End-User Course

Field Services

Service Management Extended Scenarios 2025 R1

Revision: 4/1/2025

Acumatica
The Cloud ERP

Contents

Copyright

© 2025 Acumatica, Inc.

ALL RIGHTS RESERVED.

No part of this document may be reproduced, copied, or transmitted without the express prior consent of Acumatica, Inc.

3075 112th Avenue NE, Suite 200, Bellevue, WA 98004, USA

Restricted Rights

The product is provided with restricted rights. Use, duplication, or disclosure by the United States Government is subject to restrictions as set forth in the applicable License and Services Agreement and in subparagraph (c)(1)(ii) of the Rights in Technical Data and Computer Software clause at DFARS 252.227-7013 or subparagraphs (c)(1) and (c)(2) of the Commercial Computer Software-Restricted Rights at 48 CFR 52.227-19, as applicable.

Disclaimer

Acumatica, Inc. makes no representations or warranties with respect to the contents or use of this document, and specifically disclaims any express or implied warranties of merchantability or fitness for any particular purpose. Further, Acumatica, Inc. reserves the right to revise this document and make changes in its content at any time, without obligation to notify any person or entity of such revisions or changes.

Trademarks

Acumatica is a registered trademark of Acumatica, Inc. HubSpot is a registered trademark of HubSpot, Inc. Microsoft Exchange and Microsoft Exchange Server are registered trademarks of Microsoft Corporation. All other product names and services herein are trademarks or service marks of their respective companies.

Software Version: 2025 R1

Last Updated: 04/01/2025

How to Use This Course

This course provides a set of lessons that illustrate advanced 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 business process flow in Acumatica ERP.

What Is in This Guide

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

Which Training Environment You Should Use

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

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

What Is in a Process Lesson

A *process lesson*—that is, a lesson dedicated to the performing of a particular business process—includes a brief user scenario and a description of the process workflow. It can also include process diagrams that illustrate the user scenario supported by this process. The lesson also provides a brief overview of the settings that need to be specified and the entities that need to be prepared in the system before you start to perform this business process.

Each process lesson includes at least one process activity that you have to complete in your Acumatica ERP instance to learn how to perform the described business process.

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, activity 1: *frank*
2. Lesson 1, activity 2: *smith*
3. Lesson 2: *davis*
4. Lesson 3: *davis*
5. Lesson 4: *davis*
6. Lesson 5: *davis*
7. Lesson 6: *davis*
8. Lesson 7: *davis*
9. Lesson 8: *davis*

The password for each user is *123*.

Which License You Should Use

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

Company Story

This topic explains the organizational structure and operational activities of the company 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.

Lesson 1: Recording Staff Time in Appointments

In this lesson, you will learn how to record the time spent by a staff member in the whole appointment, and how to record the time spent by a staff member on a particular service of the appointment. You will learn the difference between the appointment staff time and the service staff time.

Staff Time in Appointments: General Information

An appointment can include one service or multiple services. The work of a staff member on an appointment can vary as well: The assigned staff member can work on all services during the whole appointment or only a specific time frame in the appointment, or they can work during only particular services or one service.

In Acumatica ERP, you can track the time a staff member spends on the appointment, which means that the employee has been working during the entire duration of the appointment from the actual start time to the actual end time, and was not assigned to any particular service. Alternatively, you can assign the staff member to a particular service or to multiple services and track the time the staff member spent on the assigned services. In this case, the staff member has been working on the appointment only during the duration of the assigned services, from the actual starting time to the actual ending time of each service line.

Learning Objectives

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

- Assign a staff member to an appointment to perform all services, and record the time spent on the appointment
- Assign staff members to each particular service of the appointment, and record the time spent on providing a particular service of the appointment

Applicable Scenarios

You track the time each staff member spends providing services of the entire appointment or providing a particular service of an appointment if your company records the employees' actual working time.

Staff Time in Appointments: Time Recording and Calculation

If the *Time Management* feature is enabled on the *Enable/Disable Features* (CS100000) form, activities can be created on the *Employee Time Activities* (EP307000) form for each employee involved in an appointment when the appointment is completed.

Appointments are created on the *Appointments* (FS300200) form, where the applicable times are also recorded. Upon completion of the appointment, each staff member's time can be reported in the employee time activity in any of the following ways:

- If the staff member works during the entire appointment, the appointment time is recorded.
- If the staff member works during a part of appointment, the actual staff time is recorded.
- If the staff member performs only particular services of the appointment, the service time is recorded.

Depending on the nature of appointments and the way a scheduler or service manager assigns staff members to appointments, you may decide to always track employee time in the same way, or you may use different ways of tracking time for different appointments. You assign each of these types of appointments a service order type that has been configured on the *Service Order Types* (FS202300) form for the type of time recording you will use, as described further in this topic.

Calculation of the Actual Service Duration

The system calculates the actual service duration of an appointment as the sum of the duration of the services included in the appointment, and inserts the duration in the **Actual Duration** box of the Summary area of the *Appointments* (FS300200) form. The system does not include in the actual service duration the time that has not been recorded to any service.

The following examples show how the system calculates the actual service duration.

Example 1

Suppose that you have attended an appointment that lasted an hour and a half, but you have spent only one hour on service delivery. Further suppose that in the system, you specify the start and end times of the service and the start and end times of the appointment. The system calculates the appointment's actual service duration as one hour (see the following illustration of this calculation).

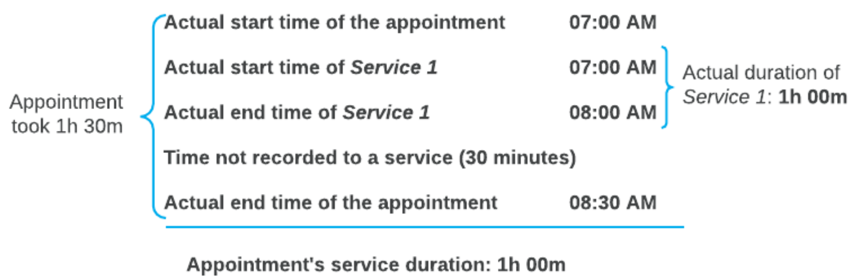


Figure: Calculation of the actual service duration for Example 1

Example 2

Suppose that you have attended an appointment that lasted an hour and a half, but you have spent only one hour on service delivery. Further suppose that in the system, you specify the actual duration of the service (one hour; the start and end times of the service are not entered) and the start and end times of the appointment. In this case, too, the system calculates the appointment's actual service duration as one hour (see the following illustration of this calculation).

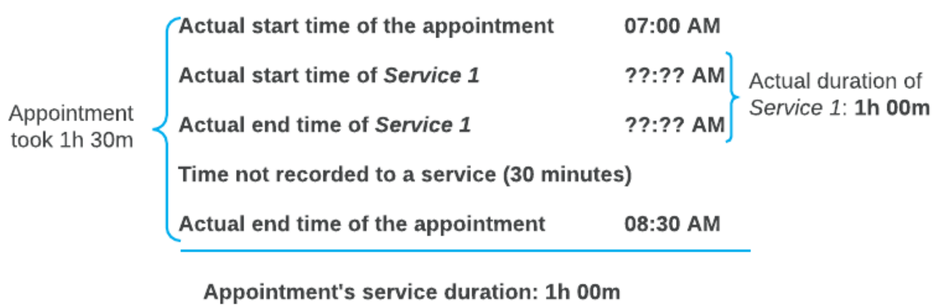


Figure: Calculation of the actual service duration for Example 2

Example 3

Suppose that you have attended an appointment that lasted an hour and a half. You delivered Service 1, and your colleague delivered Service 2 at the same time; each of you spent one hour on service delivery. In the system, you specify the start and end time of each service, as well as the start and end time of the appointment. The system calculates the actual service duration of the appointment as two hours (the total of the duration of Service 1 and Service 2), even though the services were performed in the same hour (see the following illustration of this calculation).

Figure: Calculation of the actual service duration for Example 3

Recording of Staff Time for the Entire Appointment

If a staff member is working during the entire duration of an appointment, to record the working time, you assign the staff member to the appointment but do not associate this employee with any particular service of this appointment. That is, in the row for the staff member on the **Staff** tab of the *Appointments* (FS300200) form, you leave the **Detail Ref. Nbr.** and **Inventory ID** columns empty. The system starts recording the employee's time when a staff member clicks **Start** on the form toolbar of the form, and finishes recording the time when a staff member clicks **Complete** on the form toolbar.

To record time in this way, you need to base the appointment on a service order type that is configured as follows on the **Time Behavior** tab of the *Service Order Types* (FS202300) form:

- The **Start Logging for Unassigned Staff** check box: Selected

  When an appointment is started, on the **Log** tab, the system creates log lines for staff members that are assigned to the appointment but are not assigned to any service.
- The **Status to Set for In Process Items** box: *Completed*

  On completion of an appointment, the *Completed* status will be assigned to each detail line.

Recording of Staff Time for a Part of the Appointment

If a staff member is working on an appointment only during a specific part of the appointment but not during the entire appointment, to correctly track the staff time, you should assign the applicable staff member to the appointment, but you should not associate the person with any service. That is, on the *Appointments* (FS300200) form, you assign the necessary staff members to the appointment by adding rows for them on the **Staff** tab, but you leave the **Detail Ref. Nbr.** and **Inventory ID** columns empty for these staff members.

Once an appointment is started, a staff member should click **Start** on the table toolbar of the **Staff** tab to start tracking the time, and then click **Complete** to finish recording the time. This will add a line on the **Log** tab.

Staff members can also manually add a line on the **Log** tab in which they enter the time when they started to work on the appointment and either the time when they ended or the actual time they worked.

As a result, on the **Log** tab of the form, either of the following sets of columns are filled in for the added line:

- The **Start Date**, **Start Time**, **End Date**, and **End Time** columns
- The **Start Date**, **Start Time**, and **Duration** columns

To record time in this way, you need to base the appointment on a service order type that has been configured so that the system does not record the appointment time automatically when an appointment is started and completed. That is, on the **Time Behavior** tab of the *Service Order Types* (FS202300) form, the following settings should be specified:

- The **Start Logging for Unassigned Staff** check box: Cleared

  When an appointment is started, the system does not create log lines on the **Log** tab for staff members that are assigned to the appointment but are not assigned to any service. A log line will be added only when a staff member clicks **Start** and then **Complete** on the table toolbar of the **Staff** tab.
- The **Status to Set for In Process Items** box: *In Process*.

  On completion of an appointment, the *In Process* status will remain on each detail line until you click **Complete** on the table toolbar of the **Details** tab for each line.

Recording of Staff Time Spent on Services for the Appointment

To correctly track the time that staff members have spent on performing specific services (or one service) of the appointment, you can do either of the following:

- Assign a staff member to a service on the *Appointments* (FS300200) form in either of the following ways:
  - On the **Details** tab, select the staff member in the **Staff Member ID** column of the detail line, or in the **Add Staff** dialog box, which opens when you click **Add Staff** on the table toolbar.
  - On the **Staff** tab, select the service reference number in the **Detail Ref. Nbr.** column for the staff member, or choose a service in the **Service Ref. Nbr.** box in the **Add Staff** dialog box, which opens when you click **Add Staff** on the table toolbar.

  The system starts recording the time once a staff member clicks **Start** on the form toolbar of the *Appointments* form, and finishes recording the time when a staff member clicks **Complete** on the form toolbar of the *Appointments* form.

  To record time in this way, you need to base the appointment on a service order type configured as follows on the **Time Behavior** tab of the *Service Order Types* (FS202300) form:
  - The **Start Logging for Services and Assigned Staff (if Any)** check box: Selected

    When an appointment is started, the system starts the included services and creates log lines for the services and any assigned staff members on the **Log** tab.
  - The **Status to Set for In Process Items** box: *Completed*

    On completion of an appointment, the *Completed* status will be assigned to each detail line.
- Associate the staff member with the services they perform, and track the service's time. That is, on the **Details** tab on the *Appointments* form, you assign the needed staff member to the service by specifying the staff member in the **Staff Member ID** column. In this case, once the appointment is started, a staff member selects a line with their staff member ID on the **Staff** tab, and clicks **Start** on the table toolbar to start tracking the time, and then clicks **Complete** to finish recording the time.

  To record time in this way, you need to base the appointment on a service order type that has been configured as follows on the **Time Behavior** tab of the *Service Order Types* form:
  - The **Start Logging for Services and Assigned Staff (if Any)** check box: Cleared

    When an appointment is started, the system does not start the included services. The system will create log lines for the services and for any assigned staff members only when a staff member clicks **Start** and then **Complete** on the table toolbar of the **Staff** tab.
  - The **Status to Set to In Process Items** box: *In Process*

    On completion of an appointment, the *In Process* status will remain on each detail line until you click **Complete** on the table toolbar of the **Details** tab for each line.
- Add a staff member to an appointment but do not assign a staff member to any appointment's service during the creation of an appointment. In that case, on the *Appointments* form, once an appointment is started, on the **Details** tab, you should select a service line, click **Start** on the table toolbar to start tracking the time, select a staff member in the **Staff Member** box of the **Perform Action** dialog box, click **OK** at

the bottom of the dialog box. Then, on the table toolbar, click **Complete** to finish recording the time. You can also add a line on the **Log** tab manually by adding a staff member in the **Staff Member** column, and selecting a service in the **Detail Ref. Nbr.** column.

To record time in this way, you need to base the appointment on a service order type that has been configured so that the system does not start recording the staff time automatically. That is, on the **Time Behavior** tab of the *Service Order Types* form, the settings are the following:

- The **Start Logging for Services and Assigned Staff (if Any)** check box: Cleared

  When an appointment is started, the system does not start the included services. Log lines for the services and assigned staff members are created only when you click **Start**, specify a staff member, and then click **Complete** on the table toolbar of the **Details** tab.
- The **Start Logging for Unassigned Staff** check box: Cleared

  When an appointment is started, the system will not create log lines on the **Log** tab for staff members assigned to the appointment but not assigned to any service.
- The **Status to Set to In Process Items**: *In Process*

  On completion of an appointment, the *In Process* status will remain on each detail line until you click **Complete** on the table toolbar of the **Details** tab for each line.

Staff Time in Appointments: To Record Staff Time Spent in an Appointment

The following activity will walk you through the process of recording in Acumatica ERP the time that a staff member spends at an appointment. That is, you will learn about how to record time if the staff member works during the whole appointment.

Story

Suppose that the management of the SweetLife Service and Equipment Sales Center has decided to track the time activities of its employees. Further suppose that for the GoodFood One Restaurant customer, staff members of the SweetLife Service and Equipment Sales Center attend regular appointments to deliver training services. Only one staff member attends each appointment, and this staff member works during the whole appointment. Thus, the time activity should be created for the whole duration of the appointment.

Acting as a staff member (Chase Frank), you will start and complete an appointment, and then review the time activity that has been created for the appointment.

