IIG Service Management Processing For MAS 500

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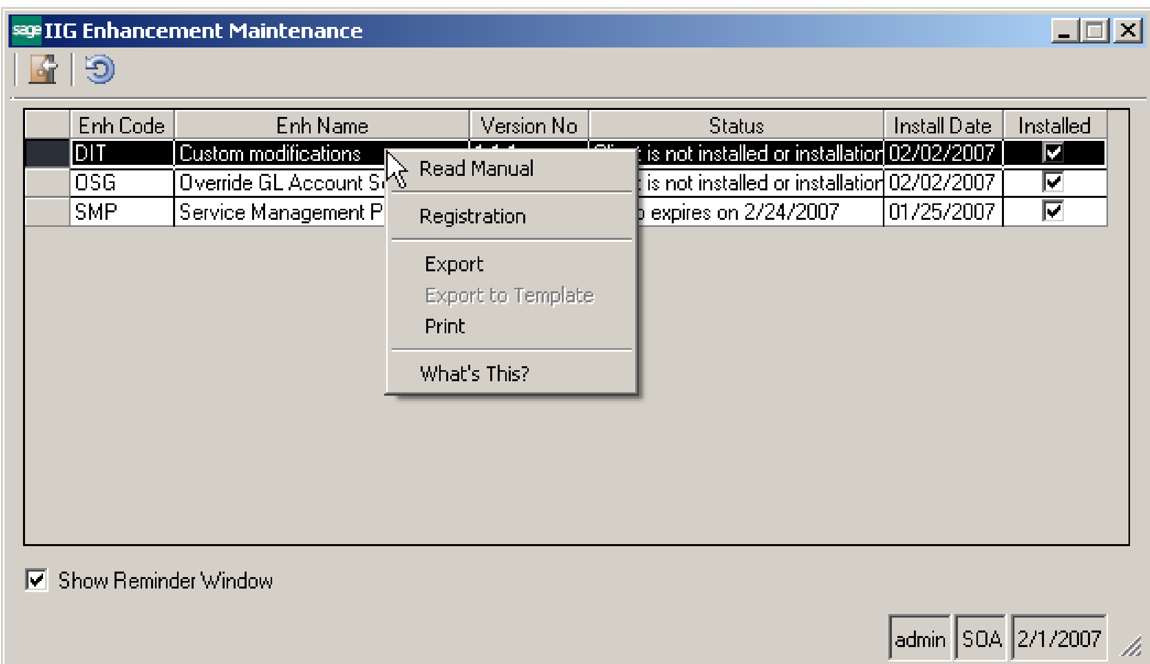
IIG Enhancements

IIG Enhancement Maintenance

The **IIG Enhancement Maintenance** task has been added to enable getting information about the added IIG Enhancements to Sage MAS 500.
The lines are added to **IIG Enhancement Maintenance** after enhancements server setup is completed for the first time.
The **Version No** field shows the enhancement version (server version).
The **Installed** field is unchecked when server installation is failed.



Select the enhancement and right click on it. The context menu will appear, from where it is possible to read the detailed information about the enhancement from the manual in .pdf format, register it, etc.

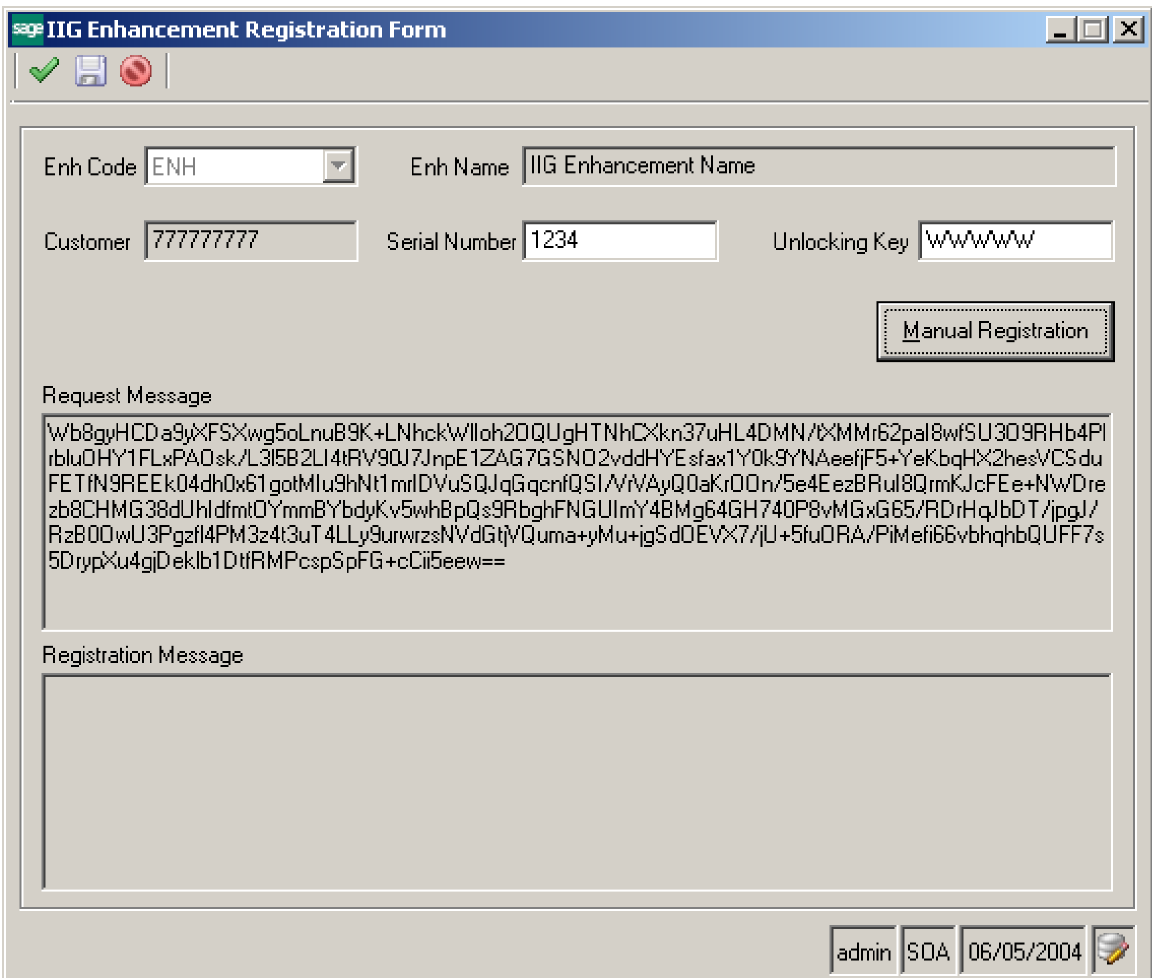
The enhancement registration process will be described in the next section.

IIG Enhancement Registration

IIG Enhancement should be registered to be able to use it. If registration is not performed, the enhancement will work in a demo mode with full functionality in 30 days. When the demo date is expired, the added enhancement does not function until performing registration.

The **IIG Enhancement Registration** has been added to enable registering the added IIG Enhancements.

Open the **IIG Enhancement Registration** program.



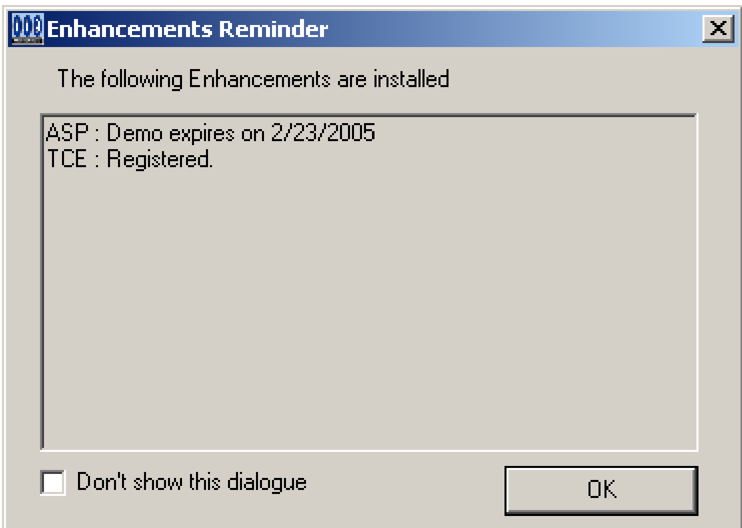
From the **Enh Code** drop-down box select the enhancement to be registered.

Enter **Serial Number** and **Unlocking Key** provided by IIG. **Customer** is the User Customer of the Sage MAS 500 (use **Maintain Site** task to enter **User Customer**).

Click the **Manual Registration** to obtain the **Request Message** for registration.

The **Request Message** will be sent to IIG, and the **Registration Message** will be provided.

The following Enhancement Reminder screen will be displayed once a day while running the enhanced programs.



Check the **Don’t show this dialogue** if you don’t want to see this dialogue again.

Introduction

The **Service Management Processing for MAS 500** is intended to enable entry of tasks to be dispatched in response to service calls received from customers.

This enhancement allows for maintaining of technicians and specifying different task types, work types and nature of tasks. Additionally, skills set required for each nature of task is defined in the system, and the skills set of the technician and the nature of task entered for each task are checked to assist dispatchers with dispatching of technicians with needed skills set to calls received.

The information regarding scheduling and the work to be performed are entered in the **Service Call Entry** program.

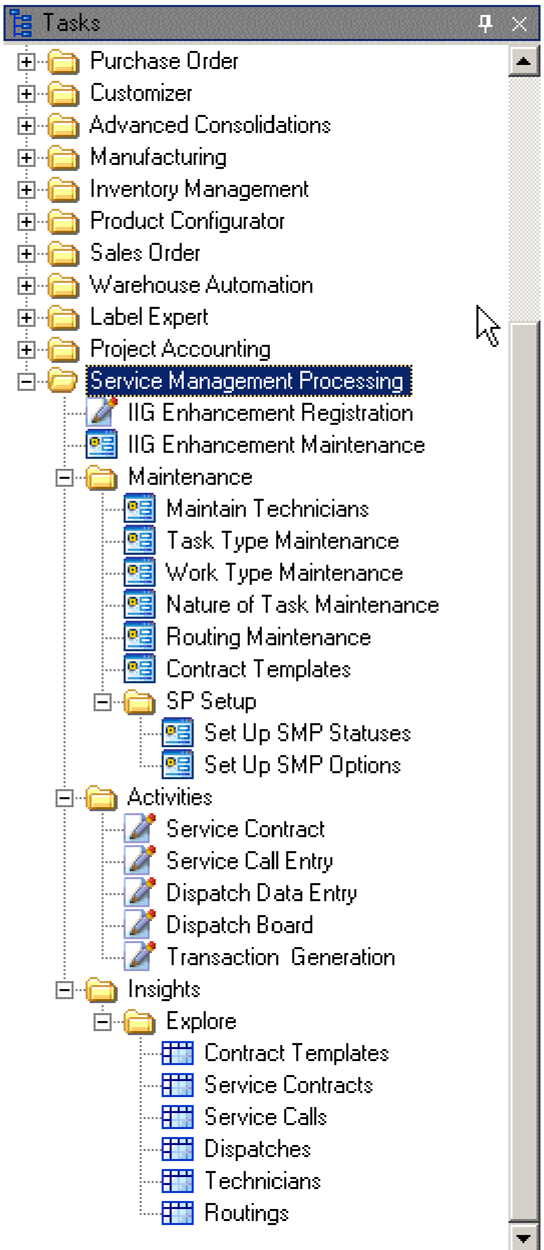
Technicians are dispatched using the **Dispatch Data Entry** program. This program allows for entry of parts to be used, actual parts and labors used and roll of the information into the **Project Accounting** module.

The **Dispatch Board** program provides a visual presentation of service calls entered and dispatched, displays available resources, and allows for changing of schedules and technicians with ease by dragging and dropping tasks and dispatches displayed on the board.

Invoices for billing of services rendered are generated by the **Transaction Generation** program.

Service Management Processing

The **Services Management Processing** is implemented as separate module. This module must be activated from the **Maintain Company** screen.



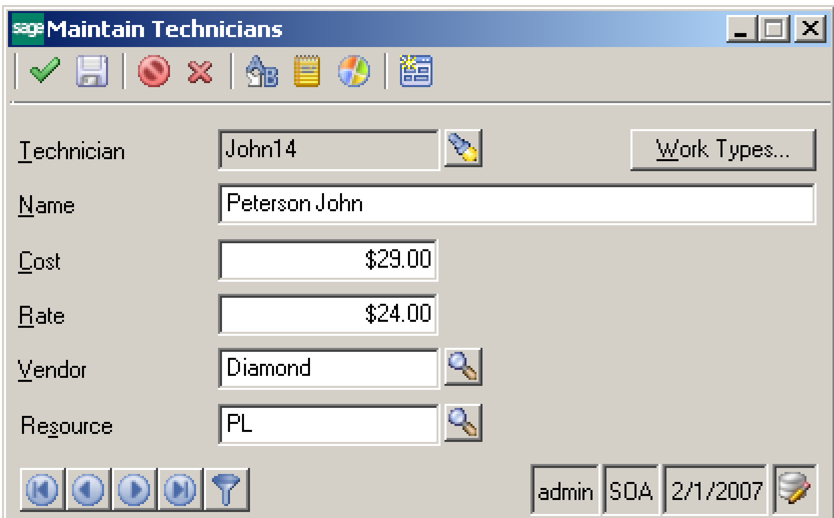
Maintenances

Here are the maintenances available for Service Management Processing: ***Maintain Technicians***, ***Task Type Maintenance***, ***Work Type Maintenance***, ***Nature of Task Maintenance, Routing Maintenance*** and ***contract Templates.***

Maintain Technician

Service Management Processing starts from setting up **Technicians** (before performing Service Calls and creating Dispatches).

The **Maintain Technicians** screen is used to maintain, edit and add technician codes.



Enter new **Tech ID** to add or an existing one to modify data.

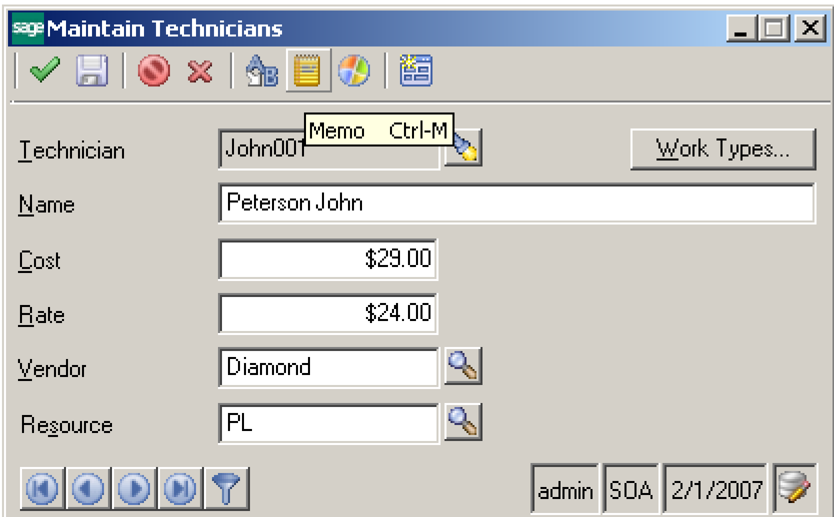
Enter the **Last and First Names** in the **Name** field.

Use the **Cost** field and the **Rate** field to enter hourly cost and price information for a given Technician ID.

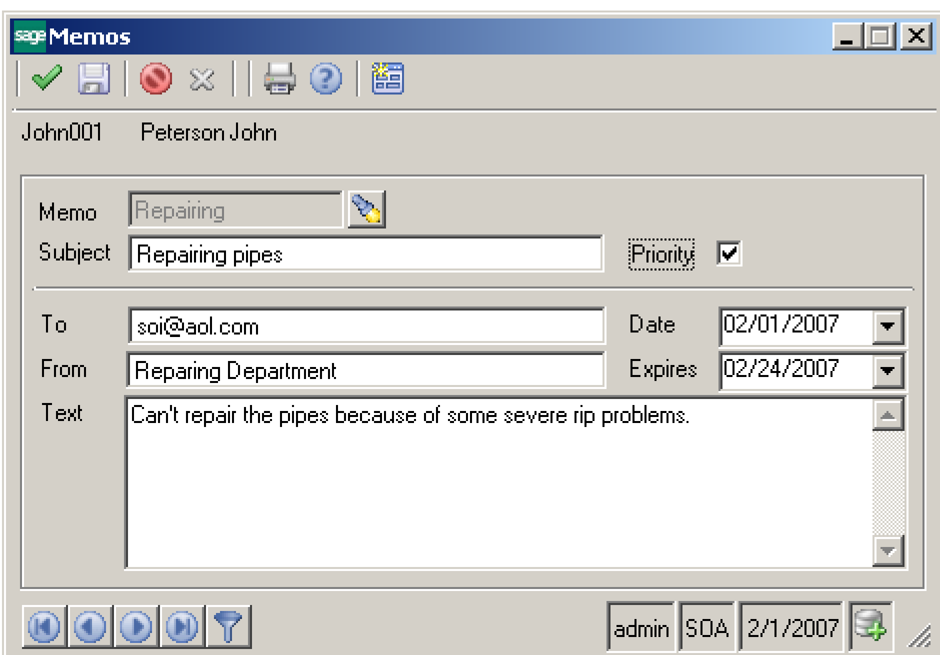
The **Vendor** field sets the connection between the Technician and Vendor that can be used later in invoices.

The **Resource** field provides the link between **Service Management Processing** (SMP) module and **MAS 500 Project Accounting**. That is, SMP module's *technicians* are associated with the *recourses* of the Project Accounting to be used when releasing the Dispatch Lines of Services Calls to the Project Lines of Projects Accounting.

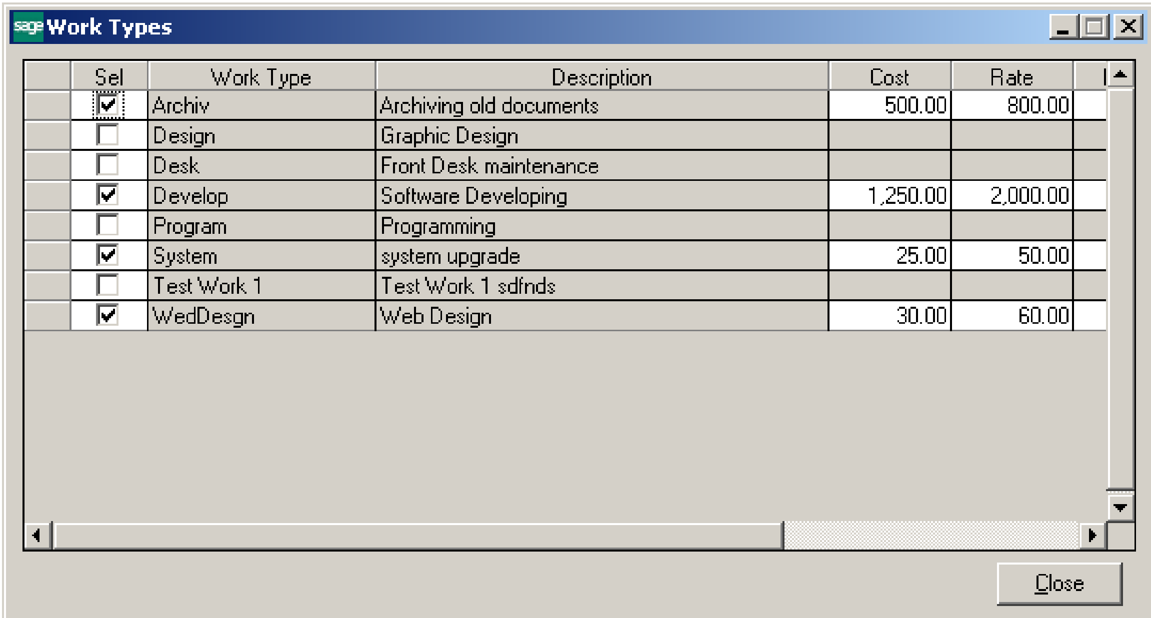
You can rename the **Technician ID** by clicking the **Rename ID** button on the top menu.



Click the Memo button on the top menu to add a Memo for the selected Technician.

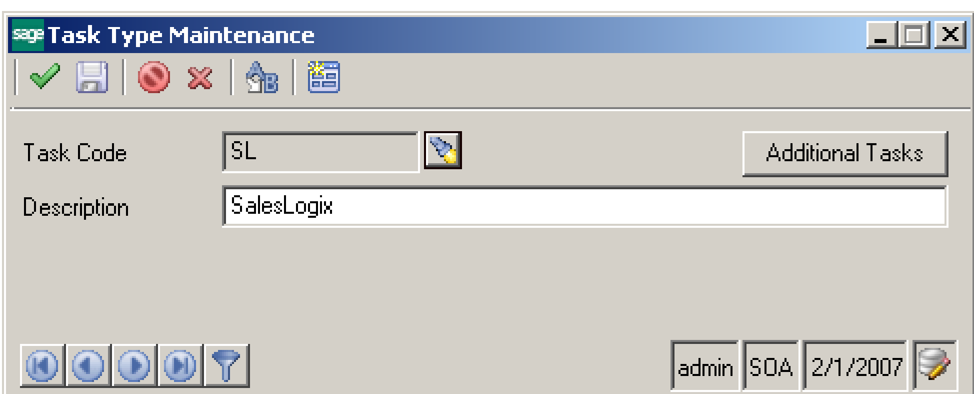


Press the **Work Type** button to select the technician qualification information using the existing skills defined in the **Work Type Maintenance** program.



Task Type Maintenance

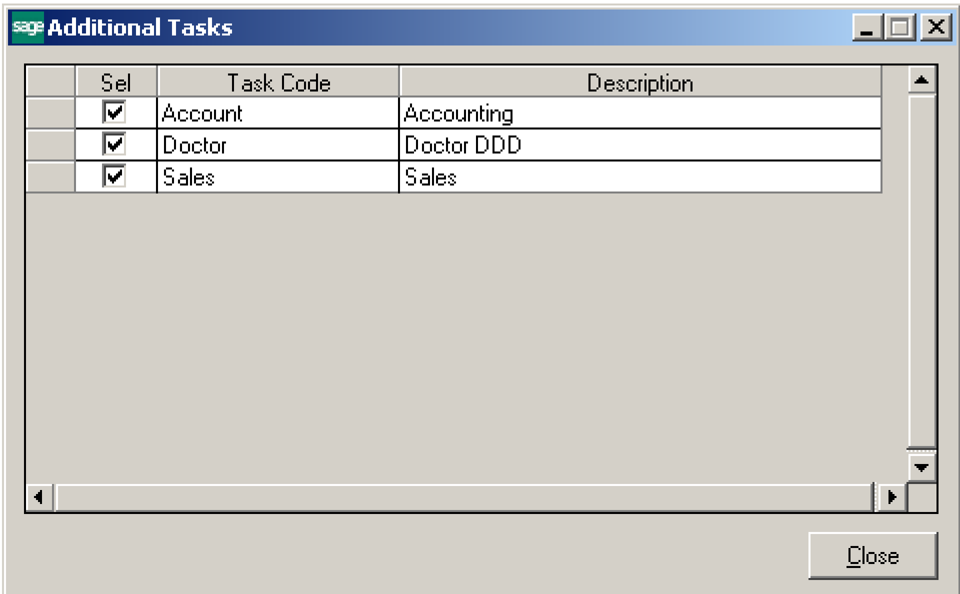
The **Task Type Maintenance** program is used to maintain task type codes.



Enter the **Task Code** and its **Description** in the corresponding fields.

