



IIG Service Management Processing For MAS 500

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IIG Enhancements

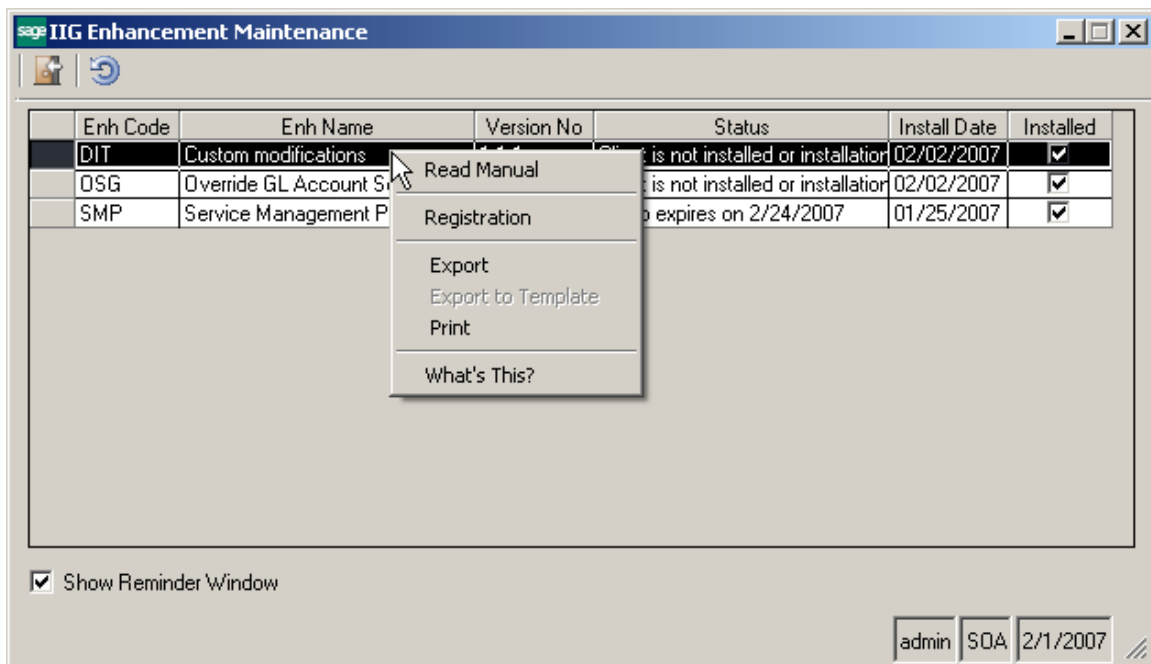
IIG Enhancement Maintenance

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.

The screenshot shows a window titled "IIG Enhancement Registration Form" with a standard Windows interface. The form contains the following fields and elements:

- Enh Code:** A dropdown menu with "ENH" selected.
- Enh Name:** A text box containing "IIG Enhancement Name".
- Customer:** A text box containing "77777777".
- Serial Number:** A text box containing "1234".
- Unlocking Key:** A text box containing "wwwww".
- Manual Registration:** A button with a dotted border.
- Request Message:** A text area containing a long alphanumeric string: "Wb8gyHCDa9yXFSXwg5oLnuB9K+LNhckWllch20QUgHTNhCXkn37uHL4DMN/txMMr62pal8wfSU309RHb4PIrbluOHY1FLxPA0sk/L3I5B2LI4tRV90J7JnpE1ZAG7GSNO2vddHYEsfax1Y0k9YNAeefjF5+YeKbqHX2hesVCSduFETfN9REEk04dh0x61gotMIu9hNt1mlD'VuSQJqGqcnfQSI/vAyQ0aKr00n/5e4EezBRul8QrmKjcfEe+NwDrezb8CHMG38dUhldfmtOYmmBYbdyKv5whBpQs9RbghFNGUImY4BMg64GH740P8vMGxG65/RDrHqJbDT/jpgJ/RzB00wUJ3PgzfI4PM3z4t3uT4LLy9urwrzsNVdGtjvQuma+yMu+jgSd0EVX7/jU+5fuORA/PiMefi66vbhqbQUFF7s5DrypXu4gjDeklb1DtfRMPcspSpFG+cCii5eew==".
- Registration Message:** An empty text area.
- Footer:** A status bar showing "admin", "SOA", "06/05/2004", and a help icon.

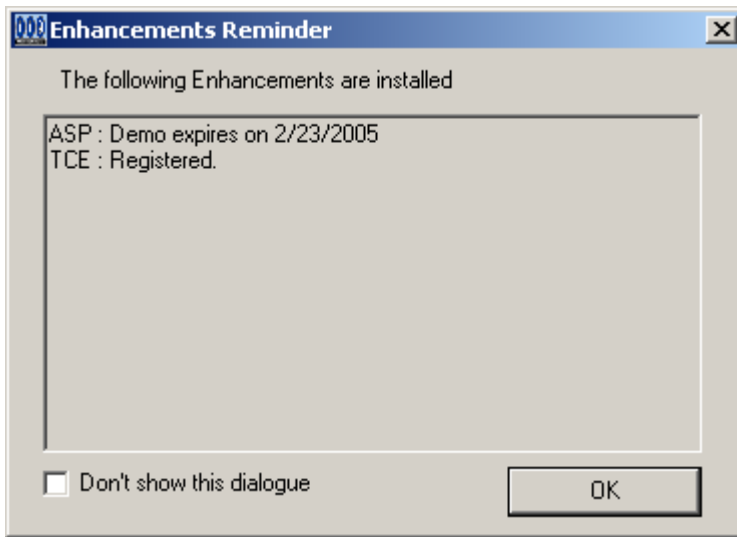
From the **Enh Code** drop-down box select the enhancement to be registered.

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.

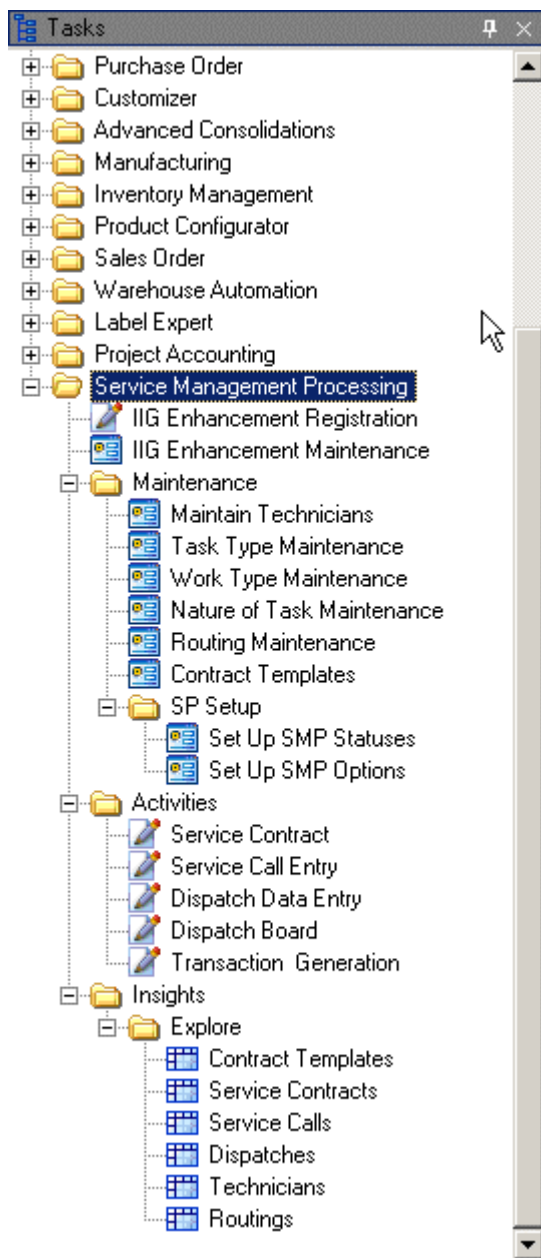
Technicians are dispatched using the **Dispatch Data Entry** program. This program allows for entry of parts to be used, actual parts and labors used and roll of the information into the **Project Accounting** module.

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.



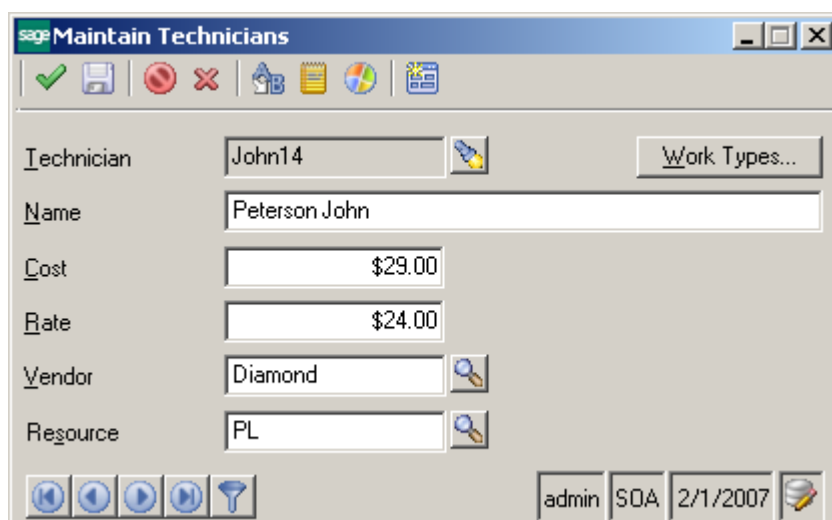
Maintenances

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.

