment, and send appointment notification emails to the customer and to the assigned employee.
- Create an appointment on the *Calendar Board* (FS300300) form. You will filter staff members by the performed services and select a staff member whose schedule suits your needs.
- Create an appointment from the *Customers* (AR303000) form, and send notification emails to the customer and to staff members.

Applicable Scenarios

You create an appointment in a wide variety of scenarios. In the most common scenario, you receive a call from your customer informing your company of a problem for which your company's services are requested. The service manager of your company creates the appointment and assigns an appropriate staff member to perform the service or services.

The Steps of the Workflow

In general, the processing of an appointment consists of the following steps (for simplicity, these steps describe one appointment with one staff member assigned and without a service order being created first):

1. Creating the appointment: The service manager creates an appointment in the system. The system automatically creates a related service order, and copies information from the appointment to the service order.
2. Adding additional information: The service manager assigns the appropriate staff member to the appointment. The appointment is ready to be attended.

3. Starting the appointment: On the day of the appointment at the agreed-on appointment location, the staff member starts the appointment in the system.
4. Adding additional items (optional): The staff member adds extra items that have been sold during the appointment.
5. Completing the appointment: After all the work on the appointment is done and all information is entered into the system and checked, the staff member specifies that all the work is finished and completes the appointment in the system.
6. Closing the appointment: An accountant verifies the information entered for the completed appointment, such as quantities and prices, and closes the verified appointment.
7. Generating a billing document for the customer (if the customer's billing cycle settings indicate that billing documents should be generated by appointment): An accountant generates billing documents and processes them in the system.

After each step has been performed, you can notify the customer and the staff member about appointment details by sending them notification emails. Before an appointment has been assigned, you can also send notification emails to staff members of the service area where the appointment takes place.

Workflow of Appointment Creation and Processing

The typical process of creating and processing an appointment that does not have an existing service order involves the actions and generated documents shown in the following diagram.

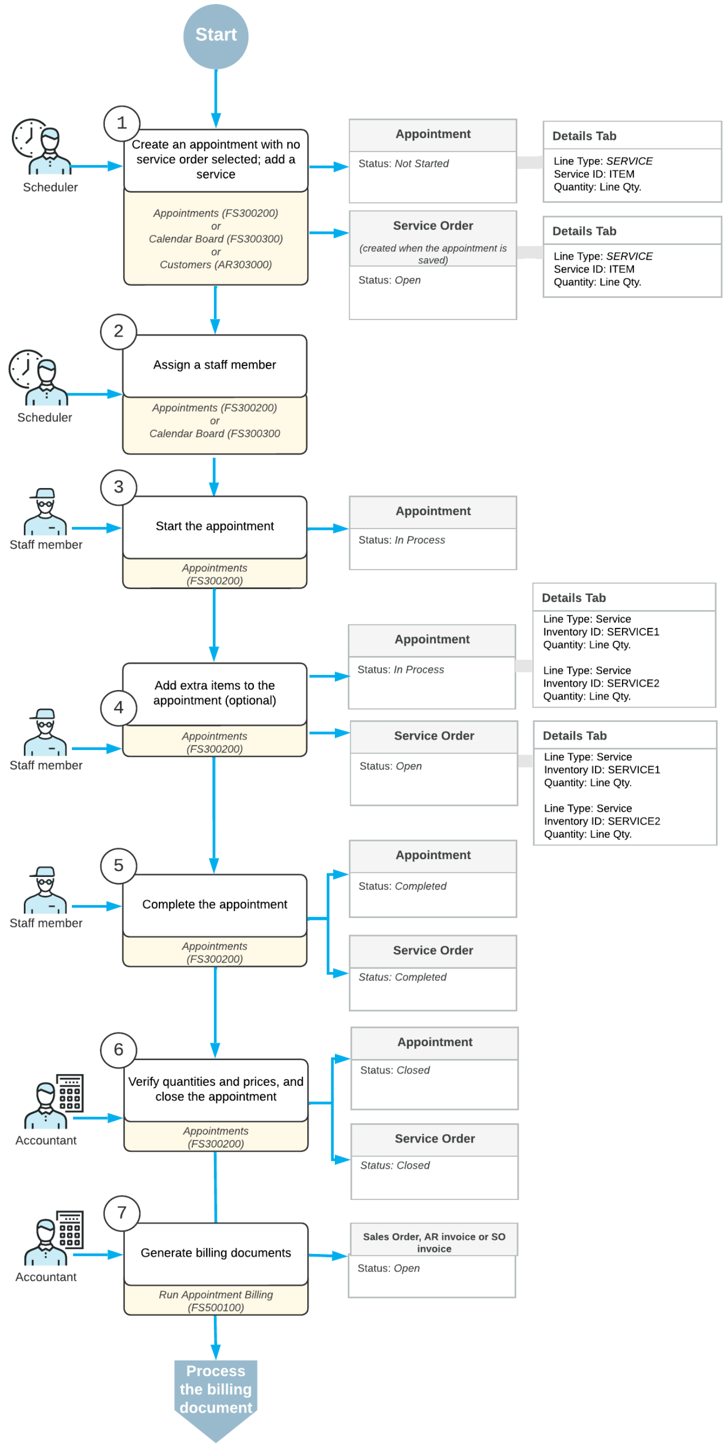


Figure: Appointment creation and processing

Appointment Creation: To Create an Appointment on the Appointments Form

The following activity will walk you through the process of creating an appointment without creating a service order first. You will assign a staff member to the appointment based on the needed skills.

Story

Suppose that the GoodFood One Restaurant previously ordered a juicer from the SweetLife Service and Equipment Sales Center with a production rate of 1.5 liters per minute. Now this customer needs installation services for the juicer. The service manager (Maia Davis) and the customer have agreed that the service will be delivered on February 4, 2025, at 9 AM.

Acting as the service manager, you need to create an appointment in the system and assign a staff member who has the needed skill for performing the service.

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.
- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.
- On the *Service Management Preferences* (FS100100) form, the minimum settings have been specified, including specifying the numbering sequences and work calendar, for the service management functionality to be used.
- On the *Users* (SM201010) form, the *davis* and *smith* user accounts have been created. The *EP00000040 - Maia Davis* employee has been associated with the *davis* user account; that is, *Maia Davis* has been selected in the **Linked Entity** box of the Summary area of the form. The *EP00000043 - Edward Smith* employee has been associated with the *smith* user account; that is, *Edward Smith* has been selected in the **Linked Entity** box of the Summary area of the form.
- On the *Branch Locations* (FS202500) form, the *WEST BRIGHTON* branch location of the *SWEETEQUIP* (*Service and Equipment Sales Center*) branch has been created.
- On the *User Profile* (SM203010) form, for the *davis* user, *WEST BRIGHTON* has been specified as the default branch location.
- On the *Service Order Types* (FS202300) form, the *INST* service order type has been defined.
- On the *Billing Cycles* (FS206000) form, the following settings have been specified for the *AP AP* billing cycle:
  - **Run Billing For**: **Appointments**
  - **Group Billing Documents By**: **Appointments**
- On the *Customers* (AR303000) form, the *GOODFOOD (GoodFood One Restaurant)* customer has been defined, and the *AP AP* billing cycle has been selected in the **Service Management** section of the **Billing** tab.
- On the *Skills* (FS200600) form, the *INSTALLING* skill has been created.
- On the *Non-Stock Items* (IN202000) form, the *INSTALL* service (that is, non-stock item of the *Service* type) has been created. On the **Price/Cost** tab, the *Flat Rate* billing rule has been specified. For this service, *INSTALLING* has been listed on the **Service Skills** tab (so the assigned staff member must have this skill).
- On the *Employees* (EP203000) form, *EP00000043 (Edward Smith)* has been defined. For this employee, on the **General** tab (**Employee Settings** section), the **Staff Member in Service Management** check box has been selected. Also, the *INSTALLING* skill has been added for this employee on the **Skills** tab.

Process Overview

On the *Appointments* (FS300200) form, you will create an appointment for which no service order exists; on the **Details** tab of the form, you will add an installation service to the appointment by using the **Inventory Lookup** dialog box. You will then assign a staff member to the appointment by using the **Add Staff** dialog box on the **Staff** tab of the form.

System Preparation

Before you begin performing the steps of this activity, do the following:

1. Launch the Acumatica ERP website, and sign in to a company with the *U100* dataset preloaded. You should sign in 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, make sure that the business date in your system is set to *1/30/2025*. If a different date is displayed, click the Business Date menu button and select *1/30/2025* on the calendar. For simplicity, in this activity, you will create and process all documents in the system on this business date.

Step 1: Creating an Appointment

To create an appointment, do the following:

1. On the *Appointments* (FS300200) form, add a new record.
2. In the Summary area, specify the following settings for the new appointment:
   - **Service Order Type**: *INST*
   - **Customer**: *GOODFOOD - GoodFood One Restaurant*
3. In the **Description** box, type `Juicer installation`.
4. On the **Settings** tab (**Scheduled Date and Time** section), specify the date and time of the appointment. In the **Scheduled Start Date** boxes, select *2/4/2025 9:00 AM*.
5. On the form toolbar, click **Save**.

Because you have neither created this appointment from a service order nor selected any service order for the appointment, when you saved the appointment, the system created a new service order automatically and inserted its reference number in the **Service Order Nbr.** box.

Step 2: Adding a Service to the Appointment

To add a service to the appointment, do the following:

1. While you are still viewing the appointment on the *Appointments* (FS300200) form, on the table toolbar of the **Details** tab, click **Add Items**.

   The **Inventory Lookup** dialog box is opened.
2. In the **Item Class ID** box of the Selection area, select *INSTALLING*.

   The dialog box lists only those services that belong to the selected class.
3. In the table, select the unlabeled check box in the row of the *INSTALL* service, and click **Add & Close**.
4. On the form toolbar, click **Save**.

Step 3: Assigning a Staff Member with the Needed Skill

To assign an appointment to a staff member who has the required skill, do the following:

1. While you are still viewing the appointment on the *Appointments* (FS300200) form, on the table toolbar of the **Staff** tab, click **Add Staff**.

   The **Add Staff** dialog box is opened. In the Skills table (the top table below the Selection area), which lists all skills that have been created in the system, the check box is selected for all skills that are preferred for performing the service for the appointment. The *INSTALLING* skill is selected because it is associated with the *INSTALL* service on the *Non-Stock Items* (IN202000) form. Similarly, the License Types table (under the Skills table) lists all license types that have been created in the system, and the check box is selected for all license types that are preferred for staff members who perform the service.

   The Staff Members table lists only those staff members who match all of the selected skills and license types. You select the check box for the staff member or members to be assigned to the service.
2. In the Skills table and the License Types table, clear all check boxes that are selected.

   Notice that all staff members are now listed in the Staff Members table.
3. In the Skills table, again select the check box for the *INSTALLING* skill.
4. In the Staff Members table, select the check box for *Edward Smith*.
5. At the bottom of the dialog box, click **OK**.
6. On the form toolbar, click **Save**.

On the **Staff** tab, notice that *EP00000043 (Edward Smith)* is now assigned to the appointment.

Appointment Creation: Calendar Board Forms

In this topic, you will read about the various Acumatica ERP calendar boards you can use for managing appointments.

Scheduling of Appointments on Calendar Boards

In Acumatica ERP, you can do the following by using calendar boards:

- If the needed appointment has not yet been created in the system, you can select the time of the appointment and the appropriate staff member to perform a particular service or multiple services, and initiate creation of the appointment.
- If the needed appointment has been created in the system, you can check the time of the appointment and assign an appropriate staff member to the appointment.

The following sections describe the available calendar boards in Acumatica ERP and their use.

The Calendar Board Form

On the *Calendar Board* (FS300300) form, you see the work schedules of the staff members of your company. To select the right staff members to perform services, you can filter staff members by any needed skills, license types, services, and service areas related to the service for which you want to schedule an appointment. Based on the available working times of staff members, you decide who will perform services and when, assign selected staff members, and create appointments. You can also assign staff members to perform existing appointments.

For an example of scheduling by using the Calendar Board, see *Appointment Creation: To Create an Appointment on the Calendar Board*.

The Staff Calendar Board Form

On the *Staff Calendar Board* (FS300400) form, you see the work schedule of a particular staff member of your company. You can filter service orders and appointments by any of the following: skills, license types, and service classes. Based on the available working times of the staff member, you can do the following:

- Decide which services, service orders, and appointments this staff member will be assigned to and when this staff member's work will occur
- Create any needed appointments

The Room Calendar Board Form

On the *Room Calendar Board* (FS300700) form, you can see the availability of the rooms in your company's branch location. Based on this information, you can select which services will be performed in which room of the selected branch location and when, and you can create any needed appointments. (If appointments have already been created, you just assign a room to them.) Rooms are usually used for service orders if the services are performed on-site (that is, those for which the services are performed at your company location), and they can also be used for internal service orders.

To be able to use rooms for services, you must have the **Enable Rooms** check box selected on the *Service Management Preferences* (FS100100) form.

Viewing of Appointments on Calendar Boards

You can view the appointments assigned to staff members of your company by using the calendar board forms in the following ways:

- If you want to see the appointments associated with staff members on a particular day, week or month, you use the *Calendar Board* (FS300300) form. You can filter information on this form by branch, branch location, and staff member. Also, you can filter staff members by skill, license type, service, and service area. On this form, you can see the general appointment information, such as service order number, appointment status, customer name, and contact phone number.
- If you want to see the appointments associated with a particular staff member for a selected period of time, you use the *Staff Calendar Board* (FS300400) form. You can filter information on this form by branch and branch location. On this form, you can see the general appointment information, such as service order number, appointment status, customer name and contact phone number.
- If you want to see the appointments associated with staff members for a particular day and the current locations of staff members on a Bing map, you use the *Staff Appointments on Map* (FS301100) form. This form displays the appointment number and address information.
- If your company uses its rooms to provide services, you can view the availability of rooms and appointments assigned to these rooms for a particular day on the *Room Calendar Board* (FS300700) form. This form shows the general appointment information, such as the service order number, the status of the appointment, the customer name and contact phone number.

  If the *WorkWave Route Optimization* feature is enabled in the *Third Party Integrations* group of features on the *Enable/Disable Features* (CS100000) form, you can optimize the appointment schedule on the *Optimize Appointment Scheduling* (FS501400) form. For details, see *Optimizing Appointment Scheduling with WorkWave*.

Appointment Creation: To Create an Appointment on the Calendar Board

In this activity, you will learn how to create an appointment without a service order from the *Calendar Board* (FS300300) form. You will also learn how to filter staff members that meet the requirements for an appointment by using the **Staff Filters** dialog box, which takes into account skills, licenses, and service areas.

Story

Suppose that GoodFood One Restaurant has a juicer and wants the SweetLife Service and Equipment Sales Center to perform repairs on the juicer. The service manager (Maia Davis) and the customer have agreed that a staff member will come to repair the juicer on January 30, 2025, at 8 AM. The assigned staff member must have a special skill to repair the juicer, as well as a license from the producer of the juicer.

Acting as the service manager, you will create the appointment and assign a staff member who meets these requirements and can perform the work at the agreed-upon time.