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 *Time Management* feature, which provides the ability to track employees' time activities in the system, has been enabled.
- 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 *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 specified in the **Linked Entity** box.
- On the *User Profile* (SM203010) form, for the *frank* user, the *WEST BRIGHTON* branch location has been specified as the default branch location.
- On the *Service Management Preferences* (FS100100) form, the basic service management functionality has been configured, including specification of the numbering sequences and the work calendar. Also, on the **General** tab (**General Settings** section), the **Enable Time & Expenses Integration** check box has been selected.
- On the *Service Order Types* (FS202300) form, the *DEV* service order type has been defined as follows:
  - On the **General** tab (**Integrating with Time & Expenses** section), the following settings have been specified:
    - **Automatically Create Time Activities from Appointments**: Selected
    - **Default Earning Type**: *RG*
  - On the **Time Behavior** tab, the following settings have been specified:
    - **Set Start Time in Appointment:** Selected
    - **Start Logging for Unassigned Staff:** Selected
    - **Set End Time in Appointment:** Selected
    - **Status to Set for In Process Items**: *Completed*
- On the *Appointments* (FS300200) form, the *000043-1* appointment has been created.

Process Overview

To enter the staff time of an appointment, on the *Appointments* (FS300200) form, you will start and complete an appointment that was created based on a service order type designed to create time activities. Then you will review the time activity created in the system on the *Employee Time Activities* (EP307000) form for the staff member assigned to this appointment.

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 staff member Chase Frank by using the *frank* username and the *123* password.
2. In the company to which you are signed in, enable the *Service Management* feature on the *Enable/Disable Features* (CS100000) form.
3. 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 *1/29/2025*. If a different date is displayed, click the Business Date menu button, and select *1/29/2025* on the calendar. For simplicity, in this activity, you will create and process all documents in the system on this business date.

Step 1: Attending an Appointment

To attend an appointment and process it through completion (while acting as Chase Frank), do the following:

1. On the *Appointments* (FS300200) form, open the *000043-1* appointment, which has the *DEV* service order type.

   > This service order type has been designed for recording staff time spent on an appointment. See the Configuration Overview section for details on its key settings.

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

   Now wait at least one minute (because the business time is recorded when at least one minute has passed after the start of the appointment).
3. On the form toolbar, click **Complete**.
4. Review the **Log** tab, and notice that the system has automatically inserted one log line.

Step 2: Reviewing the Time Activity

To review the time activity that has been created for the appointment, do the following:

1. Open the *Employee Time Activities* (EP307000) form.
2. Ensure that the following settings are specified in the Selection area:
   - **Employee**: *EP00000042 - Chase Frank* (Since you are signed in as this user, the system automatically inserts the corresponding employee ID.)
   - **From Week**: *2025-05 (01/26 - 02/01)*
   - **Until Week**: *2025-05 (01/26 - 02/01)*
3. In the table, review the time activity record for the *000043-1* appointment (Item 1 in the following screenshot).

   The **Time** (Item 2) in this row is the same as the **Actual Start Time** of the appointment on the *Appointments* (FS300200) form, and the **Time Spent** (Item 3) in this row is the difference between the appointment's **Actual Start Time** and **Actual End Time**.
4. Verify that the **Service** column is empty (Item 4), meaning that this time activity is not associated with any particular service of the appointment.

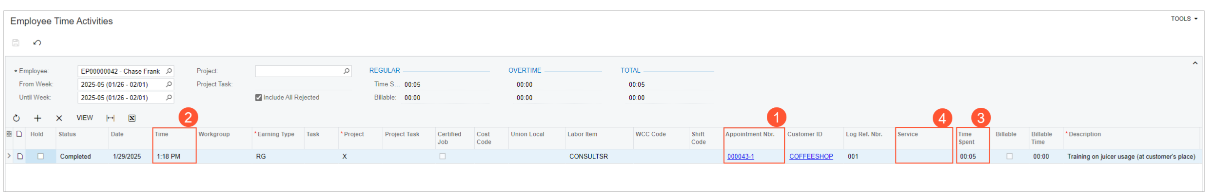


Figure: The time activity of Chase Frank

Staff Time in Appointments: To Record Staff Time Spent on a Particular Service

The following activity will walk you through the process of recording in Acumatica ERP the time that a staff member spends providing a particular service. That is, you will learn how to record time if the staff member works on a particular service but not during the whole appointment.

Story

Suppose that the management of the SweetLife Service and Equipment Sales Center has decided to track the time activities of its employees based on service duration. Each staff member must keep accurate records on what service has been performed and enter the actual start and end times of the provided services in appointments.

Acting as staff member Edward Smith, you will record the start and completion times of the service assigned to you and the service assigned to Chase Frank. You will then review the time activities that have been created for the appointment.

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 *Employees* (EP203000) form, for the *EP00000042 (Chase Frank)* and *EP00000043 (Edward Smith)* employees, the **Staff Member in Service Management** check box has been selected for both employees (on the **General** tab in the **Employee Settings** section), so you can assign them to perform services.
- On the *Users* (SM201010) form, the *frank* and *smith* user accounts have been defined in the system, and the *EP00000042 (Chase Frank)* and *EP00000043 (Edward Smith)* employees, respectively, have been associated with the user accounts defined for these employees in the system. That is, the employee name has been specified in the **Linked Entity** box.
- On the *Enable/Disable Features* (CS100000) form, the *Time Management* feature, which provides the ability to track employees' time activities in the system, has been enabled.
- On the *Service Management Preferences* (FS100100) form, the basic service management functionality has been configured, including specification of the numbering sequences and the work calendar. Also, the **Enable Time & Expenses Integration** check box has been selected on the **General** tab (**General Settings** section).
- On the *Service Order Types* (FS202300) form, the *MRO* service order type has been defined.
  - On the **General** tab (**Integrating with Time & Expenses** section), the following settings have been specified:
    - **Require Time Approval to Close/Bill Appointments**: Cleared
    - **Automatically Create Time Activities from Appointments**: Selected
    - **Default Earning Type**: *RG*
  - On the **Time Behavior** tab, the **Set Start Time in Appointment** check box has been selected
- On the *Appointments* (FS300200) form, the *000039-1* appointment has been created.

Process Overview

On the *Appointments* (FS300200) form, you will enter the start and end times spent on the installation and training services of an existing appointment; you will then complete it. Then on the *Employee Time Activities* (EP307000) form, you will review the time activities created for staff members for the services that were provided.

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 staff member Edward Smith by using the *smith* 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: Recording Staff Time Spent on Services

Acting as Edward Smith, you will record the time that you and Chase Frank spend on the services of an existing appointment. To record this staff time, do the following:

1. On the *Appointments* (FS300200) form, open the *000039-1* appointment, which has the *MRO* service order type.
2. On the form toolbar, click **Start**.
3. On the **Staff** tab, do the following:
    a. Click the line with the *INSTALL* service. Notice that *EP00000043 (Edward Smith)* is specified in the **Staff Member** column.
    b. On the table toolbar, click **Start**.
    c. In the **Perform Action** dialog box, which has opened, specify *2:00 PM* in the second **Date** box.
    d. In the table, verify that the check box is selected in the line with the *INSTALL* service.
    e. Click **OK** at the bottom of the dialog box, which closes it.
4. On the **Log** tab, ensure that the *001* log line with the *INSTALL* service has been added. Check the start time of the service. Notice that the status of the service (in the **Log Line Status** column) is *In Process*.
5. On the **Staff** tab, do the following:
    a. Again click the line with *INSTALL* service.
    b. On the table toolbar, click **Complete**.
    c. In the **Perform Action** dialog box, specify *3:00 PM* in the second **Date** box.
    d. Click **OK** at the bottom of the dialog box.
6. On the **Log** tab, ensure that in the *001* log line with the *0002 INSTALL* service, the status of the service (in the **Log Line Status** column) has changed to *Completed*.
7. On the **Staff** tab, begin recording the staff time spent on the training service as follows:
    a. Click the line with the *TRAINING* service. Notice that *EP00000042 (Chase Frank)* specified in the **Staff Member** column.
    b. On the table toolbar, click **Start**.
    c. In the **Perform Action** dialog box, which has opened, specify *3:00 PM* in the second **Date** box.
    d. In the table, verify that the check box is selected in the line with the *TRAINING* service.
    e. Click **OK** to close the dialog box.
8. On the **Log** tab, ensure that the *002* log line with the *TRAINING* service has been created. Notice that the status of the service is *In Process*.
9. On the **Staff** tab, do the following:
    a. Again click the line with *TRAINING* service.
    b. On the table toolbar, click **Complete**.
    c. In the **Perform Action** dialog box, specify *4:00 PM* in the second **Date** box.
    d. Click **OK** to close the dialog box.
10. On the **Log** tab, ensure that the *002* log line with the *TRAINING* service has been updated. Check the end time of the service. Notice that the status of the service is *Completed*. (See the screenshot at the end of this step.)
11. On the **Settings** tab, specify the following settings:
    - **Actual Start Date** (second box): *2:00 PM*
    - **Actual End Date** (second box): *4:00 PM*

- **Finished**: Selected

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

    The following screenshot shows the staff time (Item 2) on the **Log** tab (Item 1).

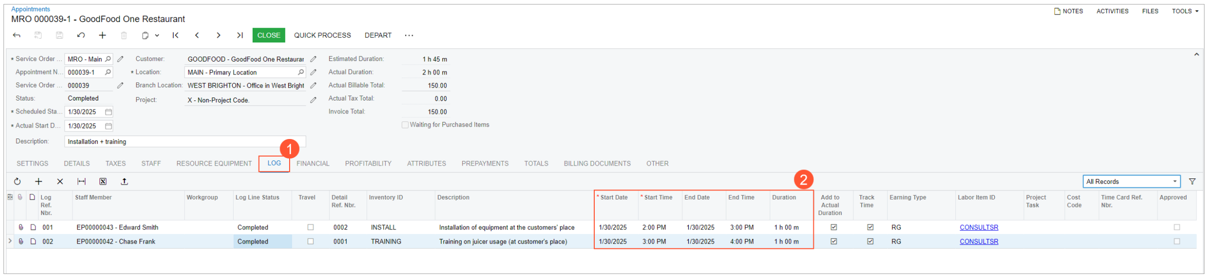


Figure: Staff time spent on services

Step 2: Reviewing the Employee Time Activities Form

To review the staff members' time, do the following:

1. Open the *Employee Time Activities* (EP307000) form.
2. In the **Employee** box of the Summary area, ensure that *EP00000043 (Edward Smith)* is specified—the staff member who has performed the installation service. (Because you are signed in as this user, the system automatically inserts the corresponding employee ID.)
3. In the **From Week** and **Until Week** boxes, make sure that *2025-05 (01/26 - 02/01)* is specified. This is the week that includes the date of the appointment: 1/30/2025.

   In the table, you can view the row representing the time activity related to the installation service performed in the appointment. In the **Time** column (Item 1), you can view the start time of the appointment; in the **Time Spent** column (Item 2), you can view the duration of the service provided. That is, for the *INSTALL* service, one hour was spent, starting at 2:00 PM.

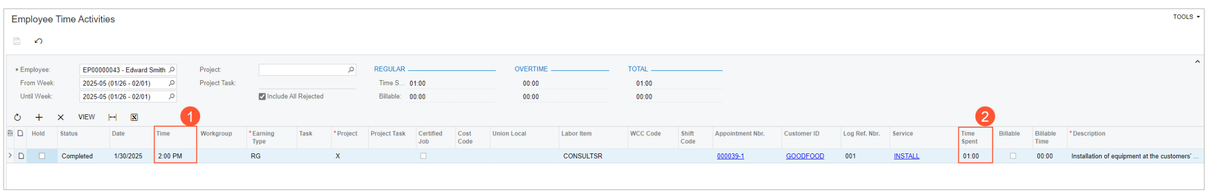


Figure: Employee time activity

4. In the **Employee** box of the Summary area, select *EP00000042 (Chase Frank)*.
5. In the table, make sure a time activity is listed for the *TRAINING* service: one hour spent starting at 3:00 PM for the *GOODFOOD* customer.

Lesson 2: Processing Sales Order-Related Service Orders

In this lesson, you will learn how to create a service order from a sales order.

Sales Order-Related Service Orders: General Information

A sales order may include both services and stock items that your company provides to the customer. This sales order can be processed along with the service order as the services are being performed. For example, suppose that a customer has ordered some products of your company along with installation services for them. A sales manager of your company receives the order and enters the sales order into the system. Then further processing is performed by the service manager who creates a service order, assigns the employees with the relevant skills to the applicable services, and the accountant who prepares invoices for the customer and processes them in the system.

Users can create a service order from a sales order only if integration with field services is enabled for the sales order type selected in the sales order. That is, the **Enable Field Services Integration** check box has to be selected for the order type on the **General** tab of the *Order Types* (SO201000) form.

In this topic, you will read about the steps involved in processing a sales order along with the service order.

Learning Objectives

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

- Create a service order from a sales order
- Create an appointment from a sales order
- Process the appointment
- Generate an invoice for an item added during an appointment

Applicable Scenarios

You create a service order from a sales order, and process it when your company sells stock items along with the services that are provided in appointments.

Process Diagram

In the diagram below, you can see the general workflow of processing a sales order along with a service order in the system. The sections below describe the steps of this workflow in more detail.

Processes and job titles may be different in your company.

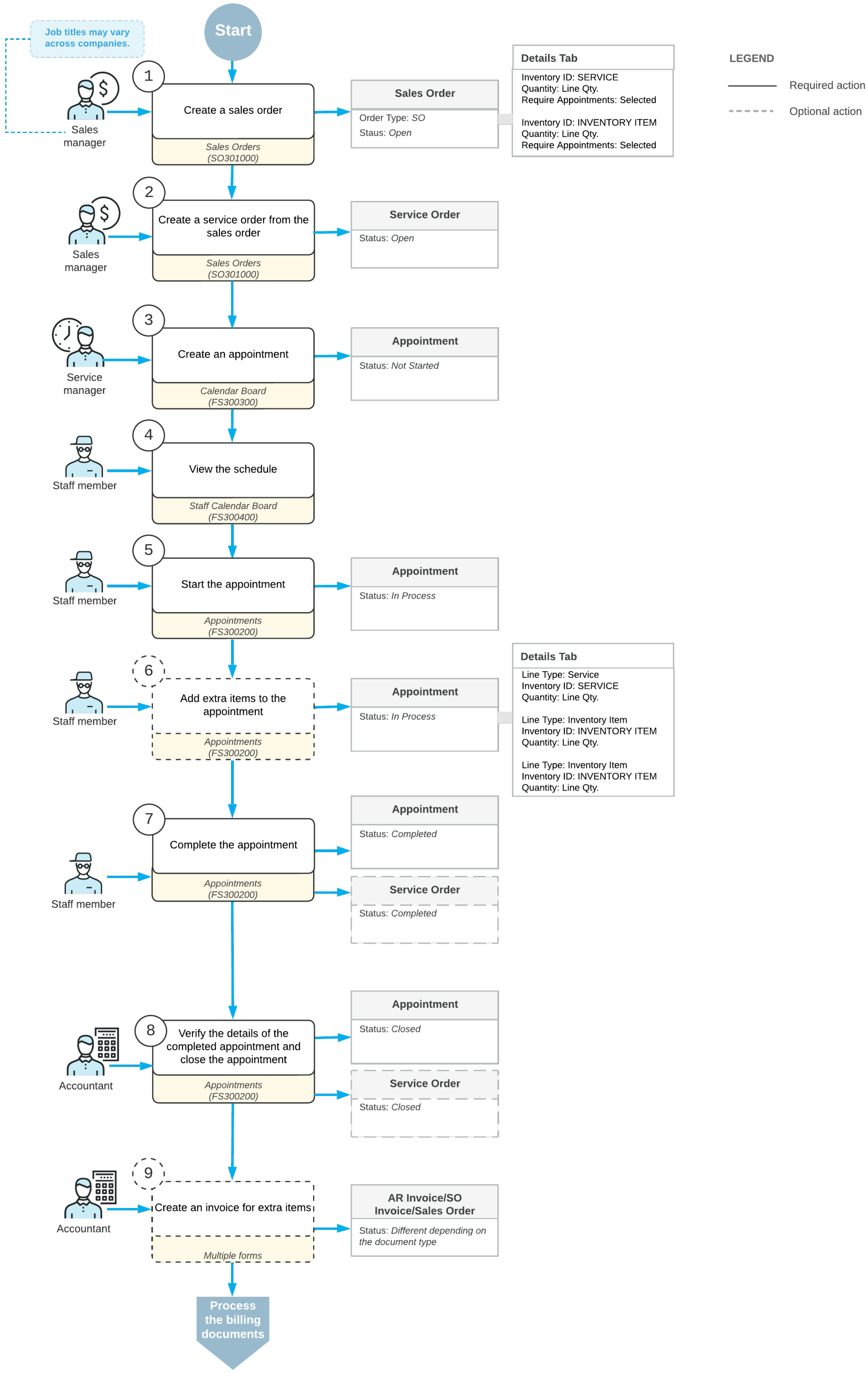


Figure: Sales order processing along with service order processing

Entry of a Sales Order

When a sales manager receives a customer order that includes service provision, the manager enters the sales order with the *Open* status on the *Sales Orders* (SO301000) form. In the sales order, the sales manager specifies the customer from which the order has been received, adds the stock items to be sold and shipped and services that should be performed.