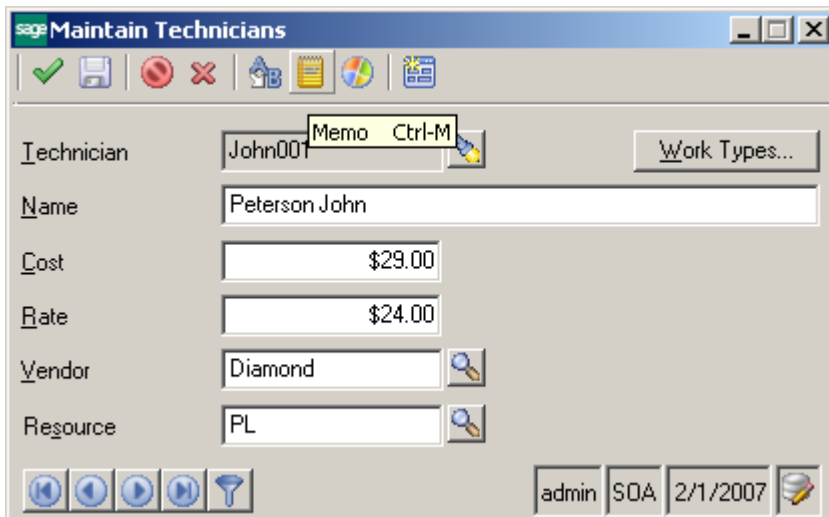
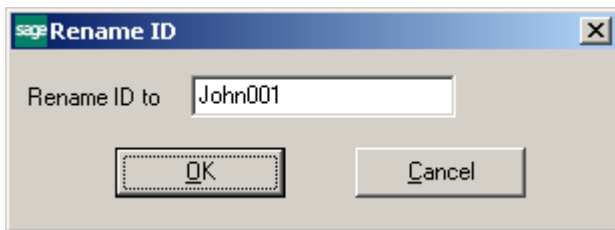
Enter the **Last and First Names** in the **Name** field.

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

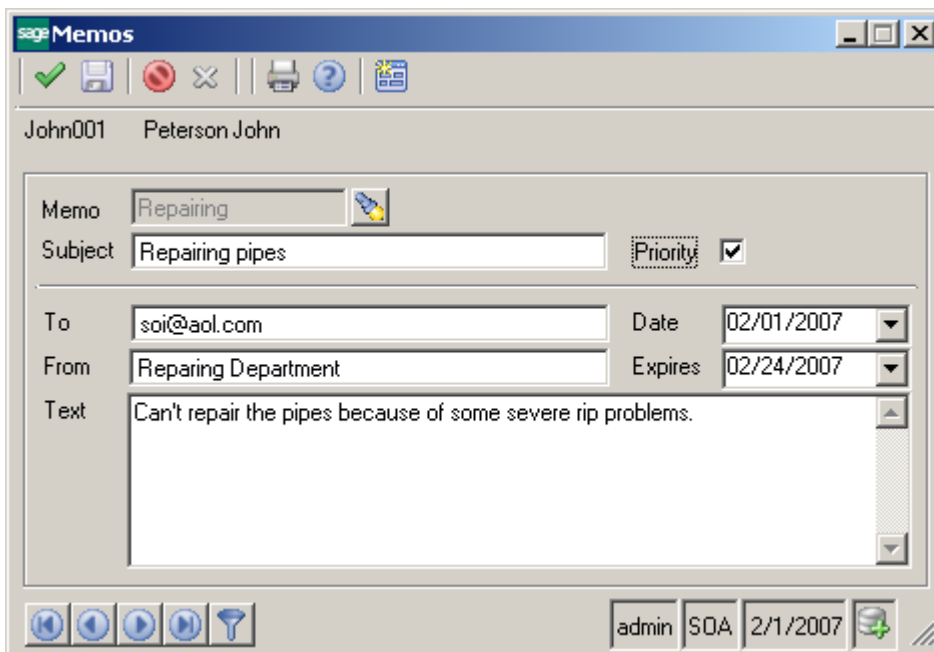
The **Vendor** field sets the connection between the Technician and Vendor that can be used later in invoices.

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.

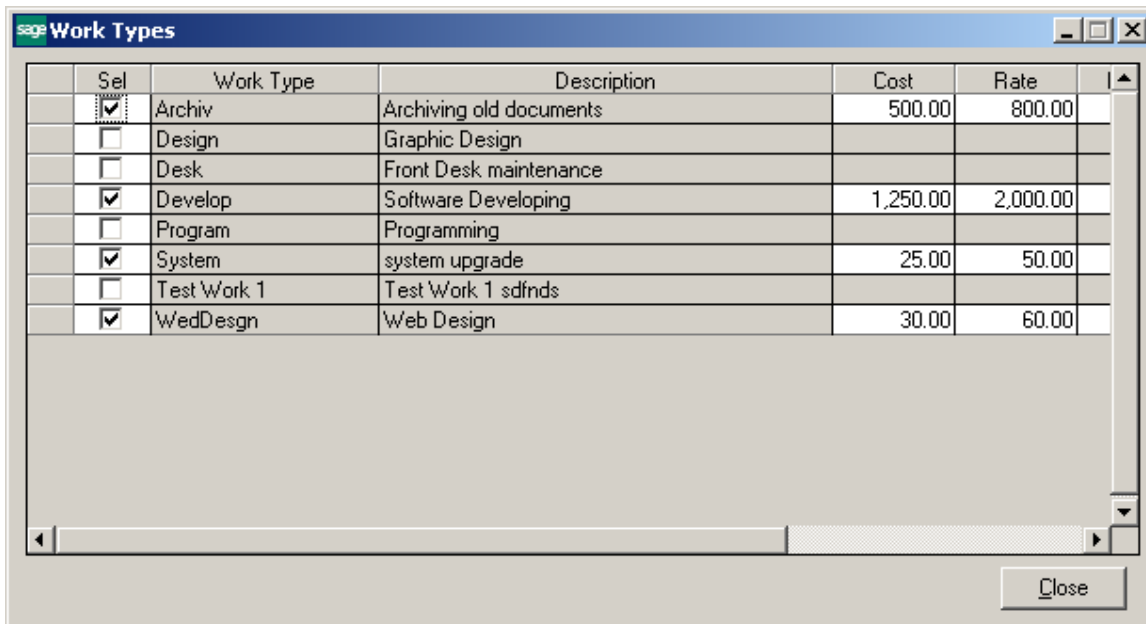
You can rename the **Technician ID** by clicking the **Rename ID** button on the top menu.



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

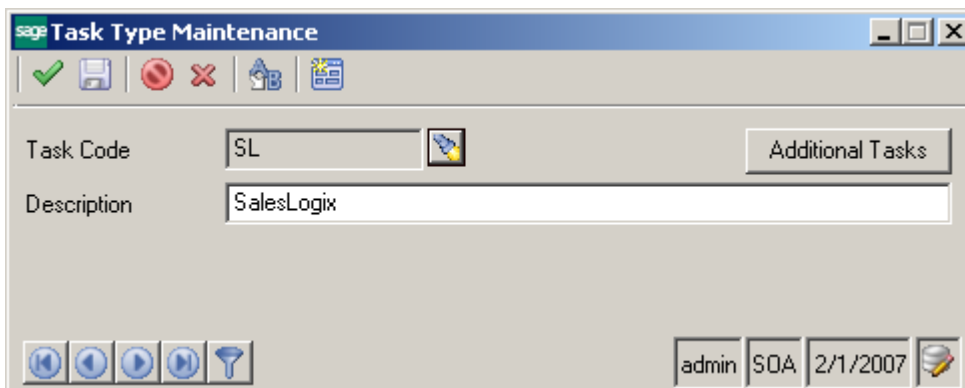


Press the **Work Type** button to select the technician qualification information using the existing skills defined in the **Work Type Maintenance** program.



Task Type Maintenance

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

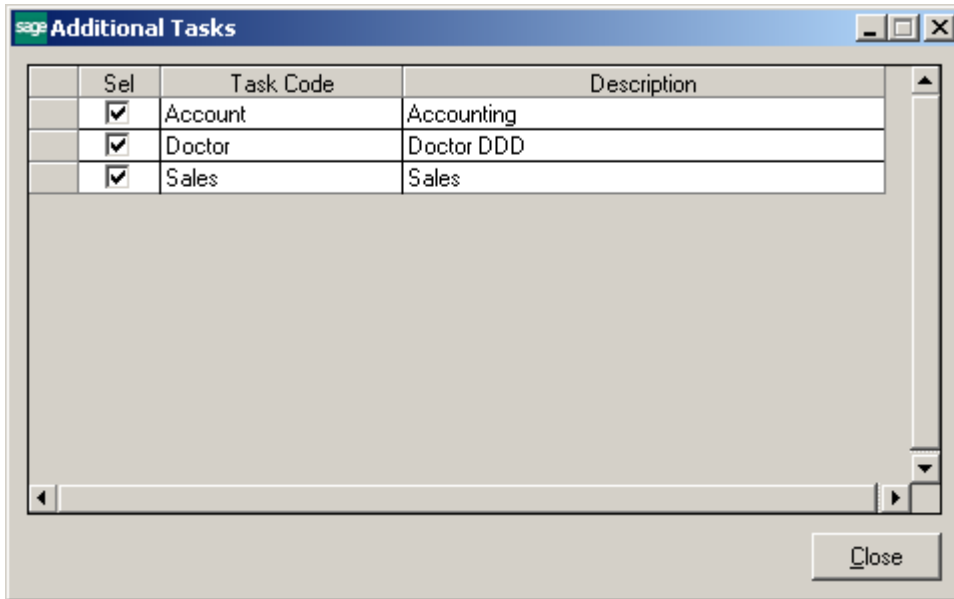


Enter the **Task Code** and its **Description** in the corresponding fields.

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.

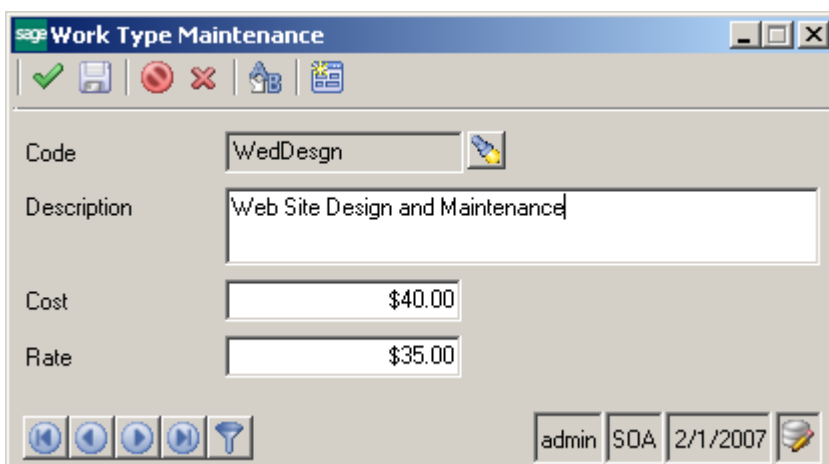
For adding additional tasks, click the **Additional Tasks** button. In the opened screen you can select the tasks you want to be created along with the selected Task Type.