Entry of certain task types may trigger auto creation of depended tasks. For example, a soil engineering company engaged to perform a soil test may wish to auto generate

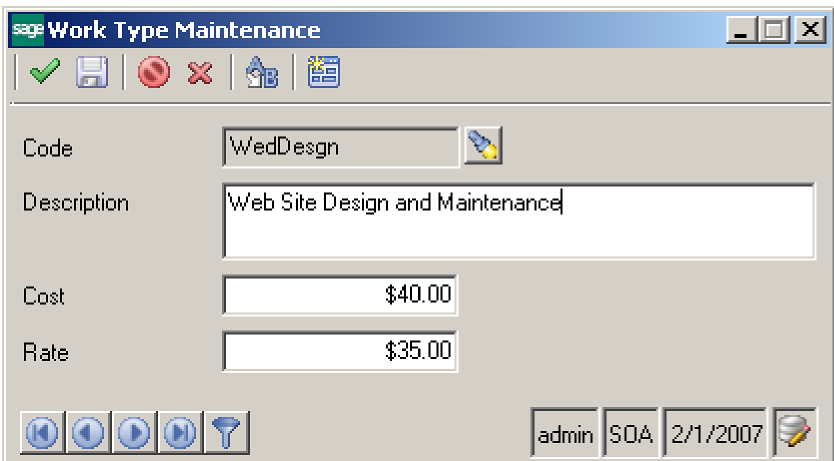
tasks for: obtain permit, perform chemical tests and prepare report tasks as part of the engagement.
For adding additional tasks, click the **Additional Tasks** button. In the opened screen you can select the tasks you want to be created along with the selected Task Type.



Work Type Maintenance

In Service Management, **Work Types** describe, in a generic way, the type of work a technician can perform. The **Work Type Maintenance** program is used to maintain, edit and add work codes used in the Service Management module.

Work types (skills) defined in this program are used in the Maintain Technician program to describe the different work types the technician can perform. This allows you to pick the appropriate or most qualified technician during Service Call or Dispatch Data Entry.

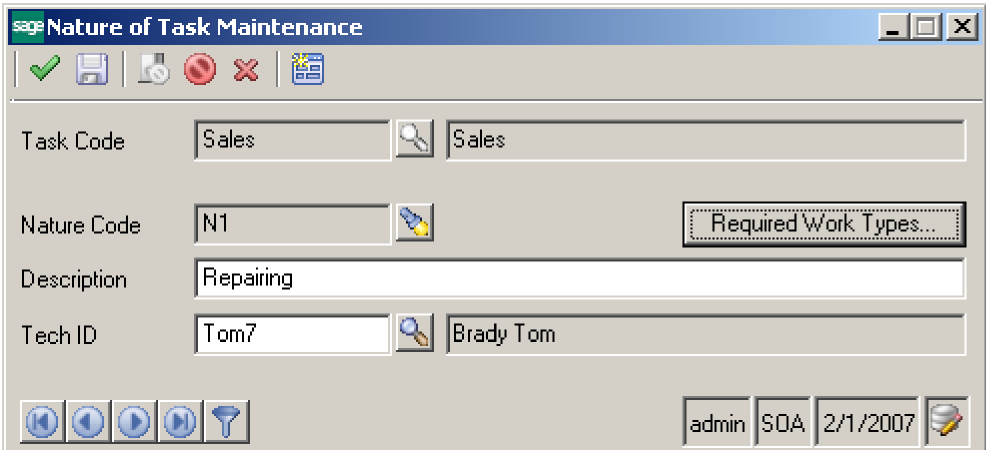


Cost is used for posting cost for transactions generated when closing dispatches with labor (based on billing rate calculation).

Rate is the billing rates for labor items.

Nature of Task Maintenance

The **Nature of Task Maintenance** program is used to maintain, edit and add Nature of Task codes used in the Service Management Module. This program can also be used to list the work types required to perform these tasks, in order to assign the task to a technician.

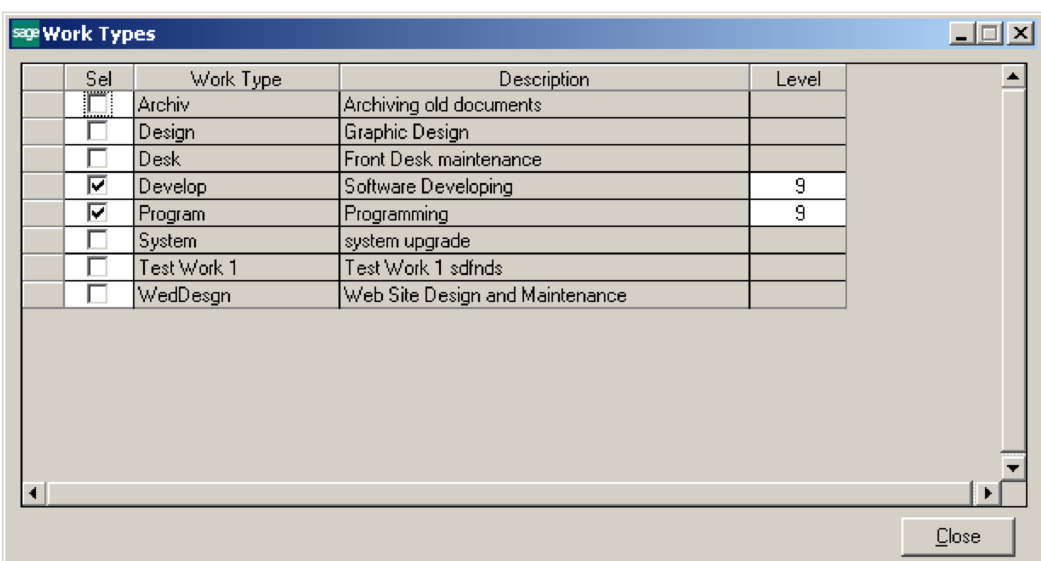


Enter the **Task Code** or select it from the lookup for the Nature of the Task you want to maintain.

Enter the desired **Nature of Task** code to add or maintain and its **Description.**

Select the **Tech ID** to be loaded by default when selecting the **Nature of Task Code**.

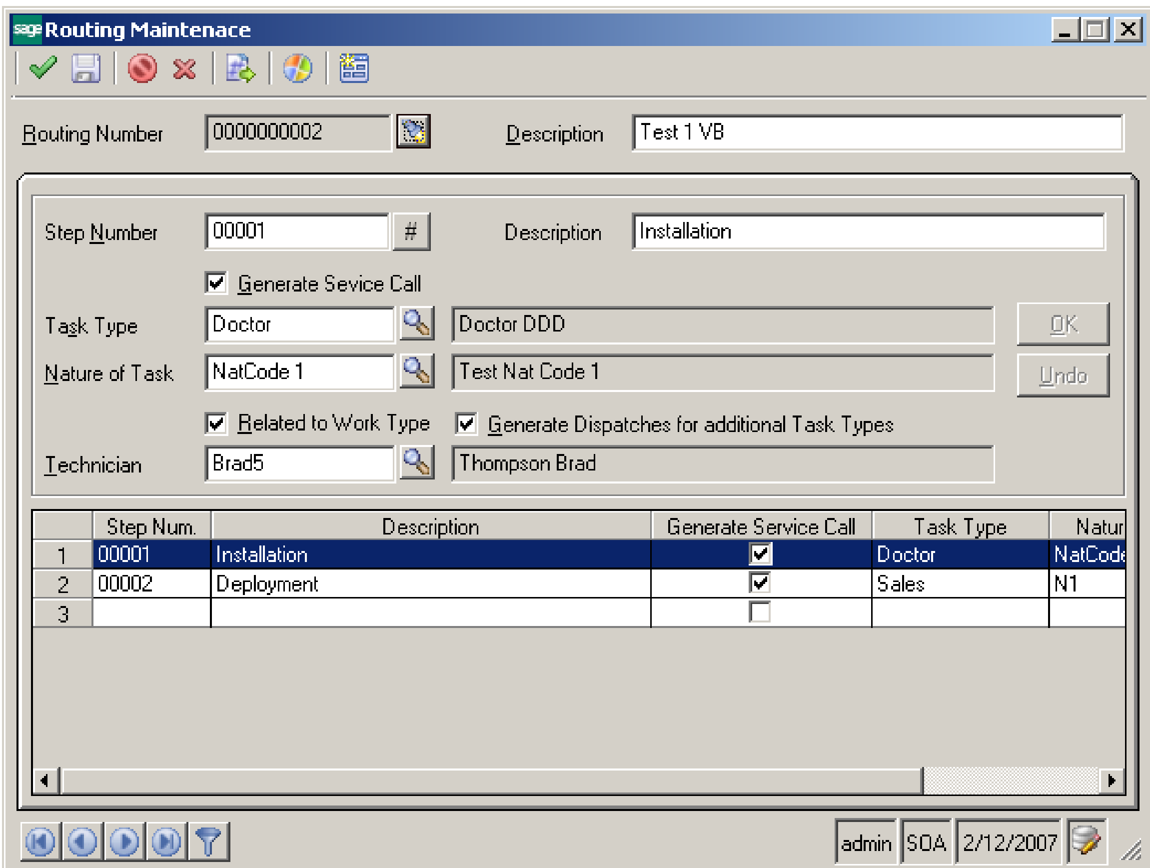
Use the **Required Work Types** button to specify the list of work types (skills) needed for the assigned tasks.



Routing Maintenance

Routing Maintenance is a program that allows entry of repair tasks to be performed on a given item, or for entry of tasks required to install an item that has been sold.

The term ***Routing*** is used in this case to describe the total set of steps taken to complete a dispatch or task. The ***Routing*** can be any kind of alphanumeric information, as well as the commonly understood repair and installation instructions.



Enter the **Routing Number** that represents the series of steps to be performed. Enter the **Description** of the routing in the corresponding field.

Enter the step number you want to add or maintain in the **Step Number** field. Use the **Next Number (#)** icon to accept the next automatically incremented step number.

Enter the **Step Description**. You may use as many characters as you wish to describe each step in the routing.

Check the **Generate Service Call** checkbox to mark this step as a service call, which can be automatically dispatched by the system when an item with this routing is sold or needs repairing. Also you can select the option to generate the service call for a step directly in the grid where the added step is displayed.

When the **Generate Service Call** checkbox is checked, select a **Task Type** describing the service call. This will be transferred automatically to the generated service call, and can be used for assigning a technician with the skills appropriate for completing the task.

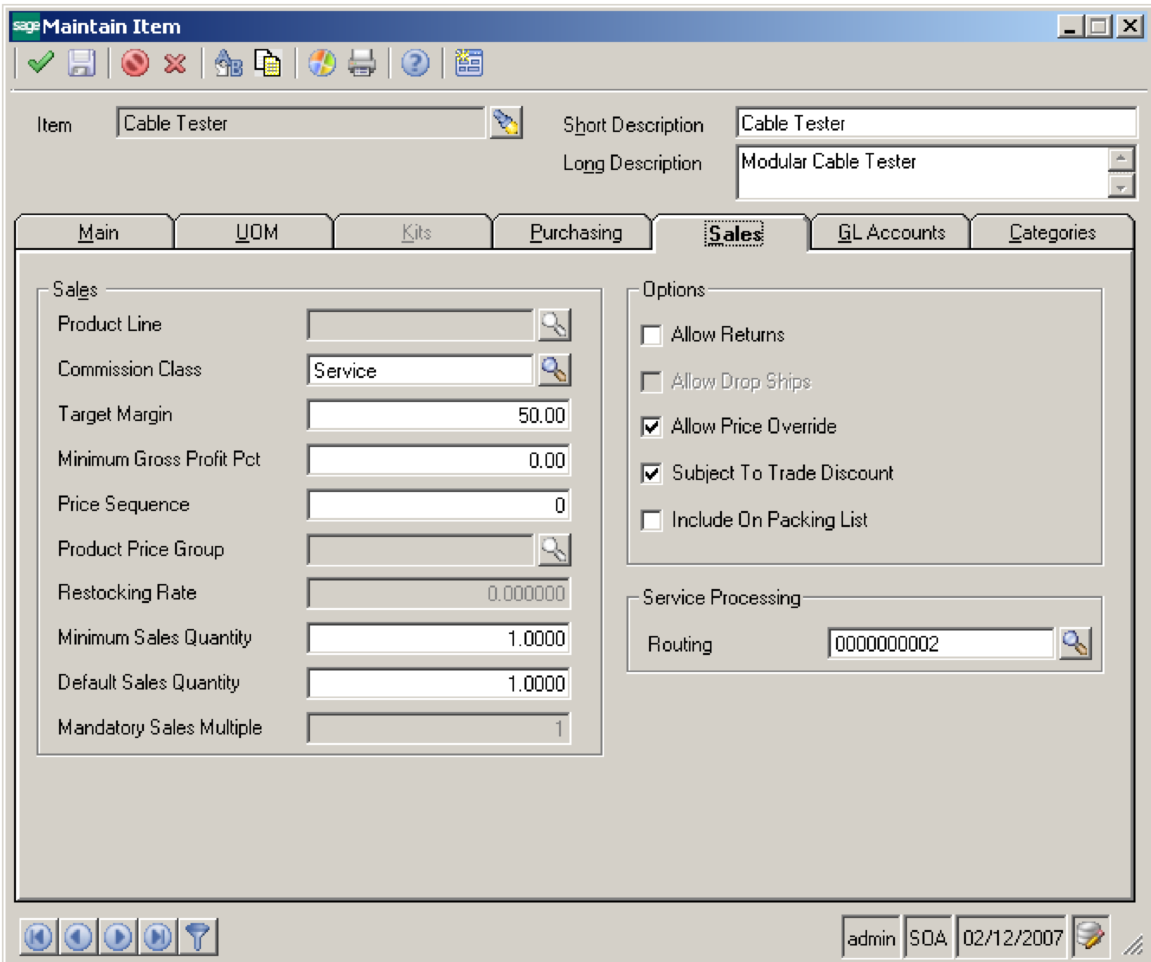
When the **Generate Service Call** checkbox is checked, enter a **Nature of Task** describing the task. You can click the **Lookup** button and select it from the list, which is changed based on the Task Type selected. If there is a Technician specified for the selected Nature of Task, that Technician number along with its description will be loaded in the corresponding fields automatically. Otherwise you can select a Technician from the Lookup list. This will be transferred automatically to the generated service call.

For each step you can select the **Related to Work Type** option to indicate whether or not the step is related to the work type for the specified nature of task.

If the selected Task of the step has additional task types associated with it, you can select the **Generate Dispatches for additional Task Types** option.

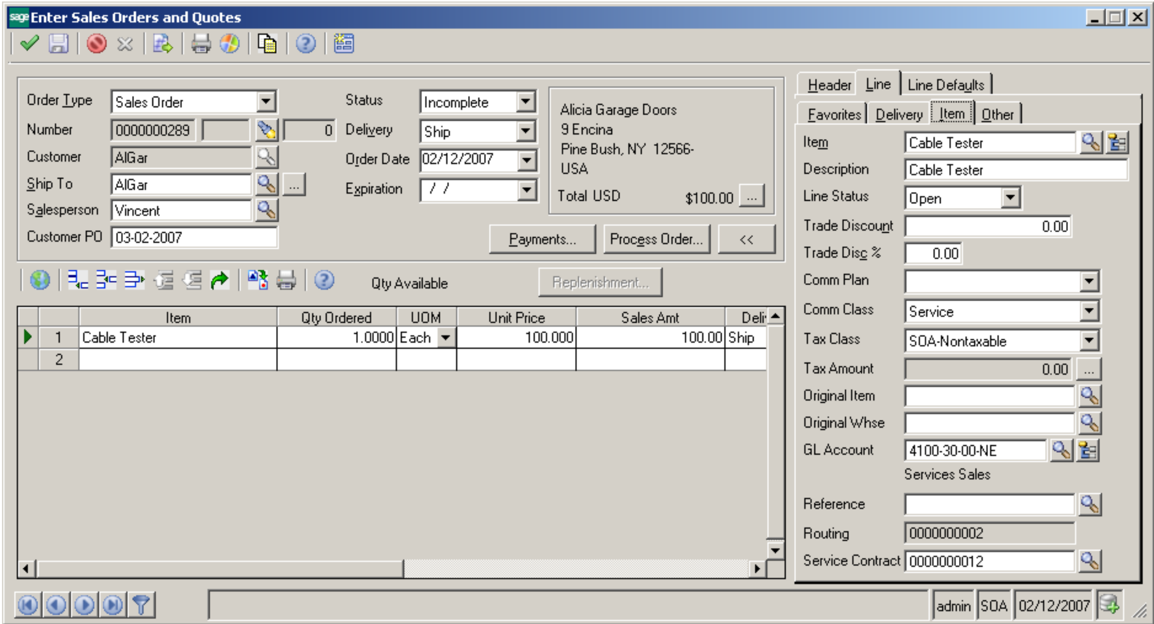
Maintain Item

On the **Sales** tab of the **Maintain Item** screen (**Inventory Maintenance** module), the **Service Processing** section has been added with **Routing** field where you can specify the Routing number for the item.



Sales Orders and Quotes

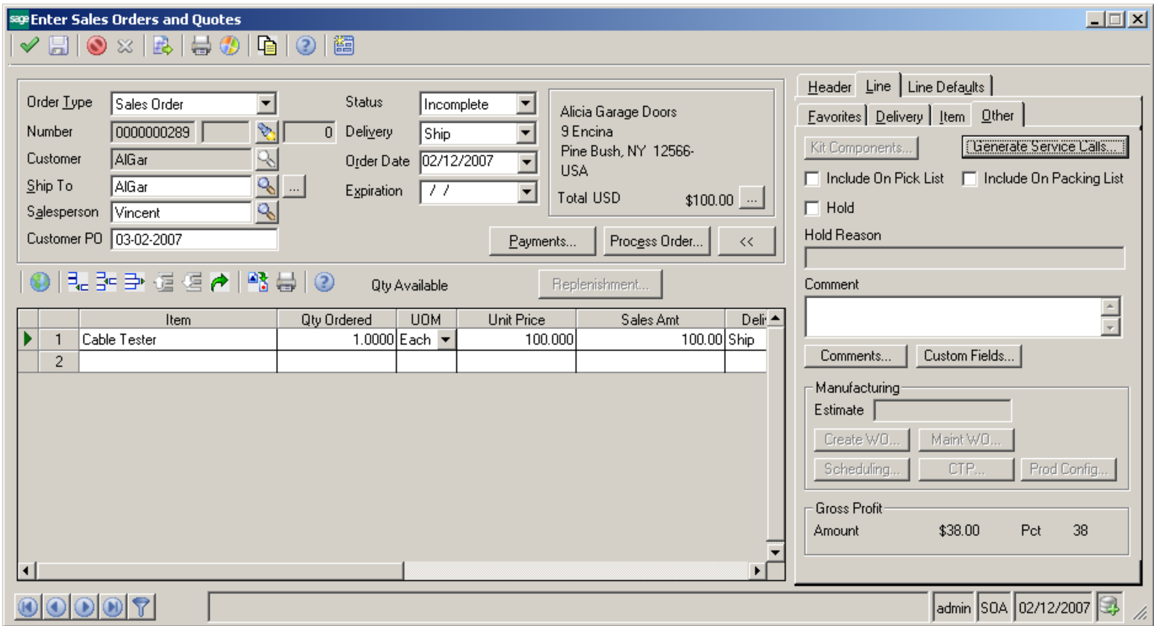
On the **Item** tab of the **Enter Sales Order and Quotes** screen **Routing** and **Service Contract** fields have been added.



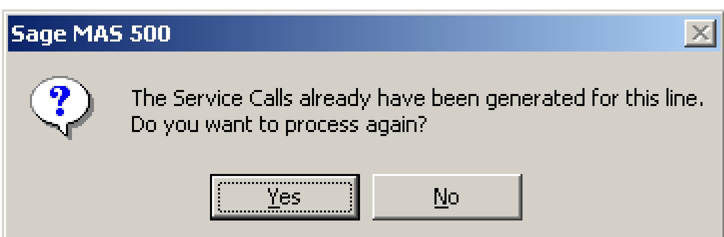
When the selected line item has a routing specified, the routing number will be loaded to the **Routing** read-only field.

You can select the **Service Contract** for which you what to generate services calls.

On the **Other** tab, the **Generate Service Calls** button has been added to allow generating service calls based on the **Routing Steps** of the selected line item. If the **Service Contract** is selected on the **Lines** tab that Contract number will be set for generated service calls.

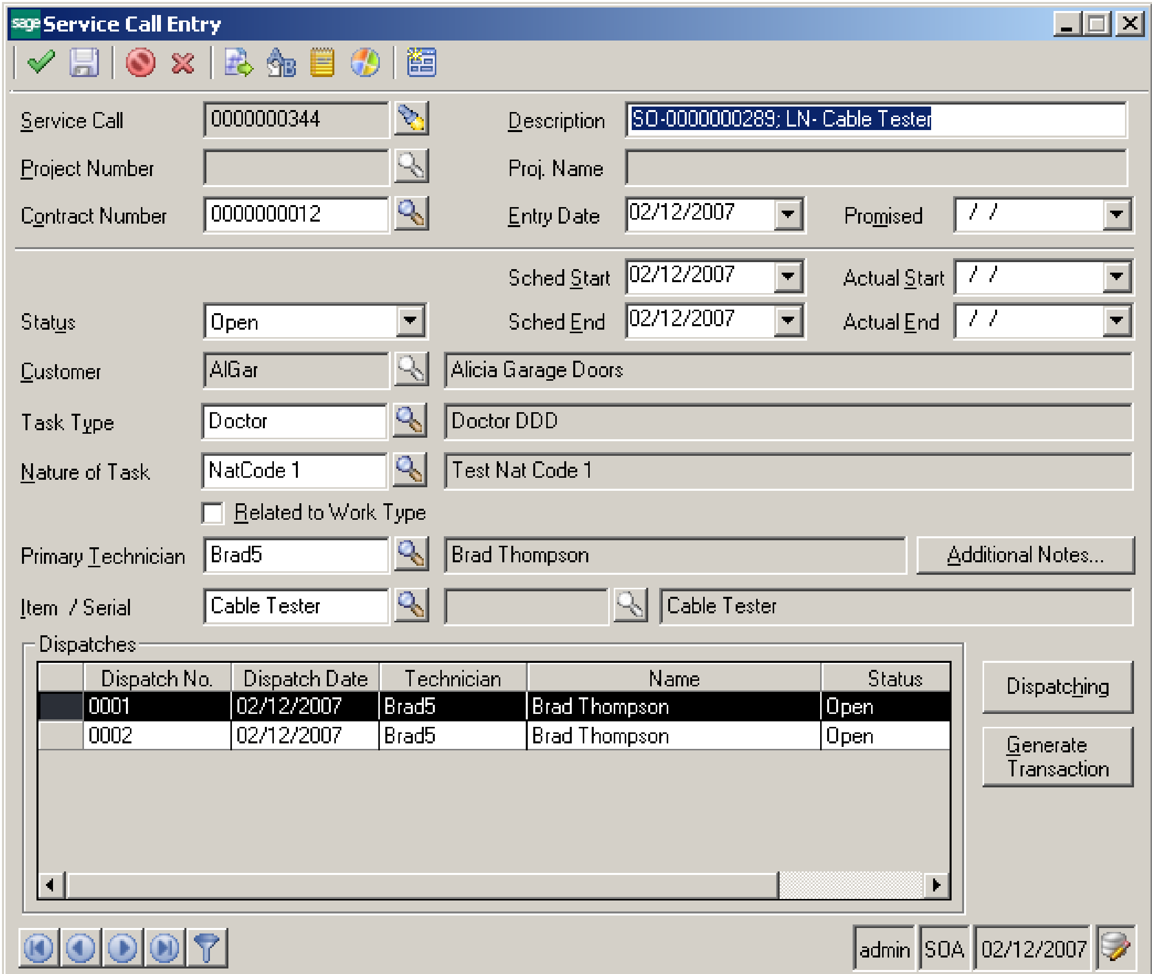


If there are Service Calls already generated for this lien you will get the following message:



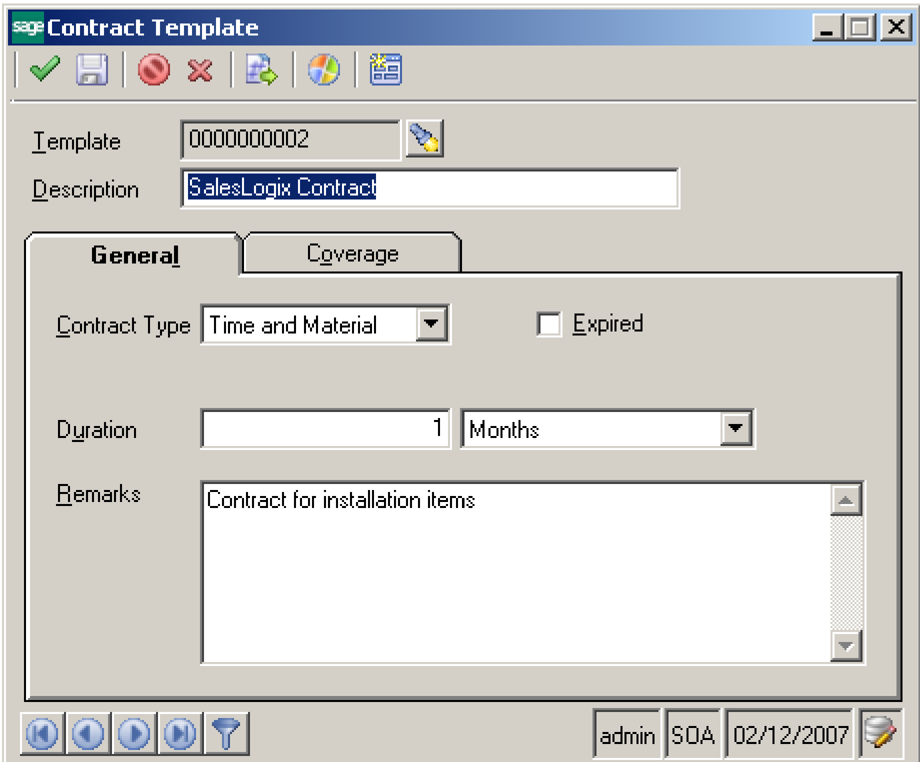
When the Service Calls are generated successfully you will get an informative message on it.