On the **Details** tab of the *Sales Orders* form, in each detail line with the inventory item to be sold and a service to be provided, the manager selects the **Require Appointment** check box, so the line will be added to the service order.

After the sales order is saved, the sales manager clicks the **Create Service Order** command on the More menu of the *Sales Orders* form. In the **Create Service Order** dialog box, which opens, the sales manager specifies the service order type and clicks **OK**. The system then opens the service order on the *Service Orders* (FS300100) form, on which the sales manager verifies the details copied from the sales order. On the **Details** tab of the form, in each detail line, the **Prepaid Item** check box is selected, and the **Billable** check box is cleared, which means that billing will be performed in the sales order. The sales manager saves the service order.

Creation of Each Needed Appointment

After the sales order and service order have been created in the system, a service manager of your company clicks **Schedule on the Calendar Board** on the More menu of the *Sales Orders* (SO301000) form. This opens the *Calendar Board* (FS300300) form, where this employee creates an appointment or appointments that are needed to perform the services requested by the customer. The system assigns the *Not Started* status to the created appointments.

During the scheduling of an appointment, the service manager can filter staff members and select a staff member to attend an appointment by taking into consideration the work schedule, the skills and licenses that are needed for performing the services, and the service area where the services are provided.

Attending of Each Appointment

The staff member who is assigned to an appointment looks through the upcoming appointments on the *Staff Calendar Board* (FS300400) form and identifies which appointment need to be attended. The staff member then goes to the location where the service has to be performed and starts the appointment on the *Appointments* (FS300200) form. The appointment is assigned the *In Process* status.

While the services are being performed, the staff member adds any needed information on services (such as notes, or pictures) to the appointment on the *Appointments* form. If additional quantities or stock items are needed, the staff member adds new lines on the **Details** tab for the items.

When the services are done, 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, which gives it the *Completed* status.

When all appointments of a particular service order are completed, the system assigns the service order the *Completed* status if on the **General** tab (the **General Settings** section) of the *Service Order Types* (FS202300) form for the service order type, the **Complete Service Order When Its Appointments Are Completed** check box is selected.

Closing of the Appointments and Service Order

After the appointment is completed, an accountant opens the completed appointment and verifies quantities and prices.

When all information is verified, the accountant closes the appointments, and the system closes the service order if on the **General** tab (**General Settings** section) of the *Service Order Types* (FS202300) form for the service order type, the **Close Service Order When Its Appointments Are Closed** check box is selected. The appointment and service order are assigned the *Closed* status.

Generation of Billing Documents

The accountant generates a new billing document for all extra stock items that were used during the appointment. The accountant can use the *Run Appointment Billing* (FS500100) form or click the **Run Billing** command on the More menu of the *Appointments* (FS300200) form.

The accountant then processes both billing documents (the one generated for the original sales order, and the billing document generated for any additional item used in the appointment) in the system.

Sales Order-Related Service Orders: Process Activity

This activity will walk you through the process of creating a service order from a sales order and then processing these orders. You will also learn how to add a stock item to a service order that has lines for services or stock items inherited from the sales order, and how this service order will be billed.

Story

Suppose that SweetLife Service and Equipment Sales Center has sold the GoodFood One Restaurant customer a juicer in combination with installation and repair services. The service manager (Maia Davis) needs to create a sales order for the juicer and the services, and then schedule the appointment to deliver the services.

Further suppose that during the appointment, the customer decides to buy an additional stock item (a plastic container for juice). The assigned staff member needs to add this item to the service order. The accountant will generate a separate invoice for the extra item because it was not included in the original sales order. You will perform these actions, acting as the service manager, staff member, and 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 *Enable/Disable Features* (CS100000) form, the following features have been enabled:
  - *Inventory and Order Management*, which provides support for the sales order functionality
  - *Inventory*, which provides the ability to create sales and purchase orders with stock items
- On the *Employees* (EP203000) form, the *EP00000040 (Maia Davis)* and *EP00000003 (Jon Waite)* employee accounts have been defined. For the *Jon Waite* account, the **Staff Member in Service Management** check box has been selected for *EP00000003 (Jon Waite)*, so you can assign this employee to perform services.
- On the *Users* (SM201010) form, the *davis* and *waite* 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 *waite* user account, in this box, the *Jon Waite* employee account has been specified.
- 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 *Branch Locations* (FS202500) form, the *WEST BRIGHTON* branch location has been configured.

- On the *User Profile* (SM203010) form, for the *davis* user, the *WEST BRIGHTON* branch location has been specified as the default branch location.
- 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**

  Based on these billing cycle settings, a separate billing document is generated for each appointment; this document presents the details of each service of the appointment.
- 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 *Order Types* (SO201000) form, for the *SO* and *IN* sales order types, the **Enable Field Services Integration** check box has been selected.
- On the *Service Order Types* (FS202300) form, the *INST* service order type has been configured to generate SO invoices to bill customers for provided services. That is, in the **Billing Settings** section of the **General** tab, *SO Invoices* has been selected in the **Generated Billing Documents** box. Also, on the **General** tab (**General Settings** section), the **Complete Service Order When Its Appointments Are Completed** and **Close Service Order When Its Appointments Are Closed** check boxes are selected.
- On the *Non-Stock Items* (IN202000) form, for the *INSTALL* non-stock item, the *Service* type is selected.

Process Overview

To create a service order from a sales order, you will first create a sales order on the *Sales Orders* (SO301000) form with the stock item to be sold and the service to be provided, and you will create a related service order from this form. You will then schedule the appointment to perform the needed service and complete the appointment. Finally, after an item has been added during the appointment, you will generate an invoice for it from the *Appointments* (FS300200) 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 a Service Order Along with the Sales Order

To create the needed sales order and service order, do the following:

1. Open the *Sales Orders* (SO301000) form.
2. Create a new sales order with the following settings in the Summary area:
   - **Order Type**: *SO*
   - **Customer**: *GOODFOOD - GoodFood One Restaurant*
   - **Description**: `Sale of a juicer and installation service`
3. On the **Details** tab, add a row with the following settings:
   - **Inventory ID**: *INSTALL*
   - **Require Appointment**: Selected
   - **Warehouse**: *EQUIPHOUSE*

- **Quantity**: `1.00`

4. Add one more row with the following settings:
   - **Inventory ID**: *JUICER15*
   - **Require Appointment**: Selected
   - **Quantity**: `1.00`
5. On the form toolbar, click **Save**.
6. On the More menu (under **Services**), click **Create Service Order**.
7. In the **Create Service Order** dialog box, which opens, make sure *Installation Services* is selected in the **Service Order Type** box, and click **OK**.

   The *Service Orders* (FS300100) form opens with the settings copied from the sales order filled in. Notice that the service order has the service and the stock item that have been copied from the related sales order (on the **Details** tab); the service order is ready to be processed. Also notice on this tab that the **Billable** check box is cleared and read-only for each line because the line has been copied from the sales order and will be billed through the original sales order.
8. Save the service order.
9. In the **Source Info** section of the **Other** tab, verify that *SO Order* is specified in the **Document Type** box and the order type and the reference number of the related sales order have been inserted in the **Reference Nbr.** box.

Step 2: Creating an Appointment from the Sales Orders Form

To create an appointment related to the sales order, do the following:

1. Return to the *Sales Orders* (SO301000) form with the sales order you have created.
2. On the More menu (under **Services**), click **Schedule on the Calendar Board**.

   The *Calendar Board* (FS300300) form opens, displaying only the service order the system has created for the sales order.
3. On the **Service Orders** tab, right-click the service order, and 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 service order from the **Service Orders** tab into the *Jon Waite* column of the dashboard area so that the start time of the appointment is set to 15:00.

Step 3: Attending the Appointment

To perform the needed actions involved with attending the appointment, do the following on behalf of Jon Waite:

1. Open the *Staff Calendar Board* (FS300400) form.
2. In the **Staff** box, select *Jon Waite*, as shown in Item 1 of the following screenshot.
3. In the Date box, select *Day* and 1/30/2025 (Item 2).

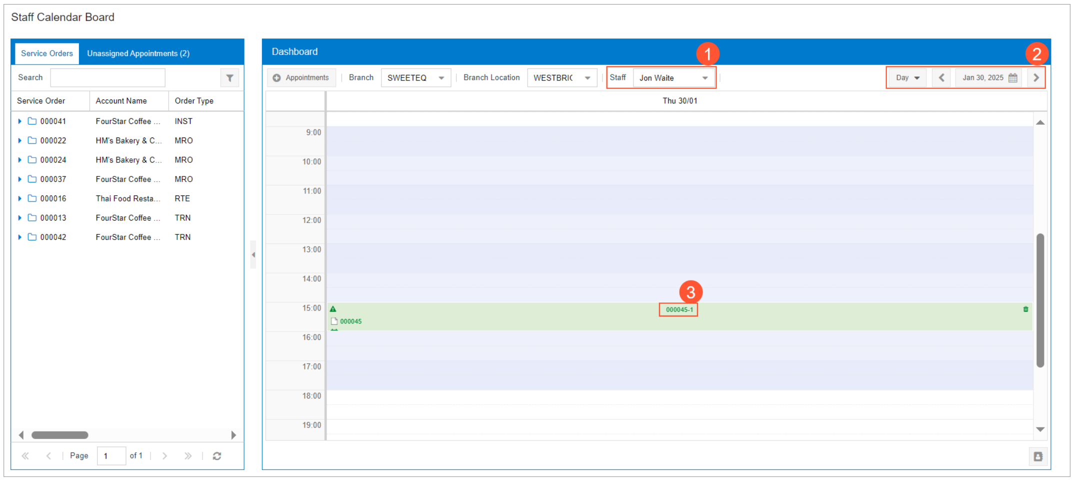


Figure: An appointment on the staff board

4. Click the link of the appointment (see Item 3 in the previous screenshot) to open it.

   The *Appointments* (FS300200) form opens.
5. On the form toolbar of the *Appointments* (FS300200) form, click **Start**.
6. On the **Details** tab, click **Add Row**, and specify the following settings in the row:
   - **Line Type**: *Inventory Item*
   - **Inventory ID**: *CONTAINER*
   - **Estimated Quantity**: `1.00`

   Notice that the **Billable** check box is selected for the newly added item, which indicates that the item is billable. Because it has not been included in the original sales order, a separate invoice will be generated for that item.
7. On the form toolbar, click **Save**.
8. On the **Settings** tab (**Actual Date and Time** section), specify the actual starting and actual ending times to be the same as the scheduled ones; select the **Finished** check box. (You perform this instruction and the next one on behalf of the staff member.)
9. On the form toolbar, click **Complete**.
10. On behalf of the accountant, on the form toolbar, click **Close**.

The completion and closing of the appointment caused the service order to also be completed and closed because of the settings of the *INST* service order type on the *Service Order Types* (FS202300) form, as described in the *Configuration Overview* section.

Step 4: Generating an Invoice for the Additional Item

To generate an invoice for the item included in the appointment, do the following (acting as an accountant):

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

   The system opens the *Invoices* (SO303000) form with the generated invoice.
2. Verify that only the stock item added during the appointment has been added to the invoice, as the following screenshot shows.

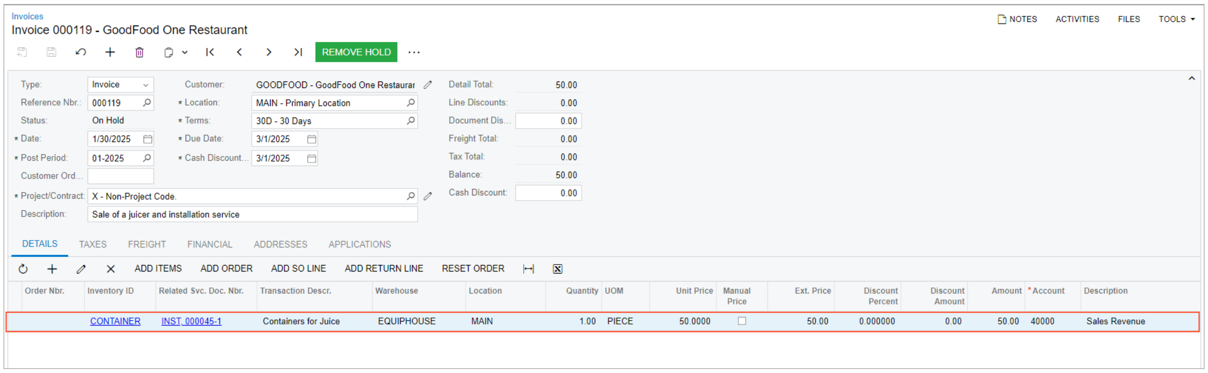


Figure: The sales order generated for the additional item

As a result, two invoices will be released: the first one for the requested service and item specified in the original sales order, and the second one for the additional item that was included in the appointment.

Lesson 3: Processing Service Orders with Items to Be Purchased

In this lesson, you will learn how to create a service order for which a stock item must be purchased from a vendor.

Service Orders with Items to Be Purchased: General Information

A purchase order can be created from a service order if the necessary stock items are not at any of your company's warehouses, or if services or non-stock items are provided by a vendor of your company.

In this topic, you will read about the steps involved in processing the service order along with any number of purchase orders.

> In this topic, we consider only the purchasing of stock items for a service order. Similarly, services or other non-stock items can be purchased and included in a service order if a vendor provides non-stock items or services (at a vendor location).

Learning Objectives

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

- Create a service order with an item to be purchased
- Create a purchase order that includes at least one item in a service order
- Process a purchase order that includes at least one item in a service order

Applicable Scenarios

You create a service order and then create a purchase order from the service order when your company needs to provide some stock items during an appointment, and it needs to purchase stock items from the vendor before the appointment.

Process Diagram

In the diagram below, you can see the entire workflow of processing a service order and the related purchase order. The sections below describe the steps of this workflow in more detail.

> Processes and job titles may be different in your company.