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.



The screenshot shows a software window titled "sage Work Type Maintenance". The window has a standard Windows-style title bar with minimize, maximize, and close buttons. Below the title bar is a toolbar with icons for save, delete, and other actions. The main area of the window contains a form with the following fields:

Code	WedDesgn
Description	Web Site Design and Maintenance
Cost	\$40.00
Rate	\$35.00

At the bottom of the window, there is a status bar with the text "admin SOA 2/1/2007" and a save icon.

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.

Task Code: Sales

Nature Code: N1

Description: Repairing

Tech ID: Tom7

Required Work Types...

admin SOA 2/1/2007

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.

Sel	Work Type	Description	Level
<input type="checkbox"/>	Archiv	Archiving old documents	
<input type="checkbox"/>	Design	Graphic Design	
<input type="checkbox"/>	Desk	Front Desk maintenance	
<input checked="" type="checkbox"/>	Develop	Software Developing	9
<input checked="" type="checkbox"/>	Program	Programming	9
<input type="checkbox"/>	System	system upgrade	
<input type="checkbox"/>	Test Work 1	Test Work 1 sdfnds	
<input type="checkbox"/>	WedDesgn	Web Site Design and Maintenance	

Close

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.

Routing Number: 000000002 Description: Test 1 VB

Step Number: 00001 # Description: Installation

Generate Service Call

Task Type: Doctor Doctor DDD OK

Nature of Task: NatCode 1 Test Nat Code 1 Undo

Related to Work Type Generate Dispatches for additional Task Types

Technician: Brad5 Thompson Brad

	Step Num.	Description	Generate Service Call	Task Type	Nature of Task
1	00001	Installation	<input checked="" type="checkbox"/>	Doctor	NatCode
2	00002	Deployment	<input checked="" type="checkbox"/>	Sales	N1
3			<input type="checkbox"/>		

admin SOA 2/12/2007

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.

The screenshot shows the Sage Maintain Item window with the Sales tab selected. The window title is "sage Maintain Item". At the top, there are standard window controls and a toolbar with icons for save, delete, print, and help. Below the toolbar, the "Item" field contains "Cable Tester", and the "Short Description" field also contains "Cable Tester". The "Long Description" field contains "Modular Cable Tester".

The main area is divided into several tabs: Main, UOM, Kits, Purchasing, **Sales**, GL Accounts, and Categories. The Sales tab is active and contains two main sections: "Sales" and "Options".

Sales Section:

- Product Line: [Empty]
- Commission Class: Service
- Target Margin: 50.00
- Minimum Gross Profit Pct: 0.00
- Price Sequence: 0
- Product Price Group: [Empty]
- Restocking Rate: 0.000000
- Minimum Sales Quantity: 1.0000
- Default Sales Quantity: 1.0000
- Mandatory Sales Multiple: 1

Options Section:

- Allow Returns
- Allow Drop Ships
- Allow Price Override
- Subject To Trade Discount
- Include On Packing List

Service Processing Section:

- Routing: 0000000002

At the bottom of the window, there are navigation buttons (back, forward, search) and a status bar showing "admin SOA 02/12/2007".

Sales Orders and Quotes

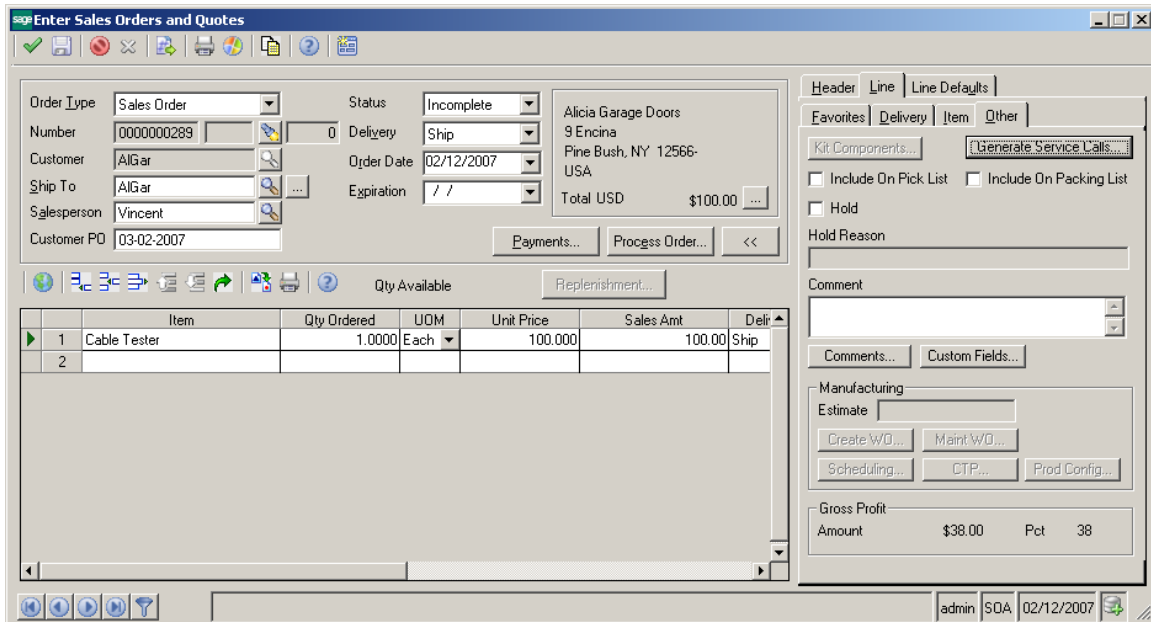
On the **Item** tab of the **Enter Sales Order and Quotes** screen **Routing** and **Service Contract** fields have been added.

Item	Qty Ordered	UOM	Unit Price	Sales Amt	Deliv
1 Cable Tester	1.0000	Each	100.000	100.00	Ship

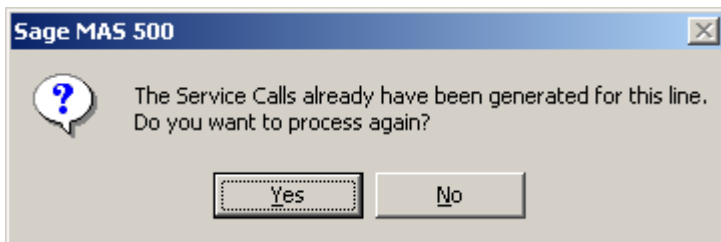
When the selected line item has a routing specified, the routing number will be loaded to the **Routing** read-only field.

You can select the **Service Contract** for which you want 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.

The screenshot shows the 'Service Call Entry' window with the following data:

- Service Call:** 0000000344
- Description:** SO-0000000289; LN- Cable Tester
- Contract Number:** 0000000012
- Entry Date:** 02/12/2007
- Status:** Open
- Customer:** ALGar (Alicia Garage Doors)
- Task Type:** Doctor (Doctor DDD)
- Nature of Task:** NatCode 1 (Test Nat Code 1)
- Primary Technician:** Brad5 (Brad Thompson)
- Item / Serial:** Cable Tester
- Sched Start:** 02/12/2007
- Sched End:** 02/12/2007
- Actual Start:** / /
- Actual End:** / /

Dispatches Table:

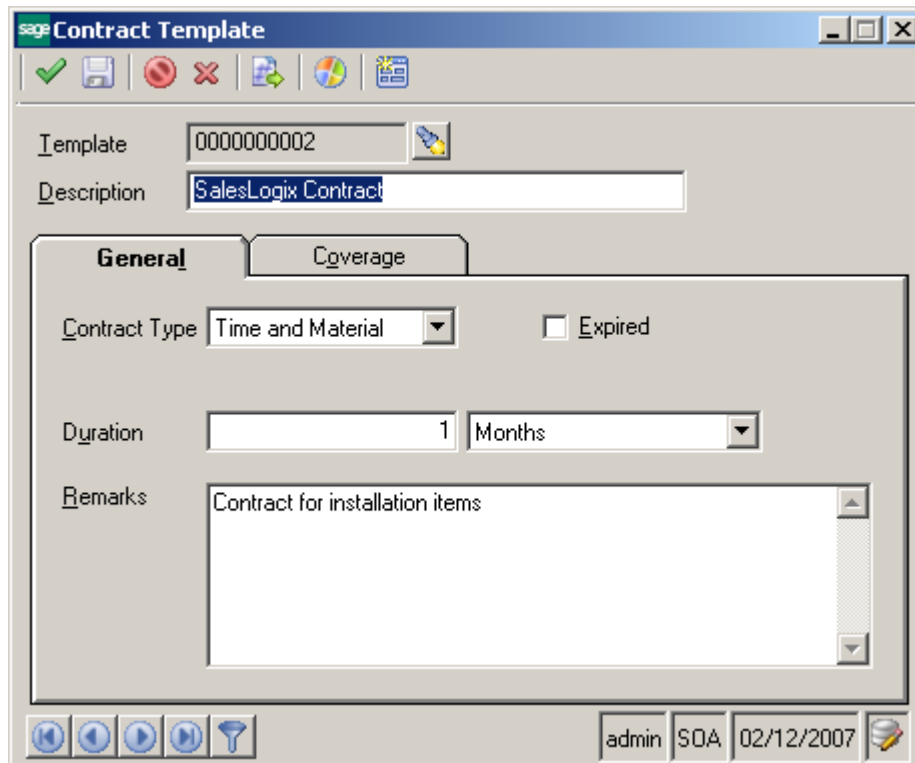
Dispatch No.	Dispatch Date	Technician	Name	Status
0001	02/12/2007	Brad5	Brad Thompson	Open
0002	02/12/2007	Brad5	Brad Thompson	Open

Buttons: Dispatching, Generate Transaction

Footer: admin SOA 02/12/2007

Contract Template

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



The screenshot shows the SAP Contract Template dialog box. The title bar reads "SAP Contract Template". The interface includes a toolbar with icons for save, delete, and other actions. The "Template" field contains the value "0000000002" and the "Description" field contains "SalesLogix Contract". There are two tabs: "General" (selected) and "Coverage". Under the "General" tab, the "Contract Type" is set to "Time and Material" with a dropdown arrow, and the "Expired" checkbox is unchecked. The "Duration" field is set to "1" with a dropdown menu showing "Months". The "Remarks" field contains the text "Contract for installation items". At the bottom, there is a status bar with the text "admin SOA 02/12/2007" and a help icon.