Here is an example of generated service call from the sales order line.



Contract Template

A contract template is used to generate a regular contract (such as a standard service contract).



There are two types of contracts – **Time and Material** or **Fixed Budget**.

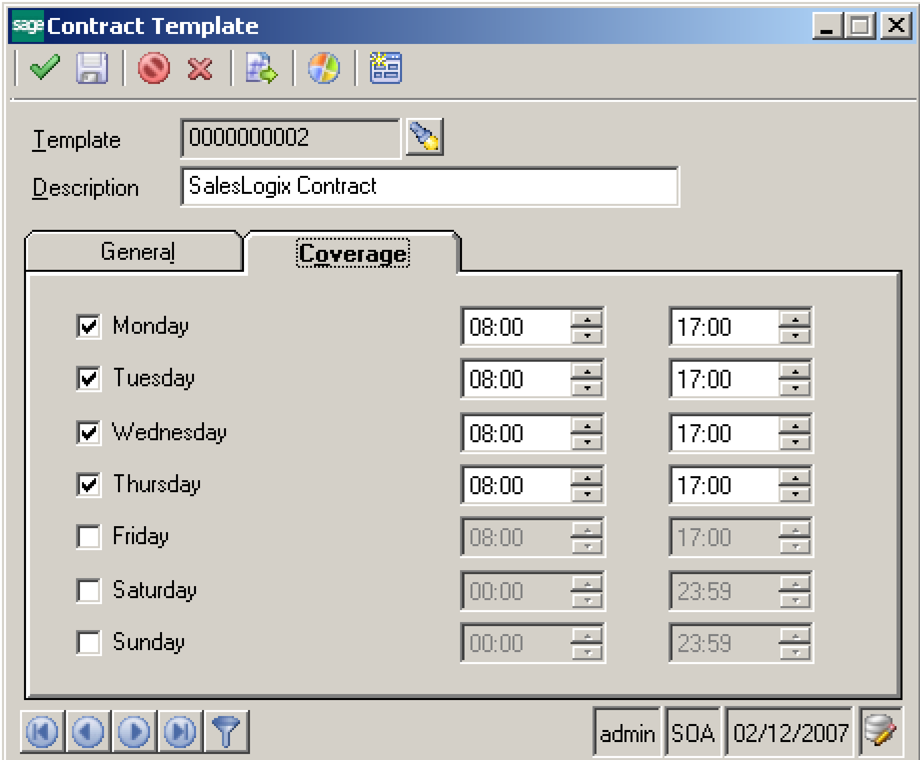
*Note: the **Fixed Budget Contract Type** processing has not been supported yet.*

If the **Expired** option is checked, the contract template cannot be used for Service Contracts.

In the **Duration** field you can specify the duration for the contract template. It can be **Months** or **Days**.

Also you can add comments in the **Remarks** field.

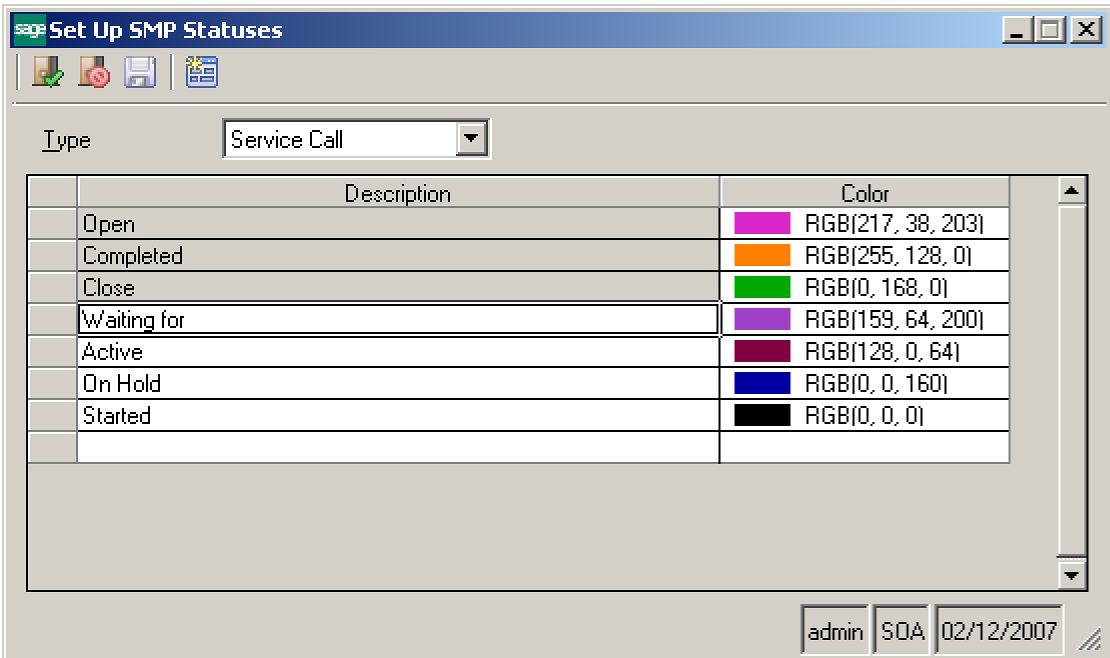
On the **Coverage** tab, the working days and hours that should be covered by the contract are specified.



SP Options

Set Up SMP Statuses

In the **Setup SMP Statuses** screen you can set statuses for **Service Calls**, **Dispatches** and **Service Contracts**.

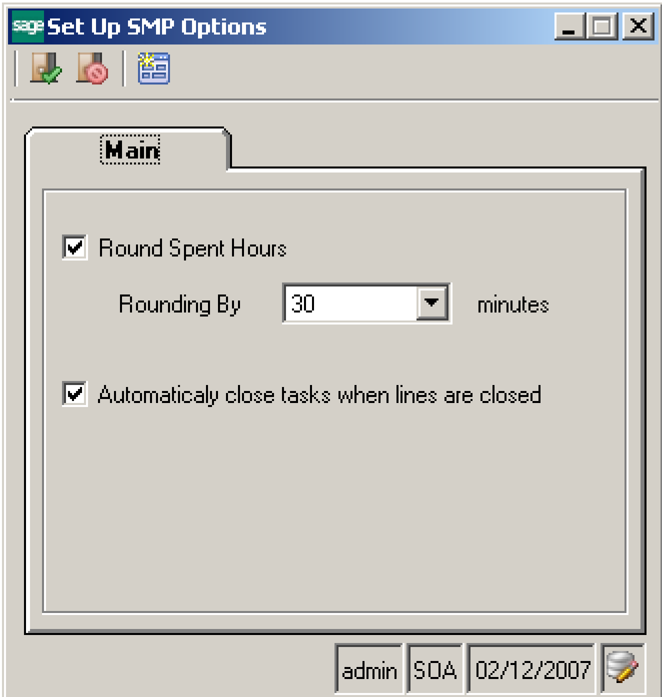


By default **Open**, **Completed** and **Close** statuses are provided and cannot be modified.

In the **Type** drop down box select the activity for which you want to set the statuses.
Enter the **Description** in the corresponding field. For statuses of **Service Calls** and **Dispatches** you can specify the **Color** to be shown on the Dispatch Board. For default statuses, if you change the status Color for one activity (for instance, Service Call), it will be changed also for the corresponding status of another activity (for instance, Dispatch).

Set Up SMP Options

Use **Set Up SMP Option** customize Service Processing.



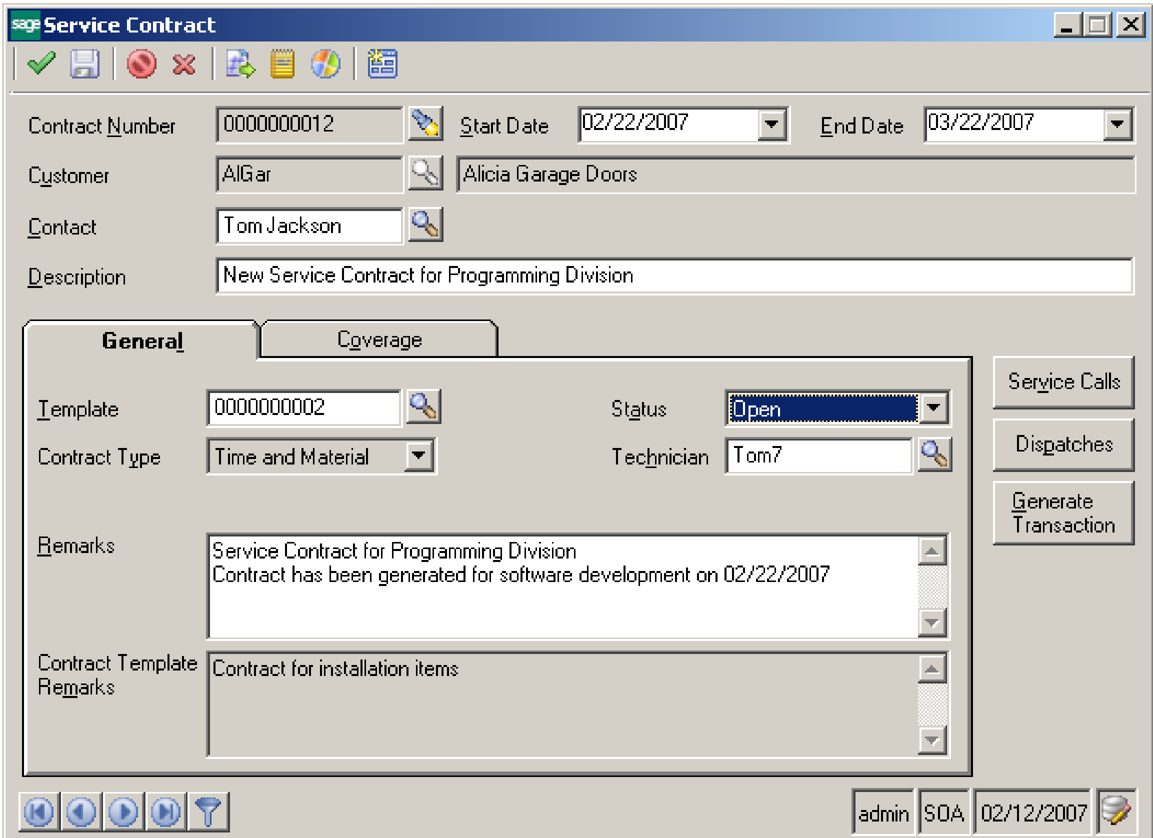
On the **Main** tab, select the **Round Spent Hours** option. This will enable the **Rounding By** field where you can indicate the minutes of rounding that will be used for rounding spent hours in the dispatch labor lines (**Dispatch Data Entry**).

Select the **Automatically close tasks when lines are closed** option to close automatically the Dispatch when all its lines are closed, and also to close the service call when all its dispatches are closed.

Activities

Service Contract

The **Contract Maintenance** program is used to enter new or maintain existing contracts and view current contract information.



You may enter the **Contract Number** you want to add or maintain manually by typing it into the Contract Number field.

If you are viewing or modifying existing contracts, use the **Lookup** button, which will display a list of contracts.

If you are adding new contracts, use the **Next Number (#)** button to accept the next new contract number, which Service Management will increment automatically.

By default, the system assigns today's date to both the **Contract Starting** and **Contract Ending Dates**. Enter the desired dates for the contract.

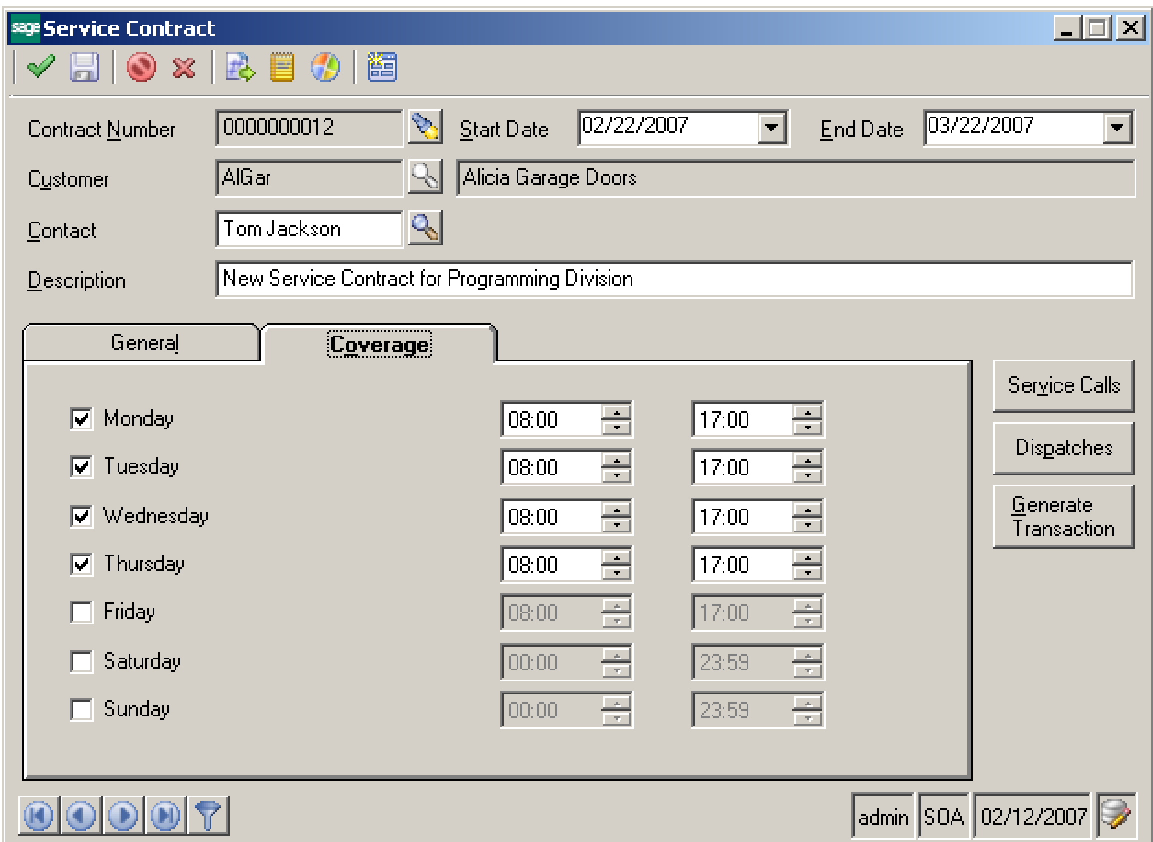
Enter the **Customer Number** for the current contract. Enter the **Description** of the contract. The program allows you to enter an extended description.

On the **General** tab, specify the **Template** for the contract. The **Contract Type**, **Remarks** along with **Coverage** information set on the selected Contract Template will be loaded to the corresponding fields.

From the dropdown field, select the **Contract Status.** For new contracts it will be **Open**. When closing the contract you can set it **Close**.

In the **Technician** field you can specify the preferred Technician of the contract.

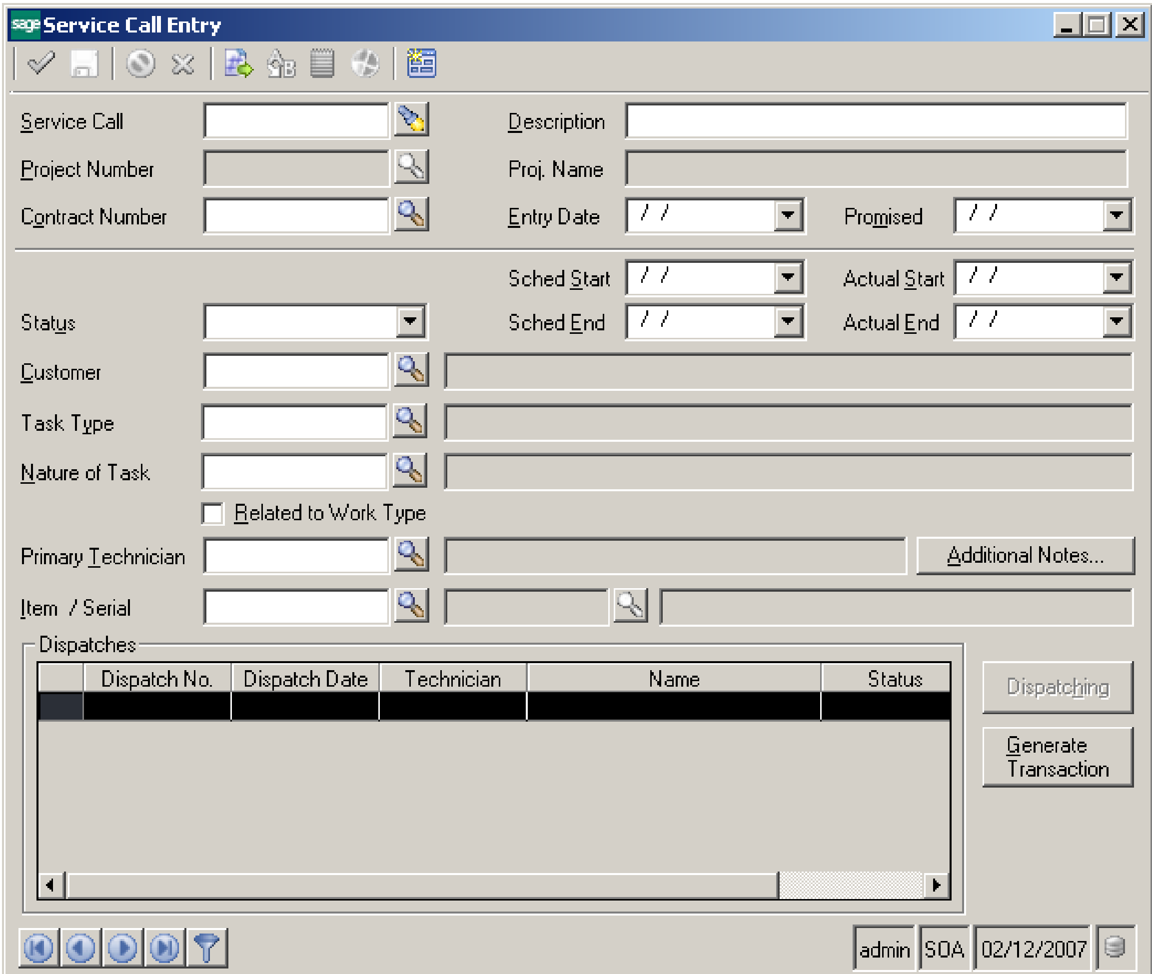
On the **Coverage** tab, the covered days and hours information specified for the **Contract Template** are displayed. You can change this information here.



If you want to generate a service call for the selected contract directly from the Service Contract screen, click the **Services Calls** button. Also you can generate dispatches by clicking the **Dispatches** button. And for transactions' generation, click the corresponding **Generate Transaction** button.

Service Call Entry

The **Service Call Entry** is used to allow entry of service calls to be dispatched in response to calls received from customers.

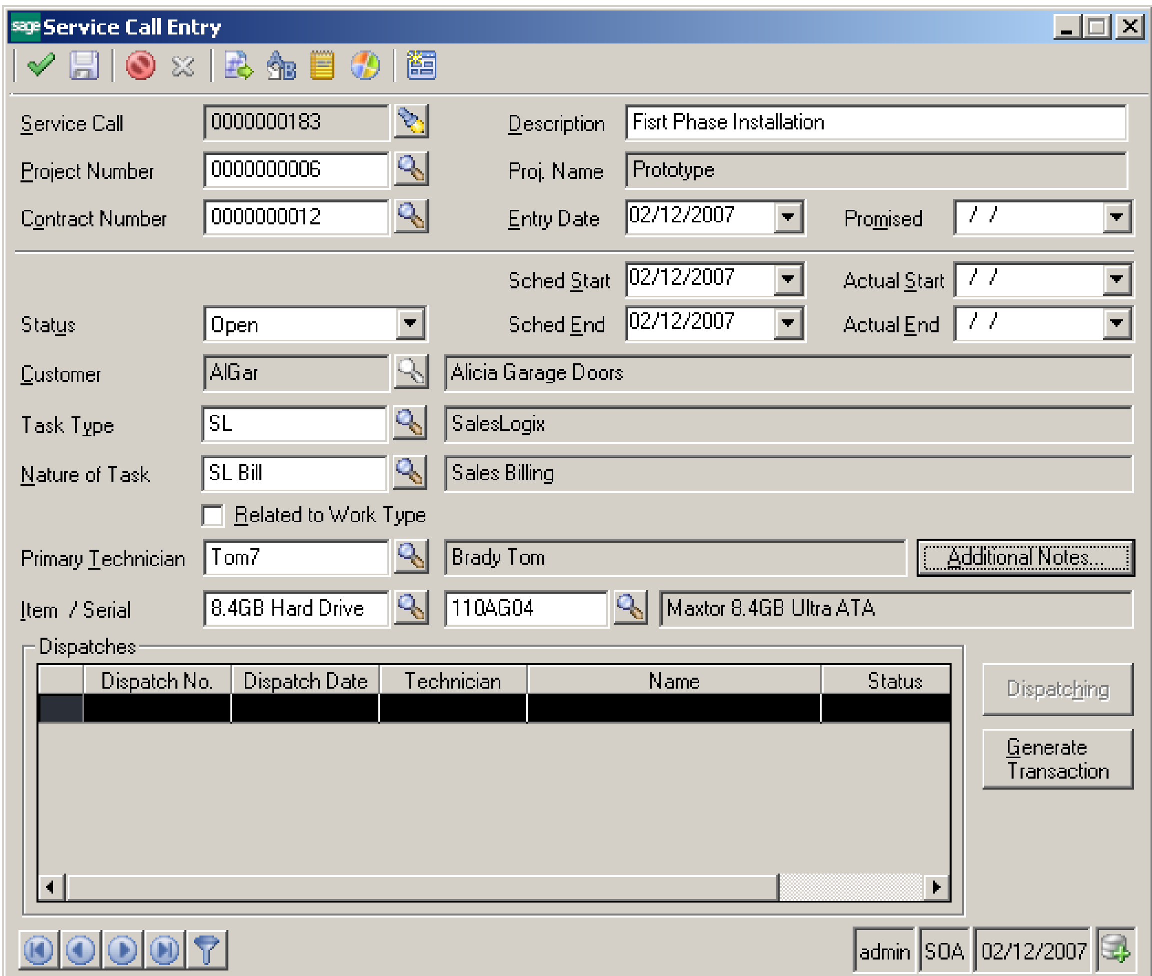


You may enter the **Service Call ID** you want to add, or select the existing one from the list in the Service Call field.

Enter the **Description** of the Service Call to be performed.

Use the **Project Number** field to enter project number for the current task. You can select any existing project using the Lookup button. The Project Name will be loaded automatically. Projects can be associated with service calls only when creating a new service call. You cannot add a project to the service call later in edit mode. (Projects are defined in the **Project Accounting** module, and the project numbers specified here associate the service calls with those projects. Also note only projects with

Time and Material Project Type can been linked with service calls).
By default, the system sets the **Entry Date** and **Scheduled Start** date to the current date. You can change these dates later. You can specify the completion date you have promised to the client in the **Promised** field. In the **Scheduled End** date field the schedule completion date is entered. And the **Actual Start** and **End** dates are entered in the corresponding fields. Note, the **Scheduled End** date, **Promised** date, and **Actual End** date may be the same.