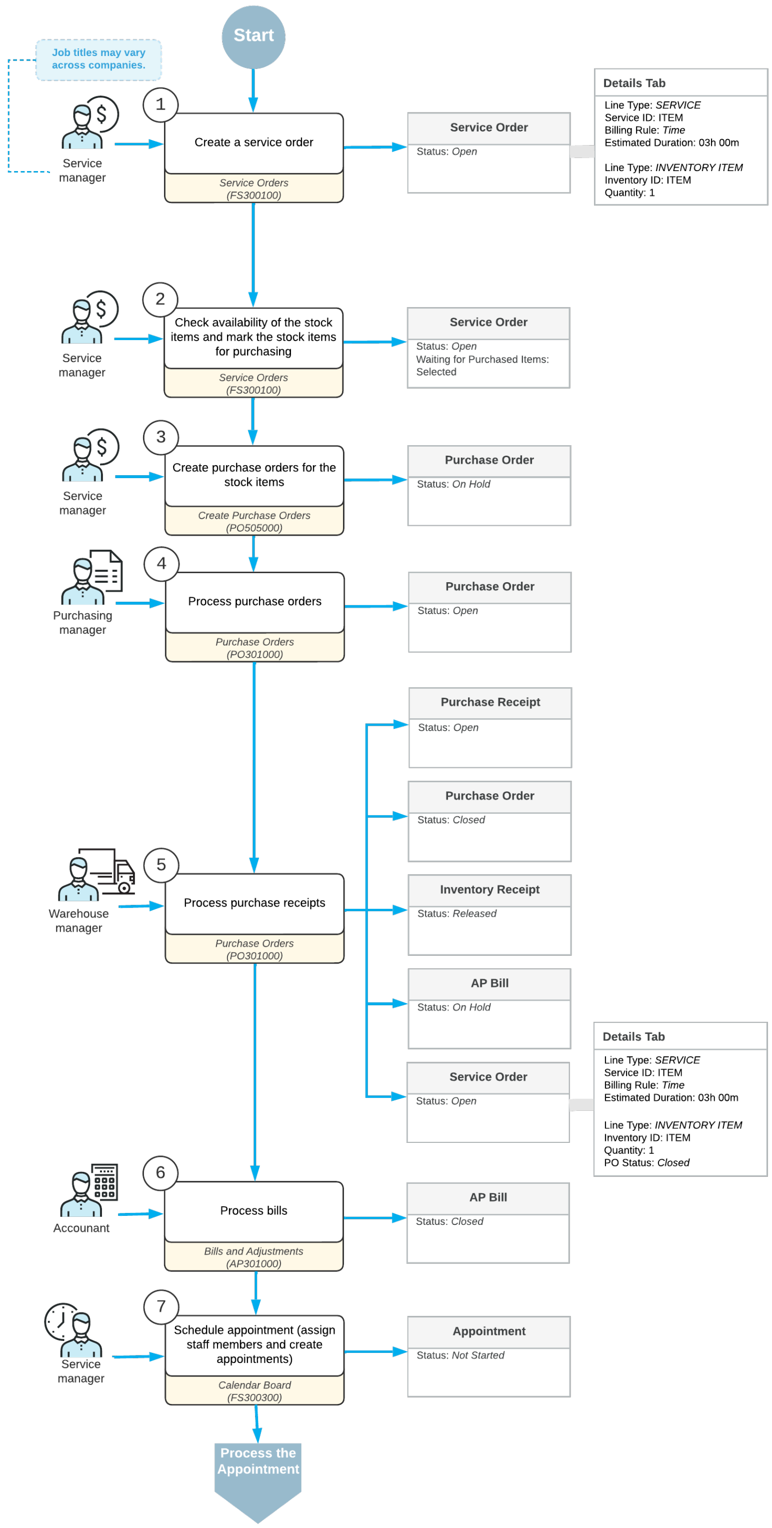


Figure: Purchase order processing along with service order processing

Entry of a Service Order

When a service manager receives a customer request for services, the service manager enters a service order with the *Open* status by using the *Service Orders* (FS300100) form. In the service order, the manager specifies such details as 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 stock items to be purchased with the services.

As part of this step, the service manager checks the availability of the stock items at the warehouse (by selecting the warehouse and an inventory item in the corresponding columns of the **Details** tab of the *Service Orders* form for each item). For the inventory items that are not available at the warehouse, the manager selects the check box in the **Mark for PO** column. The system selects the **Waiting for Purchased Items** check box in the Summary area of the form, indicating that at least one item in the service order needs to be received.

Creation of Purchase Orders

After the service manager has made sure that all the necessary items are marked as needing to be purchased from the vendor or vendors, the manager clicks **Create Purchase Orders** on the More menu of the *Service Orders* (FS300100) form to open the *Create Purchase Orders* (PO505000) form. On this form, the manager checks the vendors and vendor locations specified for the items for which the purchase orders need to be created and creates these purchase orders.

The system creates purchase orders of the *Normal* type with the *On Hold* status on the *Purchase Orders* (PO301000) form. Now the service manager can track the reference number and status of the purchase orders related to the service order in the **PO Nbr.** and **PO Status** columns on the *Service Orders* or *Service Order Details* (FS401000) form.

> The system creates one purchase order for all items with the same vendor and vendor location, and different purchase orders for items with different vendors or vendor locations.

Processing of Purchase Orders

On the *Purchase Orders* (PO301000) form, the purchase manager processes the purchase orders, as described in *Purchases of Stock Items: General Information*. The system assigns the *Open* status to each purchase order.

> Each time the status of the purchase order is changed on the *Purchase Orders* form, the status is reflected in the **PO Status** column on **Details** tab of the *Service Orders* (FS300100) form.

Each time a receiving clerk receives the purchased stock items, they create and process a purchase receipt on the *Purchase Receipts* (PO302000) form. After purchase receipts have been released for all items included in a particular purchase order, the system assigns the purchase order the *Closed* status. The system also generates an inventory receipt with the *Released* status; the receiving clerk can view this receipt on the *Receipts* (IN301000) form.

The system also creates a bill with the *On Hold* status. An accountant now can process the bills related to the purchase orders on the *Bills and Adjustments* (AP301000) form.

Creation of Appointments

After the purchase order has been processed, a service manager of your company then uses the *Calendar Board* (FS300300) form to schedule the appointments that are needed to perform the services requested by the customer.

The service manager selects a staff member to attend an appointment by taking into consideration the work schedule of the staff member, as well as filtering the displayed staff members by the skills and licenses needed to perform the service and the service area where the services are provided. On the *Appointments* (FS300200) form, the service manager checks the information on each appointment and enters additional information, such as the resource equipment used to perform the services. The system assigns the *Not Started* status to each appointment when it is first created.

> An appointment can be created earlier in the process. The items that need to be purchased will also be included in the appointment. The **Mark for PO**, **PO Nbr.** and **PO Status** columns on the **Details** tab of the *Appointments* form display details on the related purchase.

The further processing workflow of the service order and its appointment does not differ from the general processing workflow of an ordinary service order.

Service Orders with Items to Be Purchased: Process Activity

This activity will walk you through the creation of a service order for which a stock item must be purchased from a vendor. You will also learn how to process the purchase order and service order (up to but not including the creation of appointments).

Story

Suppose that the SweetLife Service and Equipment Sales Center has announced that it will begin selling a new juicer, *JUICER05*. The FourStar Coffee & Sweets Shop customer would like to order this juicer along with training services.

Because this juicer is not yet in stock, the SweetLife Service and Equipment Sales Center needs to first purchase the juicer from the *SQUEEZO* vendor. When the juicer is received, an appointment to perform the services can be created. Acting as the service manager (Maia Davis), you will create the service order, create the purchase order, and process the purchase order.

Configuration Overview

- 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* feature, which provides support for the sales order functionality, has been enabled.
- On the *Employees* (EP203000) form, the *EP00000040 (Maia Davis)* employee account has been defined.
- 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 has been configured.
- On the *User Profile* (SM203010) form, for the *davis* user, the *WEST BRIGHTON* branch location has been specified as the default branch location.
- On the *Service Order Types* (FS202300) form, the *INST* service order type has been configured to generate SO invoices to bill customers for provided services. That is, in the **Billing Settings** section of the **General** tab, *SO Invoices* has been selected in the **Generated Billing Documents** box.
- 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**

  Based on these billing cycle settings, a separate billing document is generated for each appointment; this document presents the details of each service of the appointment.

- 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 *Non-Stock Items* (IN202000) form, for the *INSTALL* non-stock item, the *Service* type has been selected.
- On the *Stock Items* (IN202500) form, the *JUICER05* item has been defined, and the *Finished Good* type has been selected for this stock item.
- On the *Vendors* (AP303000) form, the *SQUEEZO* vendor has been defined.

Process Overview

To process a service order with items to be purchased, on the *Service Orders* (FS300100) form, you will create this service order and specify each item that has to be purchased. You will then create a purchase order and process it in the system.

Step 1: Creating a Service Order with an Item to Be Purchased

To create a service order whose items need to be purchased from a vendor, do the following:

1. On the *Service Orders* (FS300100) form, create a service order, and specify the following settings in the Summary area:
   - **Order Type**: *INST*
   - **Customer ID**: *COFFEESHOP - FourStar Coffee & Sweets Shop*
2. On the **Details** tab, click **Add Row** on the table toolbar, and select the following settings in the row:
   - **Line Type**: *Service*
   - **Inventory ID**: *INSTALL*
3. Click **Add Row** to add another row, and select the following settings in the row:
   - **Line Type**: *Inventory Item*
   - **Inventory ID**: *JUICER05*

     In the table footer, notice that the juicer is not available at the warehouse.
4. On the form toolbar, click **Save**.
5. On the **Details** tab, select the **Mark for PO** check box for *JUICER05*.

   Now a purchase order for this inventory item can be created from the service order.
6. In the **Vendor ID** column of the row, select *SQUEEZO*.

   The item that is designated for purchase will be purchased from this vendor.
7. On the form toolbar, click **Save**.

Step 2: Creating a Purchase Order

To create a purchase order, do the following:

1. While you are still viewing the service order on the *Service Orders* (FS300100) form, on the More menu (under **Replenishment**), click **Create Purchase Order**.

   The *Create Purchase Orders* (PO505000) form opens with the service order type and service order number selected, and the table shows one row with the item to be purchased.
2. For the row in the table, verify the vendor in the **Vendor** column.
3. Select the unlabeled check box in the row of the inventory item, and click **Process** on the form toolbar.

   After the processing has successfully completed, the *Purchase Orders* (PO301000) form opens with the purchase order you have created.

Step 3: Processing the Purchase Order

To process the purchase order, do the following:

1. On the form toolbar of the *Purchase Orders* (PO301000) form, for the purchase order that you created in the previous step, click **Remove Hold**.
2. On the form toolbar, click **Enter PO Receipt**.

   The *Purchase Receipts* (PO302000) form opens with a new receipt that has settings copied from the purchase order.
3. On the form toolbar, click **Save**.

   The receipt has been created for the purchased item.
4. On the form toolbar, click **Release**.

   The receipt has been released, indicating that the ordered inventory item is at the warehouse.

Step 4: Reviewing the Service Order with the Purchased Item

To review the service order, do the following:

1. Open the *Service Order Details* (FS401000) form, and in the **Customer** box, select *COFFEESHOP (FourStar Coffee & Sweets Shop)* (see Item 1 in the following screenshot).

   In the list, find a service order with the item that has been purchased (*JUICER05* in the **Inventory ID** column). In the **PO Status** column, notice that the status of the purchase order is *Completed* (Item 2). This indicates that the stock item has been received at the warehouse.

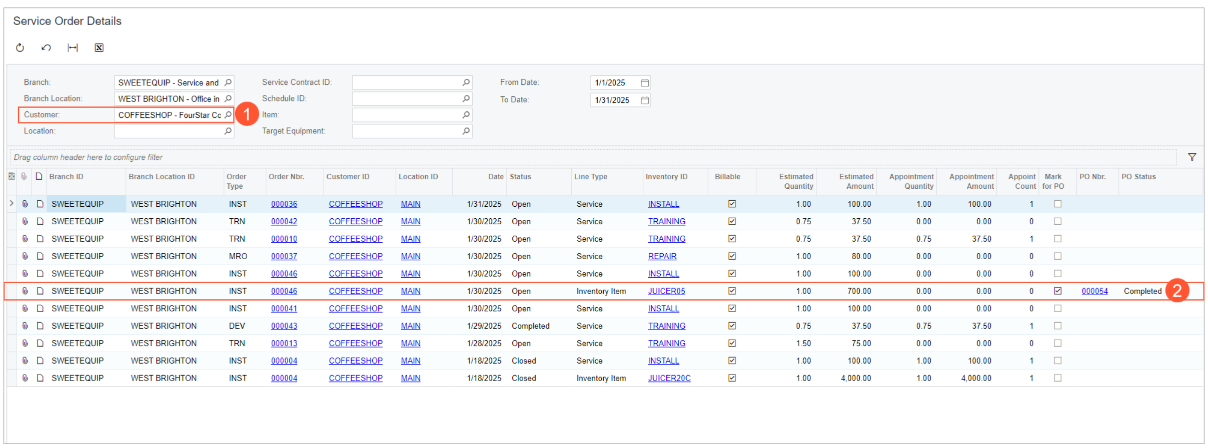


Figure: The purchased item

2. In the **Order Nbr.** box, click the link to the service order you created with the purchased item.

   The *Service Orders* (FS300100) form opens with the service order.
3. On the **Details** tab, select the row with the *JUICER05* stock item, and on the table toolbar, click the **Line Details** button.

   In the **Line Details** dialog box, which has been opened, notice that the **Allocated** check box is selected for the inventory item, indicating that the purchased item is reserved for the service order.

Lesson 4: Processing Case-Related Service Orders

In this lesson, you will learn how to create a service order from a case.

Case-Related Service Orders: General Information

A customer case can be processed along with a service order while the services necessary to resolve the case are being performed. For example, suppose that the customer of your company has complained about some product that it purchased from your company. The case is received and entered into the system by a support manager of your company, who also creates a related service order for the repair of the product. Then the service manager and staff members further process the service order, and the support manager continues processing the case to its completion. The accountant then prepares invoices for the customer and processes them in the system.

In this topic, you will read about the steps involved in the processing of the case along with the service order.

Learning Objectives

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

- Create a case whose resolution requires the provision of services
- Create a service order from a case
- Process an appointment associated with a case
- Close a case

Applicable Scenarios

You process cases along with service orders if, for example, your company provides support to the customers on the equipment that the company sells. Some support services need to be performed at a customer's location. So a support manager or representative creates a case in the system, for which an appointment is to be scheduled.

Process Diagram

In the diagram below, you can see the general workflow of processing a case along with a service order in the system. The sections below describe the steps of this workflow in more detail.

> Processes and job titles may be different in your company.