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.
- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.
- On the *Service Management Preferences* (FS100100) form, the minimum settings have been specified, including specifying the numbering sequences and work calendar, for the service management functionality to be used. Also, the *MRO* service order type has been selected in the **Default Service Order Type** box.
- On the *Users* (SM201010) form, the *davis* and *jimenez* user accounts have been created. The *EP00000040 - Maia Davis* employee has been associated with the *davis* user account; that is, *Maia Davis* has been selected in the **Linked Entity** box of the Summary area of the *Users* form. The *EP00000004 - Alberto Jimenez* employee has been associated with the *jimenez* user account; that is, *Alberto Jimenez* has been selected in the **Linked Entity** box of the Summary area on the *Users* form.
- On the *Staff Schedule Rules* (FS202001) form, a work schedule rule has been defined for the *EP00000004 - Alberto Jimenez* employee, and the work schedule has been generated for this employee on the *Generate Staff Schedules* (FS500400) form.
- On the *Branch Locations* (FS202500) form, the *WEST BRIGHTON* branch location of the *SWEETEQUIP* (*Service and Equipment Sales Center*) branch has been created.
- On the *User Profile* (SM203010) form, for the *davis* user, *WEST BRIGHTON* has been specified as the default branch location.
- On the *Service Order Types* (FS202300) form, the *MRO* service order type has been defined.
- On the *Skills* (FS200600) form, the *REPAIRING* skill has been created.
- On the *License Types* (FS200900) form, the *INST&REP* license type has been created.
- On the *Service Areas* (FS201900) form, the *MANHATTAN* area has been created.
- On the *Licenses* (FS201000) form, the following licenses have been created:
  - *FSL00003*, which has the *INST&REP* license type and was created for the *EP00000004 (Alberto Jimenez)* employee
  - *FSL00002*, which has the *INST&REP* license type and was created for the *EP00000003 (Jon Waite)* employee

- On the *Non-Stock Items* (IN202000) form, the *REPAIR* service (that is, non-stock item of the *Service* type) has been defined. This service has the *Flat Rate* billing rule specified on the **Price/Cost** tab. For this service, *REPAIRING* has been listed on the **Service Skills** tab, and *INST&REP* has been listed on the **Service License Types** tab.
- On the *Employees* (EP203000) form, the following employees have been created:
  - *EP00000004 (Alberto Jimenez)*: On the **General** tab (**Employee Settings** section), the **Staff Member in Service Management** check box has been selected. Also, the *REPAIRING* skill has been listed on the **Skills** tab, license *FSL00003* of the *INST&REP* type has been listed on the **Licenses** tab, and *MANHATTAN* has been listed on the **Service Areas** tab.
  - *EP00000003 (Jon Waite)*: On the **General** tab (**Employee Settings** section), the **Staff Member in Service Management** check box has been selected. Also, the *REPAIRING* skill has been listed on the **Skills** tab, license *FSL00002* of the *INST&REP* license type has been listed on the **Licenses** tab, and *MANHATTAN* has been listed on the **Service Areas** tab.

Process Overview

On the *Calendar Board* (FS300300) form, you will filter staff members for the performed service, which causes the system to hide the staff members who don't match the requirements. You will then select the staff members whose working schedule is suitable for the appointment and create the appointment from the board.

Step 1: Filtering Staff Members for an Appointment

To filter staff members for the appointment to be created, do the following:

1. Open the *Calendar Board* (FS300300) form.
2. In the Date box (in the upper right corner of the dashboard), ensure that *1/30/2025* is selected.

   The dashboard displays the staff members of the *Service and Equipment Sales Center* branch and their working schedules.
3. Click the **Filter** icon in the top right corner of the calendar dashboard.

   The **Staff Filters** dialog box opens, in which you can narrow the selection of staff members.
4. On the **Skills** tab of the dialog box, select the **Repair of juicers** check box.
5. On the **Services** tab of the dialog box, select the **Repair of customer's equipment** check box.
6. On the **Service Areas** tab, select the **Manhattan** check box.
7. Click **Filter & Close**.

   The dialog box is closed, the filter is applied, and the staff members whose skills and assigned service areas match those of the selected service are displayed on the *Calendar Board*.

Step 2: Creating the Appointment

To create the appointment, do the following while you are still on the *Calendar Board* (FS300300) form:

1. In the column for *Alberto Jimenez*, click at 08:00 AM, and drag the shaded box area downward to 09:30 AM.

   On the *Appointments* (FS300200) form, which is opened in a pop-up window, notice that the scheduled starting date is 1/30/2025, and that the scheduled starting and ending times are 08:00 AM and 09:30 AM, respectively.
2. In the **Customer** box, select *GOODFOOD - GoodFood One Restaurant*.
3. On the **Settings** tab, in the **Scheduled Date and Time** section, select the **Confirmed** check box.

> An appointment can be automatically confirmed, which would cause the **Confirmed** check box to be selected automatically. For automatic confirmation to occur, the time range between the time the appointment was created and the scheduled start time of the appointment must be less than or equal to (in terms of the number of days) the time range specified in the **Appointment Auto-Confirm Time** box on the **Calendars and Maps** tab of the *Service Management Preferences* form.

4. Click **Add Row** on the table toolbar of the **Details** tab, and select the following options in the row:
   - **Line Type**: *Service*
   - **Inventory ID**: *REPAIR*
5. On the form toolbar, click **Save**.
6. Close the *Appointments* form.

On the *Calendar Board* form, on the dashboard, the new appointment is now displayed, as the following screenshot shows.

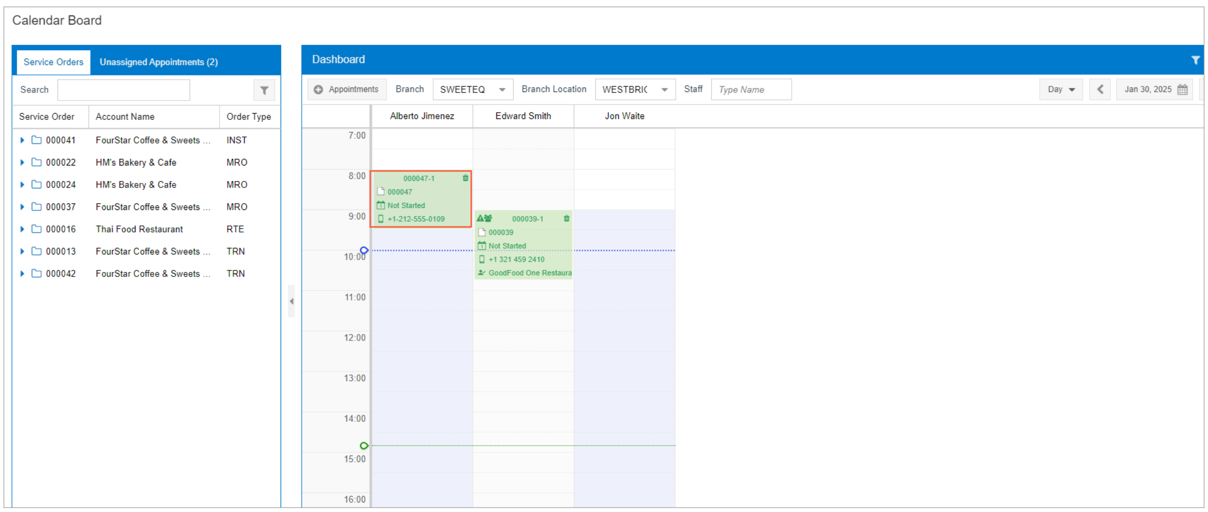


Figure: An appointment on the calendar board

Appointment Creation: To Create an Appointment from the Customers Form

In this activity, you will create an appointment from the *Customers* (AR303000) form while viewing a particular customer. You will also learn how to send notification emails to the customer and to your company's own staff members.

Story

Suppose that the service manager (Maia Davis) of the SweetLife Service and Equipment Sales Center has received a call from HM's Bakery and Cafe about the repair of a juicer that had been sold to this customer previously. The customer has asked for the repair of the juicer to be performed on February 1, 2025.

The service manager needs to check the history of this customer and schedule the appointment for the repair of the juicer. When the appointment is scheduled, the service manager needs to send confirmation emails both to the assigned employee and to the customer. You will perform these actions, acting as the service manager.

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.
- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.
- On the *Service Management Preferences* (FS100100) form, the minimum settings have been specified, including specifying the numbering sequences and work calendar, for the service management functionality to be used.
- On the *Users* (SM201010) form, the *davis* user account have been created. The *EP00000040 - Maia Davis* employee has been associated with the *davis* user account; that is, *Maia Davis* has been selected in the **Linked Entity** box of the Summary area of the *Users* form.
- On the *Branch Locations* (FS202500) form, the *WEST BRIGHTON* branch location of the *SWEETEQUIP* (*Service and Equipment Sales Center*) branch has been created.
- On the *User Profile* (SM203010) form, for the *davis* user, *WEST BRIGHTON* has been specified as the default branch location.
- On the *Service Order Types* (FS202300) form, the *MRO* service order type has been defined.
- On the *Non-Stock Items* (IN202000) form, the *REPAIR* service (that is, non-stock item of the *Service* type) has been created. This item has the *Flat Rate* billing rule selected on the **Price/Cost** tab. For this service, *REPAIRING* has been specified on the **Service Skills** tab (meaning that the assigned staff member must have this skill), and *INST&REP* has been specified on the **Service License Types** tab (indicating that the assigned staff member must have a license of this type).
- On the *Skills* (FS200600) form, the *REPAIRING* skill has been created.
- On the *License Types* (FS200900) form, the *INST&REP* license type has been created.
- On the *Licenses* (FS201000) form, the *FSL00002* license has been defined with the *INST&REP* license type and the *EP00000003 (Jon Waite)* employee specified.
- On the *Employees* (EP203000) form, *EP00000003 (Jon Waite)* has been created. On the **General** tab (**Employee Settings** section), the **Staff Member in Service Management** check box has been selected. Also, the *REPAIRING* skill has been listed on the **Skills** tab, and the license of the *INST&REP* type has been listed on the **Licenses** tab.
- On the *Billing Cycles* (FS206000) form, the following settings have been specified for the *AP AP* billing cycle:
  - **Run Billing For**: **Appointments**
  - **Group Billing Documents By**: **Appointments**
- On the *Customers* (AR303000) form, the *HMBAKERY (HM's Bakery and Cafe)* customer has been defined. The *AP AP* billing cycle has been selected in the **Service Management** section of the **Billing** tab.

Process Overview

From the *Customers* (AR303000) form, you will open the *Calendar Board* (FS300300) form to create the first appointment. By using the *Appointments* (FS300200) form, you will then send notification emails about the appointment to the customer and staff member. Finally, while again using the *Customers* form as a starting point, you will go to the *Appointment Summary* (FS400100) form to view the list of all appointments scheduled for the customer.

Step 1: Creating an Appointment from the Customers Form

To create an appointment for a customer whose record you are viewing on the *Customers* (AR303000) form, do the following:

1. On the *Customers* (AR303000) form, open the *HMBAKERY - HM's Bakery and Cafe* customer.
2. On the More menu (under **Services**), click **Schedule on Calendar**.

   The *Calendar Board* (FS300300) form is opened in a pop-up window.
3. In the Date box (in the top right corner of the dashboard), change the calendar date to *2/1/2025*.
4. On the dashboard, in the column for *Jon Waite*, click at 16:00, and drag the bottom of the shaded box to 17:30.
5. In the appointment box, which has appeared on the calendar board and is shaded in green (indicating that an appointment is in *Not Started* status), click the reference number of the appointment, which is the top number in the box. The *Appointments* (FS300200) form opens. Notice that the system has filled in the default settings based on the settings of the customer and the service order type.
6. On the **Details** tab of the *Appointments* form, add a row, and specify the following settings in the row:
   - **Line Type**: *Service*
   - **Inventory ID**: *REPAIR*
7. On the form toolbar, click **Save**.
8. On the **Staff** tab, confirm that the staff member, Jon Waite, has been assigned to the appointment.

Step 2: Sending Appointment Confirmation Emails

To send emails confirming the scheduled appointment, while you are still viewing the appointment on the *Appointments* (FS300200) form, do the following:

1. On the **Settings** tab (**Scheduled Date and Time** section), select the **Confirmed** check box.

   The selection of this check box indicates that the appointment date and time have been confirmed with the customer.
2. On the form toolbar, click **Save**.
3. On the More menu (under **Printing and Emailing**), click **Email Confirmation to Customer**.
4. On the More menu (under **Printing and Emailing**), click **Email Confirmation to Staff**.
5. On the form title bar (at the top right corner of the form), click **Activities**, and in the **Task & Activities** pop-up window, which opens, click the link to each email to review what has been sent to the customer and to the staff member.
6. Close the pop-up window.

Step 3: Reviewing the Customer's Appointments

To review the appointments for the customer, do the following:

1. On the *Customers* (AR303000) form, again open the *HMBAKERY - HM's Bakery and Cafe* customer.
2. On the More menu (under **Inquiries**), click **Appointment History**.

   The *Appointment Summary* (FS400100) form opens.
3. In the Selection area, clear the **Staff Member** box.
4. In the **To Scheduled Date** box, select *2/1/2025*.

Review the list of all appointments scheduled for the customer, including the appointment you have just created (see the following screenshot).

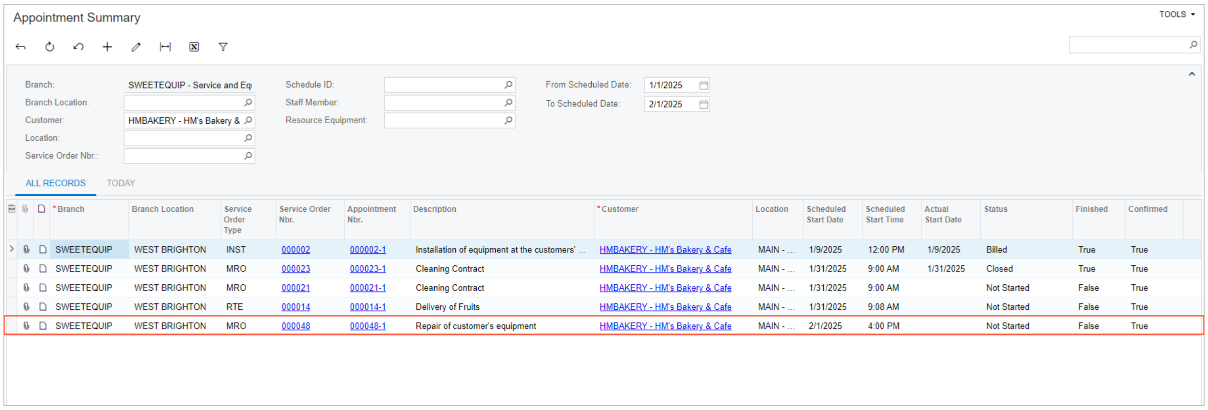


Figure: An appointment created from the Customers form

Lesson 2.5: Assigning Staff Members to Service Orders and Appointments

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

- Assign a staff member to a service of an appointment
- Assign an appointment to an employee considering employee's working schedule
- Assign a service order to an employee with consideration of the employee's skills and licenses

Appointment Creation: To Assign a Staff Member to a Particular Service Considering Skills and Licenses

The following activity will walk you through the process of assigning a staff member to a particular service of an appointment.

Story

Suppose that the GoodFood One Restaurant customer has contacted the SweetLife Service and Equipment Sales Center and requested the juicer installation service, along with the training service after installation is completed. The customer wants each employee performing the service to have specific licenses and skills, to be sure that the services will be provided with the highest quality. The service manager, Maia Davis, has already created an appointment in the system.

Acting as the service manager, you now need to assign a staff member to each service of the appointment in accordance with the staff members' skills and licenses and the skills and licenses required for the services.