Enter desired **Status**. Service Call Status is used as a search term. Once the service call is closed, it will no longer appear on your Service Calls list (but it will be saved in the History).

Enter the **Customer** information in the corresponding field for the service call.

Enter the desired **Task Type**. Task Type is used as a search term for the service call. In addition, the Nature of the Task entered later must be of this Task Type. The tool tip displays the Type Code of the task. Enter the **Nature of Task**, using a code entered in the **Nature of Task Maintenance** screen. It must be a code corresponding to the Task Type. The **Nature of Task** code you enter is used later when displaying the list of technicians available to be assigned to the task.

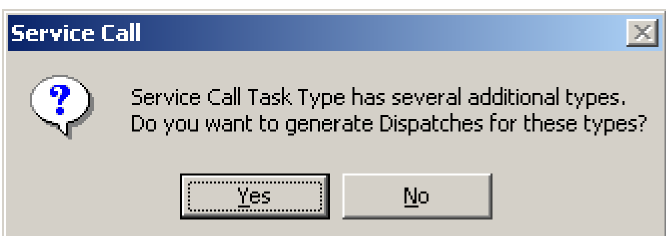
Select the **Related to Work Type** option to load to the Primary Technician lookup list only technicians with corresponding work types of the specified **Nature of Task**.

You may enter the Code Number for the customer's **Primary Technician** for this service call. By using the Lookup button, you can see those technicians qualified to perform this task based on the Nature of Task's required skills.

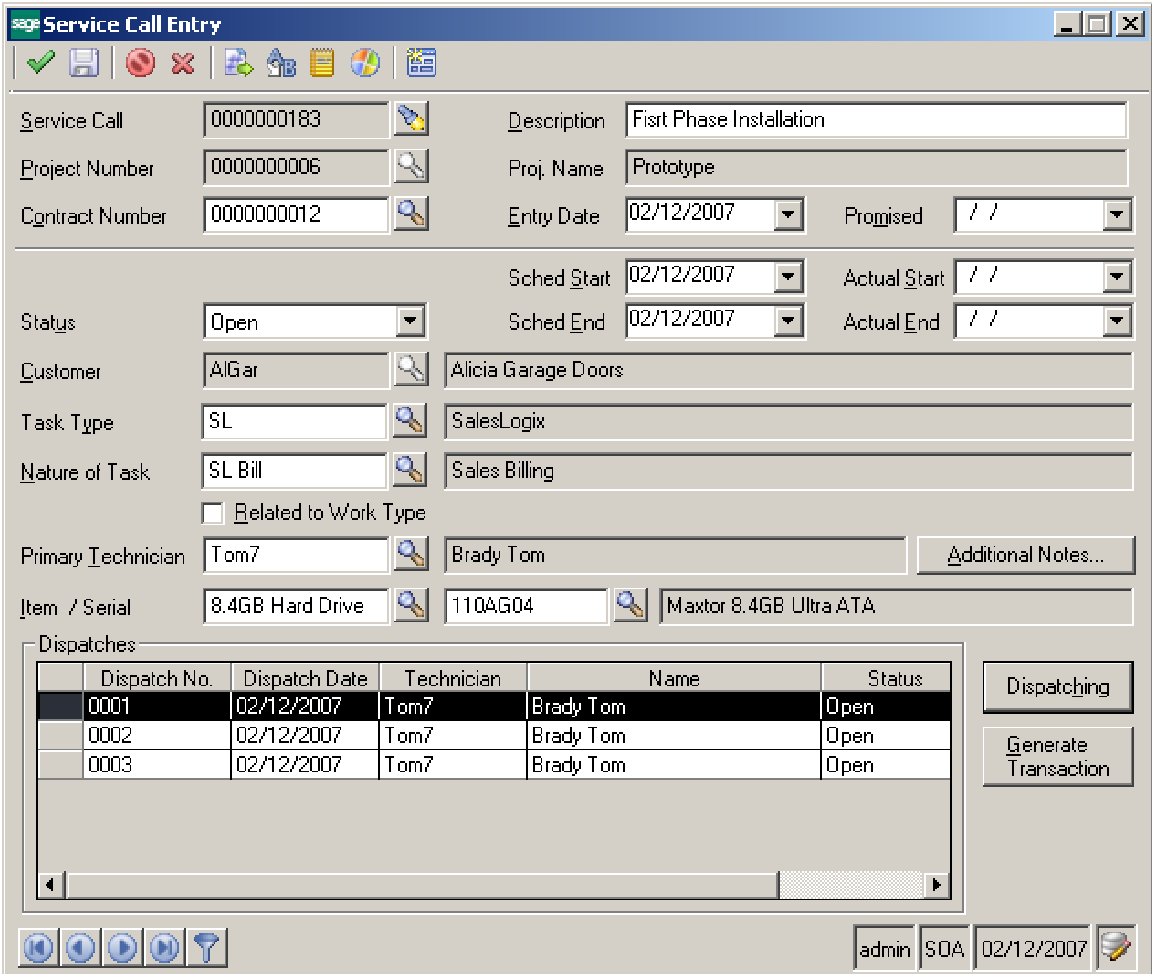
Enter the **Item/Serial Number** reported by the customer identifying the product in need of service.

If you want to make some notes, click the **Additional Notes** button.

If the selected **Task Type** has additional tasks associated with it, you will get a prompt message asking you whether or not you want to generate the dispatches for those types (you will get this, for instance, when saving data on the service call, but note, only when you are just creating the service call, not when you open the service call for editing).



In case you have decided to generate the dispatches, the lower part of the **Service Call Entry** screen will show all the dispatches previously entered for the selected task type. Information on that screen will reflect dispatch number, dispatch date, technician code, technician name and dispatch status.

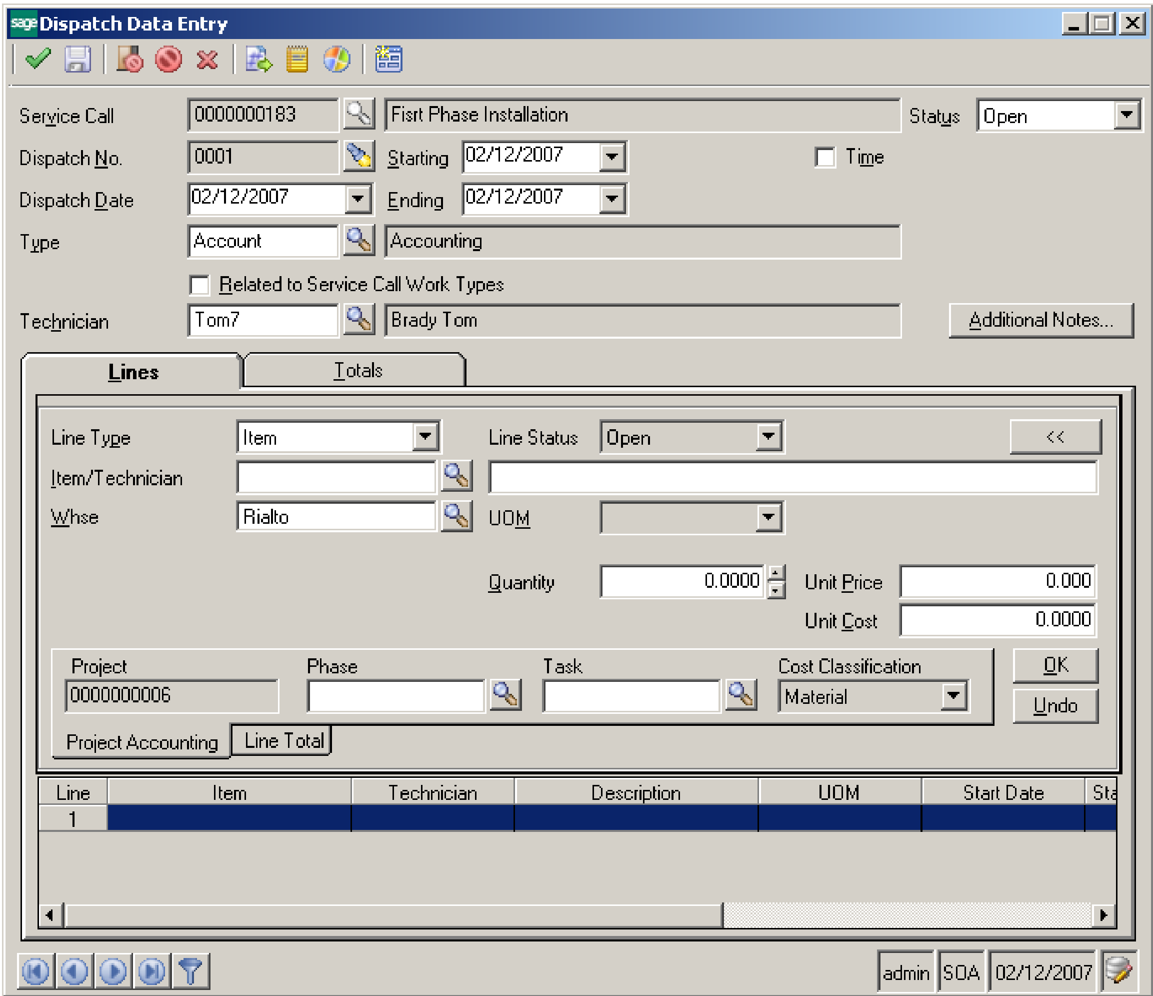


The **Dispatching** button is enabled when dispatches are generated for the additional tasks. Clicking the **Dispatching** button displays the selected dispatch in the **Dispatch Data Entry** screen *(See **Dispatch Data Entry** section).*

Through the **Generate Transaction** button you can generate transactions for selected dispatches. If no project is associated with the service call, the A/R invoices will be generated for dispatch lines (of course if dispatches have been generated for that service call). If there is a project linked with the service call, existing dispatch lines will be released to that project. Note **Dispatch Status** must be **Completed** in order to generate transactions for its lines *(For more details see the **Transaction Generation** section).*

Dispatch Data Entry

Through **Dispatch Data Entry** you can dispatch the service calls (*tasks)* entered for a technician, control the overall process, by closing *the dispatch* and *the service call* when completed, enter billing information needed to create invoices for *services rendered*.



Enter the **Service Call Number** to be dispatched. The Service Call Number, Dispatch Number, and Technician Code, if specified, will be loaded automatically when the **Dispatch Data Entry** program is accessed from the **Service Call Entry** program. In addition, the **Dispatch Date** and **Starting/Ending Dates** will be defaulted to the current date. If the **Time** option is selected, fields for entering Starting/Ending time will become available (by default system current time will be set).

Enter the **Dispatch Number** to be maintained. If creating a new dispatch, use the **Next Number** icon to accept the next new Dispatch Number for the service call, which Service Management will increment automatically.

Enter the desired **Dispatch Date** (by default system current Date is displayed in this field).

Enter the **Starting and Ending Dates** for this dispatch (by default system current Date is displayed in these fields).

Select the dispatch status in the **Status** field.

The **Type** for the entering dispatch can be specified in the corresponding field. This is the task type that should be performed by the dispatch. For instance, in order to complete a service call several sub-tasks should be performed, and each dispatch created for that service call may have different task type (these the are steps for completing the main task).

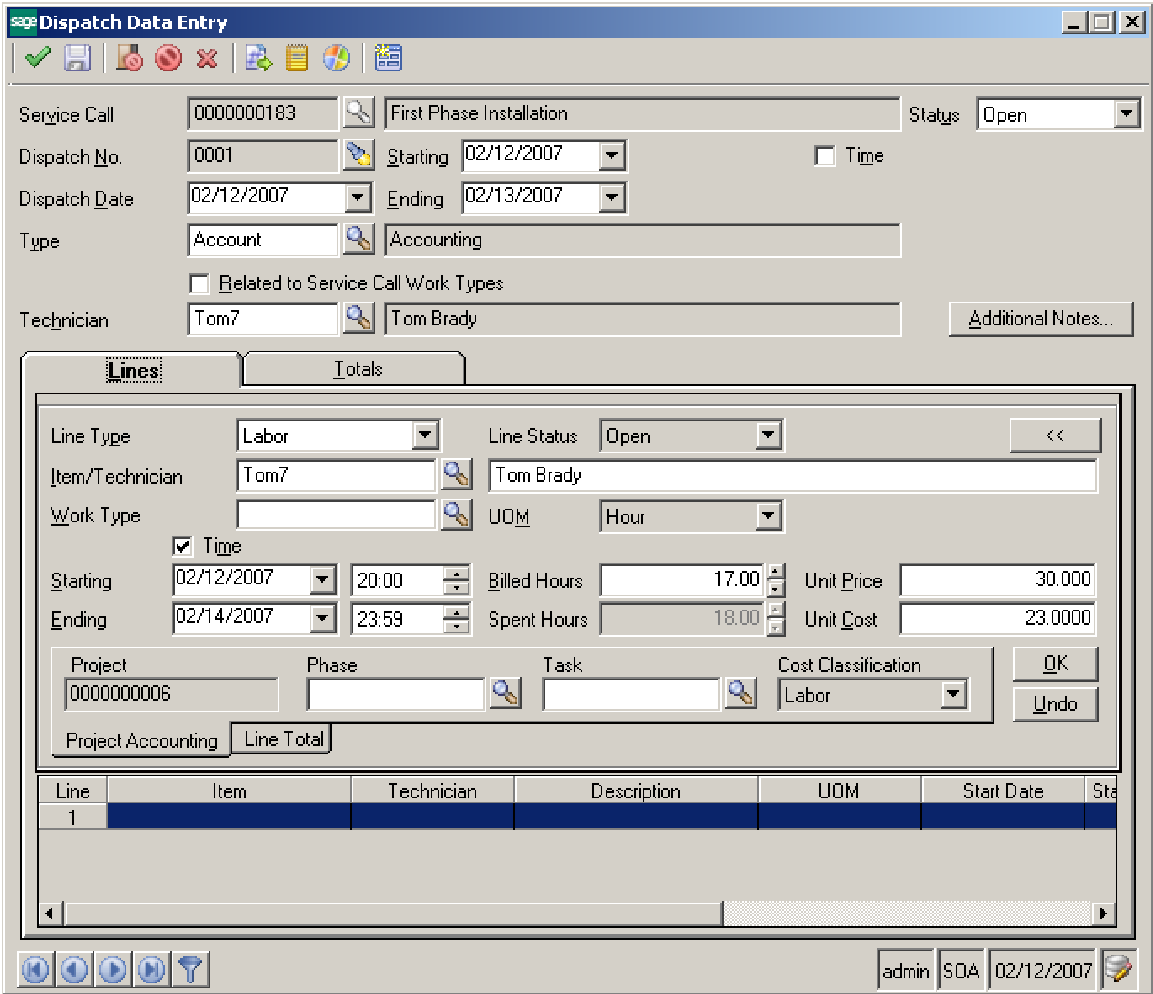
Select the **Related to Service Call Work Types** option to load to the Primary Technician lookup list only technicians with corresponding work types of the specified **Nature of Task** for the Service Call.

Enter the desired **Technician Code** for this dispatch

The **Lookup** button displays the list of all active technicians.

When the **Related to Service Call Work Type** option is checked, in the Lookup list, you can see those technicians qualified to perform the task of service call work type.

Each dispatch line can have either the **Labor** or **Item** type. On the **Lines** tab specify the **Line Type** in the corresponding field.



Depending on what you have selected as **Line Type**, enter the **Item** or **Technician** in the **Item/Technician** field. If **Labor** is selected as **Line Type** clicking the **Lookup** button will display technicians' list (technicians who are able to perform the dispatched task). The **Work Type** field becomes available, where you should enter the work type of the line (skill type). The **UOM** field's value is always **Hour** (the unit of measure for amount of time spent by the technician to perform the job). The **UOM** field is a read-only field (in case of Item Line Type the **UOM** will be the corresponding Unit of Measure for items).

If the **Time** option is selected for the **Labor Line Type,** the **Spent Hours** are calculated automatically based on the entered **Starting** and **Ending Times** and also taking into account the **coverage** information of the corresponding **Service Contract**. The **Spent Hours** are rounded based on the rounding value specified in the **Set Up SMP Option.**

If the **Time** option is not checked, the time entry fields will be hidden and you must enter the amount of time spent by technician to perform the task manually.

Enter the amount of billing hours in the **Billed Hours** field.

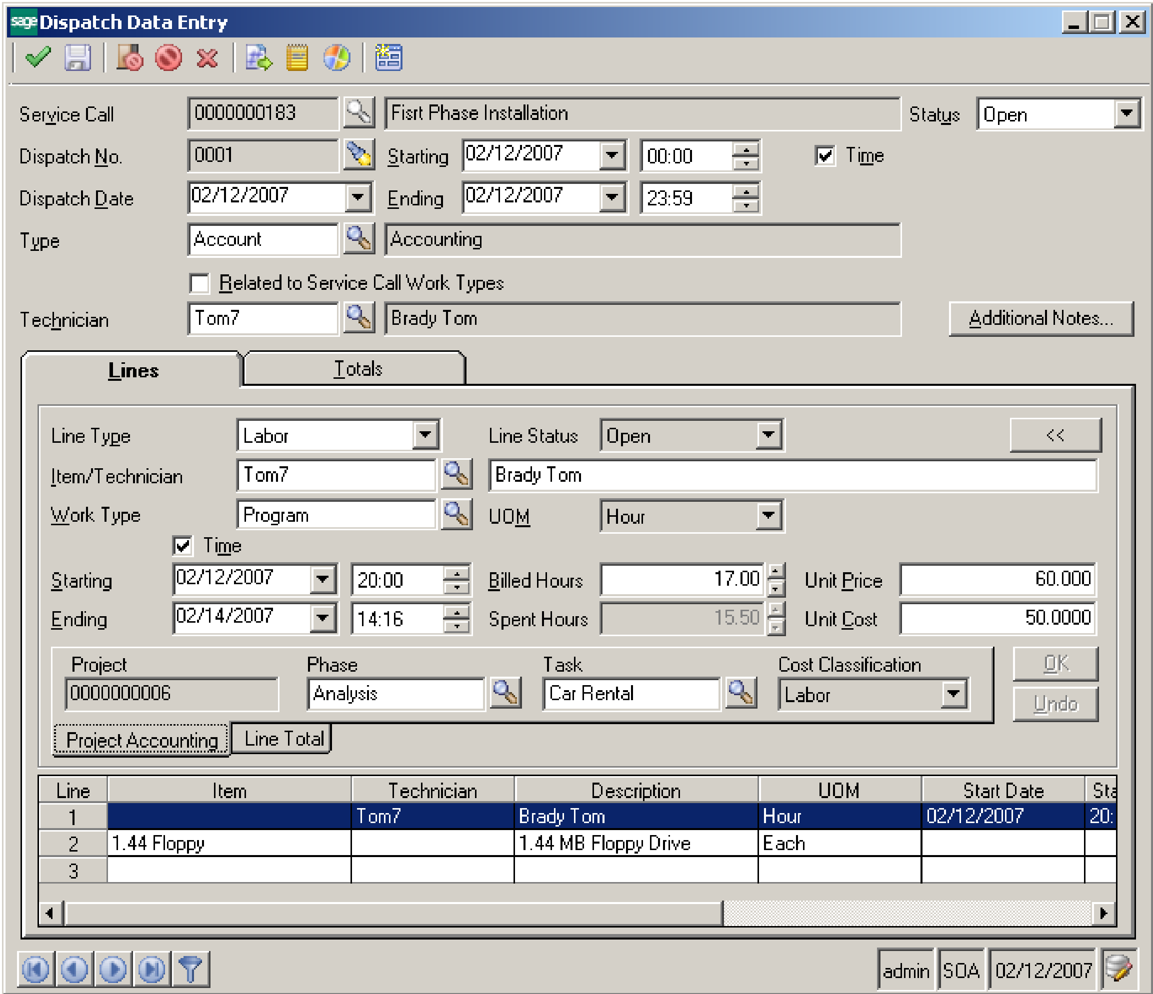
Enter the **Unit Cost** and **Unit Price** information for the selected technician in the corresponding fields. Note, when selecting the **Work Type**, the **Unit Cost** and **Unit Price** information set for the selected **Technician** by corresponding **Work Type** is loaded to those fields.

When **Item** is selected as **Line Type**, clicking the Lookup button of the Item/Technician will display the parts and materials that will be used by the technician to perform the dispatching task. The selected item Description will be loaded to the Description field.

The **Warehouse** field will become available (you can specify in this field the item warehouse).

In the **UOM** field select the unit of measure for the item. Item quantity needed to accomplish the task should be indicated in the **Quantity** field.

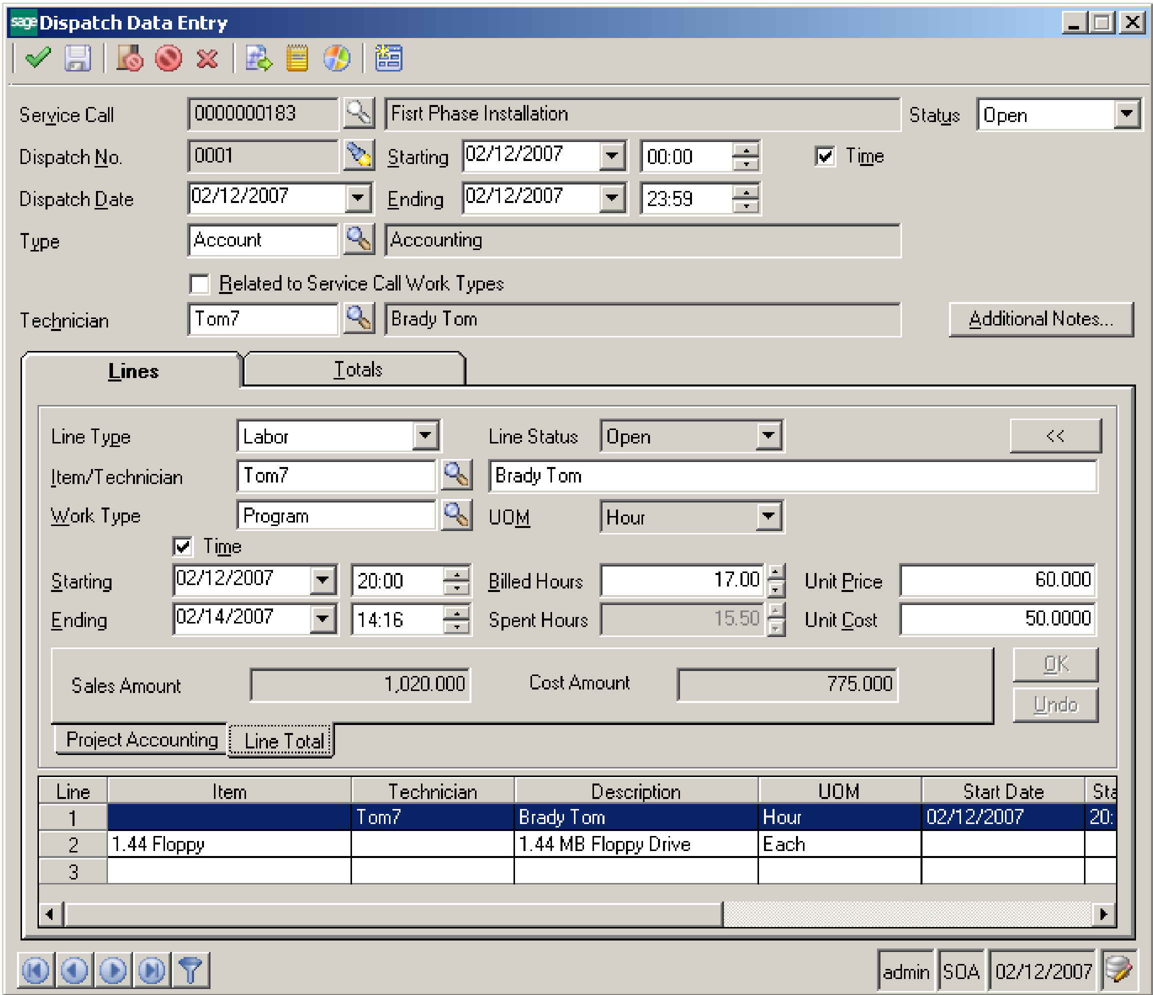
Enter the **Unit Cost** and **Unit Price** information for the item in the corresponding fields.