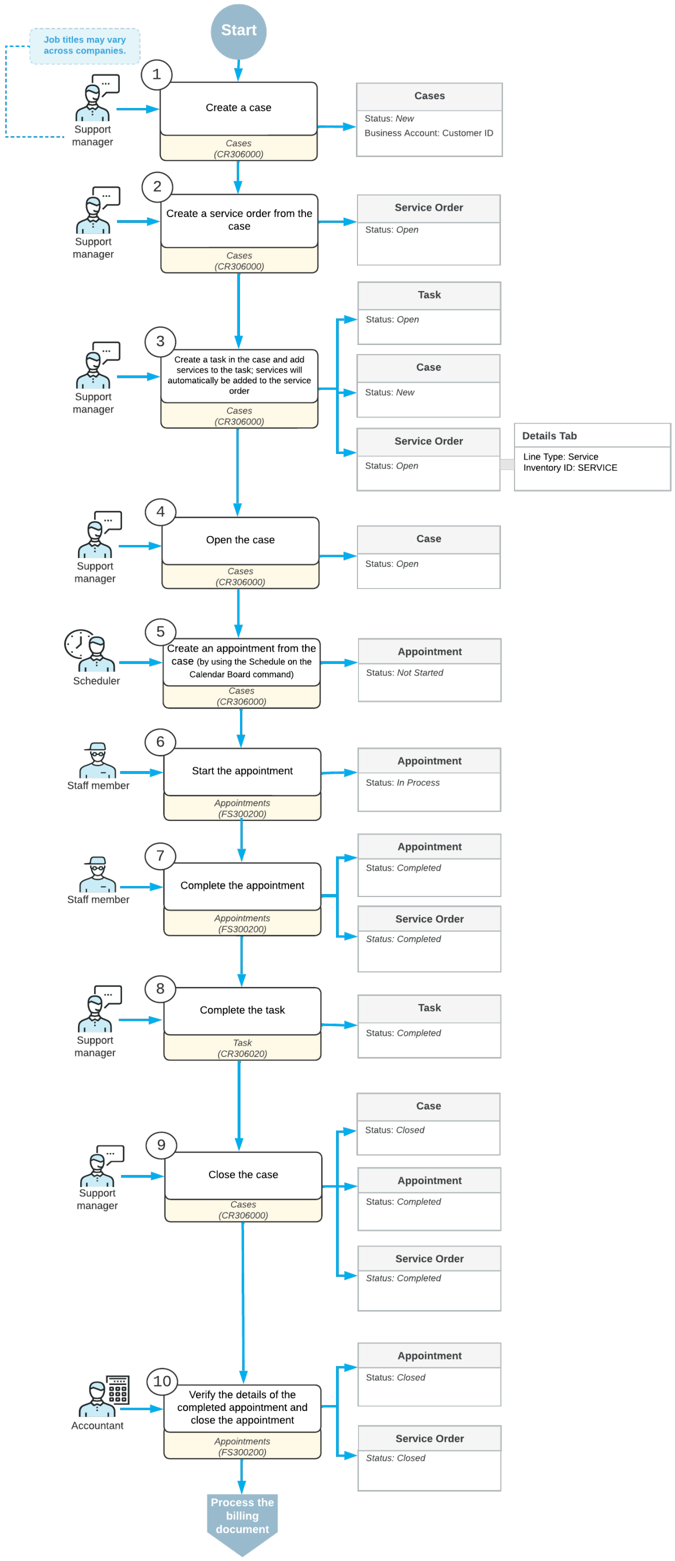


Figure: Case processing along with service order processing

Entry of a Case

The support manager enters a new case associated with the customer by using the *Cases* (CR306000) form. In the case, the support manager specifies the business account (which in this context is a customer or prospective customer) from which the case has been received, the contact person, and the details of the case; the manager saves the case with the *Open* status.

Entry of a Service Order

While still viewing the case on the *Cases* (CR306000) form, the manager clicks the **Create Service Order** command and specifies the service order type (see Step 2 in the workflow in the *Process Diagram* section). Then the manager adds the needed services (Step 3) to the service order related to this case, which the system has created on the *Service Orders* (FS300100) form.

> A service or services can also be added to the service order from the task created for the case. When the task is saved, the system automatically adds the service to the associated service order. Additionally, services can be added to the appointment linked to the service order, and the system will include them in the service order as well. By default, the **Billable** check box will be selected for all lines added to the service order.

Creation of Appointments

After the service order has been created in the system, a scheduler of your company uses the *Calendar Board* (FS300300) form to schedule the appointments that are needed to perform the services requested by the customer. The scheduler selects a staff member to attend an appointment by taking into consideration the work schedule of the staff member, as well as sorting the displayed staff members by the skills and licenses needed to perform the service and the service area where the services are provided.

The scheduler checks the information on each appointment and enters additional information, such as any inventory items expected to be included with the service to be performed. The system assigns the *Not Started* status to the created appointments.

Attending of Each Appointment

The staff member who is assigned to an appointment looks through the upcoming appointments on the *Staff Calendar Board* (FS30000) form and identifies which appointment to attend. The staff member then goes to the location where the service has to be performed, and starts the appointment on the *Appointments* (FS300200) form. The appointment is assigned the *In Process* status.

While the services are being performed, the staff member adds any needed information on services (such as status and quantities) to the appointment on the *Appointments* form; if needed, the staff member adds extra quantities or stock items that were used. When the services are done, 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, which gives it the *Completed* status.

When all appointments of a particular service order are completed, the system assigns the service order the *Completed* status if on the **General** tab (**General Settings** section) of the *Service Order Types* (FS202300) form for the service order type, the **Complete Service Order When Its Appointments Are Completed** check box is selected.

Closing of the Case

After the services have been completed, the support manager contacts the customer and confirms the resolution of the case. On the *Cases* (CR306000) form, the support manager closes the case in the system, and the system assigns the *Closed* status to the case.

Closing of the Appointments and Service Order

After all appointments are completed, an accountant processes the service order further. On the *Calendar Board* form, the accountant opens the completed appointment and verifies quantities and prices.

When all information is verified and the appointments are ready for invoicing, the accountant closes the appointments. The system closes the service order if on the **General** tab (**General Settings** section) of the *Service Order Types* (FS202300) form for the service order type, the **Close Service Order When Its Appointments Are Closed** check box is selected.

Processing of Invoices

The accountant generates a sales order document with the *Open* status by using the *Run Appointment Billing* (FS500100) form.

The accountant then processes the sales order in the system.

Case-Related Service Orders: Process Activity

This activity will walk you through the process of creating a service order from a case. You will go through the service management process while also processing the case, from creation through closing.

Story

The SweetLife Service and Equipment Sales Center provides support to its customers on equipment that the company sells, and these support services are billed to the customer on a per-case basis. The Thai Food Restaurant customer has requested the replacement of a component in a juicer that the company purchased previously.

Acting as the service manager of the company (Maia Davis), you will create a case for which an appointment should be scheduled for the replacement services to be performed. Acting as the respective employees, you will also continue the processing of the related service order through the closing of the case.

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*, which provides support for the sales order functionality
  - *Case Management* (under *Customer Management*), which provides support for the case functionality.
- On the *Employees* (EP203000) form, *EP00000040 (Maia Davis)* and *EP00000040 (Alberto Jimenez)* have been defined. For *Alberto Jimenez*, the **Staff Member in Service Management** check box has been selected and the *REPAIRING* skill has been added.
- On the *Users* (SM201010) form, the *davis* and *jimenez* 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 *jimenez* user account, in this box, the *Alberto Jimenez* employee account has been specified.
- 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 has been defined.

- On the *User Profile* (SM203010) form, for the *davis* user, the *WEST BRIGHTON* branch location has been specified as the default branch location.
- On the *Service Order Types* (FS202300) form, the *MRO* service order type has been defined to generate SO invoices to bill customers for provided services. That is, *SO Invoices* has been selected in the **Generated Billing Documents** box of the **Billing Settings** section (**General** tab). Also, on the **General** tab (**General Settings** section), the **Complete Service Order When Its Appointments Are Completed** and **Close Service Order When Its Appointments Are Closed** check boxes are selected.
- On the *Service Management Preferences* (FS100100) form, the basic service management functionality has been configured, including the specification of the numbering sequences and the work calendar. Also, on the **General** tab (**Default Settings** section), *MRO* has been selected in the **Default Service Order Type for Cases** box, meaning that when a new service order is created from the *Cases* (CR306000) form, *MRO* is inserted as its service order type.
- On the *Customers* (AR303000) form, the *TOMYUM (Thai Food Restaurant)* customer has been defined.

Process Overview

To create a service order along with a case, you will create a new case on the *Cases* (CR306000) and a service order for it on the *Service Orders* (FS300100) form. You will then add the service to be performed by creating the related task on the *Task* (CR306020) form.

Step 1: Creating a Case

To create a case, do the following:

1. Open the *Cases* (CR306000) form, and click **Add New Record**.
2. In the Summary area of this form, specify the following settings:
   - **Case Class**: *SUPPORT*
   - **Business Account**: *TOMYUM - Thai Food Restaurant*
   - **Subject**: `Component replacement is necessary`
3. On the **Details** tab, briefly describe the situation by entering the following: `The component of the juicer has a defect; replacement with a new one is necessary`.
4. On the form toolbar, click **Save**.

Step 2: Creating a Service Order from the Case

To create a service order from the case, do the following:

1. While you are still viewing the case on the *Cases* (CR306000) form, on the More menu (under **Customer Services**), click **Create Service Order**.
2. In the **Create Service Order** dialog box, which opens, make sure that *Maintenance, repair and operations (MRO)* is selected in the **Service Order Type** box, and click **OK**.

   The *Service Orders* (FS300100) form opens with the customer details inserted. Note that services have not yet been added to the service order.
3. In the **Source Info** section of the **Other** tab, verify that the system has inserted *Case* as the document type and has inserted the reference number of the case from which the service order was created.
4. On the form toolbar, click **Save**.

Step 3: Adding Services

To add services to a service order, do the following:

1. Return to the case you have created on the *Cases* (CR306000) form.
2. On the **Activities** tab, click **Create Task**.

   The *Task* (CR306020) form opens. You must create a task in order to add a service for the case.
3. In the **Summary** box of the **Details** tab, type `Replacement of a component`.
4. In the **Service** box, select *REPAIR*.
5. Save your changes and close the form.

   The case now has one task associated with it. The service associated with the task is automatically added to the service order related to the case on the **Details** tab of the *Service Orders* (FS300100) form.
6. On the *Cases* form, on the More menu, click **View Service Order** (under **Customer Services**). On the **Details** tab of the *Service Orders* (FS300100) form, which opens, notice that the **Billable** check box is selected for the line added from the case. You can now proceed to creating an appointment for this service order and assigning the appointment to the employee who is the best fit to deliver the installation service.
7. Return to the *Cases* form, and on the form toolbar, click **Open**.
8. In the **Details** dialog box, which opens, click **OK**.

The dialog box closes and the status of the case changes to *Open*.

Step 4: Creating an Appointment

To create an appointment, do the following:

1. While you are still viewing the case on the *Cases* (CR306000) form, on the More menu (under **Customer Services**), click **Schedule on the Calendar Board**.

   The *Calendar Board* (FS300300) form opens with the service order listed on the **Service Orders** tab.
2. In the Date box, select *1/30/2025*.
3. Drag the service order to the column of *Alberto Jimenez* at 15:00.

An appointment is created.

Step 5: Processing the Appointment

To process the appointment, do the following:

1. While you are still viewing the *Calendar Board* (FS300300) form, click the reference number of the appointment in the calendar. (You are acting as the staff member and will continue to do so for the next three instructions.) The *Appointments* (FS300200) form opens.
2. On the form toolbar, click **Start**.
3. In the **Actual Date and Time** section of the **Settings** tab, specify the actual start and actual end times to be the same as the scheduled times, and select the **Finished** check box.
4. On the form toolbar, click **Complete**.

The service required to complete the case has been delivered, and you have completed the corresponding appointment. The completion of the appointment caused the service order to also be completed because of the settings of the *MRO* service order type on the *Service Order Types* (FS202300) form, as described in the *Configuration Overview* section.

Step 6: Generating an Invoice for the Appointment

On behalf of the accountant, you will generate an invoice for the appointment. Do the following:

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

   According to the settings of the *MRO* service order type on the **Quick Processing** tab of the *Service Order Types* (FS202300) form, by clicking the **Quick Process** button, the system will close the appointment, run the billing process, and generate and release a sales invoice for the appointment.

2. In the dialog box, click **OK**. Once the billing process is finished, an invoice is generated and released. Click **OK** in the **Processing Results** dialog box.

Step 7: Completing the Task and Closing the Case

Now you can complete the task and close the related case; these actions must be performed manually. Do the following:

1. On the **Other** tab of the *Appointments* (FS300200) form, click the reference number of the case in the Source Info section.
2. On the *Cases* (CR306000) form, which opens, in the **Summary** column of the **Activities** tab, click the link of the task associated with the case.
3. On the form toolbar of the *Task* (CR306020) form, which opens, click **Complete**.

   Now the task is completed in the system, and you can close the case.

4. On the form toolbar of the *Cases* form, click **Close**. In the **Close** dialog box, which opens, click **OK**.
5. The status of the case has been changed to *Closed*.

Lesson 5: Processing Opportunity-Related Service Orders

In this lesson, you will learn how to create a service order from an opportunity.

Opportunity-Related Service Orders: General Information

An opportunity on the *Opportunities* (CR304000) form, represents an actual revenue-generating opportunity with a customer or potential customer. For the opportunity, a quote can be created on the *Sales Quotes* (CR304500) form to represent a formal offer made to a particular customer based on the opportunity.

> The functionality related to sales quotes becomes available in the system if the *Sales Quotes* feature is enabled on the *Enable/Disable Features* (CS100000) form.

In this topic, you will read about the steps involved in processing the opportunity with a sales quote along with processing the related service order.

Learning Objectives

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

- Create an opportunity that includes at least one service
- Create a sales quote associated with the opportunity, and send it to the customer
- Create a service order from the opportunity
- Create an opportunity-related appointment for the service order

Applicable Scenarios

You process opportunities along with service orders when your company has an opportunity that includes the provision of at least one service, and needs to prepare a sales quote for the customer for review. If the customer agrees to deal with your company—that is, if the opportunity is won—you need to process the service order and appointments along with the opportunity.

Process Diagram

The following diagram illustrates the workflow of processing the opportunity and the related documents and entities in the system. The sections below describe the steps of this workflow in more detail.