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.
- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.

- On the *Service Management Preferences* (FS100100) form, the minimum settings have been specified, including specifying the numbering sequences and work calendar, for the service management functionality to be used.
- On the *Users* (SM201010) form, the *davis* account has been created. In the **Linked Entity** box of the Summary area of the form, the Maia Davis employee account has been specified.
- On the *Branch Locations* (FS202500) form, the *WEST BRIGHTON* branch location of the *SWEETEQUIP* (*Service and Equipment Sales Center*) branch has been created.
- On the *User Profile* (SM203010) form, for the *davis* user, *WEST BRIGHTON* has been specified as the default branch location.
- On the *Skills* (FS200600) form, the *INSTALLING* and *TRAINING* skills have been created.
- On the *License Types* (FS200900) form, the *INST&REP* and *TRAINING* license types have been created.
- On the *Licenses* (FS201000) form, the following licenses have been created:
  - *FSL00006*, which has the *TRAINING* license type and was created for the *EP00000042 (Chase Frank)* employee
  - *FSL00004*, which has the *INST&REP* license type and was created for the *EP00000043 (Edward Smith)* employee
- On the *Employees* (EP203000) form, the following employees have been created:
  - *EP00000042 (Chase Frank)*: On the **General** tab (**Employee Settings** section), the **Staff Member in Service Management** check box has been selected. Also, the *TRAINING* skill has been listed on the **Skills** tab, and license *FSL00006* of the *TRAINING* license type has been listed on the **Licenses** tab.
  - *EP00000043 (Edward Smith)*: On the **General** tab (**Employee Settings** section), the **Staff Member in Service Management** check box has been selected. Also, the *INSTALLING* skill has been listed on the **Skills** tab, and license *FSL00004* of the *INST&REP* type has been listed on the **Licenses** tab.
- On the *Non-Stock Items* (IN202000) form, the following services (that is, items of the *Service* type) have been created:
  - *INSTALL*: For this service, *INSTALLING* has been listed on the **Service Skills** tab, and *INST&REP* has been listed on the **Service License Types** tab.
  - *TRAINING*: For this service, *TRAINING* has been listed on the **Service Skills** tab, and *TRAINING* has been listed on the **Service License Types** tab.
- On the *Appointments* (FS300200) form, the *000040-1* appointment has been created.

Process Overview

On the *Appointments* (FS300200) form, you will assign a staff member to each service of an appointment by using the **Add Staff** dialog box.

Step: Assigning Staff Members to Services

Do the following to assign a staff member to each service to be provided in the appointment:

1. Open the *000040-1* appointment on the *Appointments* (FS300200) form.
2. On the **Details** tab, click line *0001*, which has the installation service (that is, *INSTALL* is in the **Inventory ID** column).
3. On the table toolbar, click **Add Staff**.
4. In the Selection area of the **Add Staff** dialog box, which opens, ensure that *0001* (the reference number of the installation service) is selected in the **Service Ref. Nbr.** box.
5. In the Skills table, make sure that the check box is selected in the row with *INSTALLING* in the **Skill ID** column.
6. In the License Types table, make sure that the check box is selected in the row with *INST REP* in the **License Type ID** column.

7. In the Staff Members table, which lists employees whose skills and license type satisfy the selection criteria, select the check box in the row with *EP00000043 (Edward Smith)*.
8. Click **OK** to close the dialog box.
9. On the **Details** tab of the *Appointments* form, in the **Staff Member ID** column of the line with the INSTALL service, notice that *EP00000043 (Edward Smith)* has been added.
10. Click line *0002*, which has the training service (that is, *TRAINING* is in the **Inventory ID** column).
11. On the table toolbar, click **Add Staff** to assign a staff member to the training service.
12. In the Selection area of the **Add Staff** dialog box, which opens, ensure that *0002* (the reference number of the training service) is selected in the **Service Ref. Nbr.** box.
13. In the Skills table, make sure that the check box is selected in the row with *TRAINING* in the **Skill ID** column.
14. In the License Types table, make sure that the check box is selected in the row with *TRAINING* in the **License Type ID** column.
15. In the Staff Members table, which lists the employees whose skills and license type satisfies the selection criteria, select the check box in the row with *EP00000042 (Chase Frank)*.
16. Click **OK** to close the dialog box.
17. Notice that *EP00000042 (Chase Frank)* has been added to the **Staff Member ID** column in the line with the training service on the **Details** tab.
18. On the form toolbar, click **Save**.
19. Review the **Staff** tab (Item 1 in the following screenshot). Notice that two staff members have been added to the appointment; each is assigned to a particular service (Item 2).

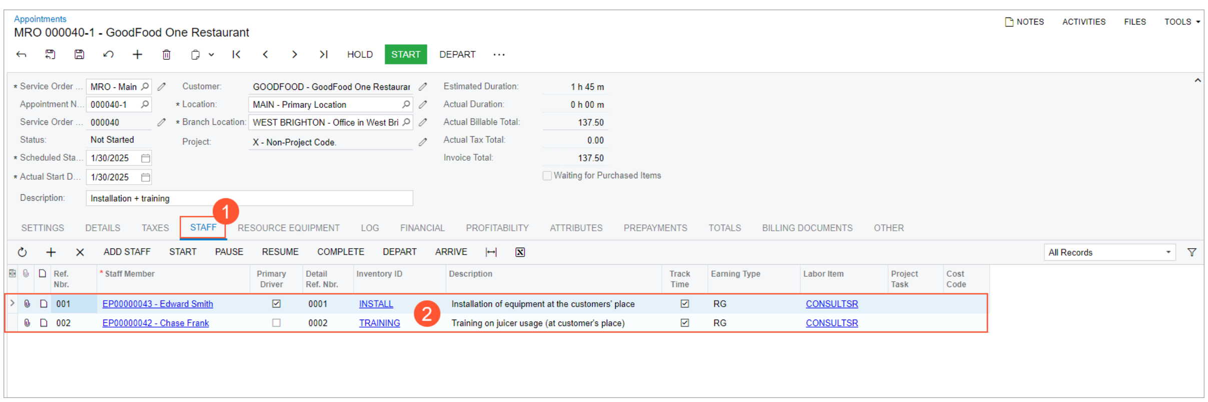


Figure: Staff members assigned to services

Appointment Creation: To Assign a Staff Member by Using the Calendar Board

The following activity will walk you through the process of creating and scheduling an appointment for a service order. You will assign the appointment to an employee who is available on the scheduled date, and you will use the **Unassigned Appointments (n)** tab on the calendar board.

Story

Suppose that the *COFFEESHOP - FourStar Coffee & Sweets Shop* customer has contacted the SweetLife Service and Equipment Sales Center and requested the juicer installation service. The customer wants the employee performing the service to have specific licenses and skills, to be sure that the services will be provided with the highest quality. A service order has been entered in the system.

Acting as the service manager (Maia Davis), you now need to create an appointment and assign it to the staff member while considering the staff member's available working hours as well as specific licenses and skills.

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.
- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.
- On the *Service Management Preferences* (FS100100) form, the minimum settings have been specified, including specifying the numbering sequences and work calendar, for the service management functionality to be used.
- On the *Users* (SM201010) form, the *davis* and *waite* user accounts have been created. The *EP00000040 - Maia Davis* employee has been associated with the *davis* user account; that is, *Maia Davis* has been selected in the **Linked Entity** box of the Summary area of the form. The *EP00000003 - Jon Waite* employee has been associated with the *waite* user account; that is, *Jon Waite* has been selected in the **Linked Entity** box of the Summary area of the form.
- On the *Branch Locations* (FS202500) form, the *WEST BRIGHTON* branch location of the *SWEETEQUIP* (*Service and Equipment Sales Center*) branch has been created.
- On the *User Profile* (SM203010) form, for the *davis* user, *WEST BRIGHTON* has been specified as the default branch location.
- On the *Skills* (FS200600) form, the *INSTALLING* skill has been created.
- On the *License Types* (FS200900) form, the *INST&REP* license type has been created.
- On the *Licenses* (FS201000) form, the *FSL00002* license has been created. This license has the *INST&REP* license type and was created for the *EP00000003 - Jon Waite* employee.
- On the *Employees* (EP203000) form, the *EP00000003 - Jon Waite* employee has been created. On the **General** tab (**Employee Settings** section), the **Staff Member in Service Management** check box has been selected. The *INSTALLING* skill has been listed on the **Skills** tab, and license *FSL00002* of the *INST&REP* type has been listed on the **Licenses** tab.
- On the *Staff Schedule Rules* (FS202001) form, a work schedule rule has been defined for the *EP00000003 - Jon Waite* employee, and the work schedule has been generated for this employee on the *Generate Staff Schedules* (FS500400) form.
- On the *Non-Stock Items* (IN202000) form, the *INSTALL* service (that is, an item of the *Service* type) has been created. For this service, *INSTALLING* has been listed on the **Service Skills** tab, and *INST&REP* has been listed on the **Service License Types** tab.
- On the *Service Orders* (FS300100) form, the service order with the *000041* reference number has been created.

Process Overview

You will create an appointment by using the *Service Orders* (FS300100) form. Then on the *Calendar Board* (FS300300) form, you will assign a staff member to an appointment while considering the staff member's available working hours.

Step 1: Creating an Appointment from the Service Orders Form

To create and assign this appointment, perform the following instructions:

1. On the *Service Orders* (FS300100) form, open the *000041* service order.

2. On the form toolbar, click **Create Appointment**.

   The *Appointments* (FS300200) form opens.

3. On the **Settings** tab, in the **Scheduled Date and Time** section, set **Scheduled Start Date** to *1/30/2025 1:00 PM*.

4. Ensure that the **Handle Manually** check box is cleared.

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

Step 2: Assigning a Staff Member to the Appointment

To assign a staff member to the appointment by using the calendar board, do the following:

1. While you are still viewing the appointment on the *Appointments* (FS300200) form, on the More menu, click **Schedule on Calendar**.

   The *Calendar Board* (FS300300) form opens in a new window. The left part of the form contains two tabs —**Service Orders** and **Unassigned Appointments (n)**. *n* is replaced with the quantity of unassigned appointments for the currently selected date.

2. On the **Unassigned Appointments (n)** tab (Item 1 in the following screenshot), ensure that the *000041-1* appointment (Item 2), which was created in Step 1, is listed.

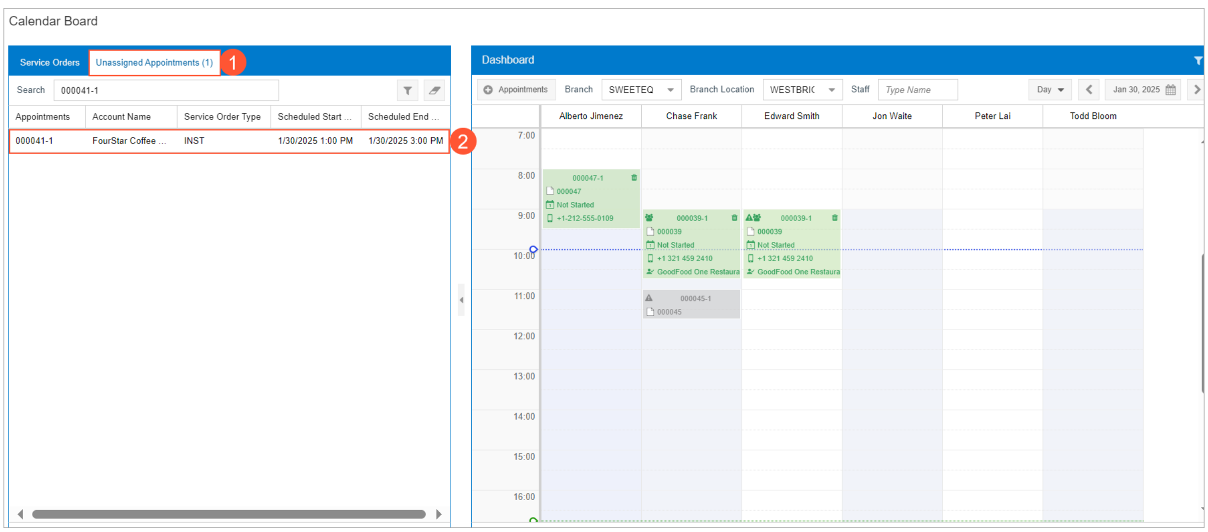
   

   Figure: An unassigned appointment

3. Right-click the appointment, and then click **Filter Staff**. The list of staff members on the dashboard is filtered to match the skills and licenses of the services in the appointment.

4. Drag the *000041-1* appointment from the **Unassigned Appointments (n)** tab to any time interval during Jon Waite's work hours. The appointment is now assigned to Jon Waite (Item 1 in the next screenshot) at the scheduled start time that was specified when you created the appointment (Item 2). Note that you can change the time of the appointment by dragging the appointment box.

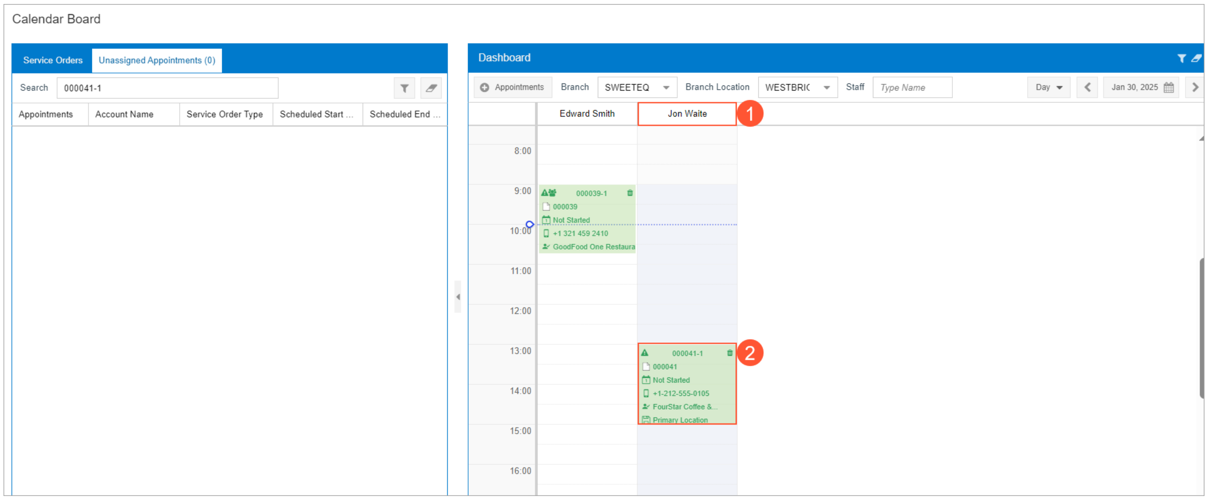


Figure: An assigned staff member

5. Click the *000041-1* appointment link in the calendar. The *Appointments* form is opened with the details of the appointment. On the **Staff** tab, confirm that Jon Waite is assigned to the appointment.

Service Orders: To Assign a Service Order to a Staff Member by Using the Calendar Board

The following activity will walk you through the process of scheduling an appointment for the service order. You will assign a service order to an employee who is available on the scheduled date with consideration given to the employee's skills and licenses. To perform this assignment, you will use the **Service Orders** tab on the *Calendar Board* (FS300300) form.

Story

Suppose that the *COFFEESHOP - FourStar Coffee & Sweets Shop* customer has contacted the SweetLife Service and Equipment Sales Center and requested the training service. The service order has been entered in the system.