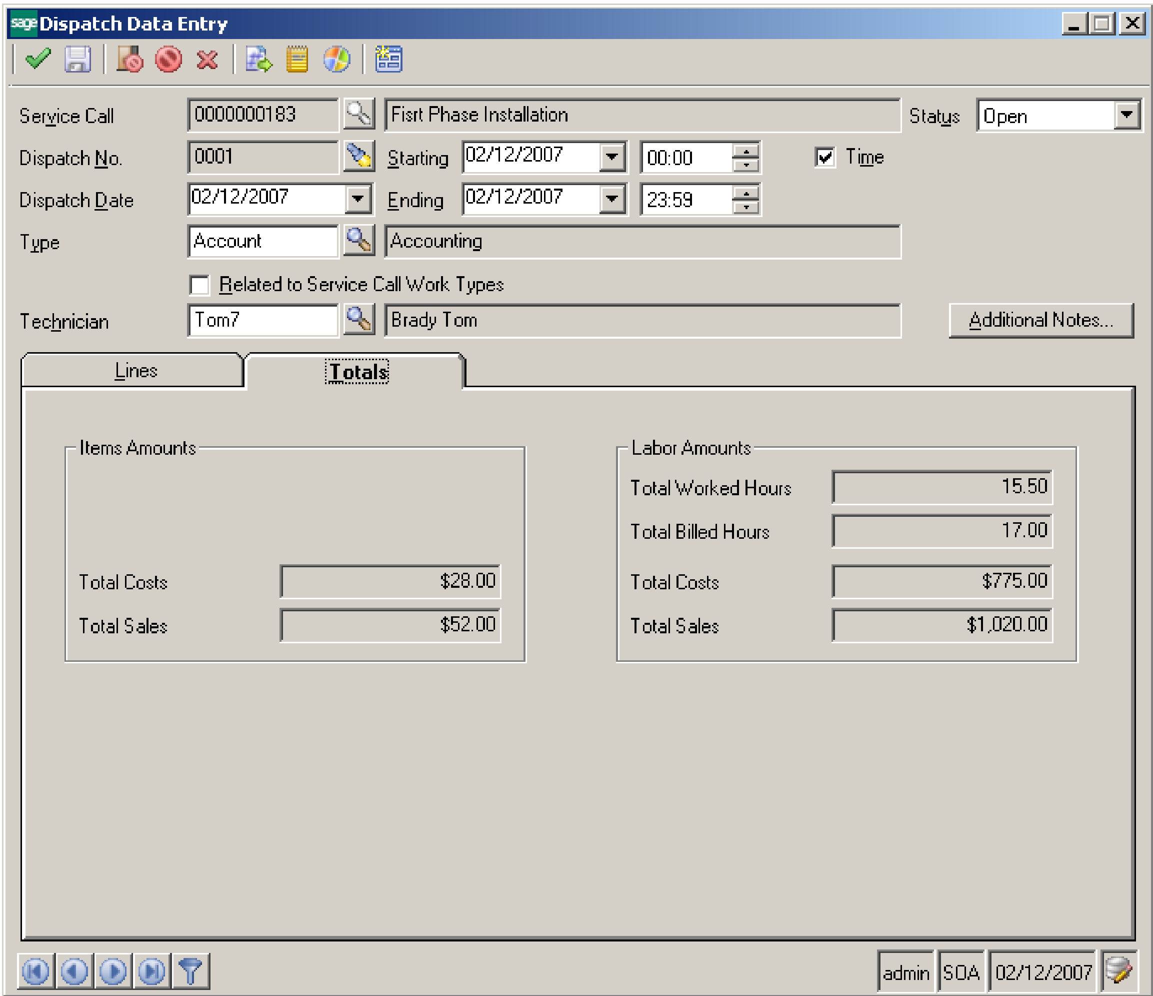
On the **Lines** tab, two other tabs are available – **Project Accounting** and **Line Total.**

When selecting the **Project Accounting** tab, information on the linked project is displayed in the corresponding fields (**Project number** – loaded when selecting the service call, **Phase**, **Task**, and **Cost Classification**). These fields will be blank if the selected service call has not been associated with any project. Otherwise, there are the required fields.

When selecting the **Line Total** tab, you can the see the **Cost Amount** (Unit Cost multiplied by Spent Hours) and **Sales Amount** (Unit Price multiplied by Billed Hours) in the corresponding fields for that line.



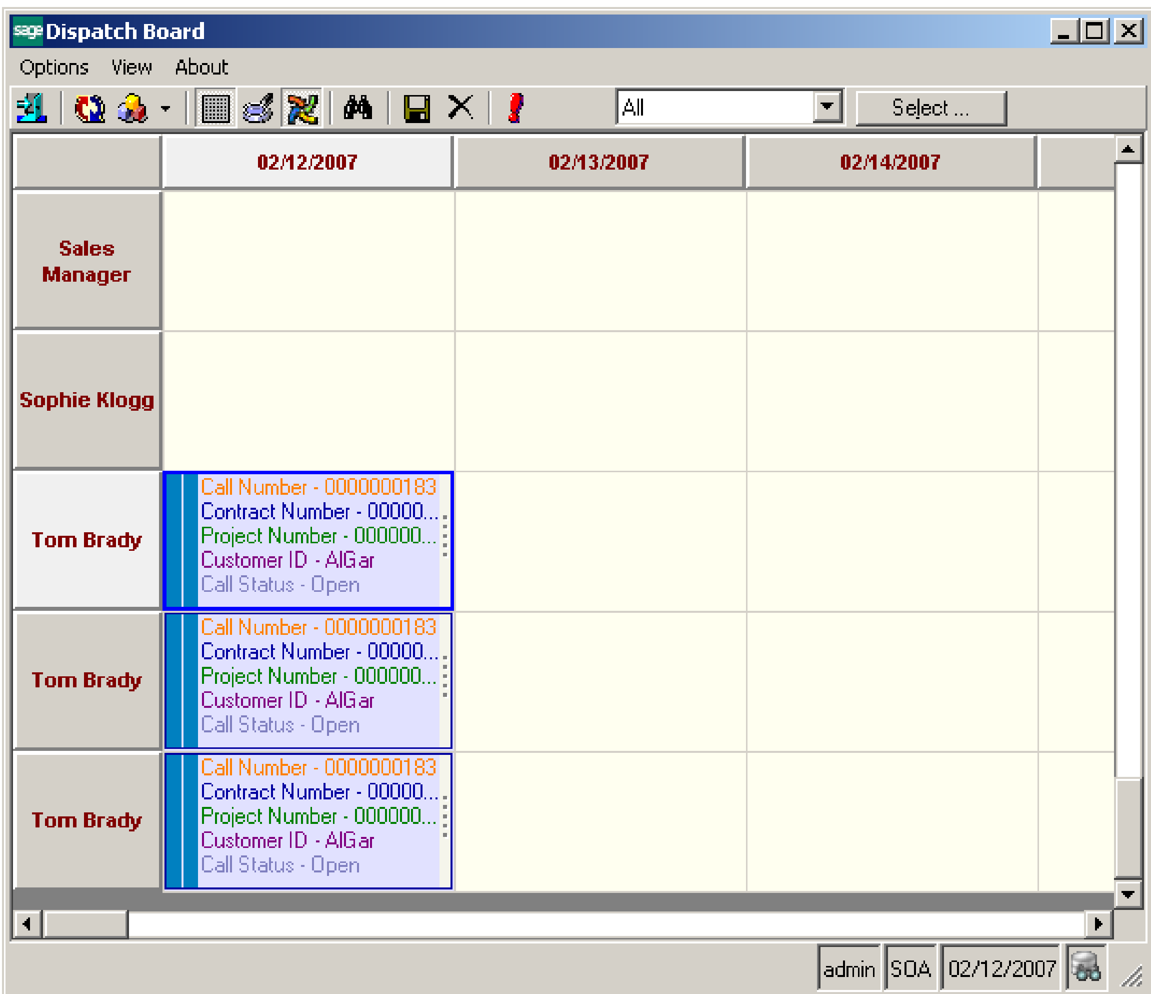
On the **Totals** tab of the **Dispatch Data Entry** you can see **Items Amounts** and **Labor Amounts** in two separate sections (that includes **Total Costs** and **Total Sales** both for **Items** and **Labor**). For **Labor Amounts**, also the **Total Worked Hours** and **Total Billed Hours** are displayed.



Dispatch Board

The **Dispatch Board** displays active service calls in cells with service calls dates and technicians placed vertically on the board or horizontally across the top of the board.

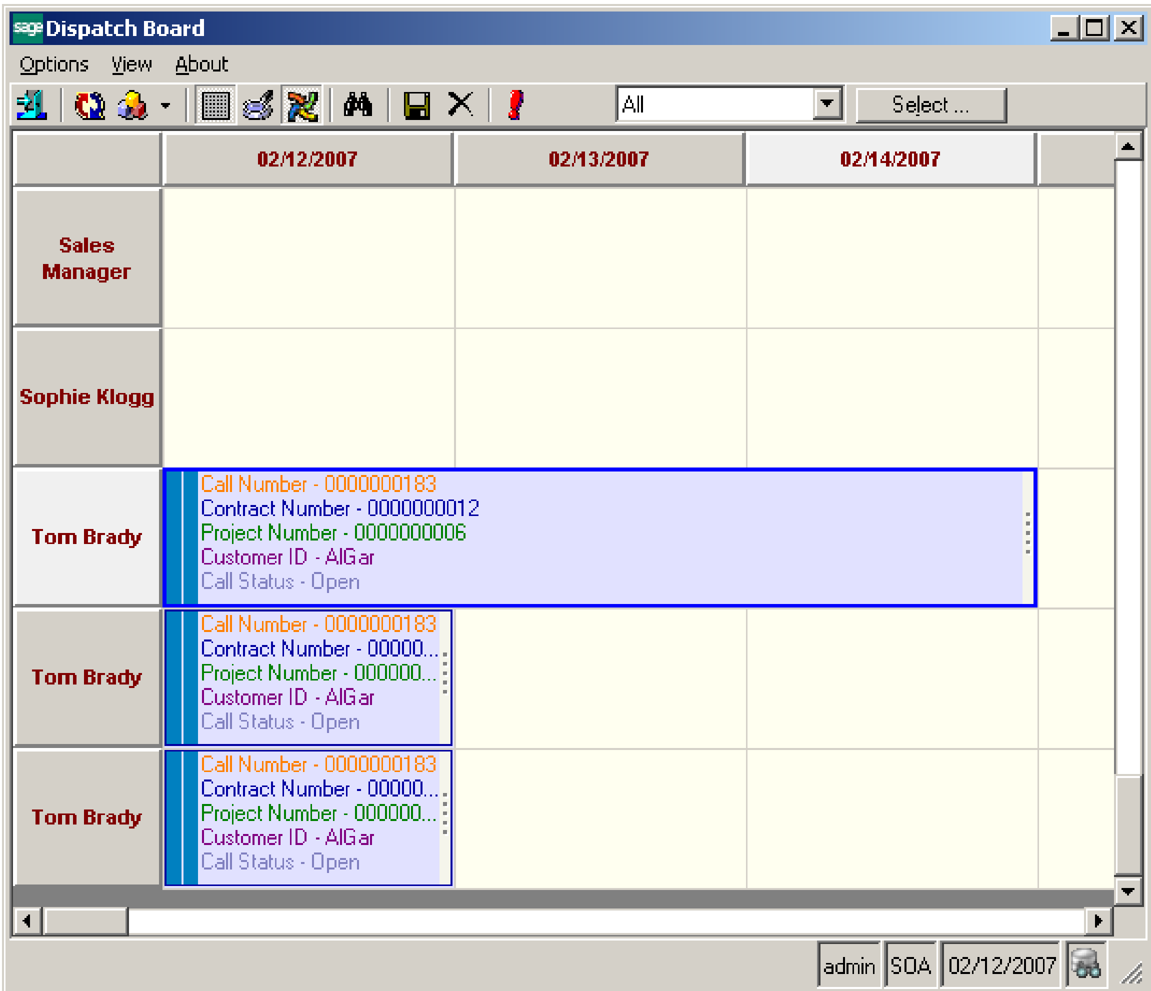
User specified information for each service call or dispatch is displayed in a cell or span of cells. Each type of data in the cell can be color-coded for easier visibility. Also display names of data fields can be changed (for example, shortened). The user can also filter the service call by requesting only those service calls with data falling in certain ranges.



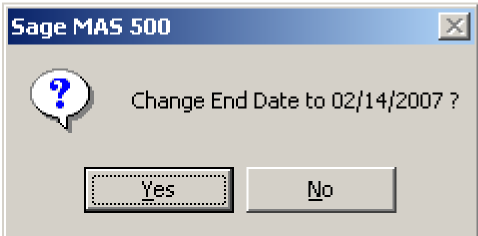
To see the details of the selected Service Call/Dispatch in the right part of the screen, click the Show fields button from the Toolbar.

You can place technicians or dates horizontally across the top or vertically on the board. Also you can view duplicates of technician codes or dates if several service call/dispatches have been assigned to the same technician and should be done on the same period of time.

You can also viewing the duration of the each task. The span of the cells displays the Scheduled and Due Date/Time of the Task or the Starting and Ending Date/Time of the Dispatch.



You can change the Dispatch End Date just by pulling out the cell to include the dates until the end date (or vice versa, to exclude dates).

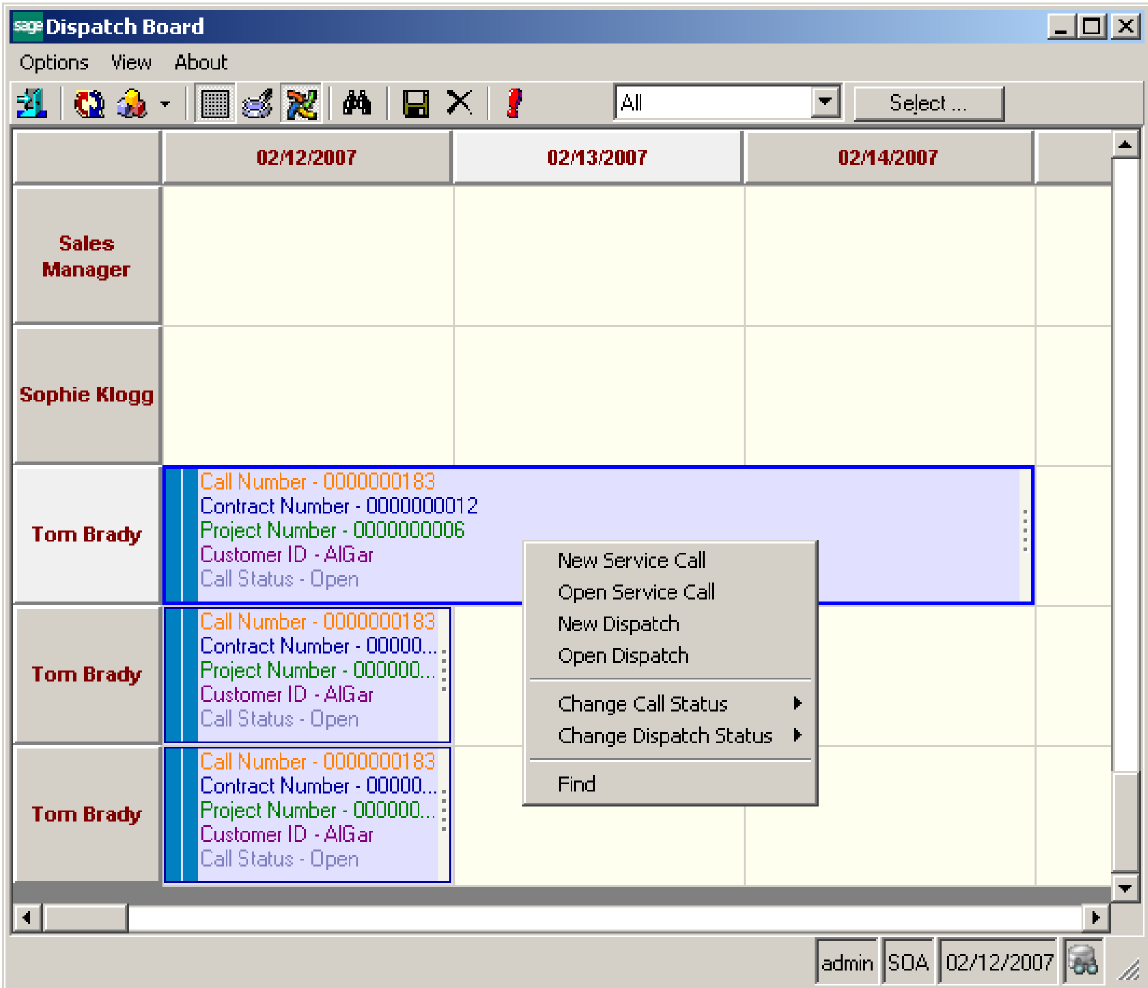


You can change the width of the cells. Click anywhere between the names of Technicians and drag the mouse to the right to increase the width or to the left to decrease it. All the columns will have equal widths when you release the mouse. The number of columns will remain unchanged when you resize the window, so you can adjust cell width by resizing window too. Rows will only have whole cells.

A cell can be dragged to another date or technician, and the system will update the corresponding dispatch. A tooltip displays the destination date and technician name while dragging. The cursor is changed, if the move is not allowed (closed dispatch, moving to the Unassigned Technician column, moving without Date change).

You can use keyboard *Arrows* plus *Alt* key combination to select the cells with Service Calls/Dispatch.

Right-clicking on a cell (or using the Windows Application key on the keyboard) displays popup menu, from which you can quickly run some programs for the dispatch.



New Service Call displays the **Service Call Entry** screen ready for new service call entry. The **Next Service Call Number** is selected, and the **Scheduled Date/Time** is set equal to the selected cell Date/Time. The selected cell **Technician** is loaded after selecting the **Customer**.

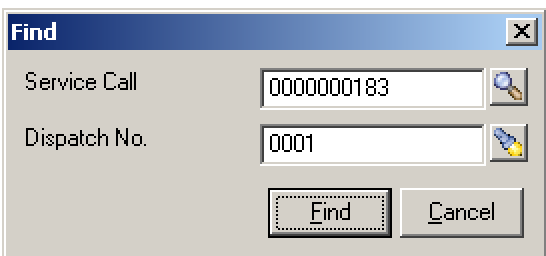
Open Service Call displays the **Service Call** Entry screen for the current task. You can also open the **Service Call** Entry screen by double clicking on the service call/dispatch cell.

New Dispatch displays the **Dispatch Data Entry** screen ready for new dispatch entry for the selected service call.

Open Dispatch displays the **Dispatch Data Entry** screen for the current dispatch. If the Dispatch Status is Closed, the Dispatch Inquiry screen is displayed instead. You can also open the Dispatch Data Entry by pressing **Ctrl** on the keyboard and clicking the in the on the service call/ dispatch.

You can **Change Call/Dispatch Status**. If the program cannot change the status, a message appears explaining the problem. (For example, you cannot close a service call that has open dispatches.)

Find allows searching a specific service call/dispatch on the Board. When a service call has dispatches you will be warned to enter also the dispatch number. The Service Number cannot be found and displayed either when it doesn't exist or some options should be changed in order to display it. Alternatively, you can press *Ctrl+F* for find.



You can press *Ctrl+G* to open the Got To screen, where you can specify the date and go to the cell corresponding to that date.

The **Main menu** located in the upper left corner of the Dispatch Board screen, contains **Options**, **View**, and **About** menu items.

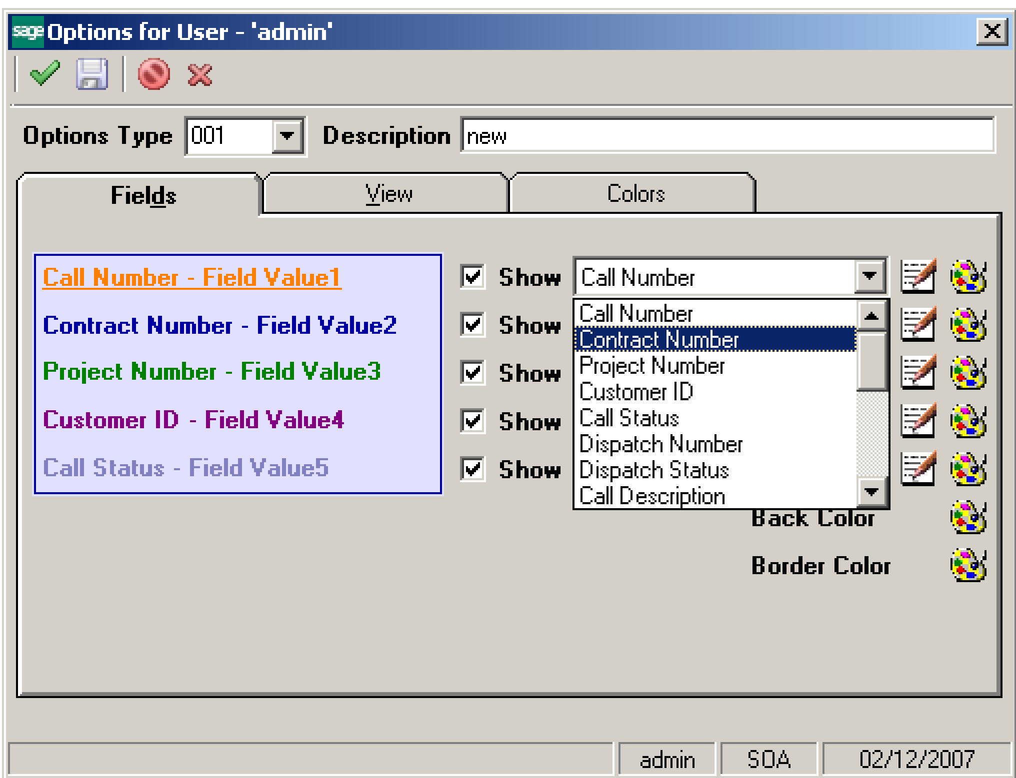
In the **Options** menu, you can select an existing **Options Type**, and **Edit Options** in the **Options for User** dialog box (described later). Current Options Type is indicated with a checkmark.

In the **View** menu, you can select to **Show/Hide** Toolbar, **Grid Lines**, **Fields**, **Blanks** (blank rows and columns), **Inactive Technicians**, **Refresh** the Dispatch Board view, and **Find** a specific Task or Dispatch on the Board.

The **Toolbar** enables you to quickly **Exit** the Dispatch Board, **Refresh** the view, **Edit Options**, select **Options Type**, **Show/Hide Grid Lines**, **Fields**, **Blanks**, **Inactive Technicians, Find** Task/Dispatch. Current Options Type is unavailable (already selected).

To control which data fields appear in the cells (and their colors), select the **Edit Options** submenu from the **Options** menu.

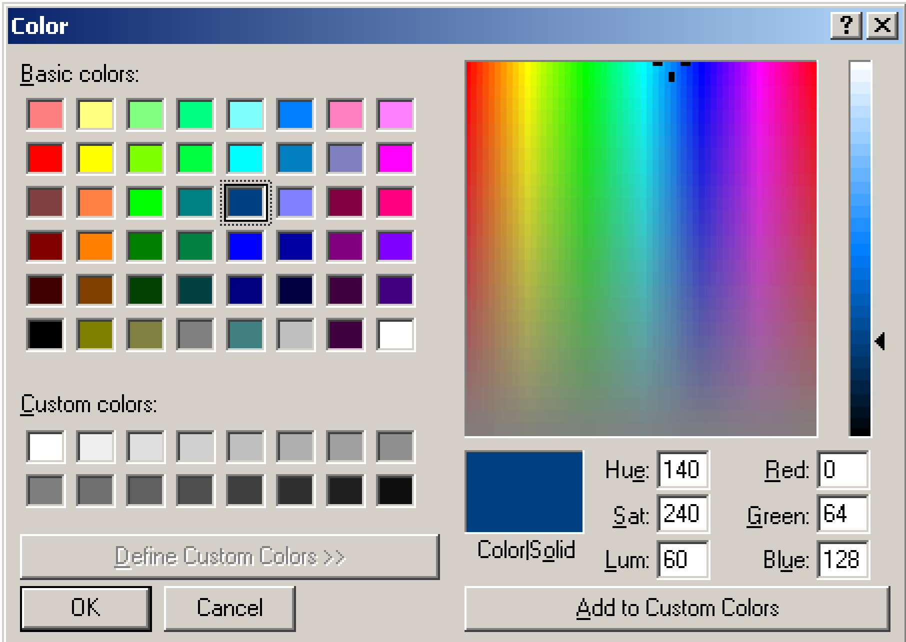
Click the **Fields** tab in the displayed **Options for User** dialog box. You can specify the fields that should be shown on the Dispatch Board cells.