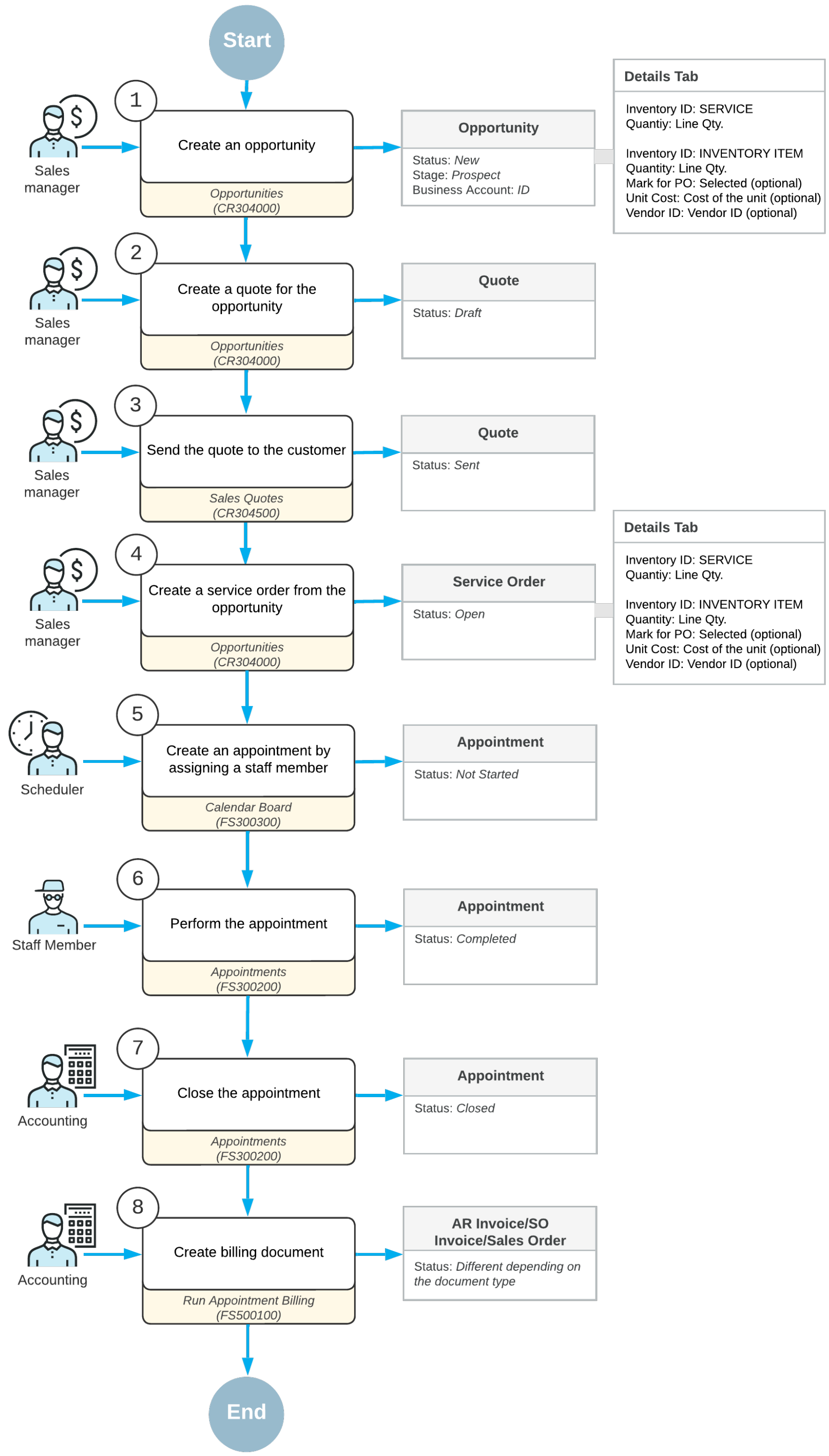


Figure: Opportunity processing along with service order processing

Processing of an Opportunity and a Sales Quote

The sales manager enters a new opportunity associated with the customer by using the *Opportunities* (CR304000) form. In the opportunity, the sales manager specifies the business account (which in this context is a customer or prospective customer) associated with the opportunity, the contact person, and the details of the opportunity. On the **Details** tab, the sales manager adds lines for the services and inventory items to be provided if the opportunity is won.

The sales manager starts the process of creating a sales quote by clicking **Create Quote** on the form toolbar of the *Opportunities* form. Then on *Sales Quotes* (CR304500) form, which opens, the sales manager adds all the needed settings and sends it to the customer.

Creation of the Service Order

When the customer accepts the offer, the sales manager returns to the *Opportunities* (CR304000) form and changes the stage of the opportunity to *Won*. The sales manager then creates a service order by clicking **Create Service Order** on the More menu (under **Services**). In the **Create Service Order/Appointment** dialog box, which opens, the sales manager specifies the service order type and branch location that will provide services.

The system creates the service order and opens it on the *Service Orders* (FS300100) form. The sales manager makes sure that all the services that should be performed and inventory items to be purchased are in the service order.

Creation of Appointments

After the service order has been created in the system, a scheduler of your company uses the *Calendar Board* (FS300300) form to schedule the appointments that are needed to perform the services requested by the customer. The scheduler selects a staff member to attend an appointment by taking into consideration the work schedule of the staff member, as well as sorting the displayed staff members by the skills and licenses needed to perform the service and the service area where the services are provided.

The scheduler checks the information on each appointment and enters additional information, such as any inventory items expected to be included with the service to be performed. The system assigns the *Not Started* status to the created appointments.

Attending of Each Appointment

The staff member assigned to attend an appointment receives the email with the appointment details, reviews the details, and goes to the customer location at the scheduled time. At the customer location, the staff member finds the appointment on the *Staff Calendar Board* (FS300400) form, opens the appointment on the *Appointments* (FS300200) form, and reflects its start in the system. The appointment is assigned the *In Process* status.

When the services have been finished, 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, which gives it the *Completed* status.

When all appointments of a particular service order are completed, the system assigns the service order the *Completed* status if on the **General** tab (**General Settings** section) of the *Service Order Types* (FS202300) form for the service order type, the **Complete Service Order When Its Appointments Are Completed** check box is selected.

Closing of the Appointments and Service Order

After all appointments are completed, an accountant processes the service order further. On the *Calendar Board* (FS300300) form, the accountant verifies the completed appointment.

When all information is verified and the appointments are ready for invoicing, the accountant closes the appointments. This action causes the system to close the related service order if on the **General** tab (**General Settings** section) of the *Service Order Types* (FS202300) form for the service order type, the **Close Service Order When Its Appointments Are Closed** check box is selected.

Processing of Invoices

The accountant generates a billing document (an AR invoice, SO invoice or sales order depending on the service order type settings) by using the *Run Appointment Billing* (FS500100) form.

Opportunity-Related Service Orders: Process Activity

This activity will walk you through the process of creating a service order from an opportunity with a quote that the customer has agreed to.

Story

Suppose that the Thai Food Restaurant customer has called and requested a proposal for some products of the SweetLife Service and Equipment Sales Center, along with installation services for the products. The service manager (Maia Davis) has received the opportunity and needs to enter it into the system. She then needs to prepare a sales quote and send it to the customer for review.

Further suppose that after reviewing the proposal, the customer decides to procure the company for the services and products, making the opportunity won. The service manager then needs to prepare a service order based on the opportunity, and schedule an appointment for a staff member. You will act as the service manager in performing all of these actions.

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*, which provides support for the sales order functionality
  - *Sales Quotes* (under *Customer Management*), which provides support for the functionality of sales quotes for opportunities
- On the *Employees* (EP203000) form, *EP00000040 (Maia Davis)* and *EP00000003 (Jon Waite)* have been defined. For *EP00000003 (Jon Waite)*, the **Staff Member in Service Management** check box has been selected and the *REPAIRING* skill has been added.
- On the *Users* (SM201010) form, the *davis* and *waite* 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 *waite* user account, in this box, the *Jon Waite* employee account has been specified.
- 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 *Branch Locations* (FS202500) form, the *WEST BRIGHTON* branch location has been defined.
- On the *User Profile* (SM203010) form, for the *davis* user, the *WEST BRIGHTON* branch location has been specified as the default branch location.

- On the *Service Order Types* (FS202300) form, the *INST* service order type has been defined to generate SO invoices to bill customers for provided services. That is, in the **Billing Settings** section of the **General** tab, *SO Invoices* has been selected in the **Generated Billing Documents** box.
- On the *Billing Cycles* (FS206000) form, the *AP SO* billing cycle has been defined to generate invoices and group them by appointment (that is, in the Summary area, the **Appointments** option button is selected under both **Run Billing For** and **Group Billing Documents By**).
- On the *Customers* (AR303000) form, the *TOMYUM (Thai Food Restaurant)* customer has been defined. The *AP SO* billing cycle has been selected for this customer in the **Service Management** section of the **Billing** tab.
- On the *Non-Stock Items* (IN202000) form, the *INSTALL* non-stock item of the *Service* type has been created.

Process Overview

In this activity, you will create a new opportunity on the *Opportunities* (CR304000) form and add the applicable service to be performed and stock item to be sold to this opportunity. You will then create a sales quote for the customer and send it to the customer. Finally, you will create a service order based on the opportunity and schedule an appointment.

Step 1: Creating an Opportunity

To create an opportunity, do the following:

1. Open the *Opportunities* (CR304000) form.
2. On the form toolbar, click **Add New Record**, and in the Summary area, specify the following settings:
   - **Class ID**: *SERVICE*
   - **Description**: `Sale of a juicer and installation service`
   - **Business Account**: *TOMYUM (Thai Food Restaurant)*
3. On the form toolbar, click **Save**.
4. On the table toolbar of the **Details** tab, click **Add Row**.
5. In the row, specify the following settings:
   - **Inventory ID**: *INSTALL*
   - **Quantity**: `1`
6. Add another row with the *JUICER15* inventory item and a quantity of `1`.
7. On the form toolbar, click **Open**. In the **Details** dialog box, which is opened, click **OK**. The opportunity is created.

Step 2: Sending a Quote to the Customer

To create a sales quote and send it to the customer, do the following:

1. While you are still viewing the opportunity on the *Opportunities* (CR304000) form, on the form toolbar, click **Create Quote**.
2. In the **Create Quote** dialog box, which opens, click **Create and Review**.

   The *Sales Quotes* (CR304500) form opens with the created quote.
3. On the More menu (under **Processing**), click **Send**.

Step 3: Creating a Service Order from the Opportunity

Suppose that the customer has accepted the sales quote that was sent. To create a service order, do the following:

1. Go back to the opportunity that you created on the *Opportunities* (CR304000) form.
2. In the **Stage** box, select *Won*, and save the opportunity.
3. On the More menu (under **Services**), click **Create Service Order**.
4. In the **Create Service Order/Appointment** dialog box, which opens, select *INST (Installation Services)* in the **Service Order Type** box, and click **Create and Review**.

   The *Service Orders* (FS300100) form opens with the details from the opportunity filled in. Notice that the service order has the service and the inventory item that have been copied from the related opportunity (on the **Details** tab); the service order is ready to be processed.
5. In the **Source Info** section of the **Other** tab, verify that *Opportunities* is specified in the **Document Type** box and that the reference number of the related opportunity has been inserted in the **Reference Nbr.** box.

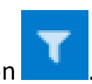
Now you can process the service order by scheduling an appointment.

Step 4: Creating an Appointment

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 *Appointments* (FS300200) form opens.
2. In the **Scheduled Start Date** box of the **Settings** tab, select *2/6/2025 2:00 PM*.
3. On the form toolbar, click **Save**.
4. On the More menu (under **Scheduling**), click **Schedule on Calendar**.

   The *Calendar Board* (FS300300) form opens.
5. On the right top corner of the dashboard, click the filter icon .
6. In the **Staff Filters** dialog box, which opens, do the following:
   - On the **Skills** tab, select **Juicer installation skill**.
   - On the **Services** tab, select **Installation of equipment**.
   - At the bottom of the dialog box, click **Filter & Close**.
7. On the **Unassigned Appointments** tab, click the appointment you just created, and drag it to the column for *Jon Waite*

   The appointment is now scheduled and the staff member is assigned to it, as the following screenshot shows.

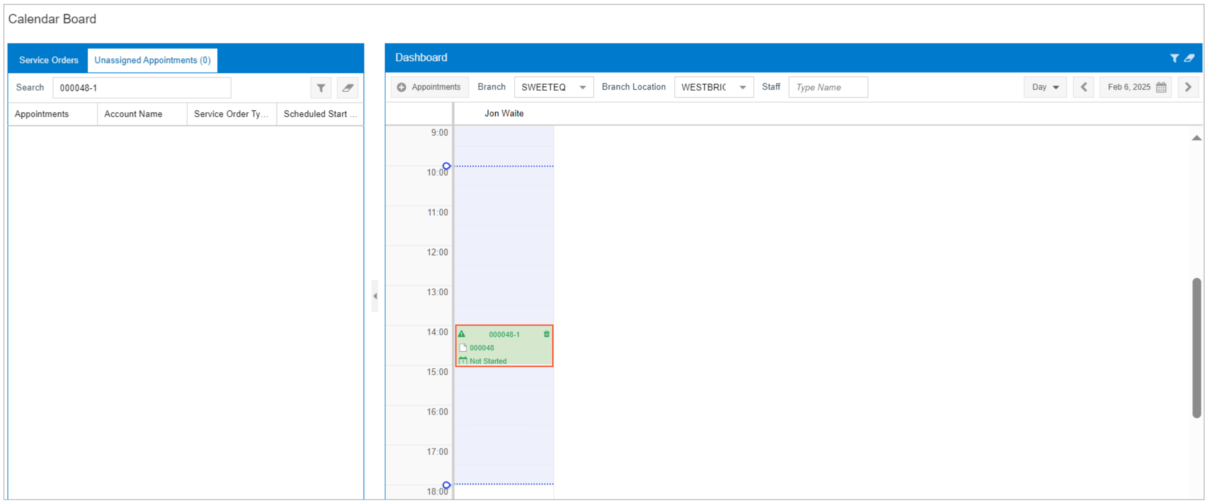


Figure: The scheduled appointment

Lesson 6: Correcting Appointments

In Acumatica ERP, if an invoice has been generated and released for an appointment but there are inaccuracies in either the invoice or the appointment details, you can correct both the settings of the appointment or its invoice.

In this lesson, you will learn how to reverse an invoice created for an appointment, correct an appointment, and run billing for the appointment once again.

Appointment Billing Correction: General Information

In Acumatica ERP, if you need to correct information in an already-released invoice that originated from an appointment, you reverse the invoice, correct the appointment, and generate a new invoice. The correction of the appointment can involve adding or deleting detail lines, editing items in the detail lines, or editing the prices.

Learning Objectives

In this lesson, you will learn how to reverse an invoice originating from an appointment, make corrections in the appointment, and generate another invoice for it. Note that the activity addresses a scenario where the billing document is an accounts receivable invoice.

Applicable Scenarios

You correct an appointment and prepare a new invoice for a customer in the following cases:

- When corrections to an invoice may be needed
- When corrections to an appointment may be needed

Workflow of Appointment Billing Correction

In the diagram below, you can see the general workflow of correcting an invoice that has been generated and released for an appointment. This diagram focuses on the process when the billing document is an accounts receivable invoice.

> Processes and job titles may be different in your company.