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

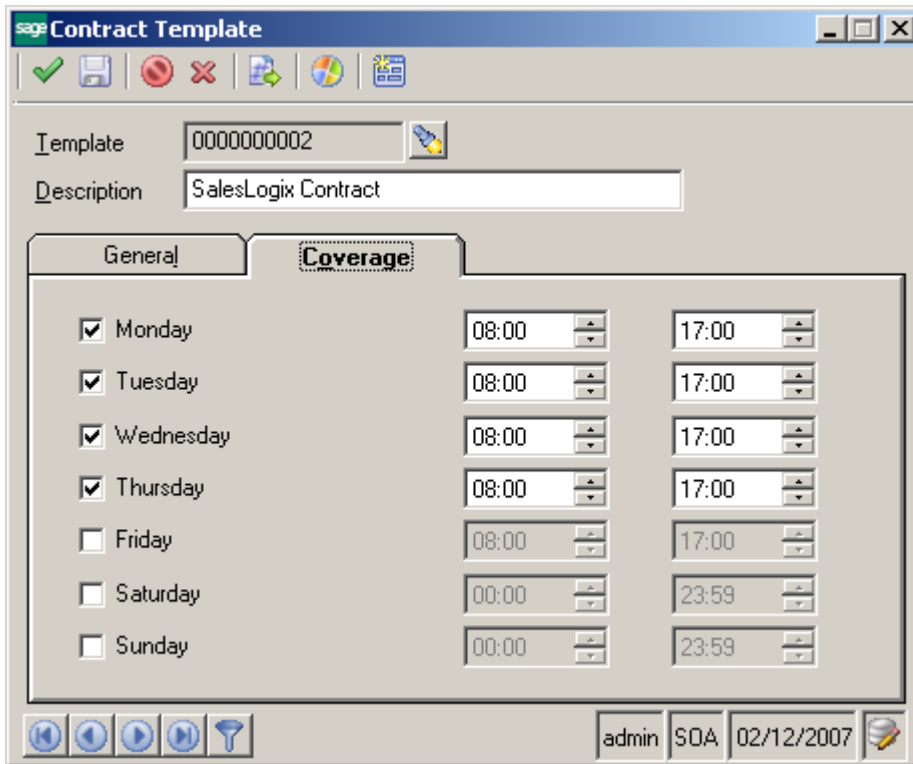
*Note: the **Fixed Budget Contract Type** processing has not been supported yet.*

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.

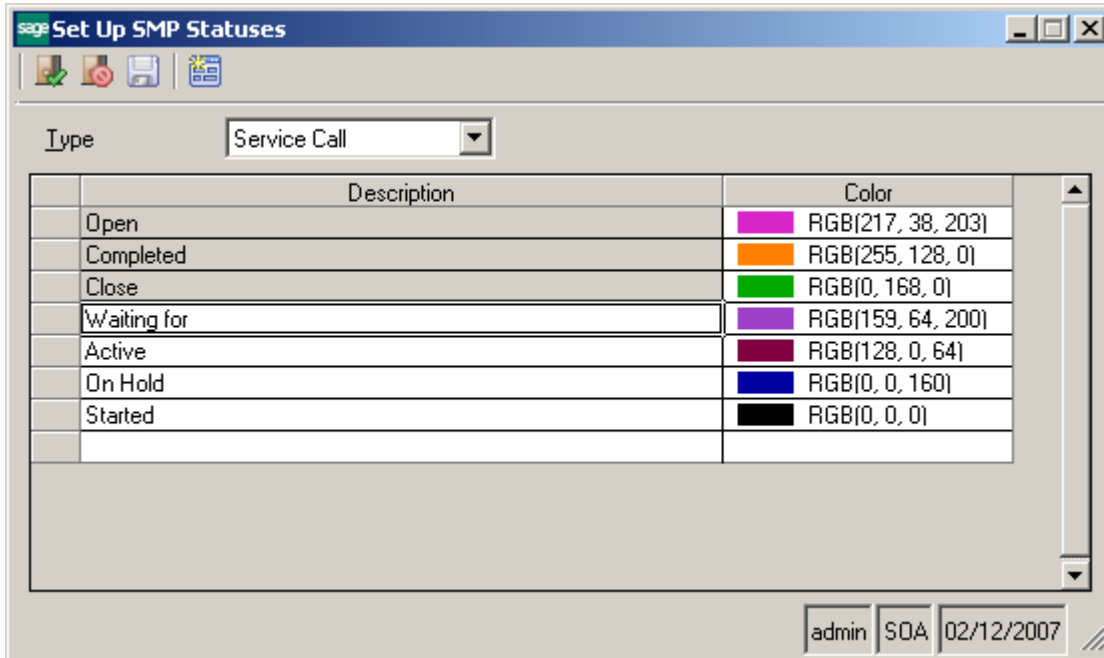
On the **Coverage** tab, the working days and hours that should be covered by the contract are specified.



SP Options

Set Up SMP Statuses

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



The screenshot shows a window titled "Set Up SMP Statuses" with a "Type" dropdown menu set to "Service Call". Below the menu is a table with two columns: "Description" and "Color". The table lists several status options with their corresponding colors and RGB values.

Description	Color
Open	RGB(217, 38, 203)
Completed	RGB(255, 128, 0)
Close	RGB(0, 168, 0)
Waiting for	RGB(159, 64, 200)
Active	RGB(128, 0, 64)
On Hold	RGB(0, 0, 160)
Started	RGB(0, 0, 0)

At the bottom right of the window, there are fields for "admin", "SOA", and "02/12/2007".

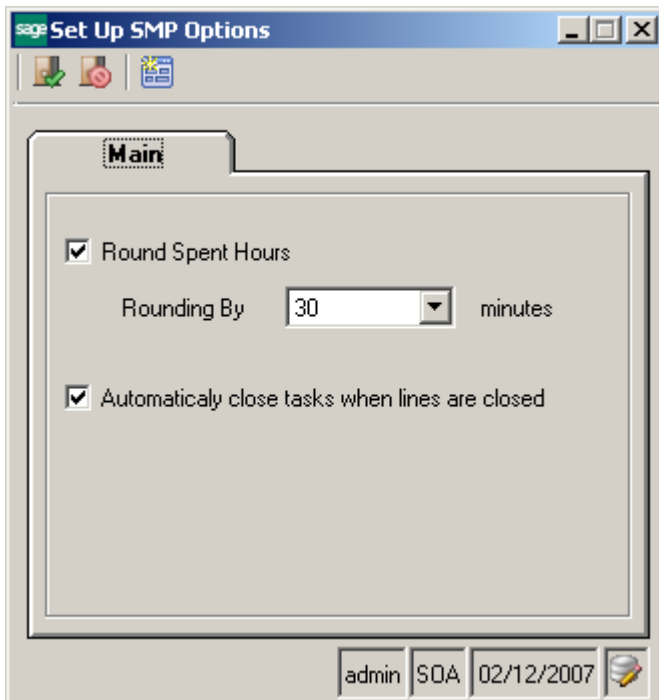
By default **Open**, **Completed** and **Close** statuses are provided and cannot be modified.

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** to 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.

The screenshot shows the 'Service Contract' window with the following fields and values:

- Contract Number: 0000000012
- Start Date: 02/22/2007
- End Date: 03/22/2007
- Customer: AIGar (Alicia Garage Doors)
- Contact: Tom Jackson
- Description: New Service Contract for Programming Division

The 'General' tab is active, showing:

- Template: 0000000002
- Contract Type: Time and Material
- Status: Open
- Technician: Tom7
- Remarks: Service Contract for Programming Division
Contract has been generated for software development on 02/22/2007
- Contract Template Remarks: Contract for installation items

Buttons on the right include: Service Calls, Dispatches, and Generate Transaction. The bottom status bar shows: admin SOA 02/12/2007.

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.

The screenshot displays the 'Service Contract' application window. The 'Coverage' tab is active, showing a table of days and their corresponding start and end times. The days are listed with checkboxes: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday. The start and end times are shown in dropdown menus. To the right of the table are three buttons: 'Service Calls', 'Dispatches', and 'Generate Transaction'. The bottom status bar shows 'admin SOA 02/12/2007'.

Day	Start Time	End Time
<input checked="" type="checkbox"/> Monday	08:00	17:00
<input checked="" type="checkbox"/> Tuesday	08:00	17:00
<input checked="" type="checkbox"/> Wednesday	08:00	17:00
<input checked="" type="checkbox"/> Thursday	08:00	17:00
<input type="checkbox"/> Friday	08:00	17:00
<input type="checkbox"/> Saturday	00:00	23:59
<input type="checkbox"/> Sunday	00:00	23:59

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.