Acting as the service manager (Maia Davis), you now need to assign a staff member to perform the service included in the service order. While performing this assignment, you need to consider the staff member's available working hours, skills, and licenses.

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.
- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.
- On the *Service Management Preferences* (FS100100) form, the minimum settings have been specified, including specifying the numbering sequences and work calendar, for the service management functionality to be used.
- On the *Users* (SM201010) form, the *davis* and *frank* user accounts have been created. The *EP00000040 - Maia Davis* employee has been associated with the *davis* user account; that is, *Maia Davis* has been selected in the **Linked Entity** box of the Summary area of the form. The *EP00000042 - Chase Frank* employee has been

associated with the *frank* user account; that is, *Chase Frank* has been selected in the **Linked Entity** box of the Summary area of the form.

- On the *Branch Locations* (FS202500) form, the *WEST BRIGHTON* branch location of the *SWEETEQUIP* (*Service and Equipment Sales Center*) branch has been created.
- On the *User Profile* (SM203010) form, for the *davis* user, *WEST BRIGHTON* has been specified as the default branch location.
- On the *Skills* (FS200600) form, the *INSTALLING* skill has been created.
- On the *License Types* (FS200900) form, the *INST&REP* license type has been created.
- On the *Licenses* (FS201000) form, the *FSL00001* license has been created. This license has the *TRAINING* license type and was created for the *EP00000002 - Todd Bloom* employee.
- On the *Employees* (EP203000) form, the *EP00000002 - Todd Bloom* employee has been created. On the **General** tab (**Employee Settings** section), the **Staff Member in Service Management** check box has been selected. The *TRAINING* skill has been listed on the **Skills** tab, and license *FSL00001* of the *TRAINING* type has been listed on the **Licenses** tab.
- On the *Staff Schedule Rules* (FS202001) form, a work schedule rule has been defined for the *EP00000002 - Todd Bloom* employee, and the work schedule has been generated for this employee on the *Generate Staff Schedules* (FS500400) form.
- On the *Non-Stock Items* (IN202000) form, the *INSTALL* service (that is, an item of the *Service* type) has been created. For this service, *INSTALLING* has been listed on the **Service Skills** tab, and *INST&REP* has been listed on the **Service License Types** tab.
- On the *Service Orders* (FS300100) form, the service order with the *000042* reference number has been created.

Process Overview

You will start by opening the service order by using the *Service Orders* (FS300100) form and then open the *Calendar Board* (FS300300) form. Then you will create an appointment and assign it to a staff member while considering staff member's available working hours and skills.

Step: Creating and Assigning an Appointment

To create an appointment for the service order and assign it to the staff member on the calendar board, do the following:

1. On the *Service Orders* (FS300100) form, open the service order with the *000042* reference number. Notice that the *TRAINING* service is listed on the **Details** tab.
2. On the More menu, click **Schedule on Calendar**.

   The *Calendar Board* (FS300300) form opens. The left part of the form contains two tabs—**Service Orders** and **Unassigned Appointments (n)**. (*n* is replaced with the quantity of unassigned appointments for the currently selected date.)
3. On the **Service Orders** tab, ensure that the *000042* service order is listed.
4. Right-click the service order, and then click **Filter Staff**. The list of staff members on the dashboard is filtered to match the skills and licenses of the services in the service order.
5. Drag the *000042* service order from the **Service Orders** tab to the Todd Bloom's time interval to be started at *4:00 PM*. The appointment (Item 1 in the following screenshot) is now assigned to Todd Bloom (Item 2). Note that you can change the time of the appointment by dragging the appointment box.

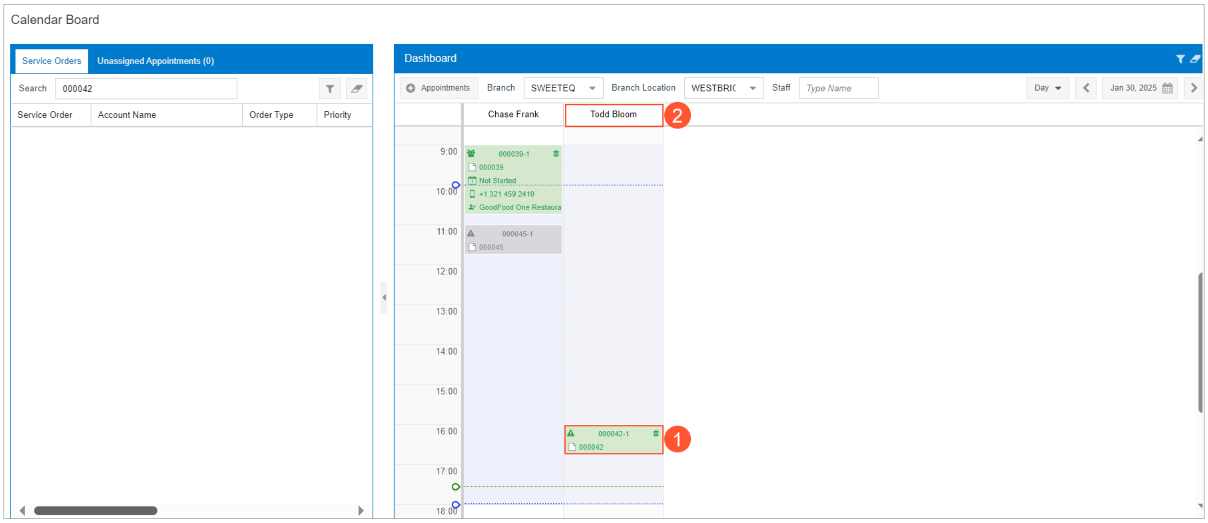


Figure: An assigned staff member

6. Click the *000042-1* appointment link in the calendar. The *Appointments* (FS300200) form is opened with the details of the appointment. On the **Staff** tab, confirm that Todd Bloom is assigned to the appointment.

Lesson 2.6: Using Resource Equipment in Appointments

In this lesson, you will learn how to add resource equipment to an appointment, and how to find and review the appointments to which a piece of resource equipment has been assigned.

Use of Resource Equipment in Appointments: To Use Resource Equipment in Appointments

This activity will walk you through the process of assigning to appointments the resource equipment that your company owns and uses for performing services.

Story

Suppose that the SweetLife Service and Equipment Sales Center has its own equipment that is used for repair services and keeps a history of appointments for each item that was used. The service manager (Maia Davis) receives a call from the FourStar Coffee & Sweets Shop customer that the repair of a juicer is necessary on February, 4, 2025.

Acting as the service manager, you will schedule the appointment, while taking into consideration which piece of resource equipment can be used during the time of the appointment. You will also review the history of usage of the selected piece of resource equipment.

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.

- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.
- On the *Service Management Preferences* (FS100100) form, the minimum settings have been specified, including specifying the numbering sequences and work calendar, for the service management functionality to be used.
- On the *Users* (SM201010) form, the *davis* account has been created. For the *davis* user account, in the **Linked Entity** box of the Summary area of the form, the *Maia Davis* employee account has been specified.
- On the *Branch Locations* (FS202500) form, the *WEST BRIGHTON* branch location of the *SWEETEQUIP* (*Service and Equipment Sales Center*) branch has been created.
- On the *User Profile* (SM203010) form, for the *davis* user, *WEST BRIGHTON* has been specified as the default branch location.
- On the *Service Order Types* (FS202300) form, the *MRO* service order type has been configured.
- On the *Equipment Types* (FS200800) form, the *SCREWDRIVER* equipment type has been created. This type has been assigned to the *FSE00001 (Vissko Screwdriver Set)* equipment on the *Equipment* (FS205000) form.
- On the *Non-Stock Items* (IN202000) form, for the *REPAIR* non-stock item, the *Service* type is selected on the **General** tab, and the *SCREWDRIVER* equipment type is assigned on the **Resource Equipment Types** tab.

Process Overview

To assign to an appointment the resource equipment that is necessary to perform a service, on the *Appointments* (FS300200) form, you create an appointment with the service for which resource equipment is required, and add needed resource equipment. You then review the *Resource Equipment History* (FS656500) report to determine which in which appointments the equipment has been or will be used, including the appointment. You will then view the appointments to which the selected piece of equipment has been assigned on the *Appointment Summary* (FS400100) form.

Step 1: Creating an Appointment

To create the appointment for which resource equipment will be used, do the following:

1. On the *Appointments* (FS300200) form, add a new record.
2. In the Summary area of the form, specify the following settings:
   - **Service Order Type**: *MRO*
   - **Customer**: *COFFEESHOP - FourStar Coffee & Sweets Shop*
   - **Description**: `Repair of a juicer`
3. On the **Settings** tab, in the **Scheduled Start Date** box, select *2/4/2025 9:00 AM*.
4. On the table toolbar of the **Details** tab, add a row, and specify the following settings:
   - **Line Type**: *Service*
   - **Inventory ID**: *REPAIR*
5. On the **Resource Equipment** tab, add a row, and in the **Equipment ID** column, select *FSE00001 (Vissko Screwdriver Set)*.
6. On the form toolbar, click **Save**.

Step 2: Reviewing the Resource Equipment to Be Used in the Appointment

To review the list of appointments in which the resource equipment will be used, do the following:

1. Open the *Resource Equipment History* (FS656500) report form.
2. In the **End Date** box, select *2/4/2025*.

3. In the **Resource Equipment** box, select *FSE00001*.
4. On the form toolbar, click **Run Report**.

The report opens with the details of the appointment that you have created in Step 1 in which the equipment will be used.

Step 3: Reviewing the Resource Equipment History

To review the history of appointments to which the piece of resource equipment has been assigned, do the following:

1. Open the *Equipment* (FS205000) form.
2. In the **Equipment Nbr.** box, select *FSE00001*.
3. On the More menu (under **Inquiries**), click **Resource Equipment History**.
4. On the *Appointment Summary* (FS400100) form, which opens with *FSE00001* selected in the **Resource Equipment** box, clear the **Staff Member** box (Item 1 in the following screenshot).
5. In the **To Scheduled Date** box, select *2/4/2025* (Item 2).

You can view the appointments for the selected time range in which the resource equipment has been or will be used to provide services (Item 3).

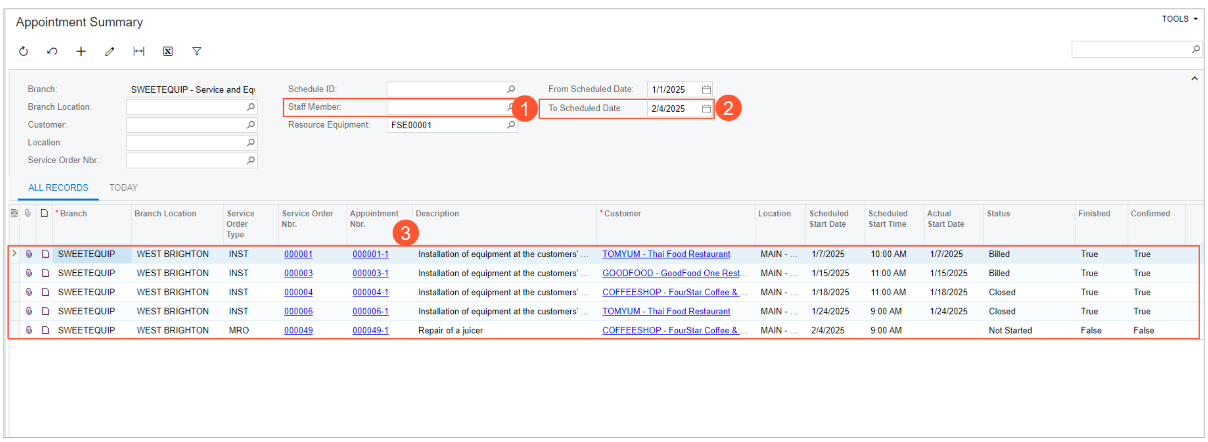


Figure: Appointments related to the resource equipment

Lesson 2.7: Quickly Processing Appointments

In this lesson, you will learn how to perform the quick billing of an appointment.

Quick Billing of Appointments: General Information

In Acumatica ERP, you can initiate the quick processing of an appointment—that is, performing such actions on the appointment as closing an appointment, preparing and releasing billing documents, and emailing the billing documents to the customer—with just one click.

To perform the quick billing process, an appointment should be created based on a service order type for which quick processing has been configured. For details, see *Service Order Types: Quick Processing Settings*.

Learning Objectives

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

- Process an appointment by using the **Quick Process** command
- Review the generated billing documents

Applicable Scenarios

You process an appointment quickly when you are not going to make changes in the billing documents based on what happens in the appointment, and you need to generate billing documents quickly.

Actions to Be Applied to an Appointment During Quick Processing

If an appointment is created based on a service order type for which the quick processing setting is permitted, you can click the **Quick Process** button on the form toolbar of the *Appointments* (FS300200) form. This opens the **Process Appointment** dialog box, which contains check boxes representing the actions that can be performed on the appointment during processing.

As described in the next section, the service order type selected for the appointment determines the check boxes available in this dialog box, as well as their default states and the specific set of check boxes that appear. The dialog box may contain the following check boxes:

- **Close** (**Appointment Actions** section): Indicates whether the system closes this appointment during quick processing.
- **Email Signed Appointment** (**Appointment Actions** section): Indicates whether during processing, the system sends an email with the *Appointment* (FS642000) report corresponding to the appointment and the customer's embedded signature. This action is available for the appointment processed in the mobile app only.
- **Run Billing** (**Appointment Actions** section): Indicates whether the system generates a billing document during quick processing of the appointment.
- **Prepare Invoice** (**Sales Order Actions** section): Indicates whether the system creates an SO invoice for the generated sales order during quick processing of the appointment.
- **Use Sales Order Quick Processing** (**Sales Order Actions**): Indicates whether when quick processing is run, the system processes the generated sales order by using the quick processing settings specified for the sales order type on the *Order Types* (SO201000) form.
- **Email Sales Order/Quote** (**Sales Order Actions** section): Indicates whether the system emails the sales order to the customer during quick processing.
- **Release Invoice** (**Invoice Actions** section): Indicates whether the system releases the generated invoice during quick processing.
- **Email Invoice** (**Invoice Actions** section): Indicates whether the system emails the generated invoice to the customer during quick processing.

In the dialog box, you review the processing details and make any needed changes to the state of check boxes. You then click **OK** to close the dialog box, start the quick processing of the appointment, and open the **Processing Results** dialog box, which shows the progress of the operations being performed and links to the generated documents.

Quick Processing Settings of the Service Order Type

You can run quick processing for an appointment on the *Appointments* (FS300200) form if both of the following conditions are met:

- For the applicable service order type, the **Allow Quick Process** check box is selected on the **General** tab of the *Service Order Types* (FS202300) form (**Billing Settings** section). On the **Quick Processing** tab, the administrator has specified the default settings for quick processing of an appointment of the type.
- The billing cycle assigned to the customer is configured to generate billing documents from appointments—that is, only if **Appointments** is selected in the **Run Billing For** section of the *Billing Cycles* (FS206000) form for this billing cycle.

When you click **Quick Process** on the *Appointments* form, the system opens the **Process Appointment** dialog box with the specific set of actions available and the default settings based on the service order type assigned to the appointment being processed. In this dialog box, you can select additional actions to be performed, or clear the check boxes for the actions selected by default that you do not want to perform. The available actions in the **Process Service Order** dialog box differ as follows, based on the settings specified on the *Service Order Types* form (**General** tab) for the service order type specified for the appointment:

- If *Sales Orders* is selected in the **Generated Billing Documents** box, the **Sales Order Actions** section appears in the **Process Service Order** dialog box, as shown in the following screenshot.