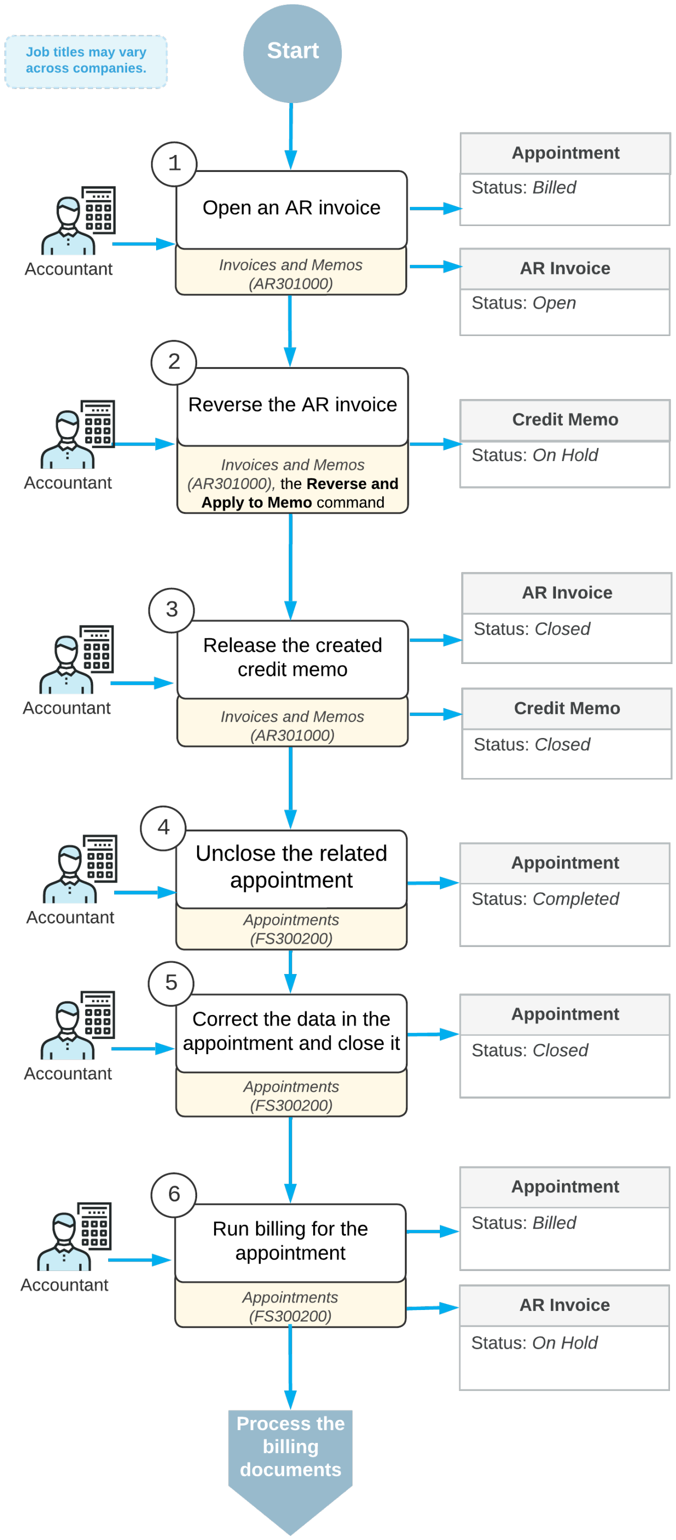


Figure: Correcting an AR invoice originating from an appointment

Correction of an Accounts Receivable Invoice Originating from an Appointment

To correct an appointment billing, if an accounts receivable invoice was used for the billing and it has the *Open* status (that is, it has been released), an accountant must first reverse this invoice. On the **Billing Documents** tab of the *Appointments* (FS300200) form, the accountant finds and clicks the reference number of the invoice. The system opens the invoice on the *Invoices and Memos* (AR301000) form in a pop-up window.

On the More menu (under **Corrections**) of the *Invoices and Memos* form, the accountant clicks **Reverse and Apply to Memo**. The system creates a document of the *Credit Memo* type and opens it on the current form. The accountant releases the credit memo, which causes the credit memo and the original invoice to be assigned the *Closed* status, and closes the form. On the **Billing Documents** tab of the *Appointments* form, the system adds a row with the *AR Credit Memo* document with its reference number.

On the *Appointments* form, on the More menu (under **Corrections**), the accountant clicks **Unclose** to unclose the appointment. The accountant then makes the needed corrections to the appointment. After that, they can process the appointment billing once again.

Correction of a Sales Invoice Originating from an Appointment

The ability to reverse a sales invoice is available only if the *Service Management* and *Advanced SO Invoices* features are enabled on the *Enable/Disable Features* (CS100000) form.

If there is an open sales invoice that has to be corrected and this invoice originates from an appointment, the accountant must first reverse the invoice, unclose the related appointment, and make the needed corrections to the appointment. Then they can generate the new invoice with the corrected information. The accountant finds the reference number of the invoice on the **Billing Documents** tab of the *Appointments* (FS300200) form. On this tab, the accountant clicks the reference number of the sales invoice. The system opens the invoice on the *Invoices* (SO303000) form in a pop-up window.

In the invoice, on the *Invoices* form, an accountant clicks **Reverse Service Invoice** on the More menu (under **Corrections**). The system creates a new document of the *Credit Memo* type and opens it on the current form. The accountant releases the credit memo and closes the *Invoices* form. The credit memo is assigned the *Closed* status, and the original invoice is assigned the *Canceled* status. The system adds a row with the *SO Credit Memo* document and its reference number on the **Billing Documents** tab of the *Appointments* form.

On the *Appointments* form, the accountant clicks **Unclose** on the More menu (under **Corrections**) and makes the needed corrections. After that, they can process the appointment billing once again.

Appointment Billing Correction: Process Activity

This activity will walk you through the processes of making corrections to an appointment after an accounts receivable invoice has been released for it, and generating a new AR invoice for the appointment.

Story

Suppose that HM's Bakery & Cafe ordered training on juicer usage for newcomers. A service manager (Maia Davis) of the SweetLife Service and Equipment Sales Center created an appointment and included a training service item. The assigned staff member (Todd Bloom) performed the necessary service at the customer location and completed the appointment in the system. The accountant (Yona Jones) closed the appointment and generated an AR invoice.

Further suppose that after the invoice was generated, the service manager learned that at the end of the appointment where the training was delivered, the staff member performed a repair of a juicer. The service manager contacted the customer and both parties agreed to include the repair service in the previously created appointment, and to generate an updated AR invoice. Acting as the service manager, you will perform the needed steps to update the appointment and generate a new AR invoice, which the accountant will process further.

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. Multiple branches of the company have been 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 the numbering sequences and work calendar, for the service management functionality to be used.
- On the *Employees* (EP203000) form, *EP00000040 (Maia Davis)* has been defined.
- On the *Users* (SM201010) form, the *davis* account has been created. For this 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 has been defined.
- On the *User Profile* (SM203010) form, for the *davis* user, the *WEST BRIGHTON* branch location has been specified as the default branch location.
- On the *Service Order Types* (FS202300) form, the *TRN* service order type has been defined to generate AR invoices to bill customers for services that have been provided. That is, *AR Documents* has been selected in the **Generated Billing Documents** box in the **Billing Settings** section of the **General** tab.
- 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.
- On the *Non-Stock Items* (IN202000) form, for the *TRAINING* and *REPAIR* non-stock items, the *Service* type has been selected, and the *Time* billing rule has been specified.

Process Overview

On the *Appointments* (FS300200) form, you will find the released accounts receivable invoice and click its link to open the invoice. You will reverse this invoice on the *Invoices and Memos* (AR301000) form by clicking the **Reverse and Apply to Memo** command on the More menu. You will then unclose the appointment and correct it. Finally, on behalf of the accountant, you will close an appointment and generate a new invoice.

System Preparation

In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, set the business date to *2/16/2025*. In this activity, you will create and process all documents in the system on this business date.

Step 1: Opening an Invoice from the Appointment

To find and open the invoice generated from the appointment, do the following:

1. On the *Appointments* (FS300200) form, open the *000018-1* appointment.
2. On the **Billing Documents** tab, click the reference number of the invoice that was generated for the appointment.

   The *Invoices and Memos* (AR301000) form opens in a pop-up window with the settings of the invoice.

Step 2: Reversing the Invoice

While you are still viewing the accounts receivable invoice on the *Invoices and Memos* (AR301000) form, reverse it as follows:

1. On the More menu (under **Corrections**), click **Reverse and Apply to Memo**. The system creates a document of the *Credit Memo* type with the settings of the invoice and opens it on the same form.
2. On the form toolbar, click **Remove Hold**.

3. On the form toolbar, click **Release** to release the credit memo.
4. Close the window with the *Invoices and Memos* form.

You have released the *Credit Memo* document that reversed the invoice. Now the corresponding appointment can be unclosed and corrections can be made to it.

Step 3: Correcting the Appointment

To correct the appointment, do the following:

1. Return to the *000018-1* appointment on the *Appointments* (FS300200) form. Refresh the page.
2. On the **Billing Documents** tab, verify that a row has been added for the *AR Credit Memo* document.
3. On the form toolbar, click **Unclose**. Then click **Yes** in the **Confirm Appointment Unclosing** dialog box, which appears.
4. On the **Details** tab, click **Add Row**, and select *REPAIR* in the **Inventory ID** column of the row.
5. In the **Actual Duration** column of the row, specify `1 h 00 m`.
6. On the form toolbar, click **Save**.
7. On the form toolbar, click **Close**.
8. On the form toolbar, click **Run Billing**.

The system opens a pop-up window with the prepared invoice on the *Invoices and Memos* (AR301000) form. Notice that two detail lines have been added on the **Details** tab (one for the *TRAINING* service, and another for the *REPAIR* service).

The invoice is on hold. The accountant can process this invoice further.

Return to the appointment on the *Appointments* (FS300200) form. On the **Billing Documents** tab, you can see that this invoice has been added to the list of billing documents.

Lesson 7: Cloning Appointments

In this lesson, you will learn how to clone an appointment. This process creates a new appointment with settings similar to those of the original appointment.

Cloning of Appointments: General Information

Sometimes, you may need to create multiple appointments with nearly identical details. In this case, you can create one appointment and then use the cloning functionality to generate additional appointments with the same settings.

Learning Objectives

In this lesson, you will learn how to clone an appointment.

Applicable Scenarios

You clone an appointment when you need to create a new appointment with similar details to an existing one. For example, if you need to schedule a follow-up appointment with the same customer, for the same service, and with the same staff member, cloning the original appointment saves time by copying over all relevant settings.

Cloning of Appointments: Process Activity

The following activity will walk you through the process of cloning an appointment.

Story

Suppose that the service manager (Maia Davis) of the SweetLife Service and Equipment Sales Center receives a call from HM's Bakery and Cafe regarding the repair of two juicers previously sold to the customer. The customer has requested that the repairs be performed on two separate days: January 31, 2025, and February 4, 2025.

The service manager needs to create an appointment for the repair of the first juicer. After creating the first appointment, Maia will clone it to create an appointment for the repair of the second juicer. Finally, she will review the customer's appointments. 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 service management functionality has been configured with the ability to sell inventory items, as described in *Basic Service Management Configuration*.
- On the *Users* (SM201010) form, the *davis* account has been created. For the user account, in the **Linked Entity** box of the Summary area of the form, the Maia Davis employee account has been specified.
- On the *User Profile* (SM203010) form, for the *davis* user, the *WEST BRIGHTON* branch location has been selected 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, the non-stock item of the *Service* type) has been defined. This service has the *Flat Rate* billing rule selected on the **Price/Cost** tab. For this service, *REPAIRING* has been specified on the **Service Skills** tab (so the assigned staff member must have this skill),

and *INST&REP* has been specified on the **Service License Types** tab (so 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 Info** tab (**Employee Settings** section), the **Staff Member in Service Management** check box has been selected. Also, the *REPAIRING* skill has been added on the **Skills** tab, and license *FSL00002* of the *INST&REP* type has been added on the **Licenses** tab.
- On the *Customers* (AR303000) form, the *HMBAKERY (HM's Bakery and Cafe)* customer has been defined.

Process Overview

You will create the first appointment on the *Calendar Board* (FS300300) form. Then, you will clone the appointment to a new one by using the *Clone Appointments* (FS500201) form. Finally, you will review the customer's appointment history on the *Appointment Summary* (FS400100) form, accessed from the *Customers* (AR303000) form.

System Preparation

Ensure you are signed in by using the *davis* username and the *123* password; in the upper-right corner of the top pane of the Acumatica ERP screen, set the business date to *2/16/2025*.

Step 1: Creating the First Appointment

To create an appointment for the customer, 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 opens in a pop-up window.
3. On the *Calendar Board* form, in the Date box (in the top right corner of the dashboard), change the calendar date to *1/31/2025*.
4. On the calendar, in the column for Jon Waite, click at 16:00, and drag the bottom of the shaded box to 17:30. When you clicked, the system automatically created an appointment.
5. Click the reference number of the appointment in the appointment box on the calendar. The *Appointments* (FS300200) form opens with the customer and default settings filled in.
6. On the **Details** tab, add a row, and in the **Inventory ID** box, select the *REPAIR* service.
7. On the form toolbar, click **Save**.

Step 2: Cloning the Appointment

To clone the appointment that you created in Step 1, do the following:

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

   The *Clone Appointments* (FS500201) form opens.
2. In the Selection area, in the **Date** box of the **Cloning Details** section, select *2/4/2025*.

   The appointment start time is set to match the time of the original appointment.
3. On the form toolbar, click **Process**.

The new appointment is generated (Item 2 in the screenshot) with the same details as the original appointment, except for the scheduled date, which is *2/4/2025* (Item 1), as shown in the following screenshot.

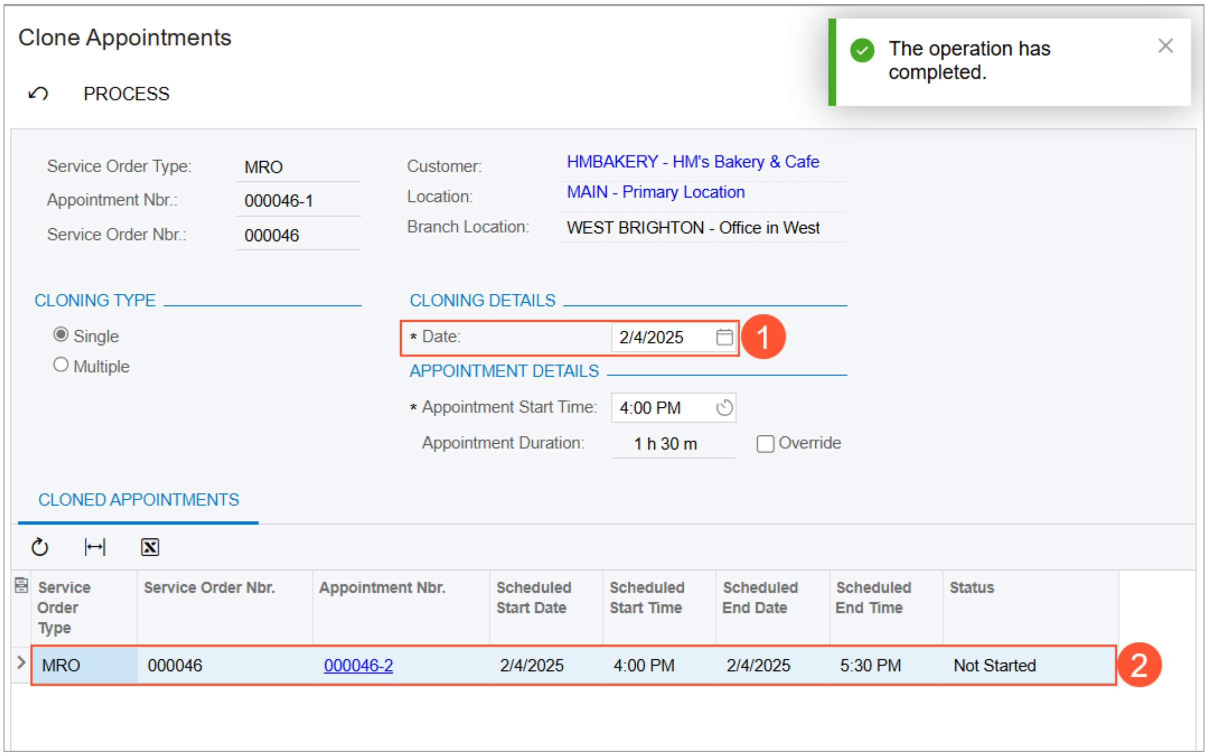


Figure: The appointment created through cloning

Step 3: Reviewing the Appointments Created for the Customer

To review the list of the customer's appointments, including the two appointments you created in this activity, follow these steps

1. On the *Customers* (AR303000) form, 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 in a pop-up window.
3. In the Selection area, clear the **Staff Member** box. In the **From Scheduled Date** box, select 1/31/2025. In the **To Scheduled Date** box, select 2/4/2025.