The screenshot shows the 'Service Call Entry' application window. The interface includes the following elements:

- Service Call**: Text input field with a lookup icon.
- Project Number**: Text input field with a lookup icon.
- Contract Number**: Text input field with a lookup icon.
- Description**: Text input field.
- Proj. Name**: Text input field.
- Entry Date**: Date picker (// / /).
- Promised**: Date picker (// / /).
- Status**: Dropdown menu.
- Sched Start**: Date picker (// / /).
- Actual Start**: Date picker (// / /).
- Sched End**: Date picker (// / /).
- Actual End**: Date picker (// / /).
- Customer**: Text input field with a lookup icon.
- Task Type**: Text input field with a lookup icon.
- Nature of Task**: Text input field with a lookup icon.
- Related to Work Type**: Checkbox.
- Primary Technician**: Text input field with a lookup icon and an **Additional Notes...** button.
- Item / Serial**: Text input field with a lookup icon.
- Dispatches**: Table with columns: Dispatch No., Dispatch Date, Technician, Name, Status.
- Dispatching**: Button.
- Generate Transaction**: Button.
- Status Bar**: admin SOA 02/12/2007

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 be 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.

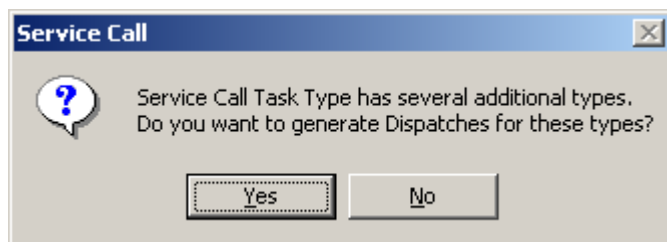
Select the **Related to Work Type** option to load to the Primary Technician lookup list only technicians with corresponding work types of the specified **Nature of Task**.

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.

Service Call Entry

Service Call: 0000000183 Description: First Phase Installation

Project Number: 0000000006 Proj. Name: Prototype

Contract Number: 0000000012 Entry Date: 02/12/2007 Promised: //

Status: Open Sched Start: 02/12/2007 Actual Start: //

Sched End: 02/12/2007 Actual End: //

Customer: AlGar Alicia Garage Doors

Task Type: SL SalesLogix

Nature of Task: SL Bill Sales Billing

Related to Work Type

Primary Technician: Tom7 Brady Tom Additional Notes...

Item / Serial: 8.4GB Hard Drive 11QAG04 Maxtor 8.4GB Ultra ATA

Dispatch No.	Dispatch Date	Technician	Name	Status
0001	02/12/2007	Tom7	Brady Tom	Open
0002	02/12/2007	Tom7	Brady Tom	Open
0003	02/12/2007	Tom7	Brady Tom	Open

Dispatching

Generate Transaction

admin SOA 02/12/2007

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*.

The screenshot shows the SAP Dispatch Data Entry window. The main form includes the following fields:

- Service Call: 0000000183
- Dispatch No.: 0001
- Starting: 02/12/2007
- Ending: 02/12/2007
- Type: Account
- Technician: Tom7
- Status: Open

The 'Lines' section contains a table with the following data:

Line	Item	Technician	Description	UOM	Start Date	Status
1						

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.

The screenshot shows the SAP Dispatch Data Entry window. The 'Lines' tab is active, displaying the following fields and values:

- Line Type: Labor
- Line Status: Open
- Item/Technician: Tom7
- Work Type: (empty)
- UOM: Hour
- Starting: 02/12/2007, 20:00
- Billed Hours: 17.00
- Unit Price: 30.000
- Ending: 02/14/2007, 23:59
- Spent Hours: 18.00
- Unit Cost: 23.0000
- Project: 0000000006
- Phase: (empty)
- Task: (empty)
- Cost Classification: Labor

The table below shows the line data:

Line	Item	Technician	Description	UOM	Start Date	Status
1						

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.

Service Call: 0000000183 First Phase Installation Status: Open

Dispatch No.: 0001 Starting: 02/12/2007 00:00 Time:

Dispatch Date: 02/12/2007 Ending: 02/12/2007 23:59

Type: Account Accounting

Related to Service Call Work Types

Technician: Tom7 Brady Tom Additional Notes...

Lines | Totals

Line Type: Labor Line Status: Open

Item/Technician: Tom7 Brady Tom

Work Type: Program UOM: Hour

Time

Starting: 02/12/2007 20:00 Billed Hours: 17.00 Unit Price: 60.000

Ending: 02/14/2007 14:16 Spent Hours: 15.50 Unit Cost: 50.000

Project: 0000000006 Phase: Analysis Task: Car Rental Cost Classification: Labor

Project Accounting | Line Total

Line	Item	Technician	Description	UOM	Start Date	Sta
1		Tom7	Brady Tom	Hour	02/12/2007	20:
2	1.44 Floppy		1.44 MB Floppy Drive	Each		
3						

admin SOA 02/12/2007

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 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.

The screenshot shows the Sage Dispatch Data Entry application window. The main form contains the following fields:

- Service Call:** 0000000183, First Phase Installation, Status: Open
- Dispatch No.:** 0001, Starting: 02/12/2007 00:00, Time:
- Dispatch Date:** 02/12/2007, Ending: 02/12/2007 23:59
- Type:** Account, Accounting
- Related to Service Call Work Types
- Technician:** Tom7, Brady Tom, Additional Notes...

The **Lines** tab is active, showing details for a labor line:

- Line Type:** Labor, **Line Status:** Open
- Item/Technician:** Tom7, Brady Tom
- Work Type:** Program, **UOM:** Hour
- Time
- Starting:** 02/12/2007 20:00, **Billed Hours:** 17.00, **Unit Price:** 60.000
- Ending:** 02/14/2007 14:16, **Spent Hours:** 15.50, **Unit Cost:** 50.0000
- Sales Amount:** 1,020.000, **Cost Amount:** 775.000
- Buttons: OK, Undo

At the bottom, the **Project Accounting** section has the **Line Total** tab selected. Below this is a table with the following data:

Line	Item	Technician	Description	UOM	Start Date	Sta
1		Tom7	Brady Tom	Hour	02/12/2007	20:
2	1.44 Floppy		1.44 MB Floppy Drive	Each		
3						

The bottom status bar shows: admin SOA 02/12/2007

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.

The screenshot shows the Sage Dispatch Data Entry application window. The 'Totals' tab is active, displaying two summary sections: 'Items Amounts' and 'Labor Amounts'.

Service Call Information:

- Service Call: 0000000183 (First Phase Installation) Status: Open
- Dispatch No.: 0001 Starting: 02/12/2007 00:00 Time:
- Dispatch Date: 02/12/2007 Ending: 02/12/2007 23:59
- Type: Account Accounting
- Related to Service Call Work Types:
- Technician: Tom7 (Brady Tom) Additional Notes...

Items Amounts	
Total Costs	\$28.00
Total Sales	\$52.00

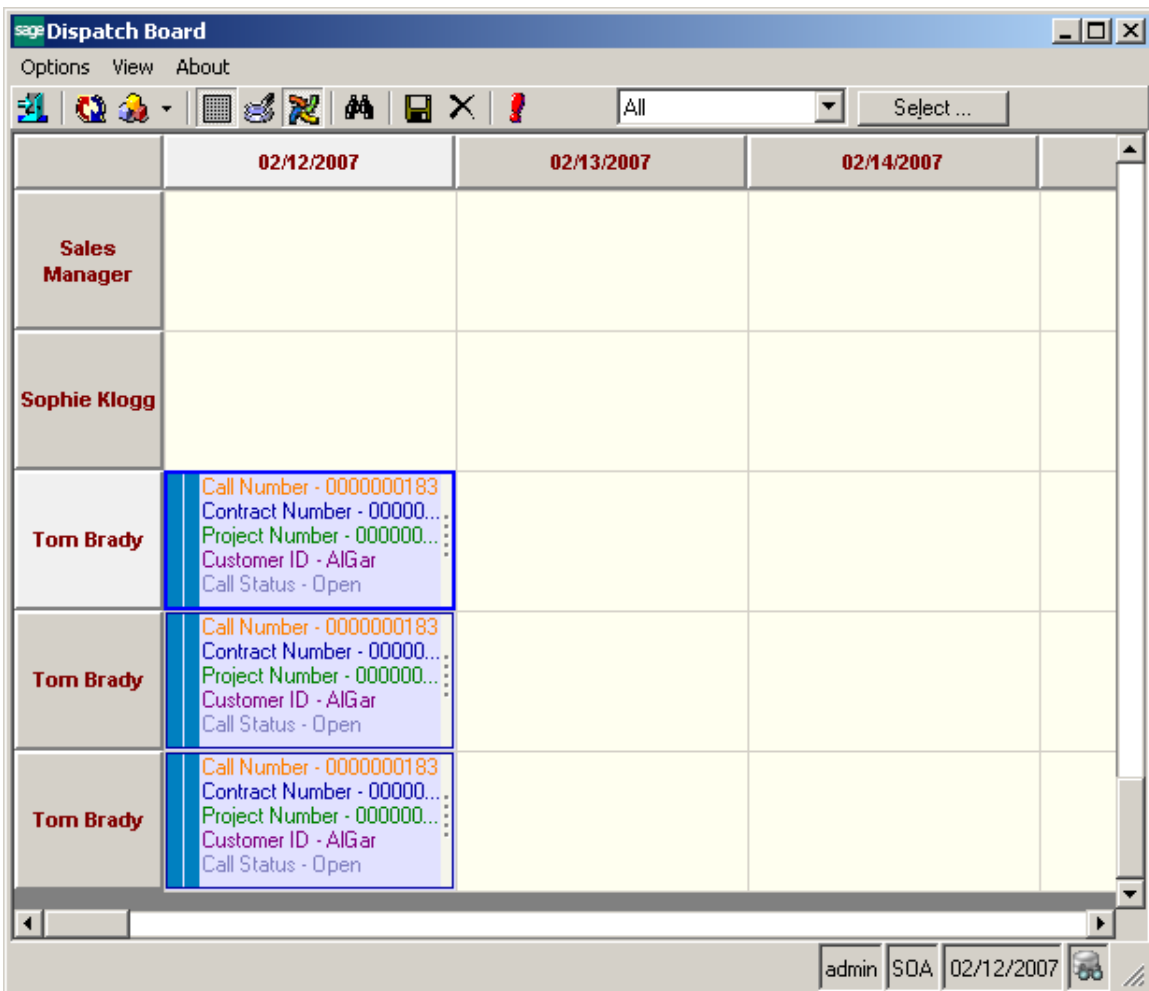
Labor Amounts	
Total Worked Hours	15.50
Total Billed Hours	17.00
Total Costs	\$775.00
Total Sales	\$1,020.00

Footer: admin SQA 02/12/2007

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.