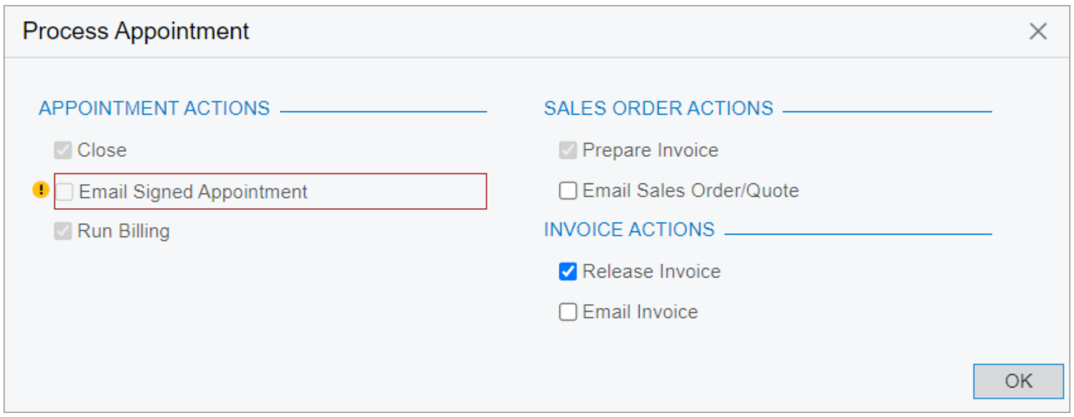


Figure: The quick processing actions for an appointment for which a sales order is to be generated

When sales orders are generated during billing, quick processing is also affected by the settings of the sales order type associated with the sales order, which is selected in the **Order Type for Billing** box of the *Service Order Types* form. If the **Allow Quick Process** check box is selected on the **Template** tab on the *Order Types* (SO201000) form for the order type, then the **Use Sales Order Quick Processing** check box is available in the **Sales Order Actions** section of the **Process Service Order** dialog box. When a user selects this check box, the **Prepare Invoice** check box disappears in the dialog box.

- If *SO Invoices* is selected in the **Generated Billing Documents** box for the service order type, the system generates an SO invoice when the appointment is billed. This setting causes the **Sales Order Actions** section to disappear in the dialog box, as shown in the following screenshot.

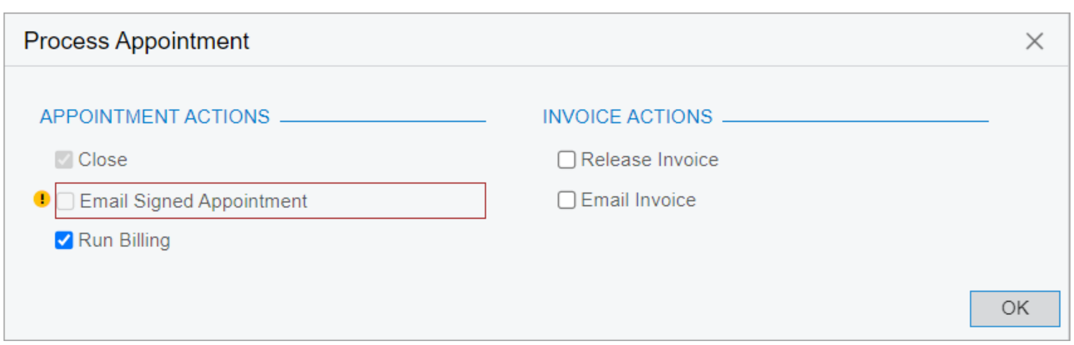


Figure: The quick processing actions for an appointment for which an SO invoice is to be generated

Quick Billing of Appointments: Process Activity

This activity will walk you through the process of billing an appointment with just one click if quick processing has been configured for the service order type specified for the service order and appointment.

Story

Suppose that the SweetLife Service and Equipment Sales Center has received a call from HM's Bakery and Cafe. This customer has requested the repair of one of the orange juicers, and the service manager (Maia Davis) has agreed on the appointment day and time with the customer.

Maia Davis has also created and scheduled the appointment in the system. A staff member, Ricardo Martinez (*EP00000044)*, has visited the customer, provided the repairing service, and completed the appointment. No changes need to be made to the invoice to be generated for this appointment.

Acting as accountant Yona Jones, you will quickly process the appointment, which initiates the automatic closing of the appointment and the generation of an invoice for it. Because the customer has requested that you send the invoice by email, you will include the sending of the released invoice to the customer in this processing.

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.
- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.
- On the *Service Management Preferences* (FS100100) form, the minimum settings have been specified, including specifying the numbering sequences and work calendar, for the service management functionality to be used.
- On the *Users* (SM201010) form, the *davis* and *martinez* accounts have been created. For the *davis* user account, in the **Linked Entity** box of the Summary area of the form, the *Maia Davis* employee account has been specified; for the *martinez* user account, in the **Linked Entity** box, the *Ricardo Martinez* employee account has been specified.
- On the *Branch Locations* (FS202500) form, the *WEST BRIGHTON* branch location of the *SWEETEQUIP* (*Service and Equipment Sales Center*) branch has been created.
- On the *User Profile* (SM203010) form, for the *davis* user, *WEST BRIGHTON* has been specified as the default branch location.
- On the *Employees* (EP203000) form, the *EP00000044 (Ricardo Martinez)* employee has been created. On the **General** tab (**Employee Settings** section), the **Staff Member in Service Management** check box has been selected.
- On the *Service Order Types* (FS202300) form, the *MRO* service order type has been defined. In the **Billing Settings** section of the **General** tab, *SO Invoices* has been selected in the **Generated Billing Documents** box, and the **Allow Quick Process** check box has been selected. On the **Quick Processing** tab, the following settings have been specified:
  - **Close** (**Appointment Actions** section): Selected
  - **Run Billing** (**Appointment Actions** section): Selected
  - **Allow Billing** (**Service Order Actions** section): Selected
  - **Run Billing** (**Service Order Actions** section): Selected
  - **Release Invoice** (**Invoice Actions** section): Selected

- On the *Billing Cycles* (FS206000) form, the following settings have been specified for the *AP AP* billing cycle:
  - **Run Billing For**: **Appointments**
  - **Group Billing Documents By**: **Appointments**
- On the *Customers* (AR303000) form, the *HMBAKERY (HM's Bakery and Cafe)* customer has been defined, and the *AP AP* billing cycle has been selected for it in the **Service Management** section of the **Billing** tab.
- On the *Non-Stock Items* (IN202000) form, for the *REPAIR* service item (that is, non-stock item of the *Service* type), the *Time* billing rule has been specified on the **Price/Cost** tab.
- On the *Appointments* (FS300200) form, the *000038-1* appointment has been created.

Process Overview

On the *Appointments* (FS300200) form, you will initiate quick processing of the appointment. You will then review the list of billing documents that the system has generated as a result of quick processing and review the invoice on the *Invoices* (SO303000) form.

System Preparation

Before you begin performing the steps of this activity, do the following:

1. Launch the Acumatica ERP website, and sign in to a company with the *U100* dataset preloaded. You should sign in as an accountant by using the *jones* username and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2025*. If a different date is displayed, click the Business Date menu button and select *1/30/2025* on the calendar. For simplicity, in this activity, you will create and process all documents in the system on this business date.
3. On the Company and Branch Selection menu on the top pane of the Acumatica ERP screen, make sure that the *Service and Equipment Sales Center* branch is selected.

Step 1: Quickly Processing the Appointment

To quickly initiate the billing process for the appointment, do the following:

1. On the *Appointments* (FS300200) form, open the *000038-1* appointment.
2. In the **Service Order Type** box of the Summary area, notice that *MRO* is selected. Note that quick processing settings have been defined for this service order type, as described in the *Configuration Overview* section of this activity.
3. On the form toolbar, click **Quick Process**.

   The **Process Appointment** dialog box opens.
4. In the **Invoice Actions** section of the dialog box, select the **Email Invoice** check box.

   The invoice will be sent to the customer during quick processing.
5. Click **OK**.

   The system closes the **Process Appointment** dialog box and opens the **Processing Results** dialog box, in which you can see the status of the process.
6. After the processing has successfully completed, close the **Processing Results** dialog box.

Based on the settings specified for the *MRO* service order type (and the setting you changed to have the invoice emailed to the customer), during the quick processing, the system closes the appointment, and creates and releases the related invoice. In this case, the system also sends the invoice to the customer by email because you have selected the **Email Invoice** check box in the **Processing Results** dialog box.

Step 2: Reviewing the Created Billing Documents and the Sent Email

Review the generated documents and the sent email as follows:

1. While you are still viewing the *000038-1* appointment on the *Appointments* (FS300200) form, click the **Billing Documents** tab, and notice that an invoice is listed. It has been created during the quick processing.
2. In the **Reference Nbr.** column, click the link to open the SO invoice.

   The *Invoices* (SO303000) form opens. Notice that the invoice has the *Open* status.
3. On the form title bar (in the top right corner of the form), click **Activities**. The **Tasks & Activities** dialog box opens.
4. In the dialog box, notice that the email sent to the customer with the invoice is listed.
5. Click the link to the email; this brings up the email in a dialog box so that you can review it.

Lesson 2.8: Billing Appointments

In this lesson, you will learn how to bill multiple appointments simultaneously on the mass-processing form.

Billing of Multiple Appointments: General Information

In Acumatica ERP, you can generate billing documents for multiple appointments simultaneously. You use the *Run Appointment Billing* (FS500100) form, on which you can run the billing process for multiple appointments. You can filter the list of appointments to be processed by the customer, billing cycle, or time frame.

> On the *Run Appointment Billing* form, you can run billing for only customers with a billing cycle that generates billing documents from appointments.

For details on and examples of the different types of billing cycles, see *Billing Cycles: Examples*.

Learning Objectives

Billing of Multiple Appointments: General Information
In this lesson, you will learn how to generate billing documents simultaneously for multiple appointments of different customers with different billing cycles assigned.

Applicable Scenarios

You perform mass-billing of appointments when you need to generate billing documents for multiple appointments at the same time.

Generated Documents

When a completed appointment is billed on the *Run Appointment Billing* (FS500100) form, the system creates a sales order, a sales invoice with the *Credit Memo* type, or an AR credit memo if all of the following conditions are met:

- The customer has the service order type of the appointment specified on the **Billing** tab of the *Customers* (AR303000) form.

- For the service order type, *Sales Orders*, *SO Invoices*, or *AR Documents* is selected in the **Generated Billing Documents** box on the **General** tab of the *Service Order Types* (FS202300) form. The system creates the noted documents depending on the specified document type as follows:
  - *Sales Orders*: If this type is selected and the amount of the service order is negative, a sales order with the *Credit Memo* type is created. (If the amount is positive, a sales order of the type specified in the **Order Type for Billing** box is created.)
  - *SO Invoices*: If this type is selected and the amount of the service order is negative, a sales invoice with the *Credit Memo* type is created. (If the amount is positive, a sales invoice with the *Invoice* type is created.)
  - *AR Documents*: If this type is selected, the **Create AP Bills for Negative Balances** check box is cleared for the service order, the amount of the service order is negative, and an AR invoice is created. (If the amount is positive, an AR credit memos is created.)
- The billing cycle specified for the customer on the **Billing** tab of the *Customers* form has the **Appointment** option button selected under **Run Billing For** on the *Billing Cycles* (FS206000) form.

> The billing cycle is specified for the customer on the **Service Billing** tab of the *Customers* form if the **Manage Multiple Billing Options per Customer** check box is selected on the **General** tab of the *Service Management Preferences* (FS100100) form.
>
> If the **Manage Multiple Billing Options per Customer** check box is cleared, the billing cycle should be specified in the **Service Management** section on the **Billing** tab on the *Customers* form, because in this case the **Service Billing** tab on the *Customers* form is not displayed.

In the document created during the appointment billing, the system fills in credit terms as follows, depending on whether the **Use Credit Terms in Credit Memos** check box is selected on the *Accounts Receivable Preferences* (AR101000) form:

- If the check box is selected, the system copies the credit terms from the customer's settings.
- If the check box is cleared, the system leaves the **Terms** box of the *Invoices and Memos* form empty.

Billing of Multiple Appointments: Process Activity

The following activity will walk you through the process of generating invoices for multiple appointments. You will also review the invoices that have been generated for customers with different billing cycles assigned.

Story

The accountant of the SweetLife Service and Equipment Sales Center generates billing documents every day. On February 3, 2025, the accountant (Yona Jones) has to run billing for appointments for the following customers:

- *GOODFOOD (GoodFood One Restaurant)*: For this customer, a billing document is generated for each appointment.
- *RETSALE (Individual Retail Customer)*: For this customer, a billing document is generated each Monday.
- *TOMYUM (Thai Food Restaurant)*: For this customer, one billing document is generated for each service order; it includes all appointments of the service order.

The service orders for all these customers are of a service order type that is defined to generate sales invoices. In this activity, you will act as the accountant and run billing for these customers.

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.
- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.
- On the *Service Management Preferences* (FS100100) form, the minimum settings have been specified, including specifying the numbering sequences and work calendar, for the service management functionality to be used.
- On the *Users* (SM201010) form, the *jones* account has been created. For the user account, in the **Linked Entity** box of the Summary area of the form, the *Yona Jones* employee account has been specified.
- On the *Branch Locations* (FS202500) form, the *WEST BRIGHTON* branch location of the *SWEETEQUIP* (*Service and Equipment Sales Center*) branch has been created.
- On the *User Profile* (SM203010) form, for the *jones* user, *WEST BRIGHTON* has been specified as the default branch location.
- On the *Order Types* (SO201000) form, the *SO* and *IN* sales order types have been created. On the **General** tab (**Field Services Settings** section), the **Enable Field Services Integration** check box has been selected.
- On the *Service Order Types* (FS202300) form, the *INST* and *MRO* service order types have been defined. On the **General** tab (**Billing Settings** section), *SO Invoices* has been selected in the **Generated Billing Documents** box.
- On the *Billing Cycles* (FS206000) form, the following billing cycles have been created:
  - *AP AP*: For this billing cycle, **Appointments** is selected under **Run Billing For**, and **Appointments** is selected under **Group Billing Documents By**.
  - *AP MONDAY*: For this billing cycle, **Appointments** is selected under **Run Billing For**, **Time Frame** is selected under **Group Billing Documents By**, and *Monday* has been selected as the **Fixed Day of Week** (in the **Time Frame Grouping Settings** section, under **Prepare On**).
  - *AP SO*: For this billing cycle, **Appointments** is selected under **Run Billing For**, and **Service Orders** is selected under **Group Billing Documents By**.
- On the *Customers* (AR303000) form, the following customers have been defined with the noted billing cycles selected in the **Billing Cycle** box (**Service Management** section) of the **Billing** tab:
  - *GOODFOOD (GoodFood One Restaurant)*, which has the *AP AP* billing cycle
  - *RETSALE (Individual client)*, which has the *AP MONDAY* billing cycle
  - *TOMYUM (Thai Food Restaurant)*, which has the *AP SO* billing cycle
- On the *Appointments* (FS300200) form, multiple appointments have been created for the purposes of this activity.

Process Overview

You will review closed appointments on the *Run Appointment Billing* (FS500100) form. On the form, you will specify settings that cause the system to generate invoices automatically. You will then review the generated billing documents on the *Service Billing Batches* (FS305800) form.