You can choose five data fields to be displayed in the cells of the board. Select fields from the drop-down lists, and see preview on the left.

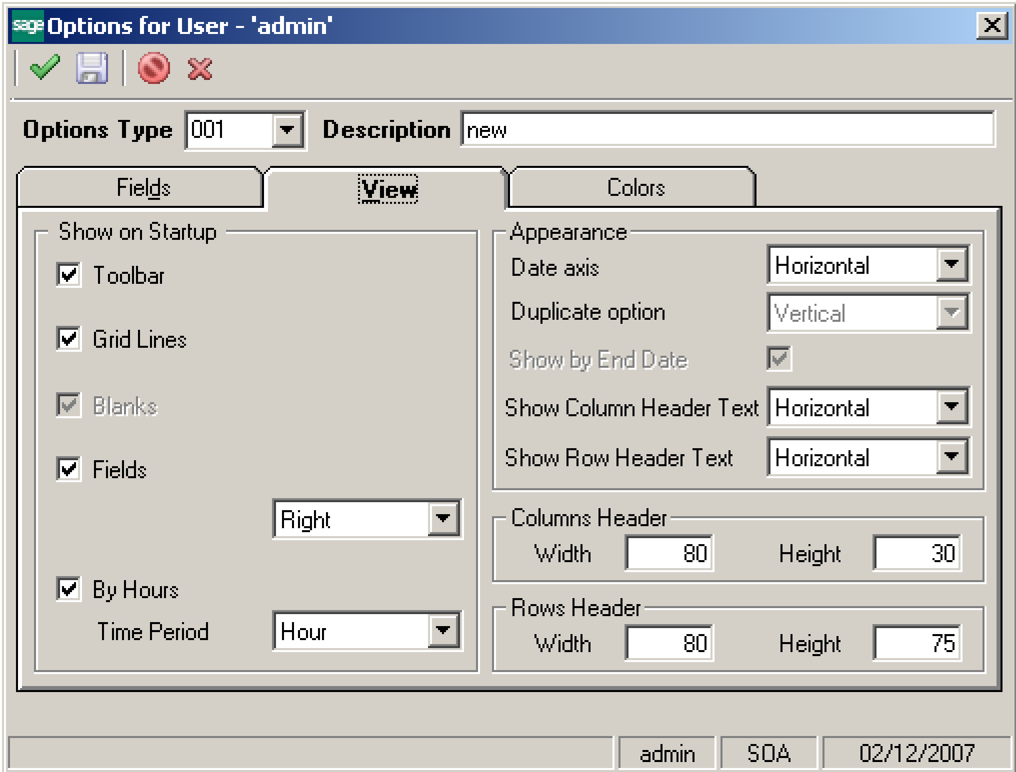
You can hide fields if you do not need all five fields displayed. Uncheck the boxes next to fields that you do not want to be displayed.

To change the color of a field, click the **Field Color** button. Select color in the standard Windows **Color** dialog box.



You can select a background color by clicking the **Back Color** button. Also you can specify the **Border Color** by clicking the corresponding button.

Go to the **View** tab.



Check the corresponding boxes in the **Show on Startup** section to show **Toolbar, Grid Lines, Blanks, Fields** and **By Hours** each time the Dispatch Board starts. When **Fields** option is selected, a drop down box is displayed where you can specify on which side the details of the selected Service Call/Dispatch will be shown (**Right** or **Left**). When **By Hours** option is selected, a drop down box is displayed where you can specify the time segments on the Board (by **Hour**, **Half** or **Quarter**).

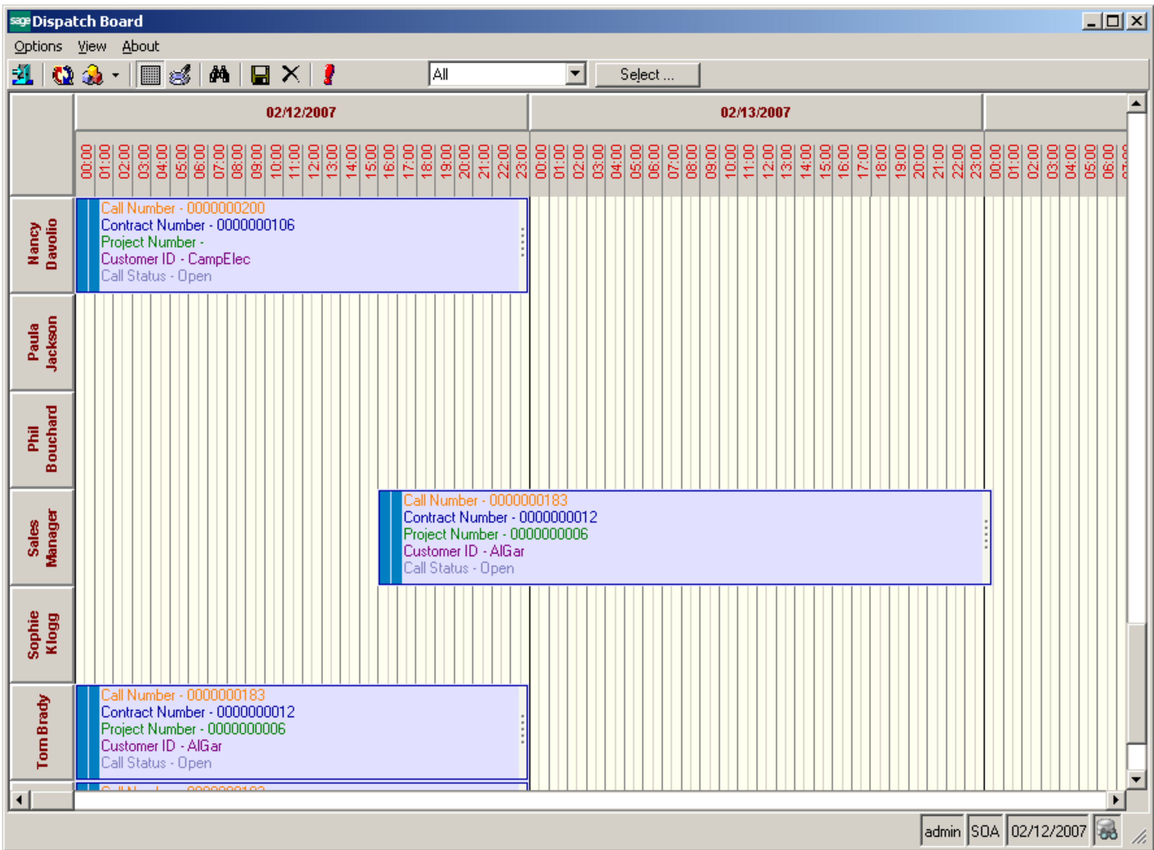
In the **Appearance** section, you can specify whether the **Date Axis** will be placed horizontally or vertically on the Board.

Select the **Duplicate Option** (either horizontal or vertical) to see duplicated columns or rows (in case the same service calls are assigned to the same technician and should be done on the same period of time).

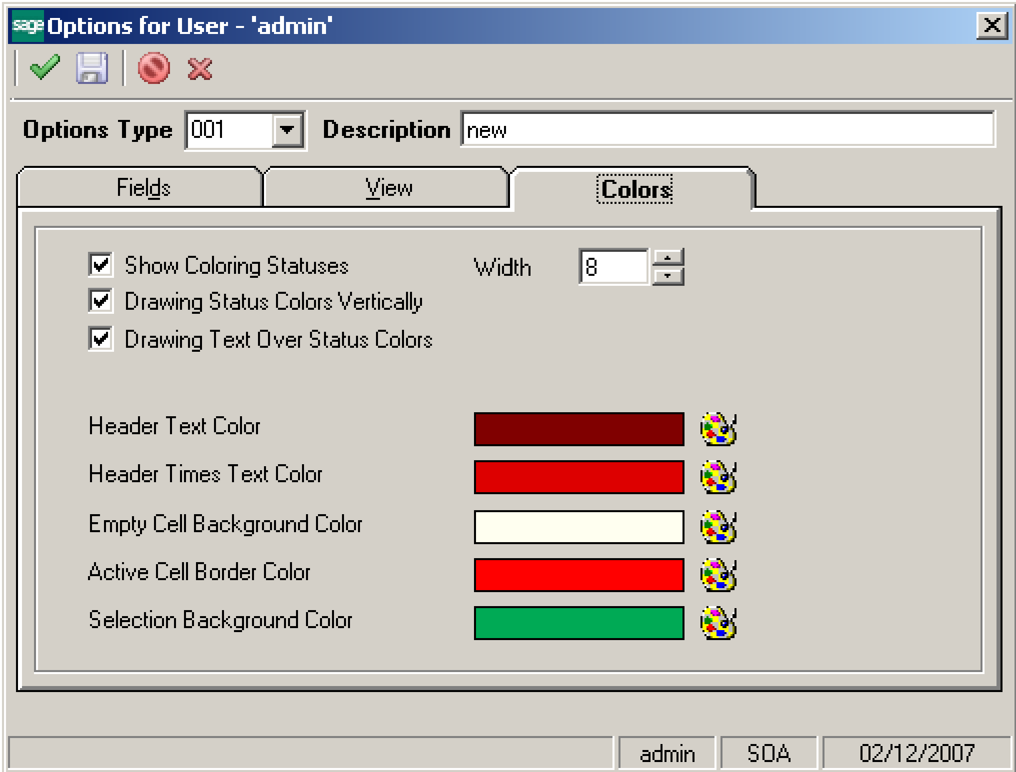
Check the **Show by End Date** option if you want all tasks will be shown till their end date.

You can choose to display the header texts of the columns/rows vertically or horizontally on the Board by selecting the corresponding **Horizontal** or **Vertical** values in the **Show Column/Row Header Text** drop down box.

You can specify the sizes of the cells by entering the corresponding values in the **Width** and **Height** fields of the **Columns/Rows Header** sections.



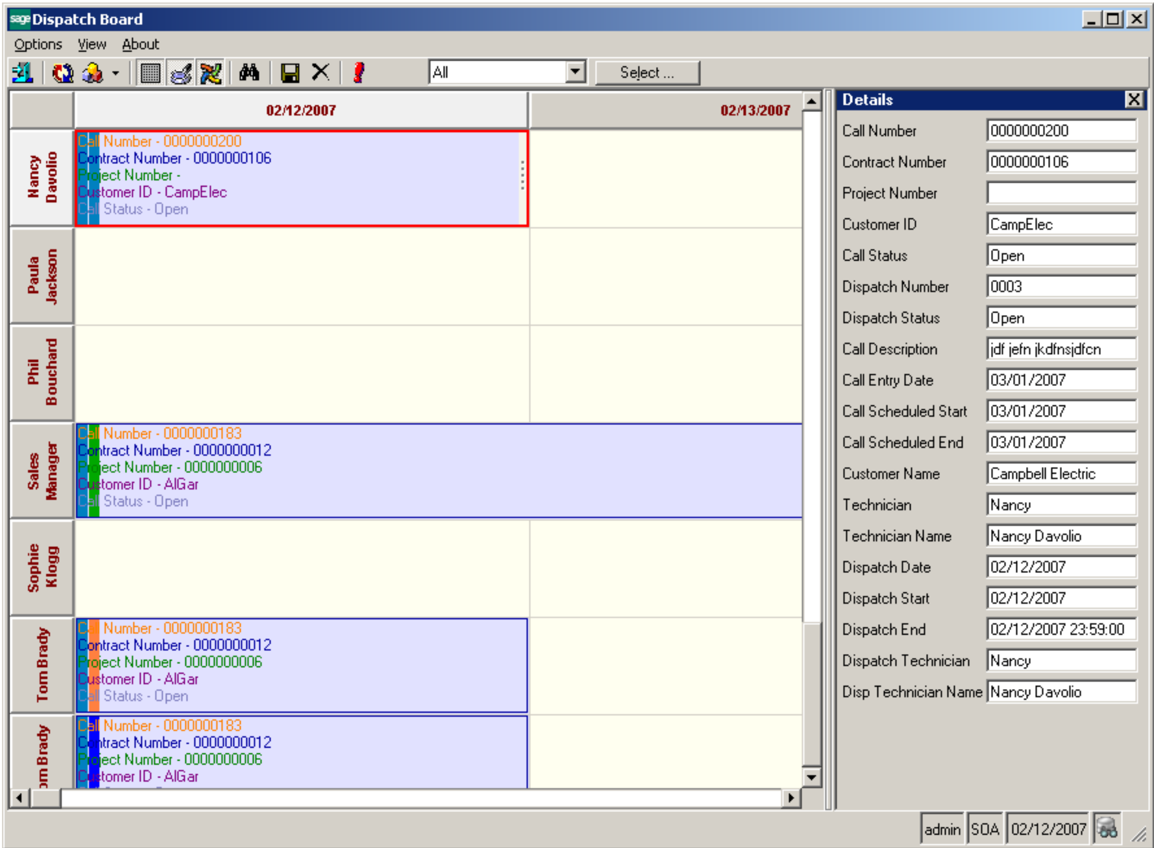
On the **Colors**, you can specify the color related settings.



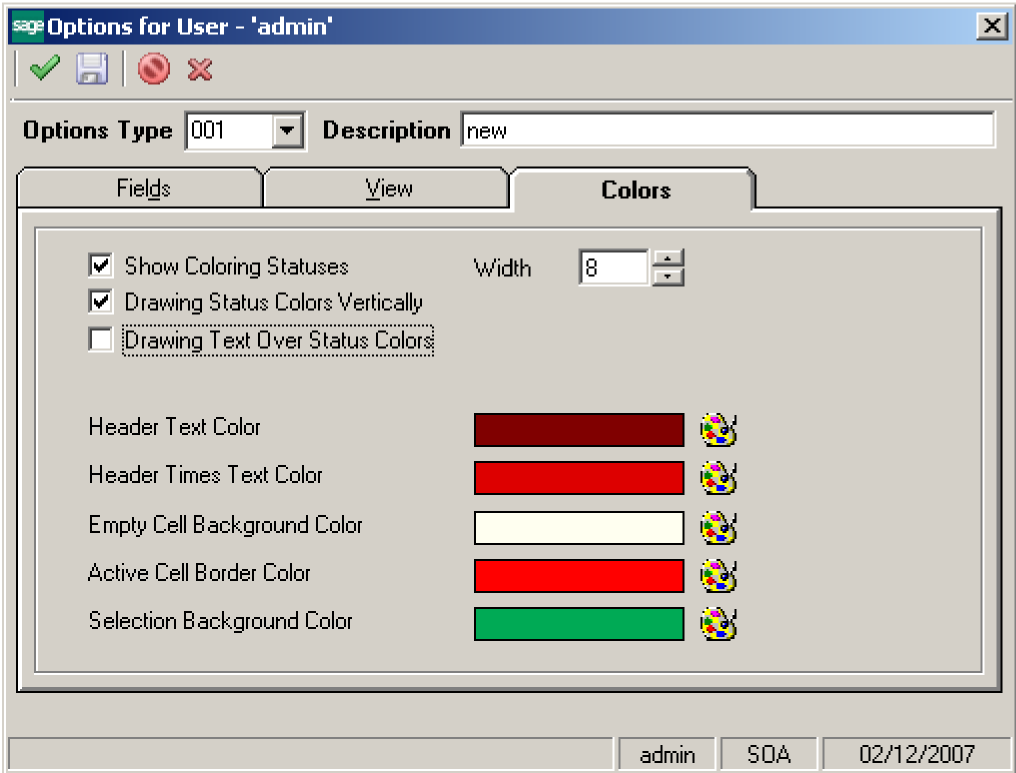
Check the **Show Coloring Statuses** option to display the status colors of the Service Calls/Dispatches on the Board (the status colors specified in the **Set Up SMP Statuses** screen). You can specify the width of the displayed status color area in the **Width** field.

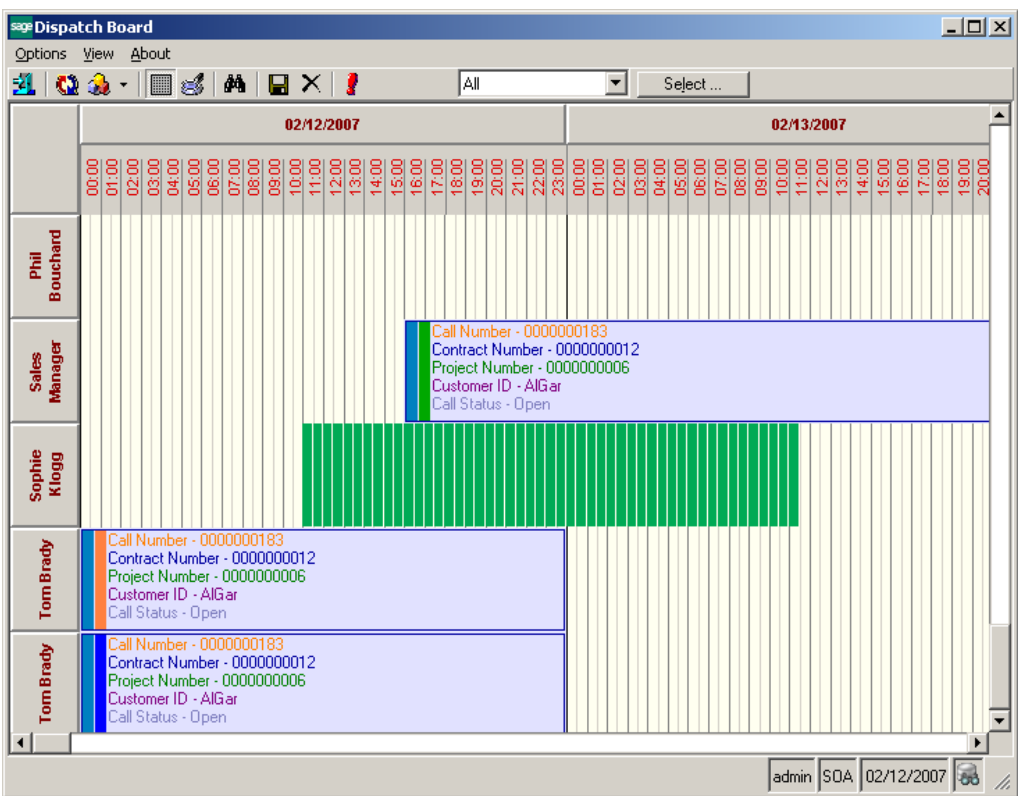
The **Status Colors** can be displayed either on the top or on the left side of the cell. Select the **Drawing Status Colors Vertically** option to display the **Status Colors** on the left of the cells. Otherwise, it will be shown on the top of the cell.

In case of having the space issues on the Board you can check the **Drawing Text Over Status Color** option save to space.



You can also specify the **Header Text Color** for headers, Header **Times Text Color** for Times, **Empty Cell Background Color**, **Active Cell Border Color**, and the **Selection Background Color** for selected cells.

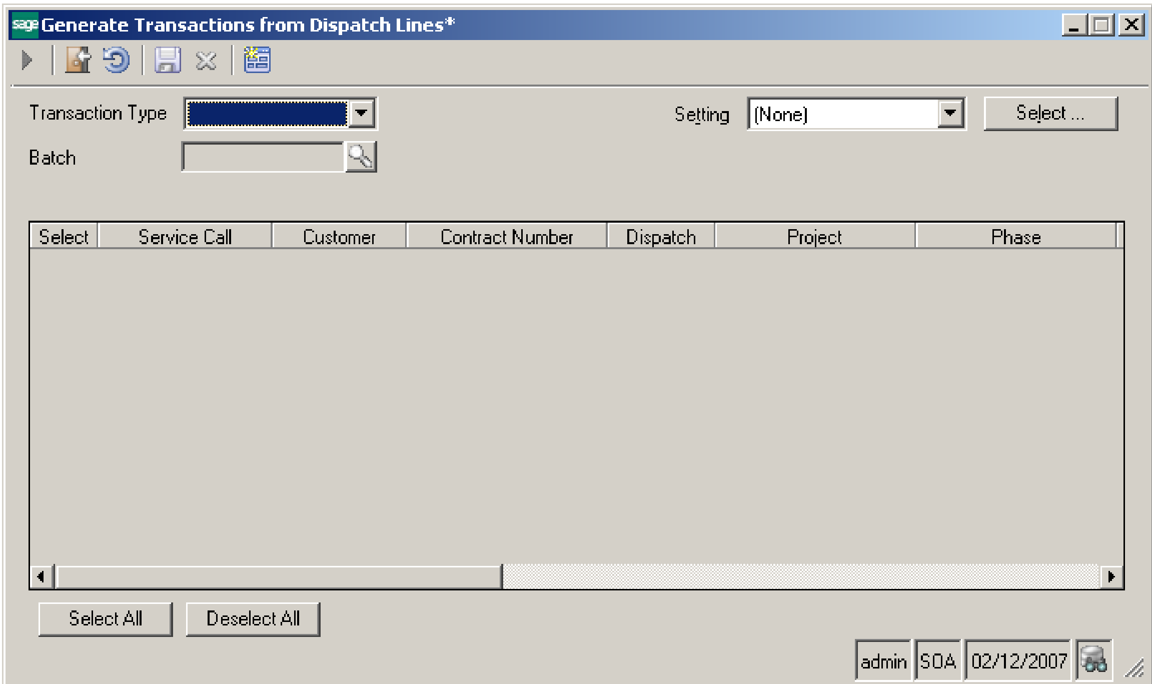




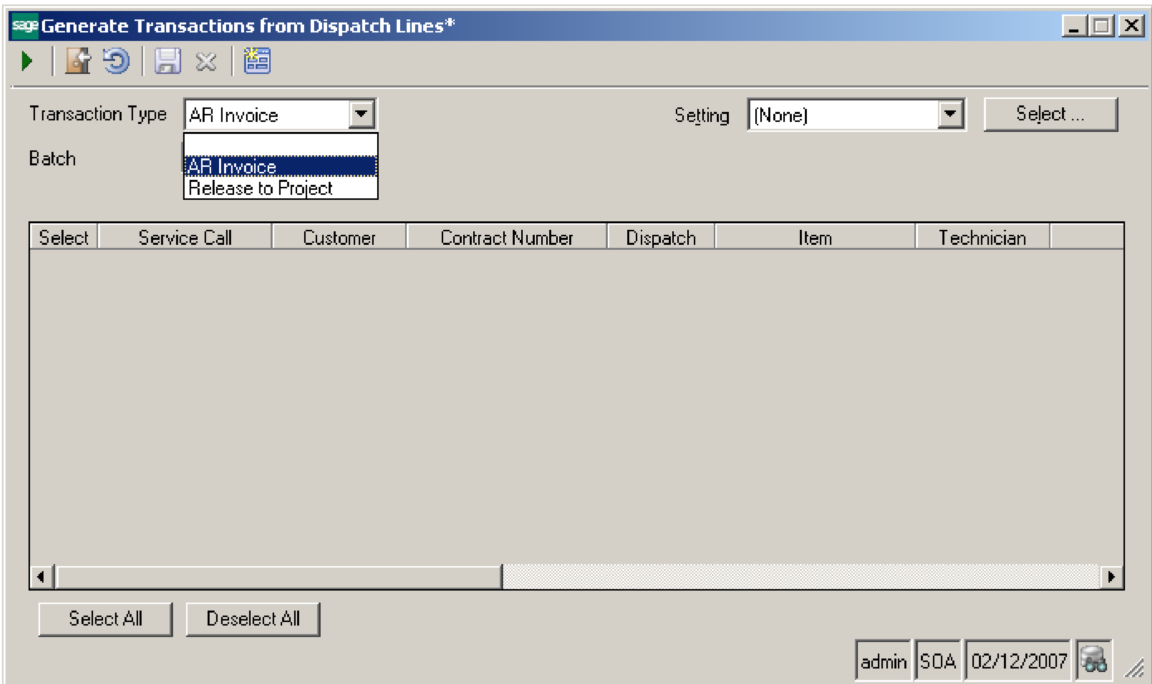
Transactions Generation

The **Transaction Generation** program serves for generating transactions from Dispatch Lines.