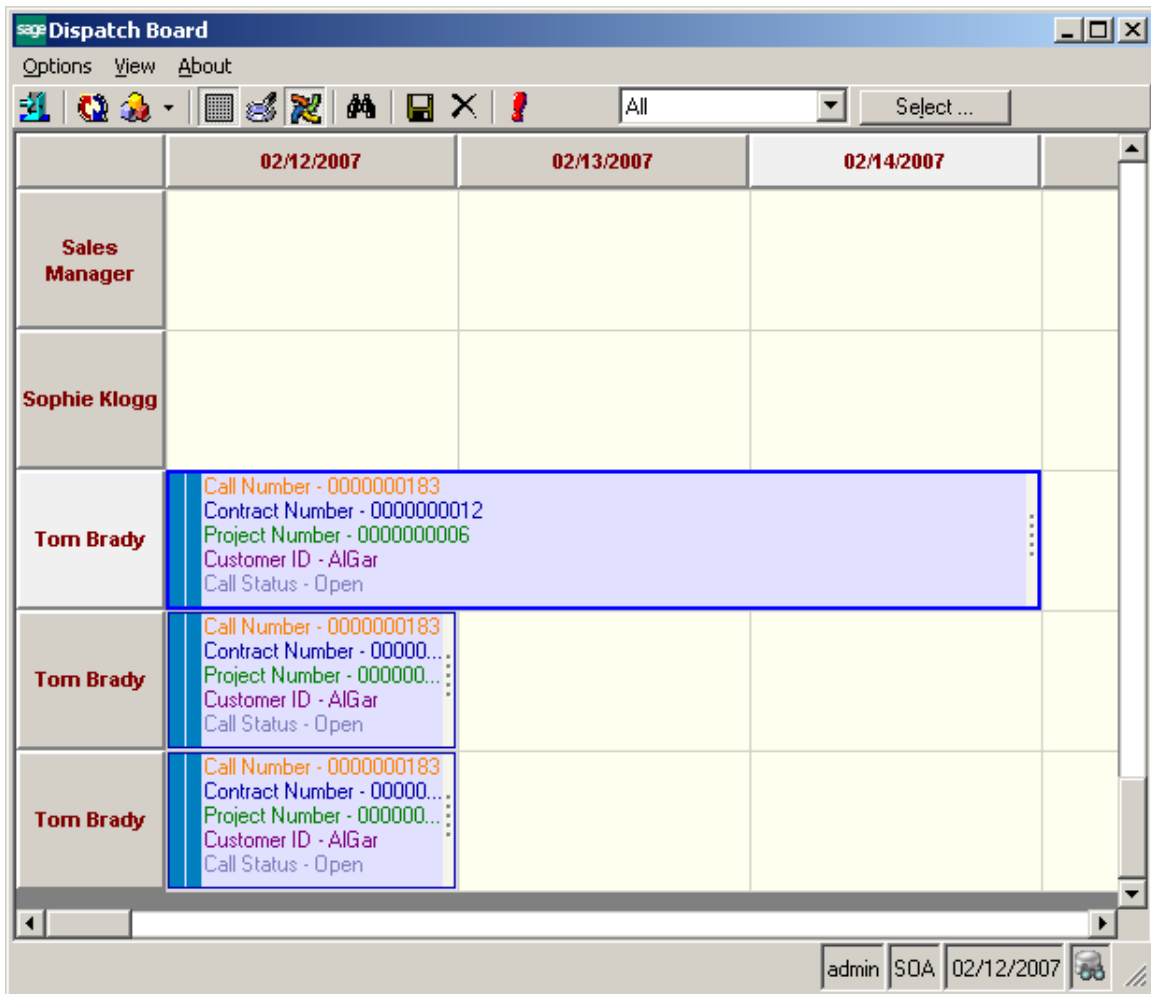
User specified information for each service call or dispatch is displayed in a cell or span of cells. Each type of data in the cell can be color-coded for easier visibility. Also display names of data fields can be changed (for example, shortened). The user can also filter the service call by requesting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



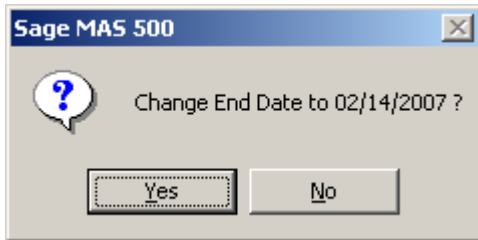
To see the details of the selected Service Call/Dispatch in the right part of the screen, click the Show fields button from the Toolbar.

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).

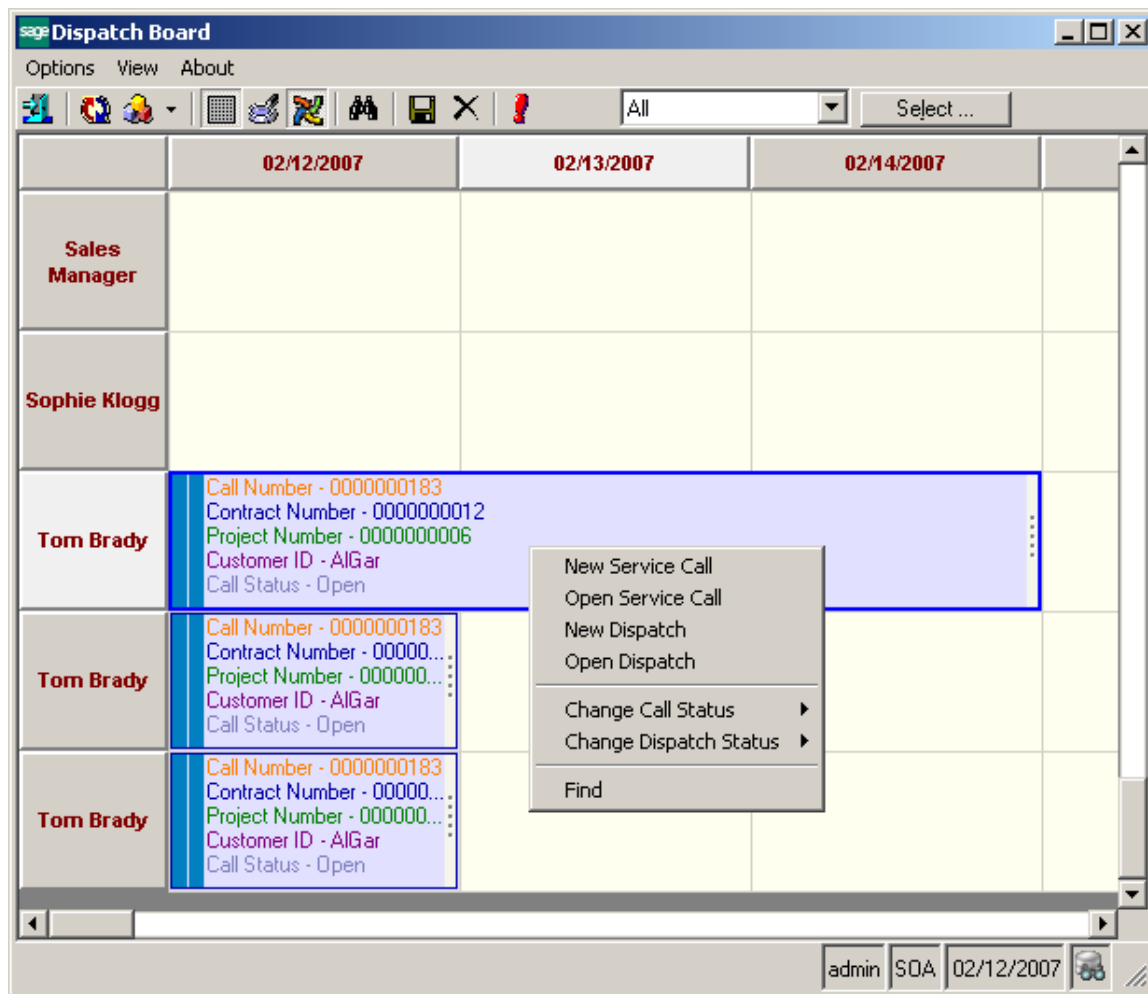


You can change the width of the cells. Click anywhere between the names of Technicians and drag the mouse to the right to increase the width or to the left to decrease it. All the columns will have equal widths when you release the mouse. The number of columns will remain unchanged when you resize the 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**.

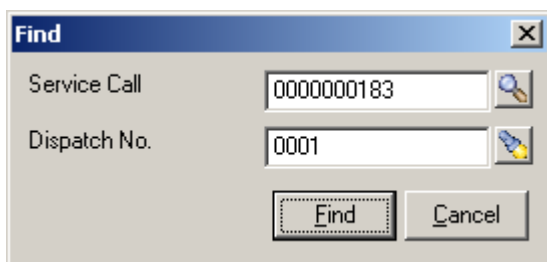
Open Service Call displays the **Service Call Entry** screen for the current task. You can also open the **Service Call Entry** screen by double clicking on the service call/dispatch cell.

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

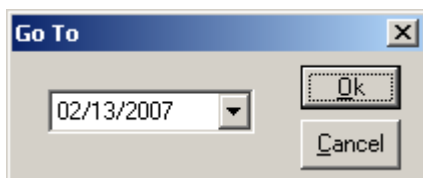
Open Dispatch displays the **Dispatch Data Entry** screen for the current dispatch. If the Dispatch Status is Closed, the Dispatch Inquiry screen is displayed instead. You can also open the Dispatch Data Entry by pressing **Ctrl** on the keyboard and clicking the in the on the service call/dispatch.

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.