System Preparation

Before you begin performing the steps of this activity, do the following:

1. Launch the Acumatica ERP website, and sign in to a company with the *U100* dataset preloaded. You should sign in as an accountant by using the *jones* username and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *2/3/2025*. If a different date is displayed, click the Business Date menu button, and select the *2/3/2025* date from the calendar. For simplicity, in this activity, you will create and process all documents in the system on this business date.

3. On the Company and Branch Selection menu on the top pane of the Acumatica ERP screen, make sure that the *Service and Equipment Sales Center* branch is selected.

Step 1: Reviewing the Closed Appointments

To review the list of closed appointments for customers awaiting billing, do the following:

1. Open the *Run Appointment Billing* (FS500100) form.
2. In the **Generated Billing Documents** box of the Selection area, select *SO Invoices*.
3. In the **From Date** box, select *1/20/2025*.
4. In the **Up to Date** box, select *2/3/2025*.

In the table, notice that for *GOODFOOD*, two appointments of one service order have been closed on *1/28/2025*. For *RETSALE*, two appointments of one service order have been closed, and one appointment of another service order has been closed during the past week. For *TOMYUM*, the last appointment of a service order has been closed on *1/28/2025*. In the **Cut-Off Date** column, you can see the date when the billing document can be generated for each appointment. This date is computed based on the actual completion date of the appointment, and the billing date is based on the customer's billing cycle.

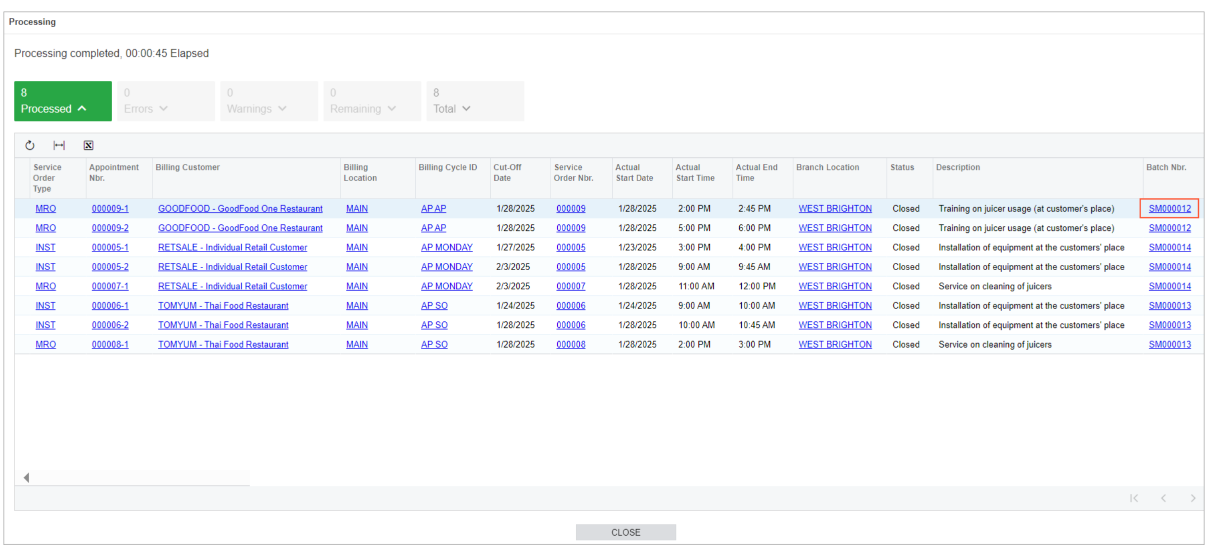
Step 2: Generating and Reviewing Invoices

To generate multiple invoices for the appointments, do the following:

1. Once the list of appointments is opened on the *Run Appointment Billing* (FS500100) form, on the form toolbar, click **Process All**.

   The system opens the **Processing** dialog box, in which you can see the status of the processing.
2. After the processing has successfully completed, in the **Processing** dialog box, click the **Processed** tab.

   The table with the processed records is shown in the dialog box. A separate batch with invoices has been generated for each customer. Move the scroll bar to the right until it reaches the end.
3. In the **Batch Nbr.** column, click the link in either row for *GOODFOOD (GoodFood One Restaurant)* (see the following screenshot).



Service Order Type	Appointment Nbr.	Billing Customer	Billing Location	Billing Cycle ID	Cut-Off Date	Service Order Nbr.	Actual Start Date	Actual Start Time	Actual End Time	Branch Location	Status	Description	Batch Nbr.
MRO	000009-1	GOODFOOD - GoodFood One Restaurant	MAIN	AP AP	1/28/2025	000009	1/28/2025	2:00 PM	2:45 PM	WEST BRIGHTON	Closed	Training on juicer usage (at customer's place)	SM000012
MRO	000009-2	GOODFOOD - GoodFood One Restaurant	MAIN	AP AP	1/28/2025	000009	1/28/2025	5:00 PM	6:00 PM	WEST BRIGHTON	Closed	Training on juicer usage (at customer's place)	SM000012
INST	000005-1	RETSALE - Individual Retail Customer	MAIN	AP MONDAY	1/27/2025	000005	1/23/2025	3:00 PM	4:00 PM	WEST BRIGHTON	Closed	Installation of equipment at the customers' place	SM000014
INST	000005-2	RETSALE - Individual Retail Customer	MAIN	AP MONDAY	2/3/2025	000005	1/28/2025	9:00 AM	9:45 AM	WEST BRIGHTON	Closed	Installation of equipment at the customers' place	SM000014
MRO	000007-1	RETSALE - Individual Retail Customer	MAIN	AP MONDAY	2/3/2025	000007	1/28/2025	11:00 AM	12:00 PM	WEST BRIGHTON	Closed	Service on cleaning of juicers	SM000014
INST	000006-1	TOMYUM - Thai Food Restaurant	MAIN	AP SO	1/24/2025	000006	1/24/2025	9:00 AM	10:00 AM	WEST BRIGHTON	Closed	Installation of equipment at the customers' place	SM000013
INST	000006-2	TOMYUM - Thai Food Restaurant	MAIN	AP SO	1/28/2025	000006	1/28/2025	10:00 AM	10:45 AM	WEST BRIGHTON	Closed	Installation of equipment at the customers' place	SM000013
MRO	000008-1	TOMYUM - Thai Food Restaurant	MAIN	AP SO	1/28/2025	000008	1/28/2025	2:00 PM	3:00 PM	WEST BRIGHTON	Closed	Service on cleaning of juicers	SM000013

Figure: The batches with the generated billing documents

The *Service Billing Batches* (FS305800) form opens in a pop-up window with the batch of generated invoices. Notice that a separate invoice (Item 1 in the following screenshot) has been generated for each appointment

(Item 2) of one service order (Item 3). This is because the billing cycle of the customer has been defined to run billing for appointments and group them by appointments.

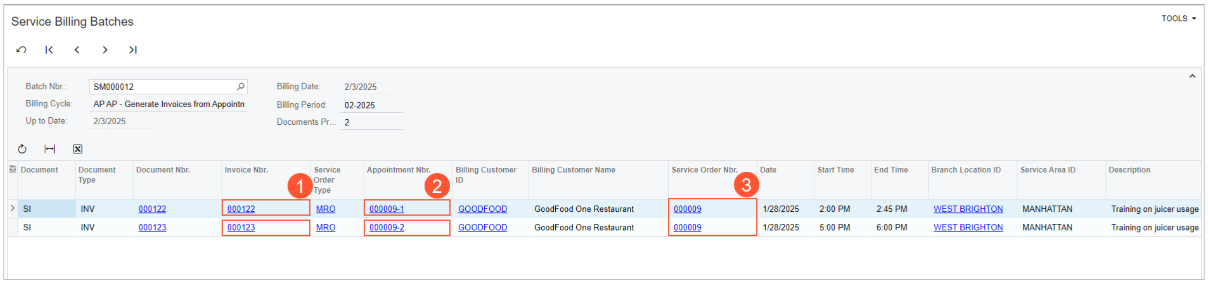


Figure: A separate invoice generated for each appointment

4. Close the window with the *Service Billing Batches* form.
5. In the **Processing** dialog box, in the **Batch Nbr.** column, click the link for the batch of invoices generated for *RETSALE - Individual Retail Customer*.

   The *Service Billing Batches* form opens in a pop-up window with the batch of generated invoices. Notice that one invoice (Item 1 in the following screenshot) has been generated for three appointments (Item 2) of two service orders (Item 3). This is because the billing cycle of the customer has been defined to run billing for appointments and group them by time frame (on each Monday).

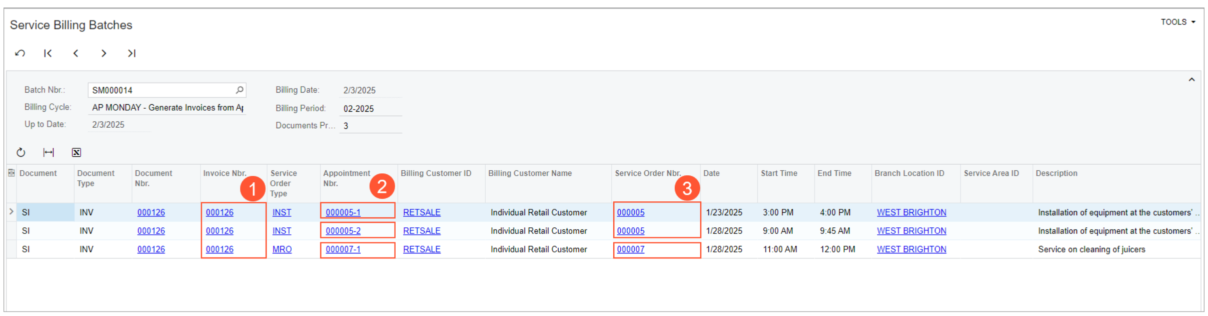


Figure: One invoice generated for three appointments

6. Close the window with the *Service Billing Batches* form.
7. In the **Processing** dialog box, in the **Batch Nbr.** column, click the link for the batch of invoices generated for *TOMYUM (Thai Food Restaurant)*.

   The *Service Billing Batches* form opens in a pop-up window with the batch of generated invoices. Notice that two invoices (see Item 1 in the following screenshot) have been generated for three appointments (Item 2) of two service orders (Item 3). This is because the billing cycle of the customer has been defined to run billing for appointments and group them by service orders.

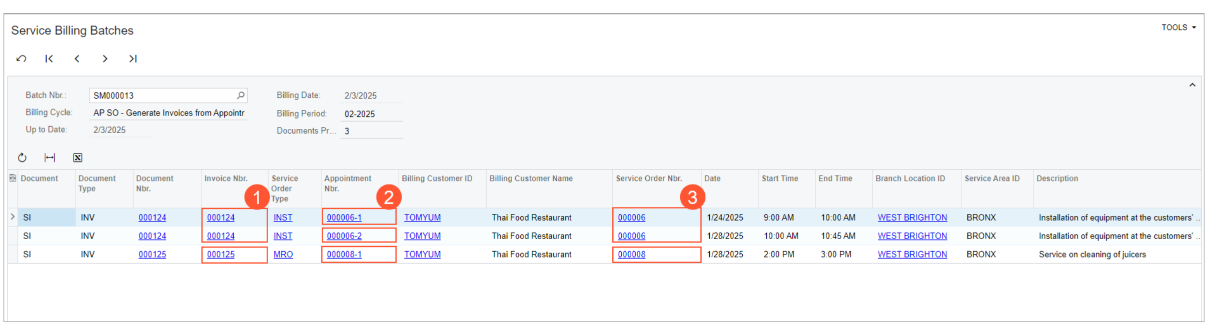


Figure: Two invoices generated for three appointments and grouped by service order

8. Close the window with the *Service Billing Batches* form.

Lesson 2.9: Processing Quotes

In this lesson, you will learn how to create and process a quote in Acumatica ERP.

Quote Processing: General Information

A quote is a document that contains the list of items (any services and inventory items) that will be used if a customer decides to deal with your company and their costs. The details of the quote can be communicated by phone or email.

Once the customer has agreed to have the services performed at the quoted costs, you create a service order from the quote. (Multiple service orders can be created based on a single quote.) Thus, quotes can be used as templates for future service orders.

Learning Objectives

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

- Create a quote
- Confirm the quote
- Copy the quote to a service order

Applicable Scenarios

You create a quote in the following cases:

- You want to show a customer what services and costs will be involved if the customer orders the services of your company
- You want to gain more customers, so you create quotes with the details of the services and stock items (and costs) that are typically included in a common service order. Any of these quotes can be sent to a potential customer.

Workflow of Quote Processing

For processing a quote, the typical workflow involves the actions and generated documents shown in the following diagram.

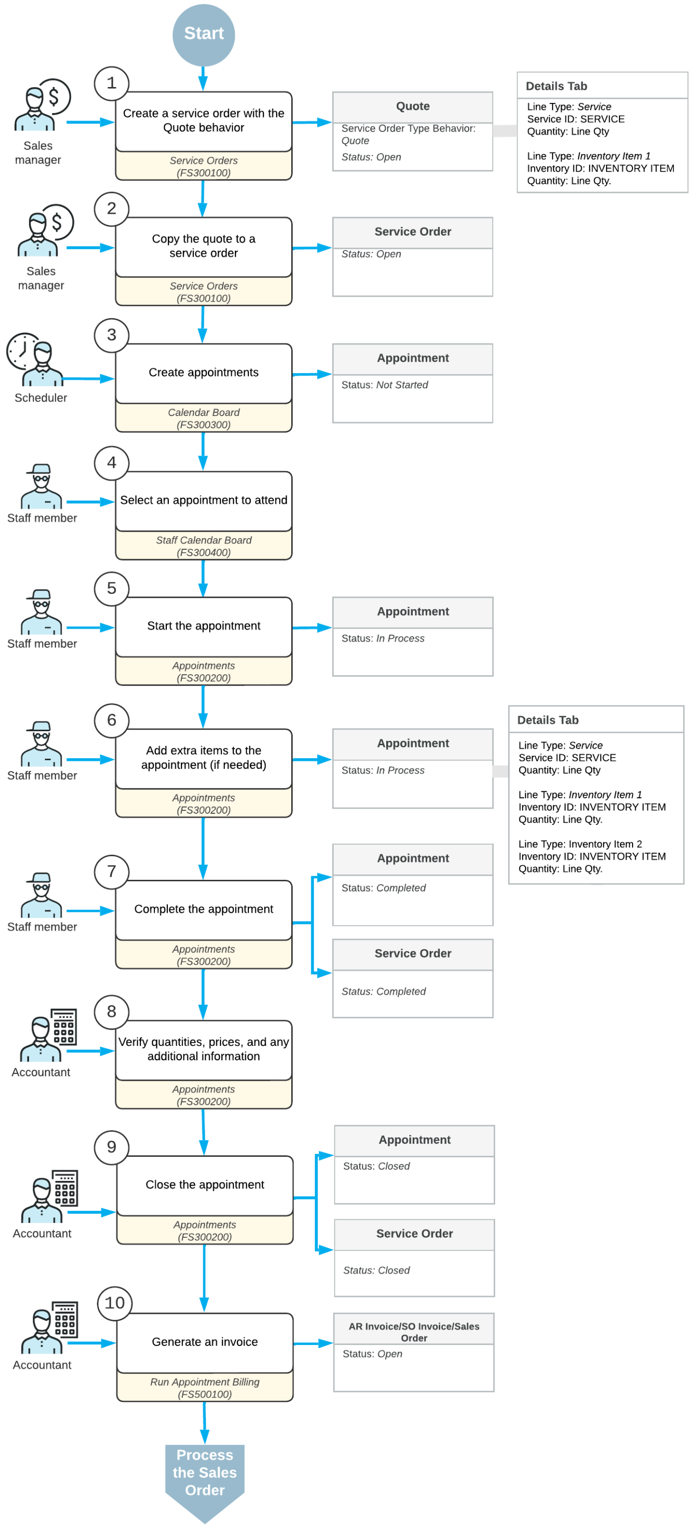


Figure: Quote processing

The remaining sections of this topic describe many of the actions shown in the diagram.