This program is accessed also from the **Service Call Entry** when clicking the **Generate Transaction** button.

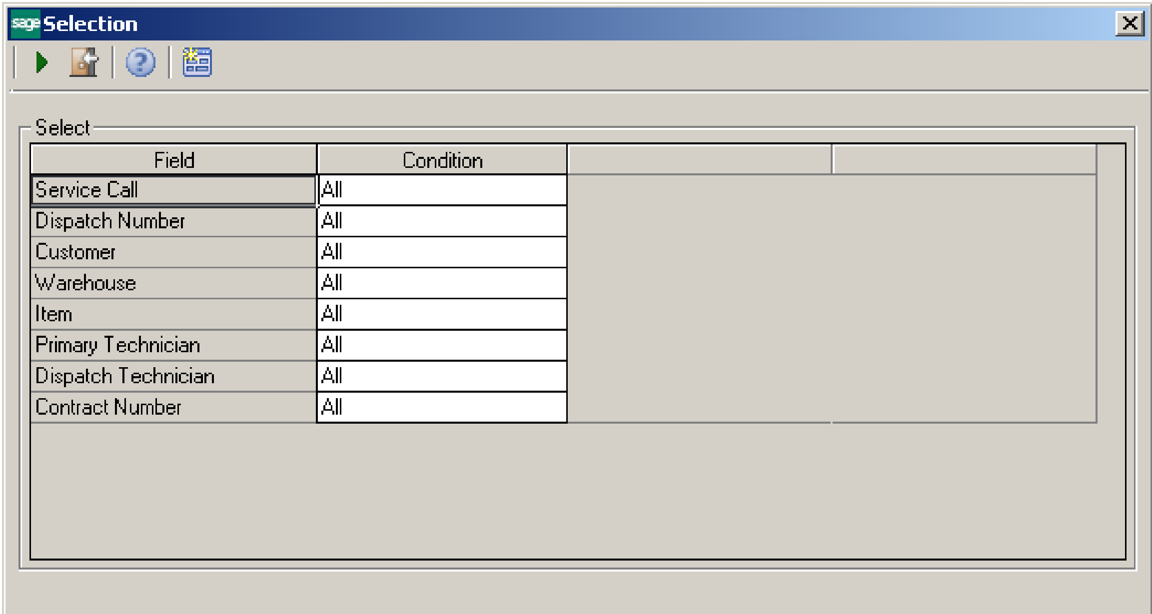


In the Generate Transactions from Dispatch Lines screen select the **Transaction Type.** It can be either the A/R Invoice or Release to Project. If the service call has been associated with a project, its dispatch lines can be only **Released to Project** (**A/R invoice** cannot be generated from dispatch lines). In case there is no project for the service call, the Transaction Type can be **A/R Invoice,** which means A/R invoice will be generated based on the dispatch lines.



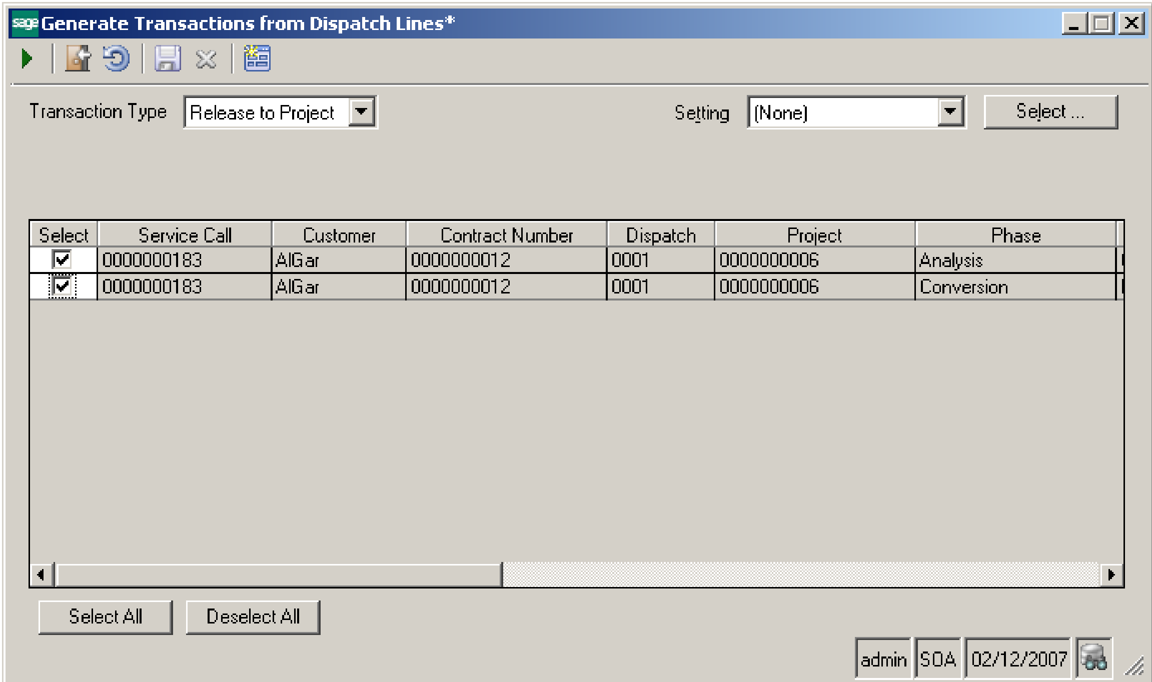
In case of *A/R Invoice* **Transaction Type**, you can specify also the **Batch** number for generated A/R invoices. For **Release To Project** Transaction Type the Batch field is not available. .

Click the **Select** button to specify the selection criteria on which the transaction should be performed.



You can specify the **Conditions**, or just select **All** to include all data. This screen is for filtering the lines that should be released to project or converted to A/R invoices. Click **Proceed** button to apply the selection.

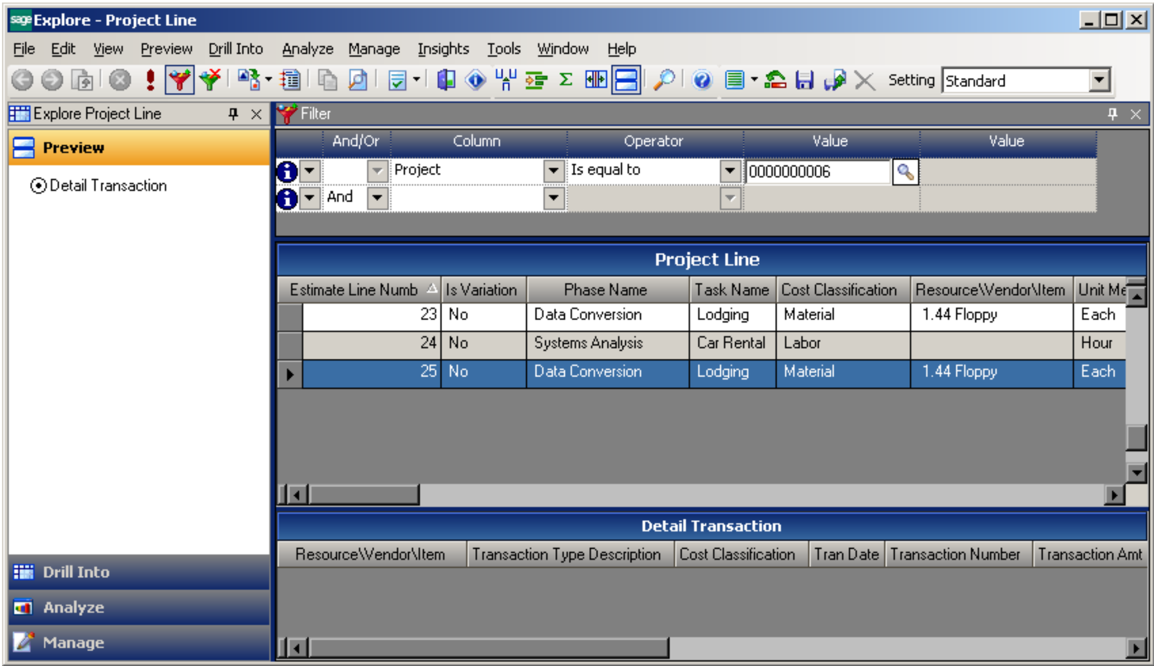
Note: In order to generate transactions the dispatches status should be completed. Otherwise, no selection will be done and you cannot generate transactions.



You can check the lines from which you want to generate transactions by selecting the corresponding checkbox. Or you can click the **Select All** button to include all dispatch lines in the transaction generation.

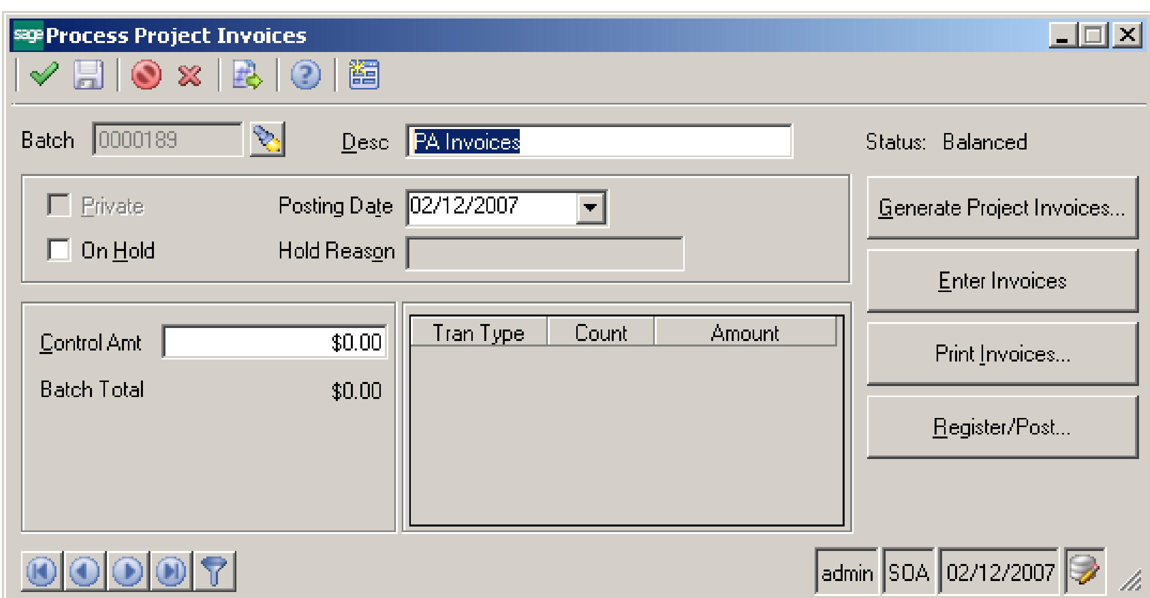
Click the **Proceed** button to generate transactions. After transaction generation from dispatch lines, the corresponding dispatch status automatically will be set to **Close** if all dispatch lines have been included in the transaction generation process. Also the **Service Call** status will be set to **Close** if all its dispatches are closed.

After generation selected dispatch lines become project lines of the corresponding projects. You can view those lines through the **Explore - Project Line.**

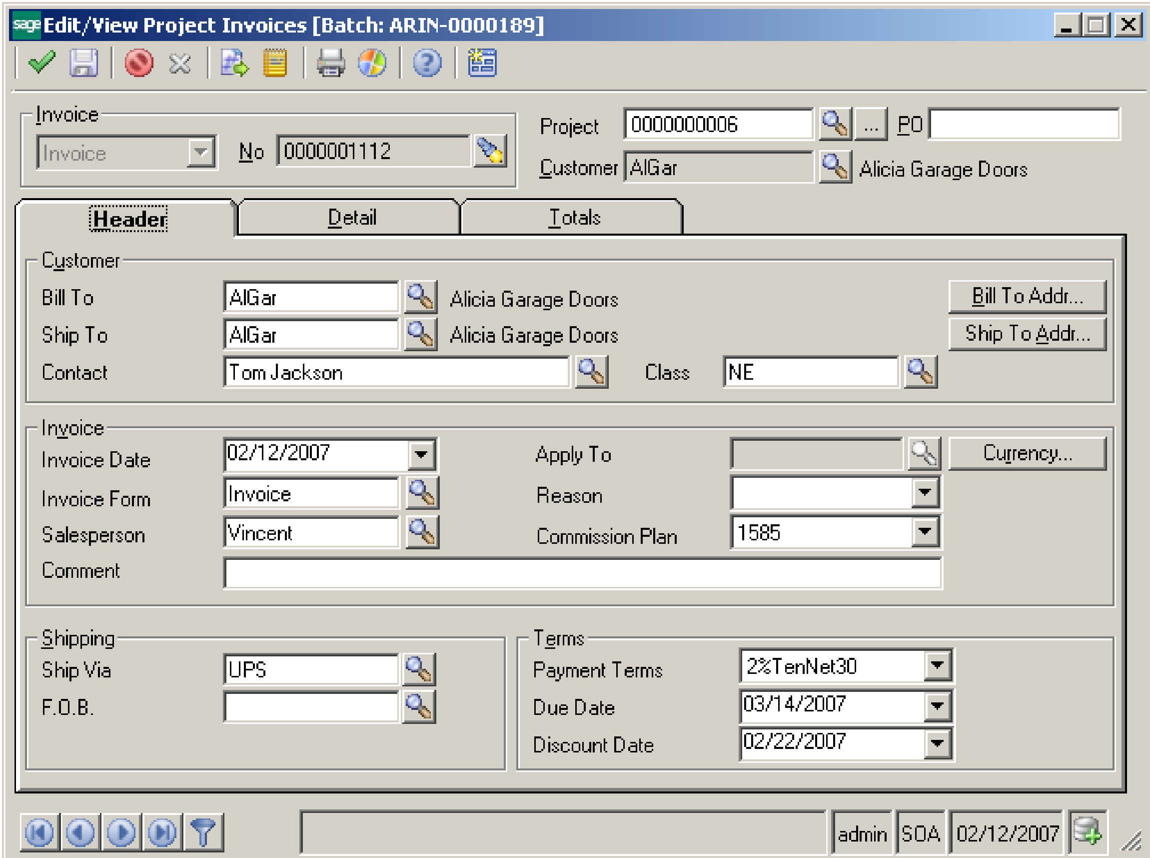


Through the **Process Projects Invoices** (**Project Accounting** module) you can generate an invoice for the selected project.

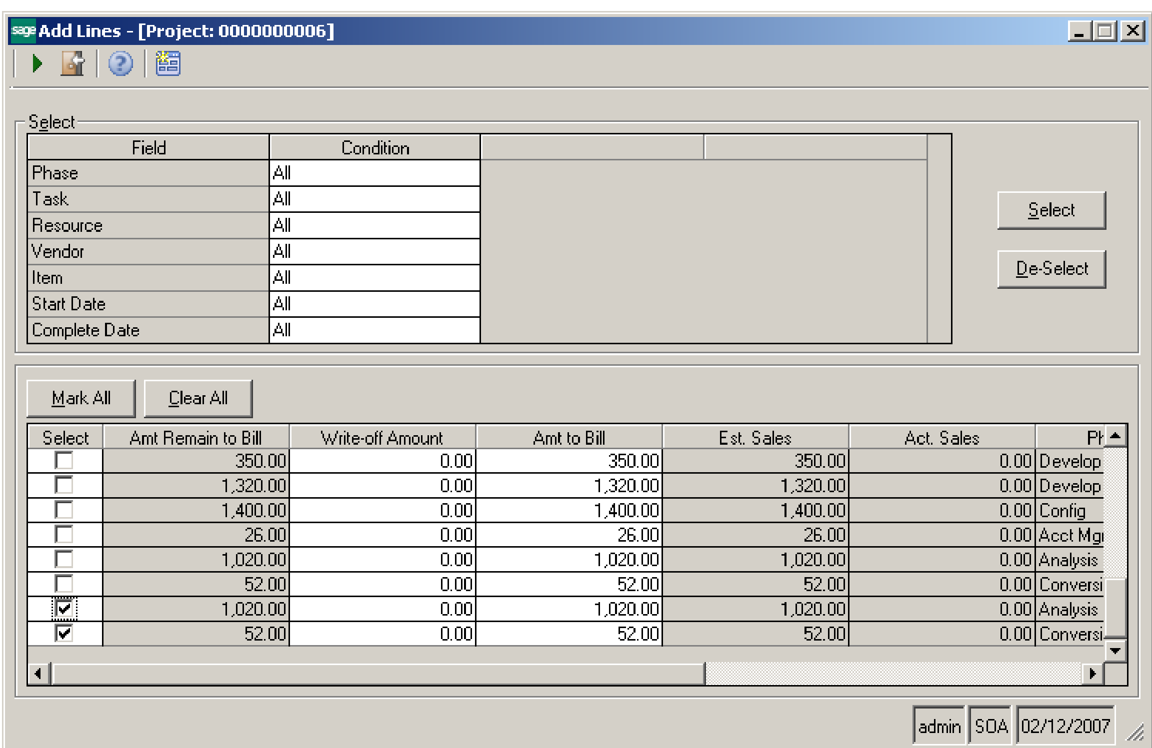
Enter **Batch** number and click the **Enter Invoices** button.



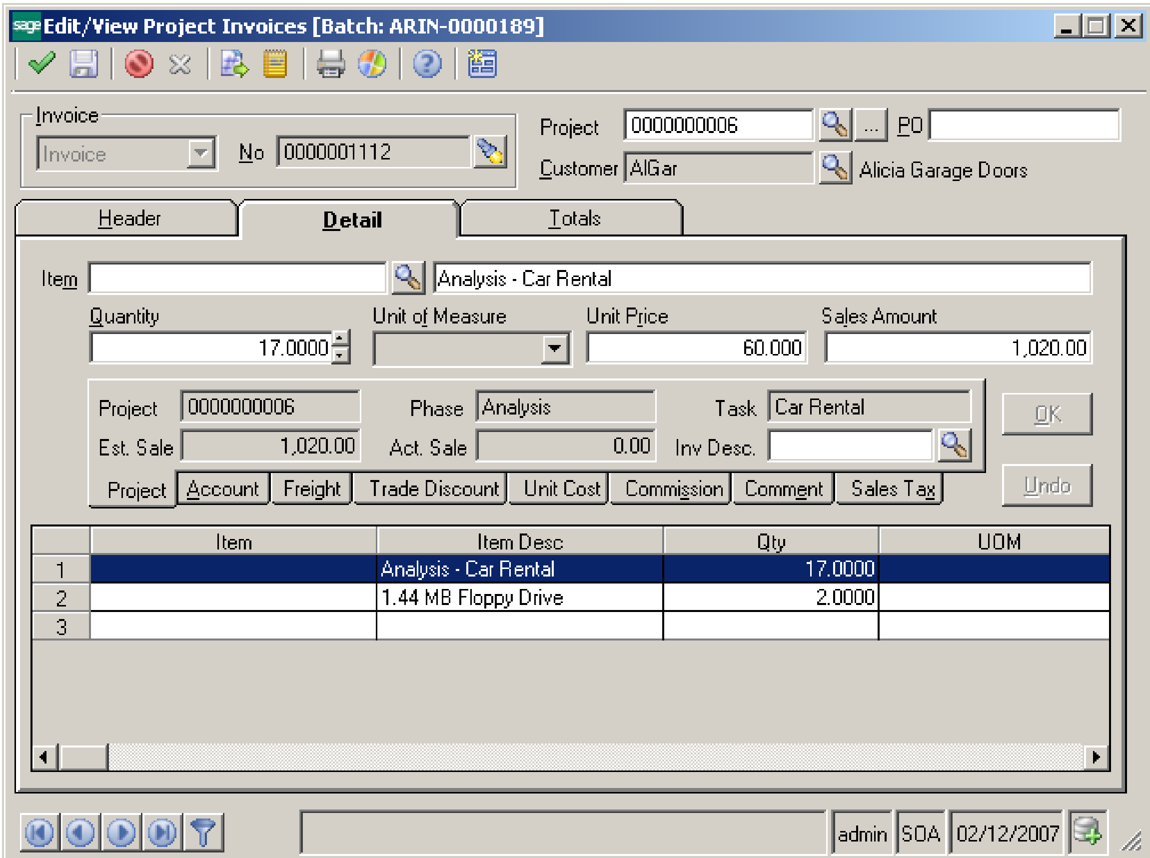
In the opened screen, enter the Project ID for which you want to generate an invoice.



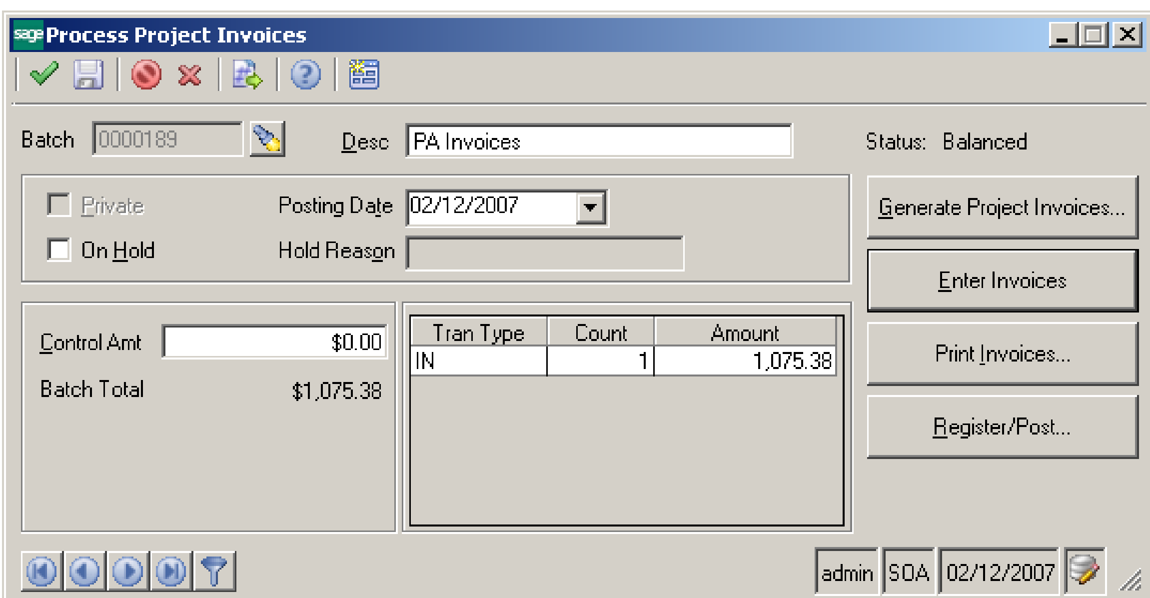
Click the button next to **Project** field to add the project lines that should be included in the invoice.



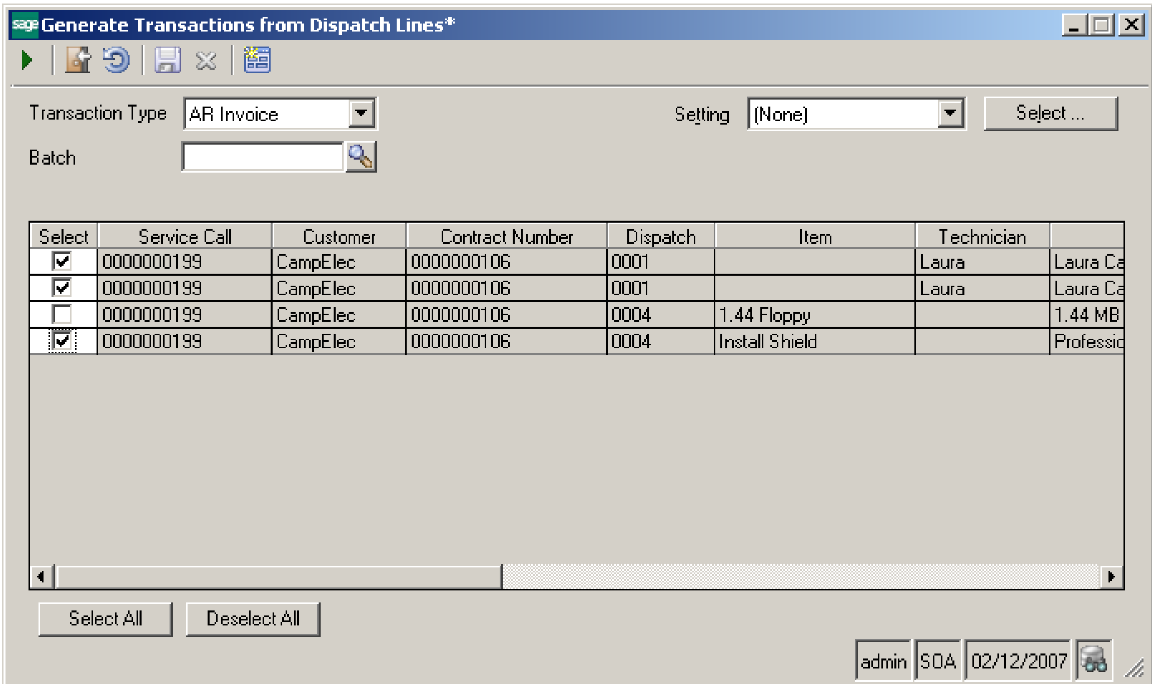
The selected lines will added as invoice lines.