   Review the two appointments: one scheduled for *1/31/2025 4:00 PM*, and the other scheduled for *2/4/2025 4:00 PM* (shown in the following screenshot).

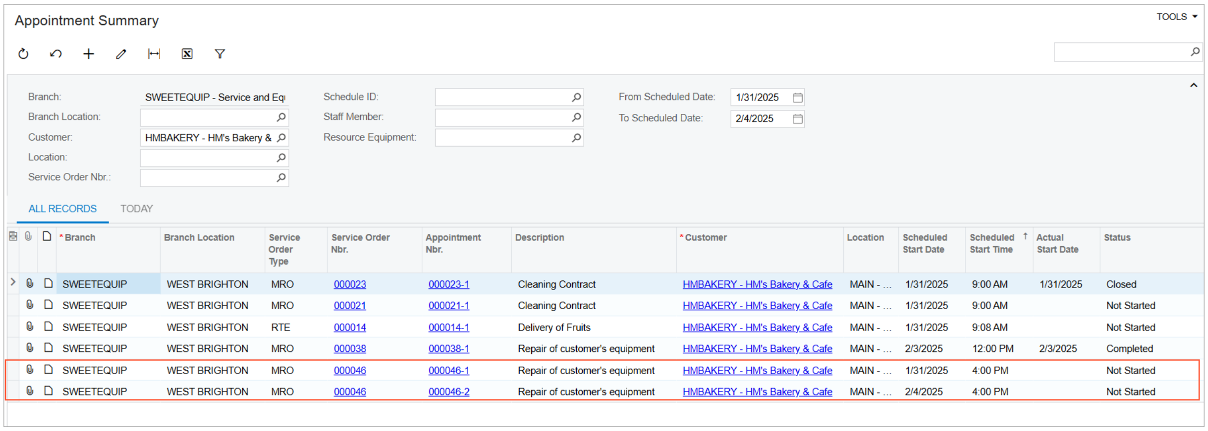


Figure: Two Appointments: The original and the cloned one

Lesson 8: Processing Prepayments for Service Orders

In this lesson, you will learn how to process a service order for which prepayments have been applied.

Service Order Prepayments: General Information

Sometimes you may agree with the customer on providing a service or multiple services with some prepayment made by the customer beforehand.

Learning Objectives

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

- Create a service order and enter the prepayment to the service order
- Create an appointment and enter the second prepayment for the appointment
- Generate a sales order and review two prepayments applied

Applicable Scenarios

You process service orders with prepayments if customers of your company make prepayments for the service to be provided.

Process Diagram

In the diagram below, you can see the general workflow of processing a service order with prepayments.

> Processes and job titles may be different in your company.

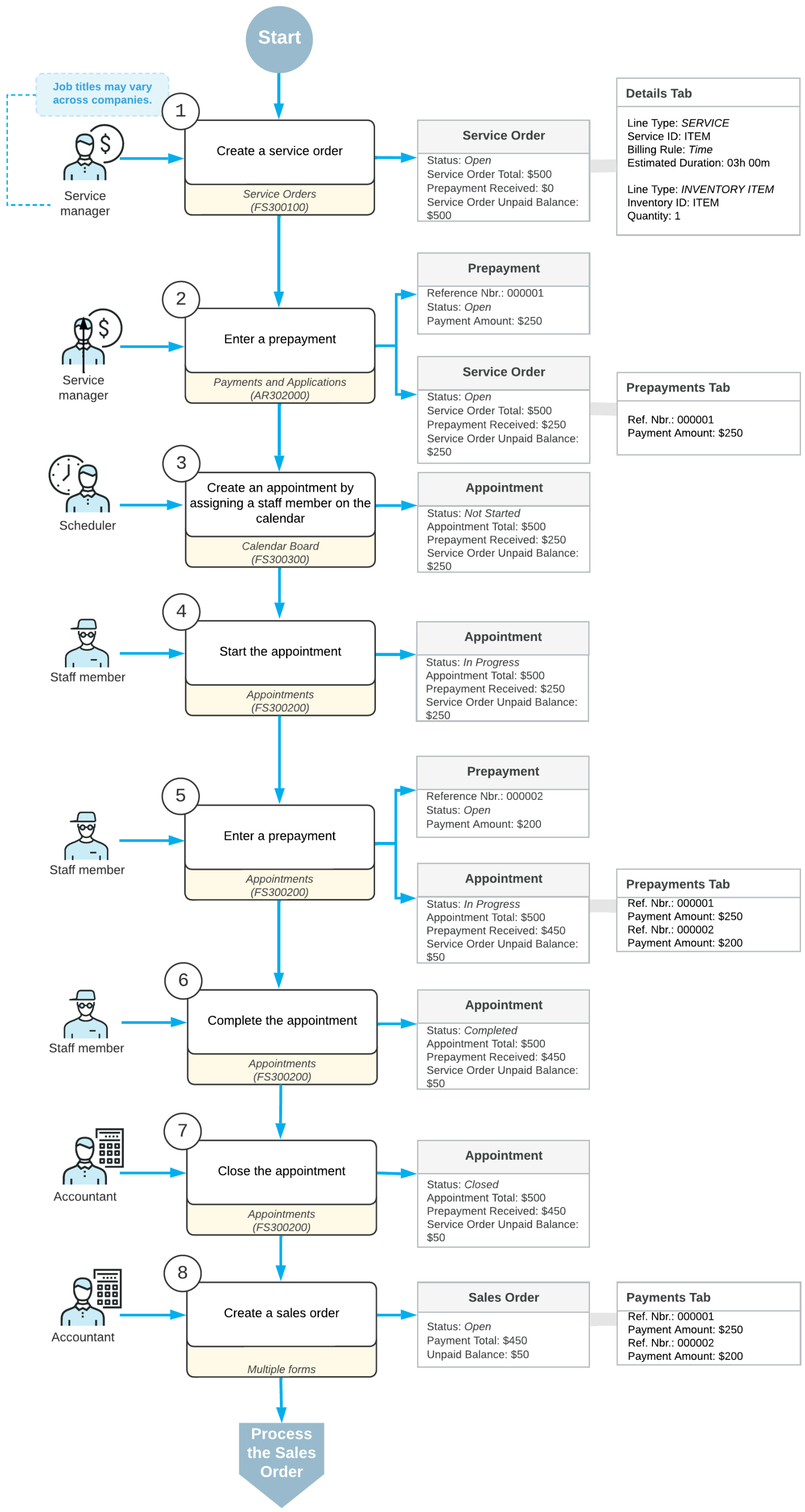


Figure: Processing a service order with prepayments

Service Order Prepayments: Process Activity

This activity will walk you through the process of managing prepayments that have been made for a service order, including entering a prepayment while acting as a staff member attending an appointment. You will go through the whole process, starting from the creation of a service order and ending with the release of the invoice for the service order.

Story

Suppose that the GoodFood One Restaurant customer has contacted the service manager of the SweetLife Service and Equipment Sales Center to request installation services and a juicer. You will enter the service order into the system and create and schedule the related appointment. The customer has paid 20% of the service order total in advance when requesting the services and the item, and will prepay an additional 30% at the appointment. You will enter the prepayments at the appropriate times, process the appointment, and generate the billing documents.

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 *Employees* (EP203000) form, *EP00000040 (Maia Davis)* and *EP00000004 (Alberto Jimenez)* have been defined. For *EP00000004 (Alberto Jimenez)*, the **Staff Member in Service Management** check box has been selected, so you can assign him to perform services.
- On the *Users* (SM201010) form, the *davis* and *jimenez* 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 *jimenez* user account, in this box, the *Alberto Jimenez* employee account has been specified.
- On the *Branch Locations* (FS202500) form, the *WEST BRIGHTON* branch location has been defined.
- On the *User Profile* (SM203010) form, for the *davis* user, the *WEST BRIGHTON* branch location has been specified as the default branch location.
- On the *Service Order Types* (FS202300) form, the *INST* service order type has been defined to generate SO invoices to bill customers for provided services. That is, in the **Billing Settings** section of the **General** tab, *SO Invoices* has been selected in the **Generated Billing Documents** box. Also, on the **General** tab (**General Settings** section), the **Complete Service Order When Its Appointments Are Completed** and **Close Service Order When Its Appointments Are Closed** check boxes are selected.
- 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 *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**

  Based on these billing cycle settings, a separate billing document is generated for each appointment; this document presents the details of each service of the appointment.

- On the *Cash Accounts* (CA202000) form, the *10200EQ (Equipment Checking)* cash account is assigned to the *SWEETEQUIP* branch.

Process Overview

You will create a service order on the *Service Orders* (FS300100) form and add the service to be performed. You will enter the initial prepayment for the service order on the *Payments and Applications* (AR302000) form and then create the related appointment on the *Appointments* (FS300200) form. You then will process the appointment, including entering the second prepayment on the *Payments and Applications* form. Finally, you will process an invoice on the *Invoices* (SO303000) form to bill the customer.

System Preparation

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

Step 1: Entering a Service Order

To create a service order for the GoodFood One Restaurant, do the following:

1. Open the *Service Orders* (FS300100) form.
2. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:
   - **Service Order Type**: *INST*
   - **Customer**: *GOODFOOD - GoodFood One Restaurant*
3. On the **Details** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:
   - **Line Type**: *Service*
   - **Inventory ID**: *INSTALL*
4. Click **Add Row** again on the table toolbar, and specify the following settings in the added row:
   - **Line Type**: *Inventory Item*
   - **Inventory ID**: *JUICER20C*
5. On the form toolbar, click **Save**.

Step 2: Entering a Prepayment for the Service Order

To create a prepayment for the service order, do the following:

1. While you are still viewing the service order you created on the *Service Orders* (FS300100) form, on the **Prepayments** tab, click **Create Prepayment** on the table toolbar.

   The *Payments and Applications* (AR302000) form opens in a pop-up window.
2. In the **Cash Account** box of the Summary area, ensure that *10200EQ (Equipment Checking)* is selected.
3. In the **Payment Amount** box, type `820`, which is 20% of the total amount.
4. On the **Service Orders** tab, notice that the service order you created is assigned to the prepayment.
5. On the form toolbar, click **Remove Hold**.
6. On the form toolbar, click **Save** and then **Release**.
7. Close the window with the form.

   On the *Service Orders* form, to which you return, notice that the prepayment you have created is now listed on the **Prepayments** tab.

Step 3: Creating an Appointment

To create an appointment for the service order, do the following:

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

   The system opens the *Appointments* (FS300200) form with relevant settings copied from the service order.
2. On the **Settings** tab, in the **Scheduled Start Date** boxes, specify *2/3/2025 12:00 PM*
3. On the table toolbar of the **Staff** tab, click **Add Row**.
4. In the **Staff Member** column, select *Alberto Jimenez*.
5. On the form toolbar, click **Save**.

Step 4: Processing the Appointment with the Prepayment

To process the appointment, do the following on behalf of staff member Alberto Jimenez:

1. While you are still viewing the appointment you created on the *Appointments* (FS300200) form, click **Start** on the form toolbar.
2. On the **Prepayments** tab, click **Create Prepayment**.

   The *Payments and Applications* (AR302000) form opens in a pop-up window.
3. In the **Cash Account** box, ensure that *10200EQ (Equipment Checking)* is selected.
4. In the **Payment Amount** box, type `1,230.00`, which is 30% of the total amount.
5. On the **Service Orders** tab, notice that the created service order is assigned to the prepayment.
6. On the form toolbar, click **Remove Hold**.
7. On the form toolbar, click **Save** and then **Release**.
8. Close the window.
9. On the *Appointments* form, to which you return, in the **Actual Date and Time** section of the **Settings** tab, specify the following settings:
   - **Actual Start Date**: *2/3/2025 12:00PM*
   - **Actual End Date**: *2/3/2025 1:00PM*
   - **Finished**: Selected
10. On the form toolbar, click **Complete**.
11. On behalf of the accountant, on the form toolbar, click **Close**.

The completion and closing of the appointment caused the service order to also be completed and closed because of the settings of the *INST* service order type on the *Service Order Types* (FS202300) form, as described in the *Configuration Overview* section.

Step 5: Generating an Invoice

To generate an invoice, do the following (while still acting as an accountant):

> You can process appointment billing on the *Run Appointment Billing* (FS500100) form. In this activity, we describe an alternative billing method using the *Appointments* (FS300200) form.

1. While you are still viewing the appointment on the *Appointments* form, click **Run Billing** on the form toolbar.

2. After the processing has successfully completed, on the **Billing Documents** tab, click the reference number of the invoice.

   The *Invoices* (SO303000) form opens in a separate window with the generated invoice.

3. On the **Applications** tab (Item 1 in the following screenshot), notice that both prepayments are listed (Item 2).

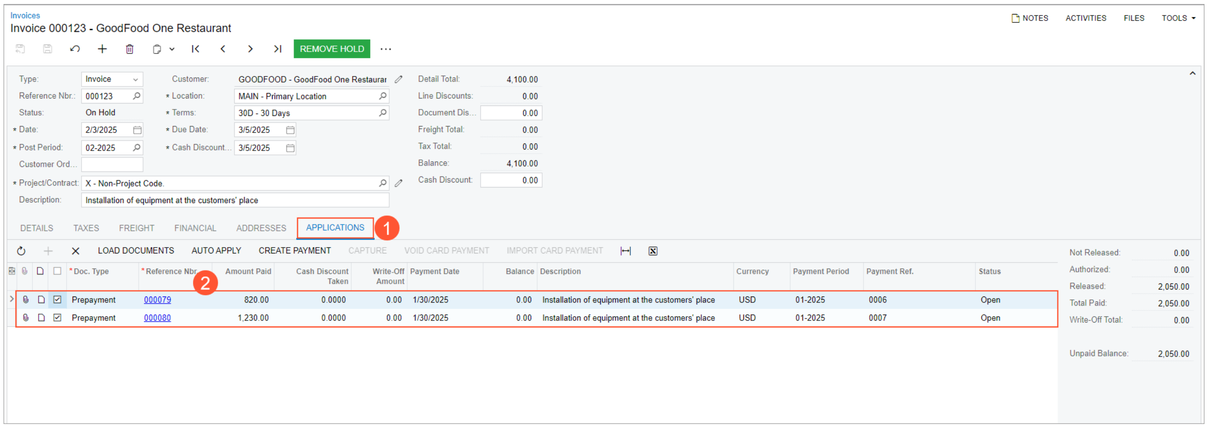
   

   Figure: The Applications Tab

   Also notice that the **Total Paid** and the **Unpaid Balance** amounts are indicated in the right panel of the **Application** tab. Verify that the **Total Paid** is 50% of total appointment billable amount.

4. On the form toolbar, click **Remove Hold** and then **Release**.

   In the Summary area of the *Invoices* form, review the invoice balance (**Balance**) to be paid is 2,050.00.

5. On the More menu, click **Pay**.

   The system opens the document of the *Payment* type on the *Payments and Applications* (AR302000) form, with the amount to be paid equal to 2,050.00, which is specified in the **Payment Amount** box in the Summary area of the form.

6. Click **Remove Hold** and **Release**.