Creation of a Service Order from a Quote

When a customer request for services is received, a sales manager enters a quote (that is, a service order with the *Quote* behavior) by using the *Service Orders* (FS300100) form (see Item 1 in the diagram in *Workflow of Quote Processing*). In the quote, the sales manager specifies the customer from which the request has been received, the branch and branch location from which the services are delivered, the services that should be performed, and the inventory items to be purchased with the service (if any). The sales manager then sends it to the customer for confirmation.

After the customer has approved the quote, the sales manager creates a service order from the quote by using the **Copy** command on the *Service Orders* form (Item 2). The system creates a service order with the *Open* status using the settings specified in the quote. Since accounts and subaccounts (if subaccounts are used in the system) are not specified in a quote, the system specifies an account and a subaccount (if any) in the created service order based on the settings of the service order type selected during the creation of the service order as follows:

- **Account**: The source of the sales account is specified in the **Use Sales Account From** box on the *Service Order Types* (FS202300) form for the selected service order type. It can be one of the following options:
  - *Inventory Item*: The system uses an account specified on the **GL Accounts** tab of the *Stock Items* (IN202500) or *Non-Stock Items* (IN202000) form.
  - *Warehouse*: The system uses an account specified on the **GL Accounts** tab of the *Warehouses* (IN204000) form.
  - *Posting Class*: The system uses an account specified on the **GL Accounts** tab of the *Posting Classes* (IN206000) form.
  - *Customer/Vendor Location*: The system uses an account specified on the **Locations** tab of the *Customers* (AR303000) form or on the *Vendors* (AP303000) form.
- **Subaccount**: A subaccount is determined by the rule specified in the **Combine Sales Sub. From** box on the *Service Order Types* form for the selected service order type. For details, see the description of the **Combine Sales Sub. From** box in *Service Order Types*.

The system inserts a respective account and subaccount (if any) in the **Account** and **Subaccount** columns on the **Details** tab of the *Service Orders* form.

Once a service order has been created, staff members can be assigned to the service order and appointments can be created.

Appointment Creation

After the service order has been created in the system, a scheduler of your company (that is, a person who is responsible for planning the appointments) uses the *Calendar Board* (FS300300) form to schedule the appointments (see Item 3 in the diagram in *Workflow of Quote Processing*) that are needed to perform the services requested by the customer.

> Appointments can also be created directly on the *Appointments* (FS300200) form.

When the scheduler selects a staff member to attend an appointment, the scheduler considers the work schedule of the staff member, the skills and licenses needed to perform the service, and the service area where the services are provided. The scheduler checks the settings of each appointment and enters additional information (if needed), such as the resource equipment used to perform the services and the stock items purchased by the customer along with the service. (The system assigns the *Not Started* status to the created appointments.)

Attending Appointments

The staff member who is assigned to an appointment looks through the upcoming appointments on the *Staff Calendar Board* (FS300400) form, identifies which appointment needs to be attended (see Item 4 in the diagram in *Workflow of Quote Processing*), and goes to the location where the service has to be performed (which is usually the customer location). The staff member starts the appointment on the *Appointments* (FS300200) form (Item 5), which causes the appointment to be assigned the *In Process* status.

While the services are being performed, the staff member adds information on services (such as status, quantities, and extra stock items that were used) to the appointment on the *Appointments* form (Item 6). When the services have all been performed, the staff member checks the details of the appointment. When everything is correct and complete, the staff member selects the **Finished** check box and completes the appointment (Item 7), which gives it the *Completed* status and causes the system to complete the service order.

When all appointments of a particular service order are completed, the system assigns the service order the *Completed* status.

Closing of the Appointments and Service Order

Further processing of the service order is performed by an accountant. On the *Appointments* (FS300200) form, the accountant opens the completed appointment and verifies quantities and prices (see Item 8 in the diagram in *Workflow of Quote Processing*). When all information is verified and the appointments are ready for invoicing, the accountant closes the appointments (Item 9), and the system closes the service order. (The appointments and service order are assigned the *Closed* status.)

Generation and Processing of the Billing Document

The accountant generates a document (AR invoice, sales order, or sales invoice) with the *Open* status by using the *Run Appointment Billing* (FS500100) form (see Item 10 in the diagram in *Workflow of Quote Processing*).

The accountant then processes the billing document in the system.

Quote Processing: To Create and Process a Quote

This activity will walk you through the process of creating and confirming a quote in Acumatica ERP, and then converting the quote to a service order.

Story

Suppose that the *COFFEESHOP - FourStar Coffee & Sweets Shop* customer has requested particular services from the SweetLife Service and Equipment Sales Center. Acting as a service manager (Maia Davis) of the company, you will create a quote in the Acumatica ERP. Then you will generate the quote and review a printable version of it. Finally, after the customer has approved the quote, you will confirm the quote in the system and convert it to a service order.

Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- The minimum system configuration, which is described in *Company with Branches that Do Not Require Balancing: General Information*, has been performed.
- The *SWEETLIFE* company has been created on the *Companies* (CS101500) form. This company has multiple branches created on the *Branches* (CS102000) form, including *SWEETEQUIP (Service and Equipment Sales Center)*.
- On the *Service Management Preferences* (FS100100) form, the minimum settings have been specified, including specifying the numbering sequences and work calendar, for the service management functionality to be used.
- On the *Users* (SM201010) form, the *davis* account has been created. For the *davis* user account, in the **Linked Entity** box of the Summary area of the form, the *Maia Davis* employee account has been specified.

- On the *Branch Locations* (FS202500) form, the *WEST BRIGHTON* branch location of the *SWEETEQUIP* (*Service and Equipment Sales Center*) branch has been created.
- On the *User Profile* (SM203010) form, for the *davis* user, *WEST BRIGHTON* has been specified as the default branch location.
- On the *Service Order Types* (FS202300) form, the *QTE* service order type has been created.
- On the *Customers* (AR303000) form, the *COFFEESHOP - FourStar Coffee & Sweets Shop* customer has been created.
- On the *Non-Stock Items* (IN202000) form, for the *TRAINING* non-stock item, the *Service* type has been selected, and the *Time* billing rule has been specified.
- On the *Stock Items* (IN202500) form, the *JUICER15* and *BLADE20* items have been created.

Process Overview

On the *Service Orders* (FS300100) form, you will create a quote for a one-hour repair service by creating a service order of the *QTE* type. You will also add to the quote the inventory items needed by the customer and see how the order total is updated. You will review the print-friendly form of the quote. On the *Service Orders* form, you will then copy the service order of the type with the *Quote* behavior to a regular service order.

System Preparation

Before you begin performing the steps of this activity, do the following:

1. Launch the Acumatica ERP website, and sign in to a company with the *U100* dataset preloaded. You should sign in 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, make sure that the business date in your system is set to *1/30/2025*. If a different date is displayed, click the Business Date menu button and select *1/30/2025* on the calendar. For simplicity, in this activity, you will create and process all documents in the system on this business date.

Step 1: Creating and Reviewing the Quote

You will create a quote for the cost of the service and generate a print-friendly version of the quote for the customer's review. Do the following:

1. On the *Service Orders* (FS300100) form, add a new record.
2. In the Summary area of the form, specify the following settings:
   - **Service Order Type**: *QTE*
   - **Customer**: *COFFEESHOP - FourStar Coffee & Sweets Shop*
   - **Description**: `A quote for the FourStar Coffee & Sweets Shop`
3. On the **Details** tab, add a row, and specify the following settings in the row:
   - **Line Type**: *Service*
   - **Inventory ID**: *REPAIR*

     As soon as you select the service, the system inserts the default billing rule (which you will change), price, and duration information that have been specified for the service.
   - **Billing Rule**: *Flat Rate*
4. Add another row, and specify the following settings in the row:
   - **Line Type**: *Inventory Item*
   - **Inventory ID**: *JUICER15*

   As soon as you select the inventory ID, the system inserts the stock item's unit price from its settings.

5. Add a row, and specify the following settings in the row for the inventory item:
   - **Line Type**: *Inventory Item*
   - **Inventory ID**: *BLADE20*

   The system again inserts the stock item's unit prices from its settings.
6. On the form toolbar, click **Save**.
7. In the row with the *BLADE20* inventory item, change **Unit Price** to `300.0000`.
8. On the form toolbar, click **Save**.
9. Verify that the service order total in the **Estimated Billable Total** box in the Summary area is $2,880.00 (see Item 1 in the following screenshot).

   This total is the sum of the unit prices of all lines of the **Details** tab (Item 2): $80.00 (1h of the service) + $2500.00 (commercial juicer) + $300.00 (blade holder).

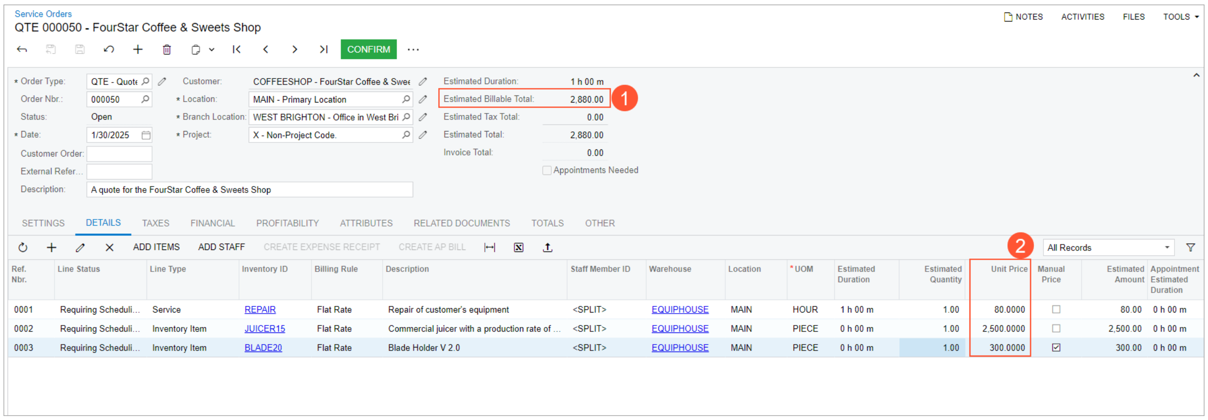


Figure: The service order total

10. On the More menu (under **Printing and Emailing**), click **Print Service Order**.

    A print-friendly version of the service quote is opened in a new window, as shown in the following screenshot, and you can print it, if needed. You can also convert the quote to PDF or XLS format, or send it to the customer via email for review.

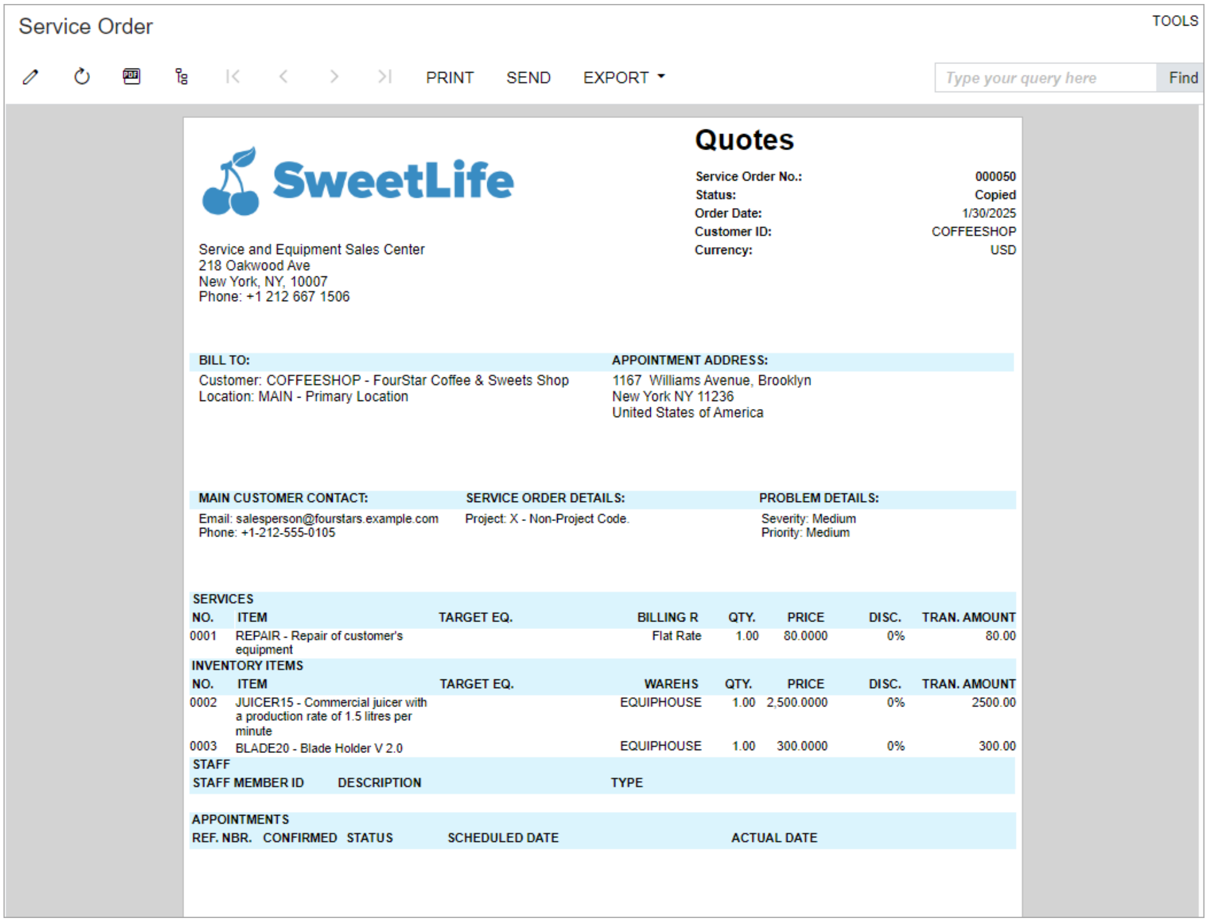


Figure: The print-friendly quote

Step 2: Confirming the Quote

When the customer has agreed to have the services at the quoted costs, you confirm the quote in the system by doing the following:

1. Return to the quote on the *Service Orders* (FS300100) form.
2. On the form toolbar, click **Confirm**.

Notice that the status of the service order changed to *Confirmed*.

Step 3: Copying the Quote to a Service Order

Once the quote is confirmed, you should convert it to a regular service order (that is, copy the quote to a service order). Do the following:

1. On the *Service Orders* (FS300100) form, open the quote.
2. On the form toolbar, click **Copy**.
3. In the **Select the New Service Order Type** dialog box, select *MRO*, and click **Proceed**.

   The system opens the *Service Orders* form displaying the service order being created. The service order inherits the service and inventory lines from the quote.
4. On the form toolbar, click **Save**; then verify that the service order has been assigned the *Open* status.