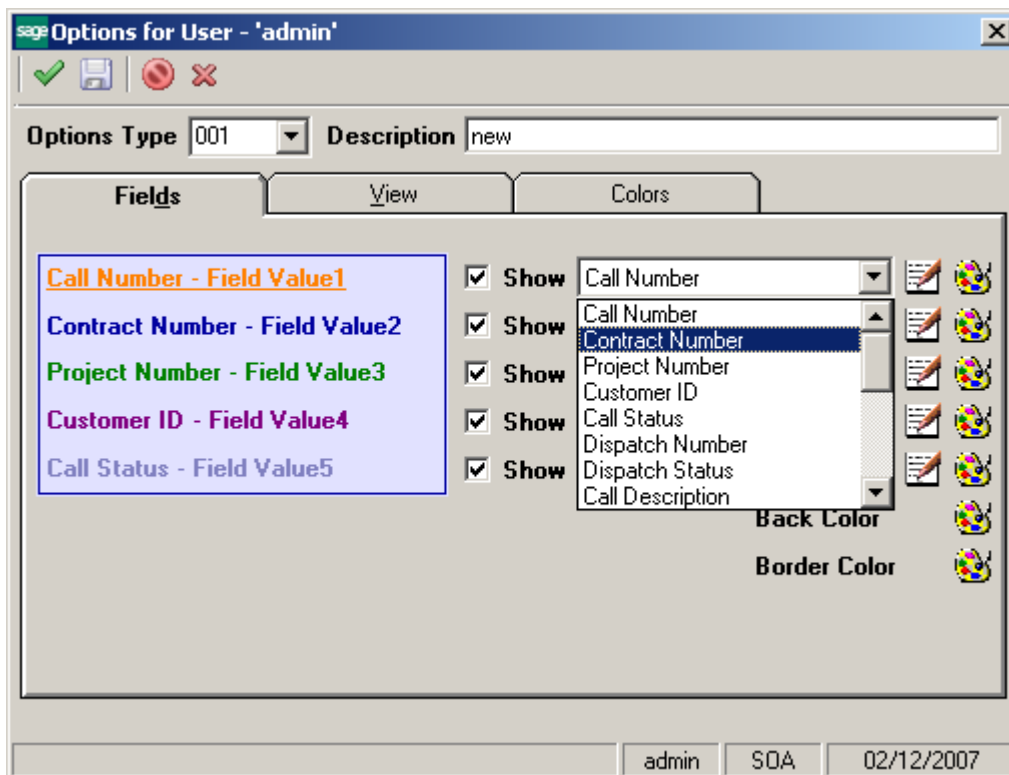
In the **Options** menu, you can select an existing **Options Type**, and **Edit Options** in the **Options for User** dialog box (described later). Current Options Type is indicated with a checkmark.

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.

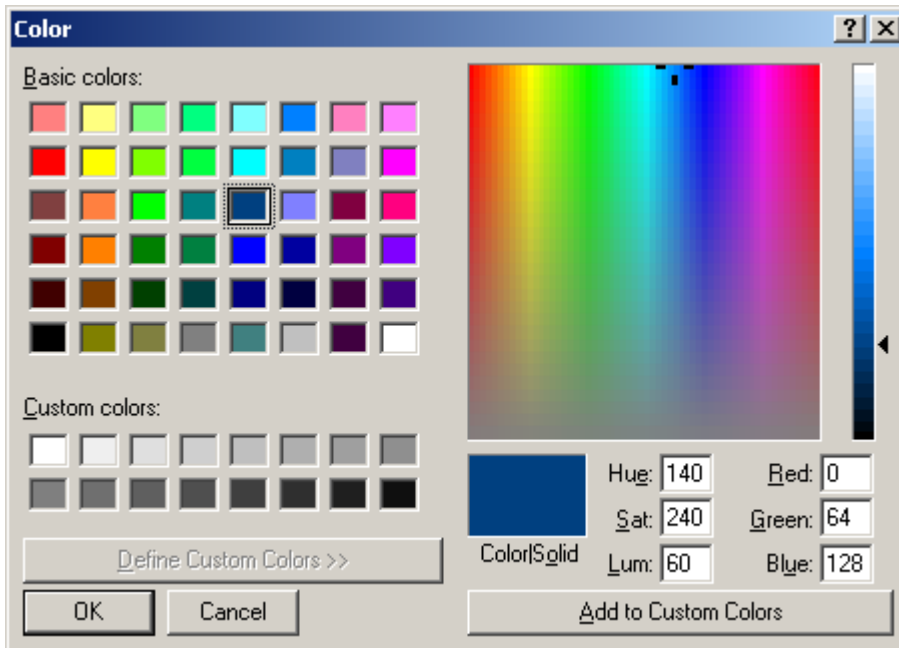
Click the **Fields** tab in the displayed **Options for User** dialog box. You can specify the fields that should be shown on the Dispatch Board cells.



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.

The screenshot shows a dialog box titled "Options for User - 'admin'". At the top, there are icons for save, delete, and refresh. Below that, there are fields for "Options Type" (set to 001) and "Description" (set to new). The dialog is divided into three tabs: "Fields", "View", and "Colors". The "View" tab is active. Under "Show on Startup", there are five checked checkboxes: "Toolbar", "Grid Lines", "Blanks", "Fields", and "By Hours". Next to "Fields" is a dropdown menu set to "Right". Next to "By Hours" is a dropdown menu set to "Hour". The "Appearance" section has "Date axis" set to "Horizontal", "Duplicate option" set to "Vertical", and "Show by End Date" checked. "Show Column Header Text" and "Show Row Header Text" are both set to "Horizontal". The "Columns Header" section has "Width" set to 80 and "Height" set to 30. The "Rows Header" section has "Width" set to 80 and "Height" set to 75. At the bottom, there are three fields: "admin", "SOA", and "02/12/2007".

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**).

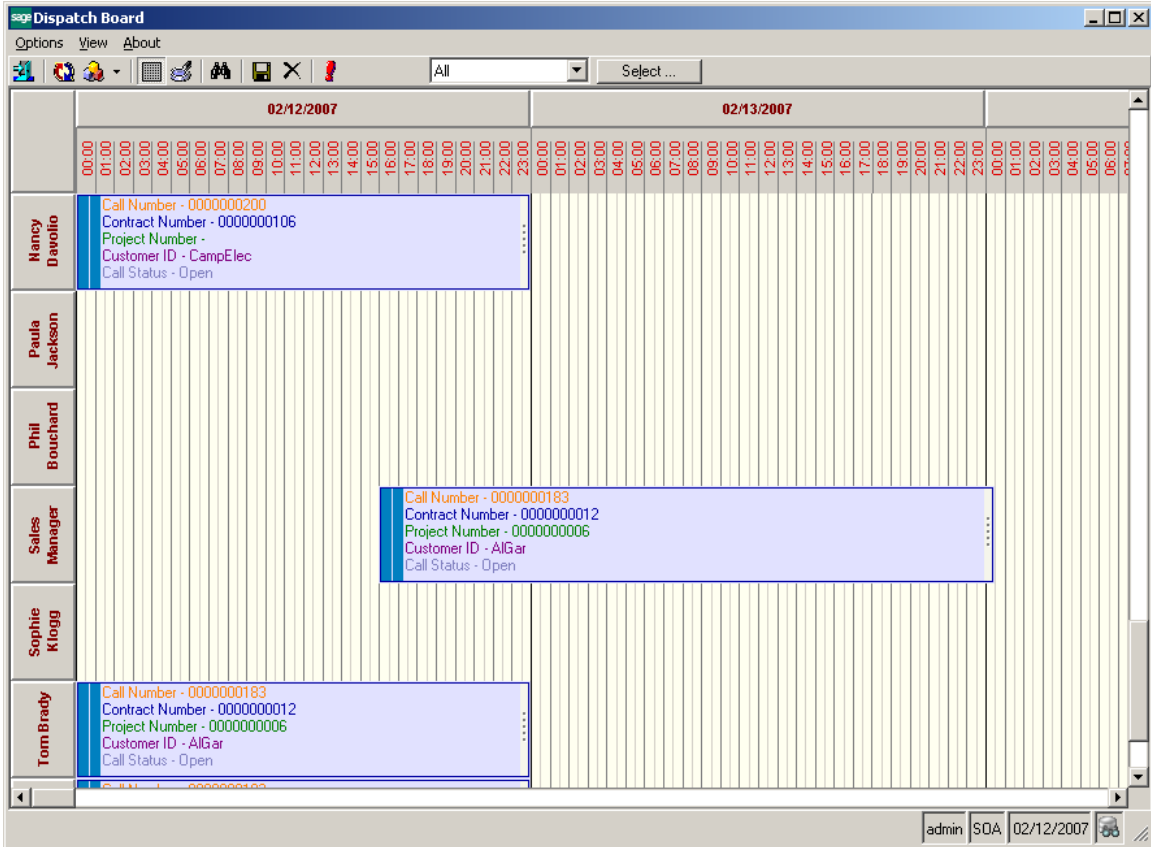
In the **Appearance** section, you can specify whether the **Date Axis** will be placed horizontally or vertically on the Board.

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).