Save the changes in this screen and return to the **Process Invoices** screen. Click the **Generate Project Invoices** button for invoice generation.

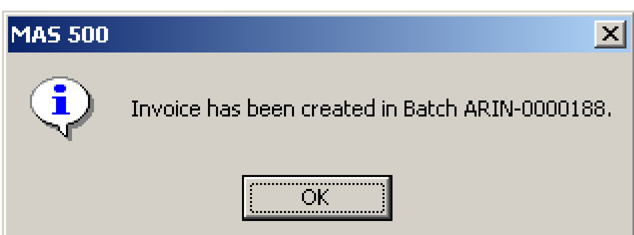


For **A/R Invoice Transaction Type**, lines of all completed dispatches are loaded, and then you can select the lines which you want to include in transaction generation (or click the Select All button to include all lines).



Click **Proceed** button to generate an invoice. In the end, you will get a message informing you in which batch the invoice has been created.

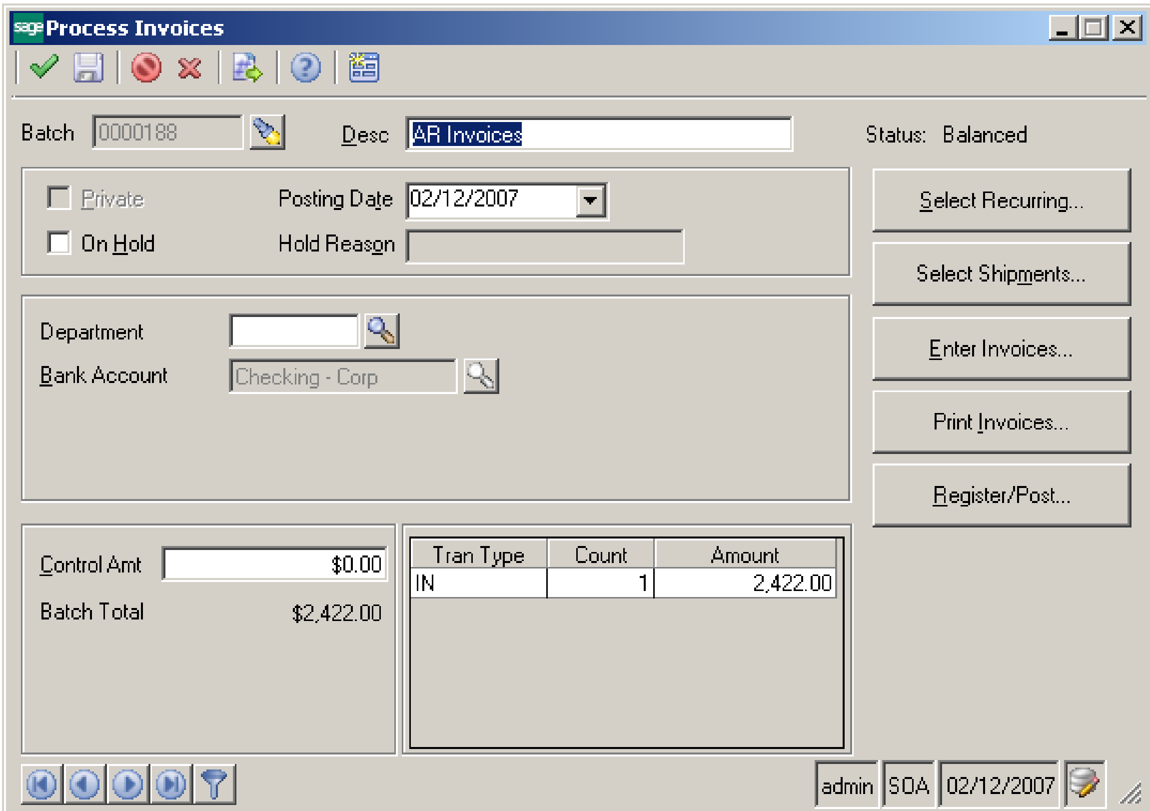
Here is an example:



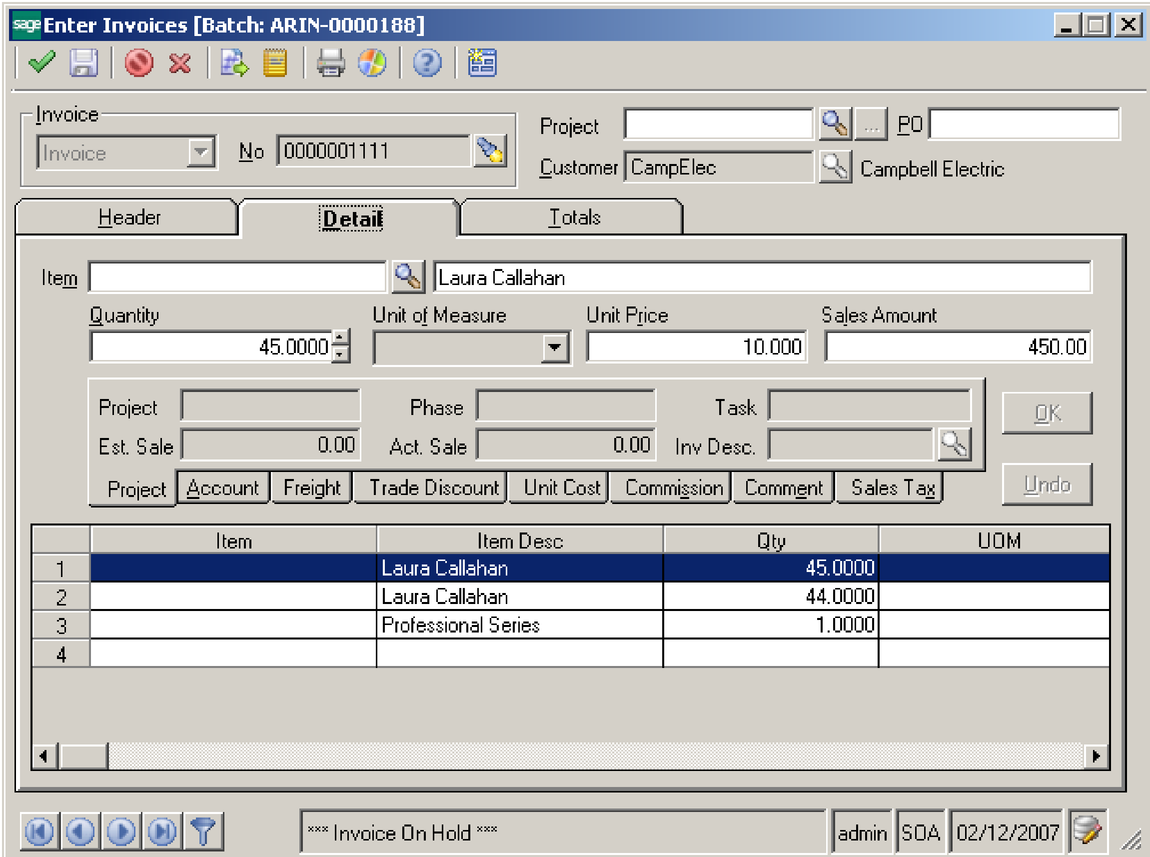
All Dispatch lines have turned into Invoice lines (one invoice is generated in the specified batch with lines corresponding to the dispatch lines included in the current transaction).

You can view the generated invoice through the **Process Invoices** programs (A/R Invoice module).

Select the batch with generated invoice, and go the **Enter Invoices** screen (by clicking the corresponding button).



Here you can see the invoice lines created from the dispatch lines.

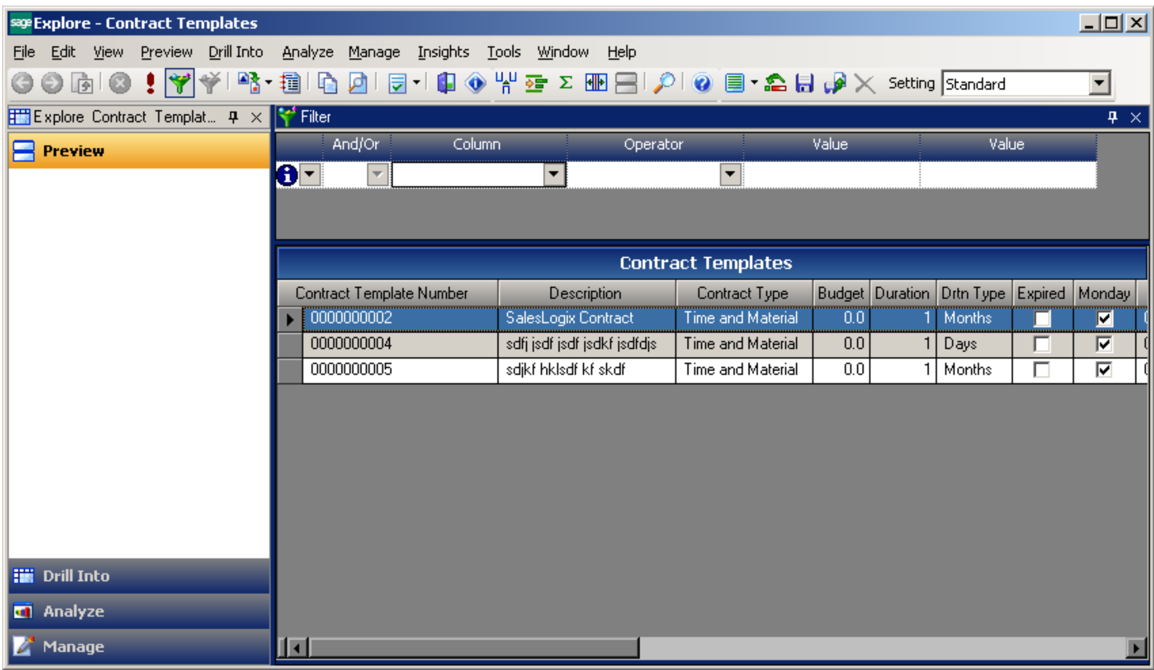


Insights

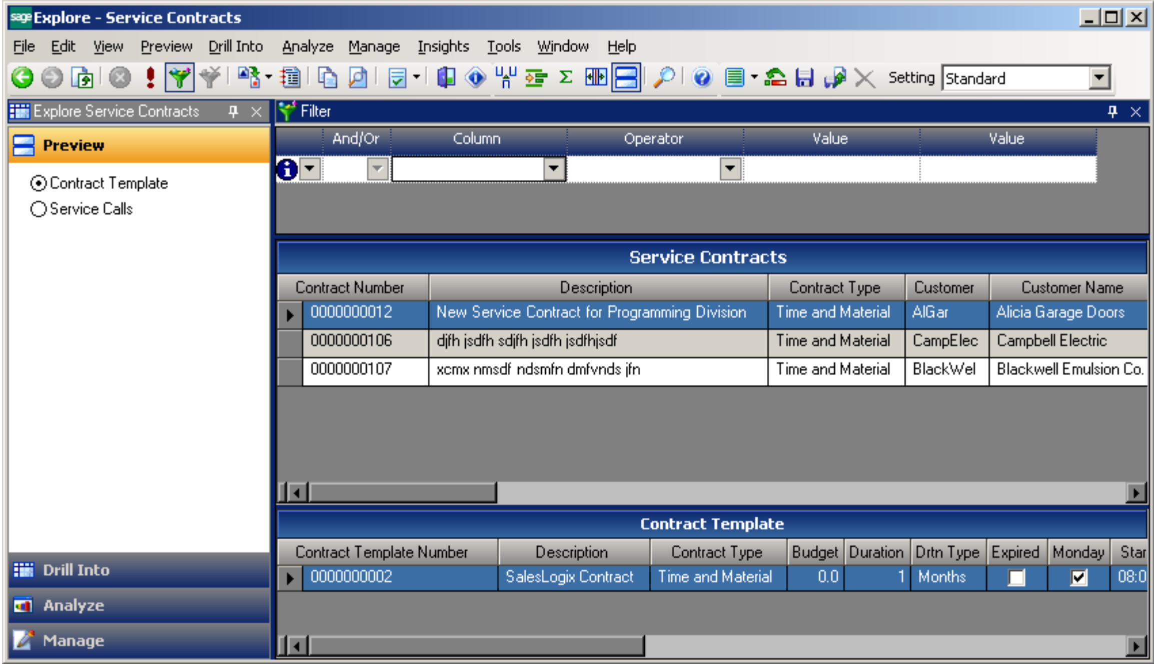
Explore

Use the Insights - Explorer to navigate through service related data, preview and drill into data for the selected data row, and customize and save filter settings for future use. You can also use this feature to group tasks and inquires.

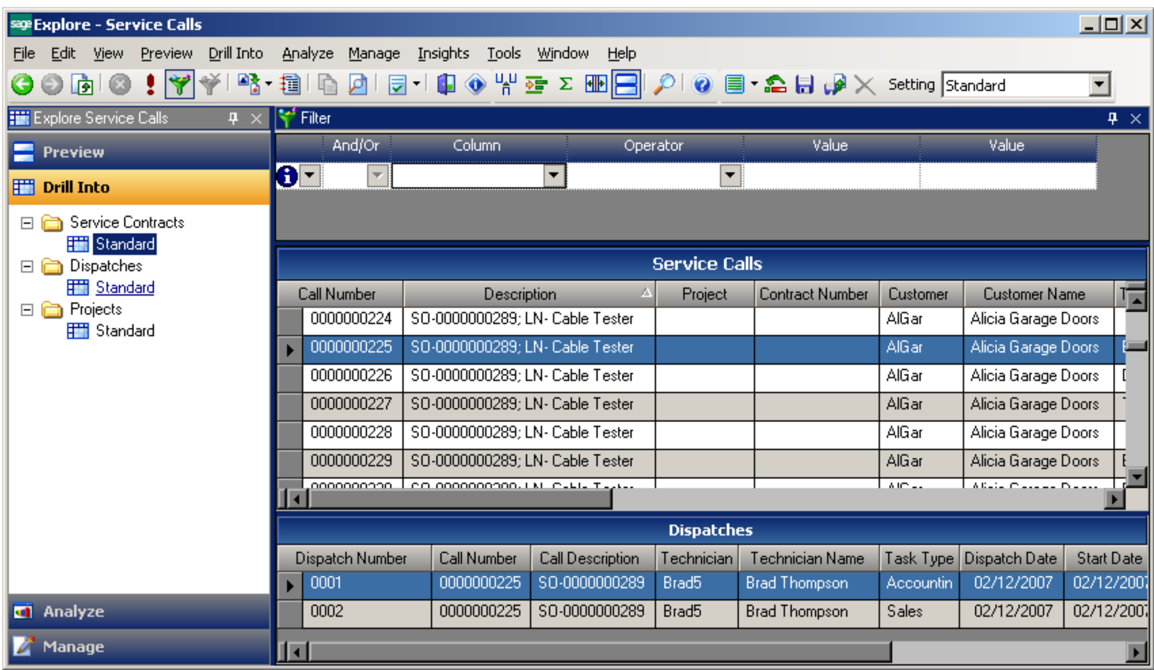
Contract Template



Explore – Service Contract

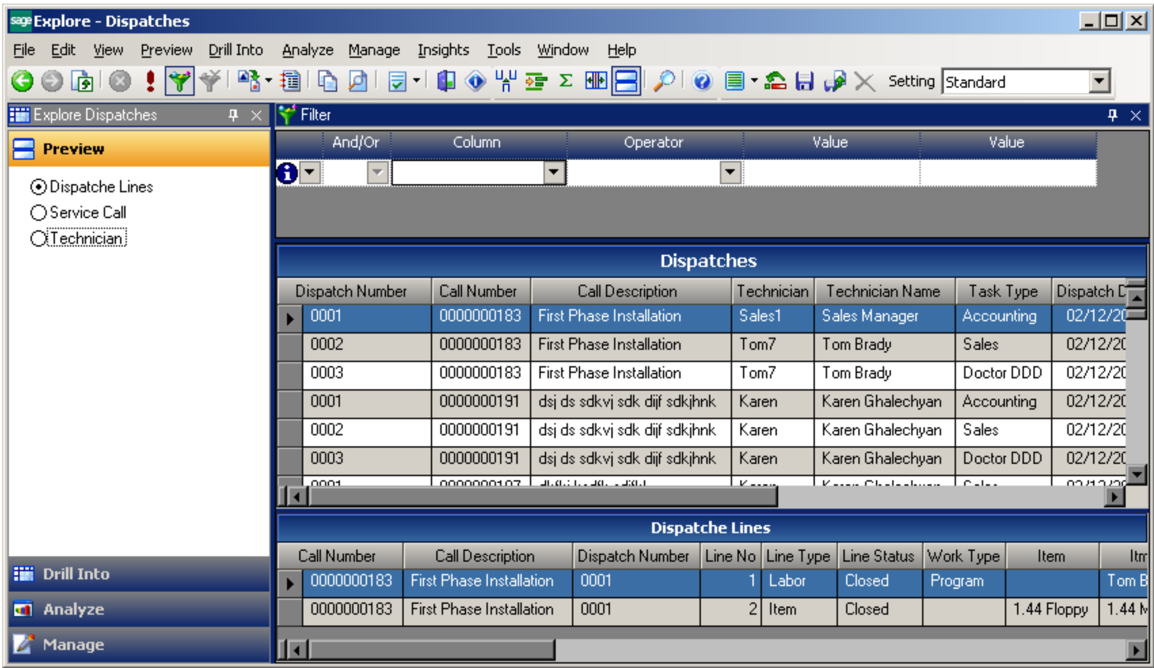


Explore – Services Calls

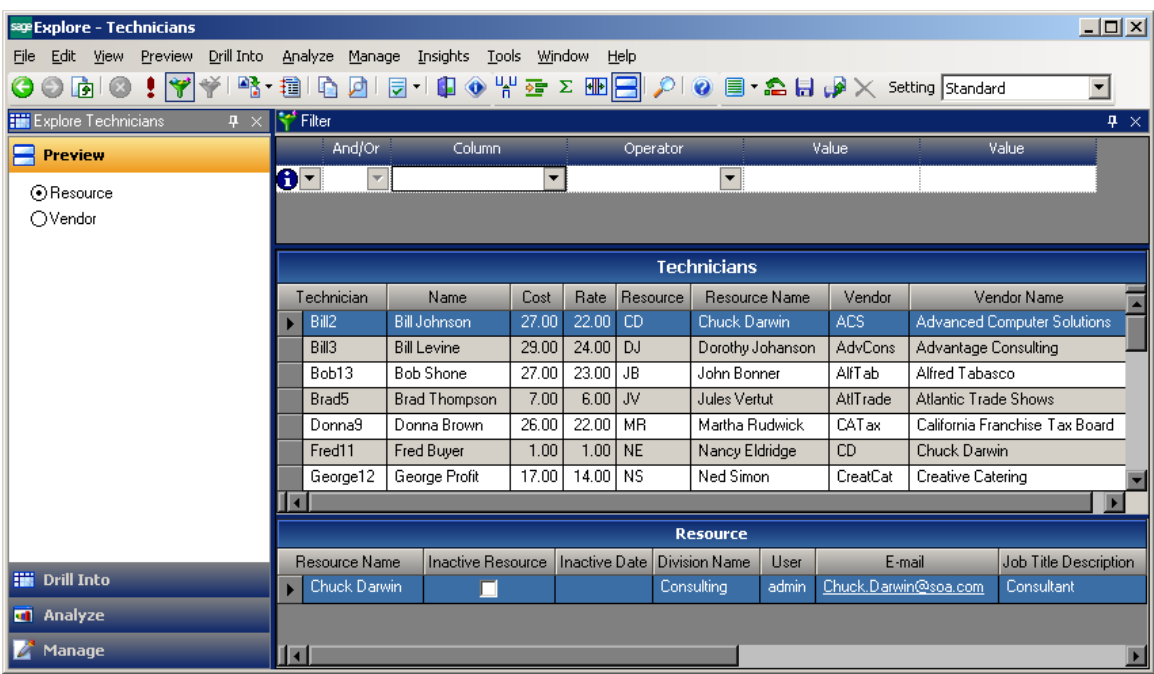


 Created 6/22/2007 17:06 A6/P6 Last Updated 6/22/07 17:06 A6/P6

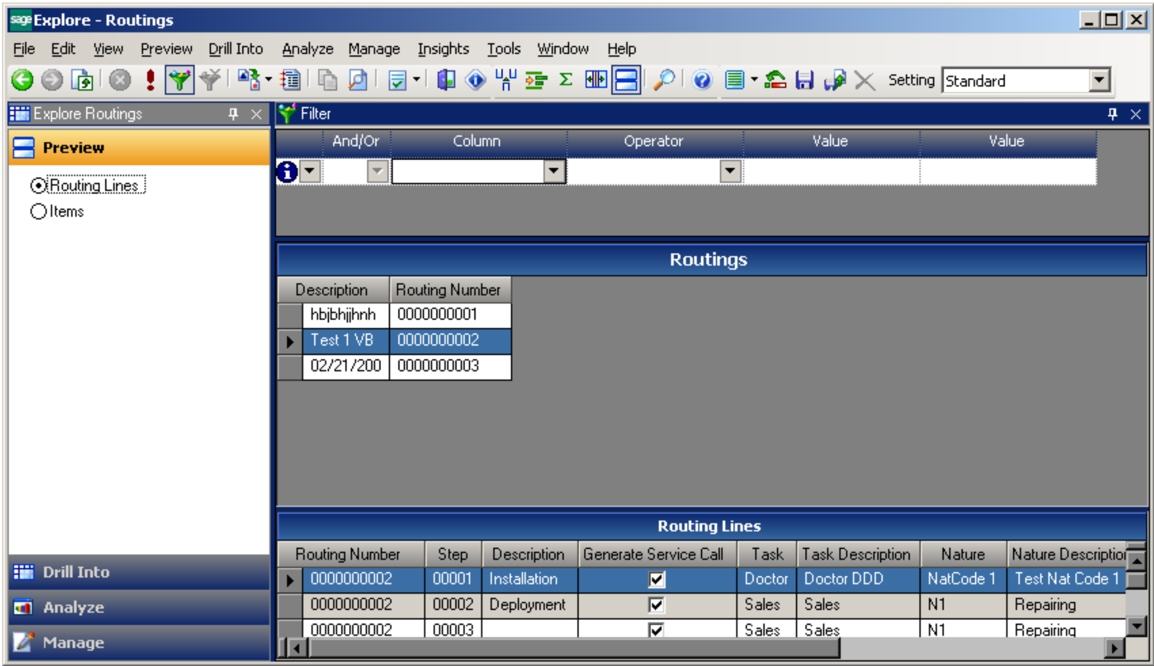
Explore – Dispatches



Explore – Technicians



Explore – Routings



IIG Created Tasks

The **IIG Created Tasks** menu has been created during server setup.
The following **Tasks** are added by this enhancement:

- IIG Enhancement Registration
- IIG Enhancement Maintenance
- Maintain Technicians
- Task Type Maintenance
- Work Type Maintenance
- Nature of Task Maintenance
- Routing Maintenance
- Contract Templates
- Set Up SMP Statuses
- Set Up SMP Options
- Service Contract
- Service Call Entry
- Dispatch Data Entry
- Dispatch Board
- Transaction Generation
- BI Contract Template
- BI Service Contracts
- BI Service Calls
- BI Dispatches
- BI Technicians
- BI Routings

By default, the permissions are given to **SysAdmin** security group, if one exists. Otherwise, the permissions are given to **Public** fixed security group.

Use the **Maintain Security Groups** program to give permissions to new **Tasks**, as needed.