5. On the **Other** tab, verify that the quote number has been inserted in the **Reference Nbr.** box as the source of this service order.
6. Click the link in the **Reference Nbr.** box.

   The original quote is displayed on the *Service Orders* form, which opens in a new window. Verify that the quote has been assigned the *Copied* status.
7. On the **Related Documents** tab, make sure that the service order you created based on this quote is listed.

> Multiple service orders can be listed on this tab. A quote can be copied to any number of service orders, and they can have different service order types.

Part 3: Processing Service Documents in the Mobile App

This part of the course contains lessons related to processing appointments in the Acumatica mobile app.

Lesson 3.1: Processing Appointments in the Mobile App

In this lesson, you will learn how to process an appointment in the Acumatica mobile app.

Appointments in the Mobile App: Basic Operations

The Acumatica mobile app is an out-of-the-box solution that empowers the staff members of your company to access Acumatica ERP from mobile devices to manage their work documents, including appointments.

The appearance and functionality of the Acumatica mobile app may slightly differ for iOS and Android devices.

Opening the List of Appointments

In the Acumatica mobile app, you access the list of appointments by tapping **Services** on the main menu and then tapping **Appointment List** (see the following screenshots).

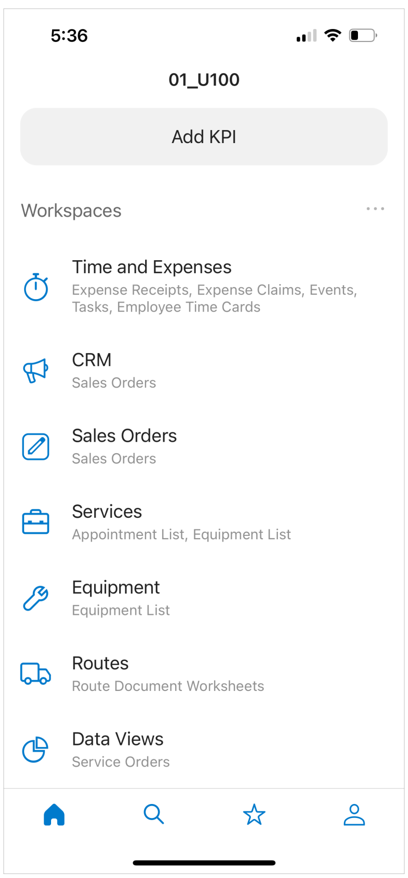


Figure: The list of workspaces on the main menu of the mobile app

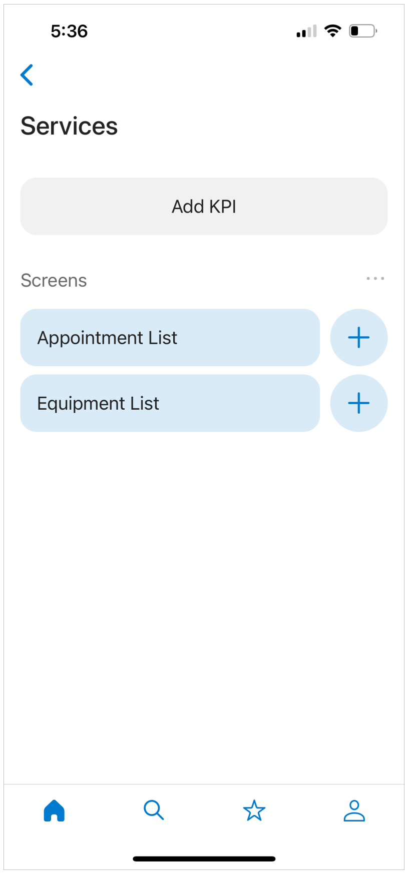


Figure: The list of screens in the Services workspace

> The lists of available workspaces and screens depend on the features included in your license and enabled on the *Enable/Disable Features* (CS100000) form.

When you tap **Appointment List**, the Appointment List screen opens.

To find and view the needed appointment, you can change the filter criteria by tapping the Filter button in the top right corner of the screen, and specifying the needed dates and the assigned staff member (see the following screenshot).

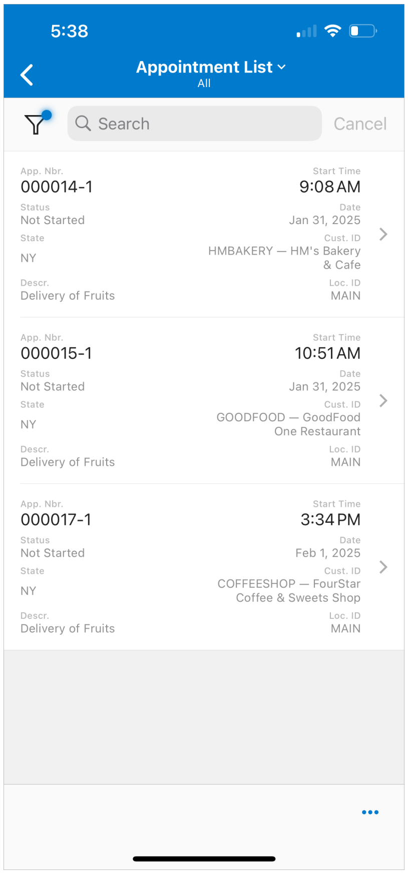


Figure: The list of appointments on the Appointment List screen

Creating a New Appointment

In the mobile app, you can create a new appointment. On the Appointment List screen, you tap the + icon or **Create New** (depending on the mobile operating system) at the bottom of the appointment list, and specify the settings and details of the new appointment in form view. Once you are finished, you save the new appointment.

Searching for an Appointment

In the Acumatica mobile app, you can find any needed appointment by entering a search string in the search box. The search results are listed with the highlighted words matching your string, as you can see in the following screenshot below.

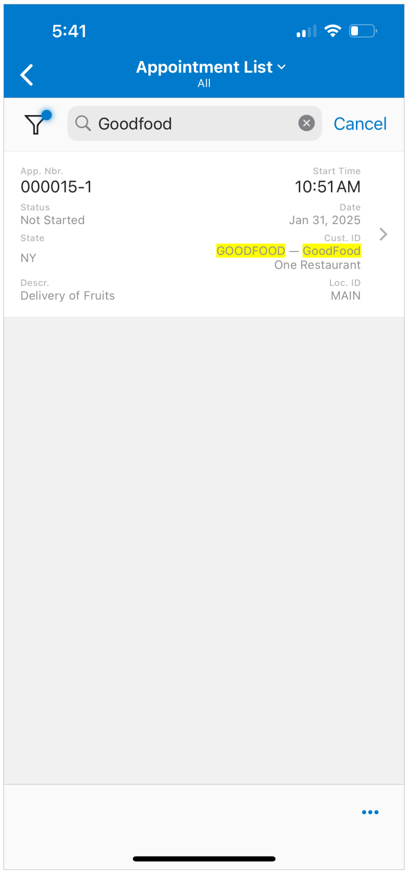


Figure: Search results

Working with a Particular Appointment

By tapping a particular appointment in the appointment list, you open the form view with the settings of the selected appointment. You can process an appointment by using one of the commands available on the More menu (see the following screenshot). You can use these commands to start, depart, pause, and complete the appointment, as well as signing and previewing a report related to the appointment.

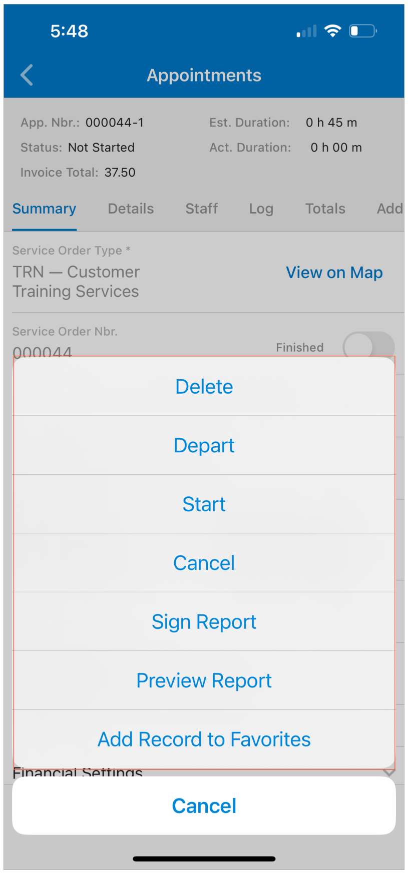


Figure: Appointment commands

Reviewing and Signing the Report

Before completing an appointment, you open the report by tapping **Preview Report** on the More menu (see Item 1 in the following screenshot); you review the report and show it to the customer. You then tap **Sign Report** (Item 2), and the signature screen opens so that the customer can sign it.

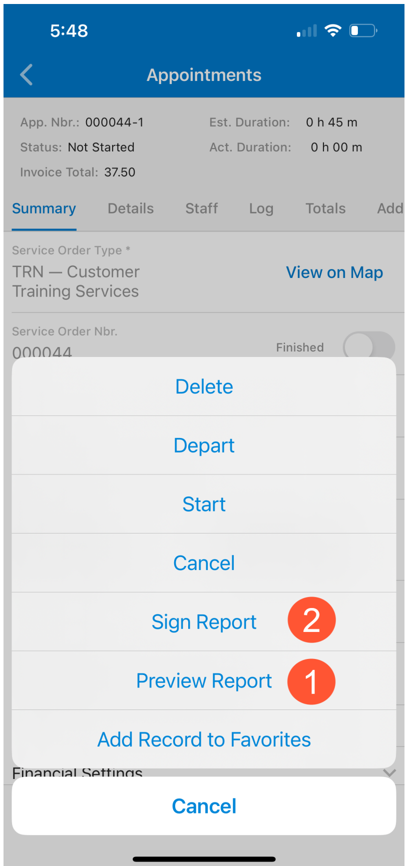


Figure: The Preview Report and Sign Report commands on the More menu

On the signature screen, the customer signs. You close the view by tapping **OK** at the bottom of the screen.

Figure: The signature screen

You can open the signed report by tapping **Preview Report** again. The following screenshot shows the signed report.

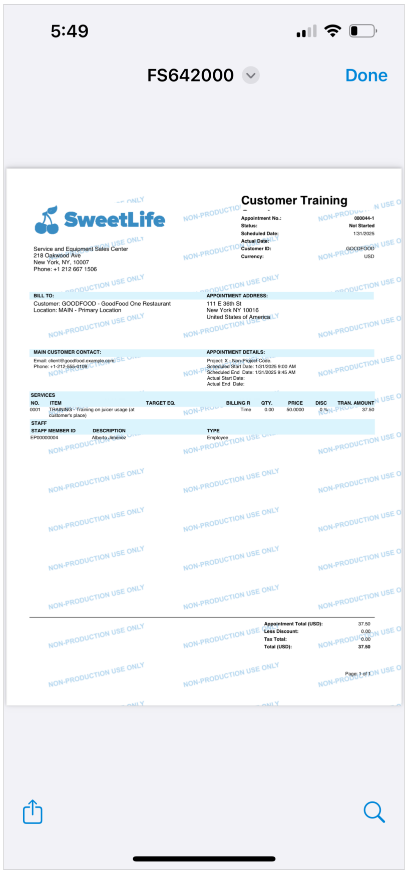


Figure: The signed report

Additional Materials

Basic Service Management Configuration: Implementation Checklist

The following sections provide details you can use to ensure that the system is configured properly for the processing of service orders and their appointments that may include stock items, and to specify settings that affect this processing workflow.

Prerequisite Configuration

We recommend that before you initially set up the service management functionality, you make sure the needed entities have been created, and settings have been specified, as summarized in the following checklist.

Form	Criteria to Check
Multiple forms	Make sure that the minimum company settings are specified, as described in *Company Without Branches*, *Company with Branches that Do Not Require Balancing*, or *Company with Branches that Require Balancing* (depending on your company structure).
Multiple forms	To offer the provision of inventory items as part of providing field services, make sure that the sales order management configuration has been implemented, as described in *Configuration of Order Management: Implementation Checklist* .
Employees (EP203000) form	Make sure that the employees to be involved in field service processes have been created. For details, see *Employee Settings*.

Implementation Checklist

Once the needed prerequisites are met, you should navigate to the forms listed below and perform the tasks described in the table to be able to use the basic service management functionality.

Form	Things to Do	Notes
Enable/Disable Features (CS100000) form	Enable the *Service Management* feature.	
Work Calendar (CS209000) form	Create the calendar with the staff members' work days, work times for each day, and unpaid break time. For details, see *Basic Service Management Configuration: Implementation Activity*.	

Form	Things to Do	Notes
Numbering Sequences (CS201010) form	Create the numbering sequences for service orders, staff members' schedules, and field service billing documents. For details, see *Basic Service Management Configuration: Implementation Activity*.	
Service Management Preferences (FS100100) form	Specify the necessary numbering sequences and work calendar.	
Billing Cycles (FS206000) form	Create the necessary billing cycles (which define the way billing documents are generated for the services provided to customers). For details, see *Billing Cycles*.	
Customers (AR303000) form	Do the following: • Create all customers that are expected to request the company's services. • Assign the necessary billing cycles to customers who may be billed for services.	
Employees (EP203000) form	Define the employees to be involved in field service processes as staff members—that is, select the **Staff Member in Service Management** check box for these employees. For details, see *Staff Members*.	
Order Types (SO201000) form	To offer the provision of inventory items as part of providing field services, make sure that for the sales order types that will be used for the field service processes, the **Enable Field Services Integration** check box is selected. For details, see *Basic Service Management Configuration: Implementation Activity*.	
Service Order Types (FS202300) form	Create the service order types that suit the company's processes, as described in the *Service Order Types* chapter.	To generate billing documents that may include both services and inventory items, you select the *Sales Orders* or *SO Invoices* option in the **Generated Billing Documents** box on the **General** tab of the form.
Branch Locations (FS202500) form	Create all branch locations that represent company offices. For details, see *Branch Locations*.	

Optional Settings

Depending on your company's processes, you may need the settings described in the table below.

Form	Things to Check
Service Areas (FS201900) form	If staff members are to work within a certain geographical area, make sure that the service areas have been defined and staff members have been assigned to the areas. For details, see *Service Areas*.
Skills (FS206000) and *Employees* (EP203000) forms	If the assignment of staff members has to be performed based on skills that are necessary for the service, make sure that the skills have been defined and assigned to staff members. For details, see *Skills*.
License Types (FS200900) and *Services* (FS400800) forms	If the assignment of staff members has to be performed based on licenses that prove that a staff member can perform a service, make sure that the types of these licenses have been defined and assigned to the appropriate services. For details, see *Licenses*.
Licenses (FS201000) and *Employees* (EP203000) forms	If the assignment of staff members has to be performed based on licenses that prove that a staff member can perform a service, make sure that the licenses have been entered and assigned to the needed staff members. For details, see *Licenses*.
Item Classes (IN201000) form	Make sure that the item classes that contain the default settings of the company's services have been created.
Non-Stock Items form	If services have been created in the system, make sure that the skills that are required for performing these services have been assigned to them. If services have been created in the system, make sure that the type of the licenses that are required for performing these services have been assigned to them.
Service Management Preferences (FS100100) form	If you plan to use the calendar board forms (*Calendar Board* (FS300300), *Room Calendar Board* (FS300700), or both), specify the **Day Start Time** on the *Service Management Preferences* form. This setting is required to properly configure the calendar view.