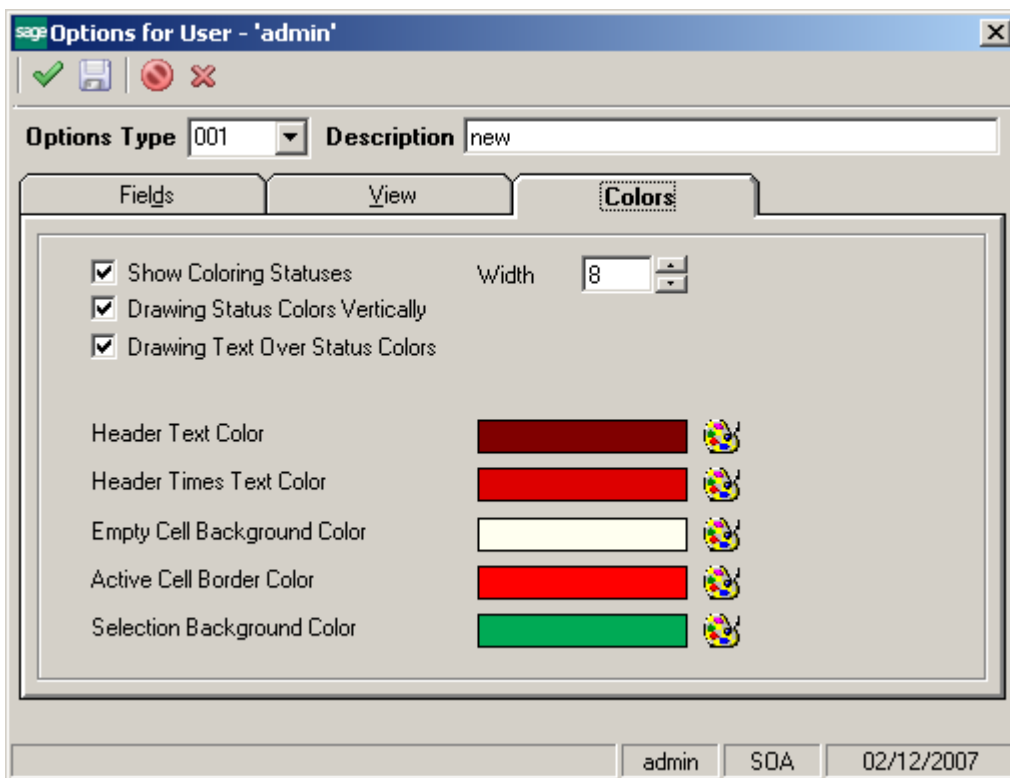
Check the **Show by End Date** option if you want all tasks will be shown till their end date.

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.



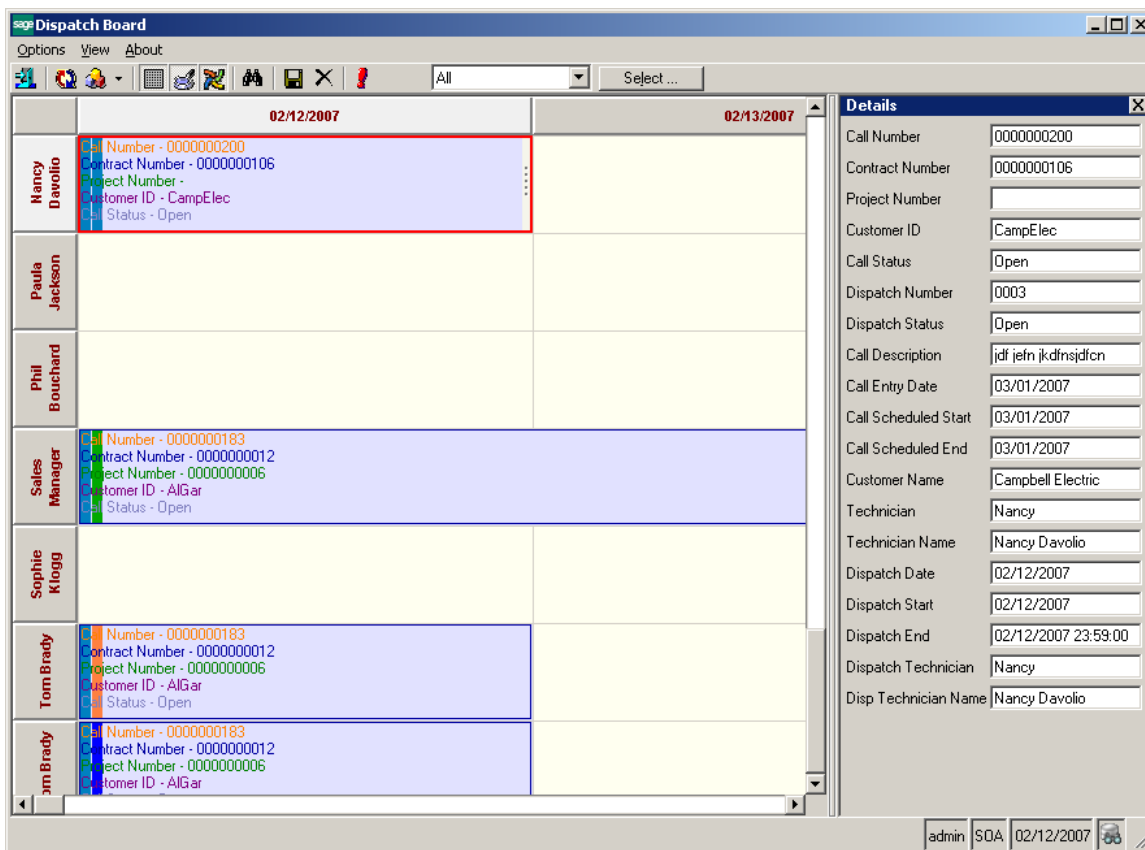
On the **Colors**, you can specify the color related settings.



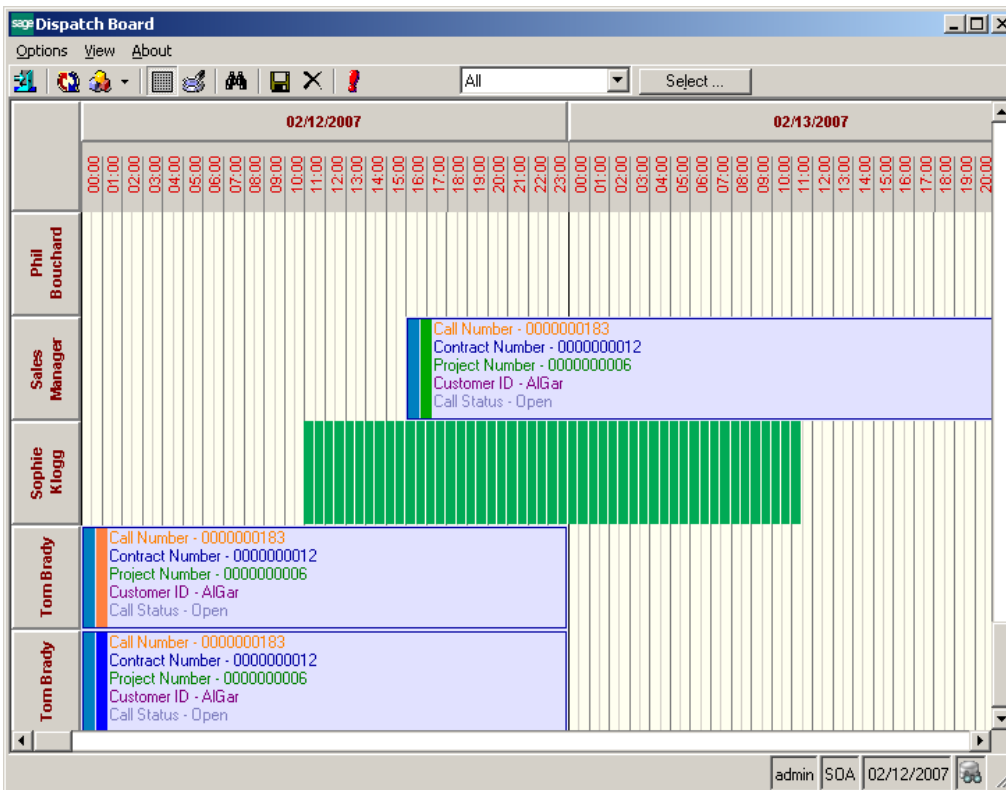
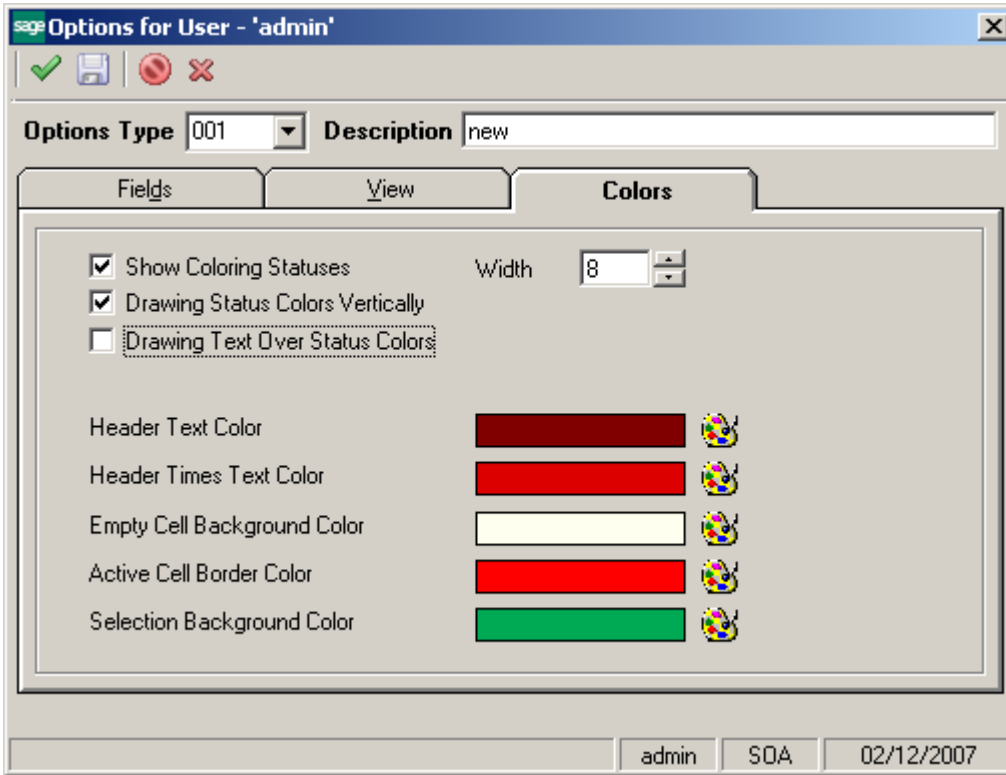
Check the **Show Coloring Statuses** option to display the status colors of the Service Calls/Dispatches on the Board (the status colors specified in the **Set Up SMP Statuses** screen). You can specify the width of the displayed status color area in the **Width** field.

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.



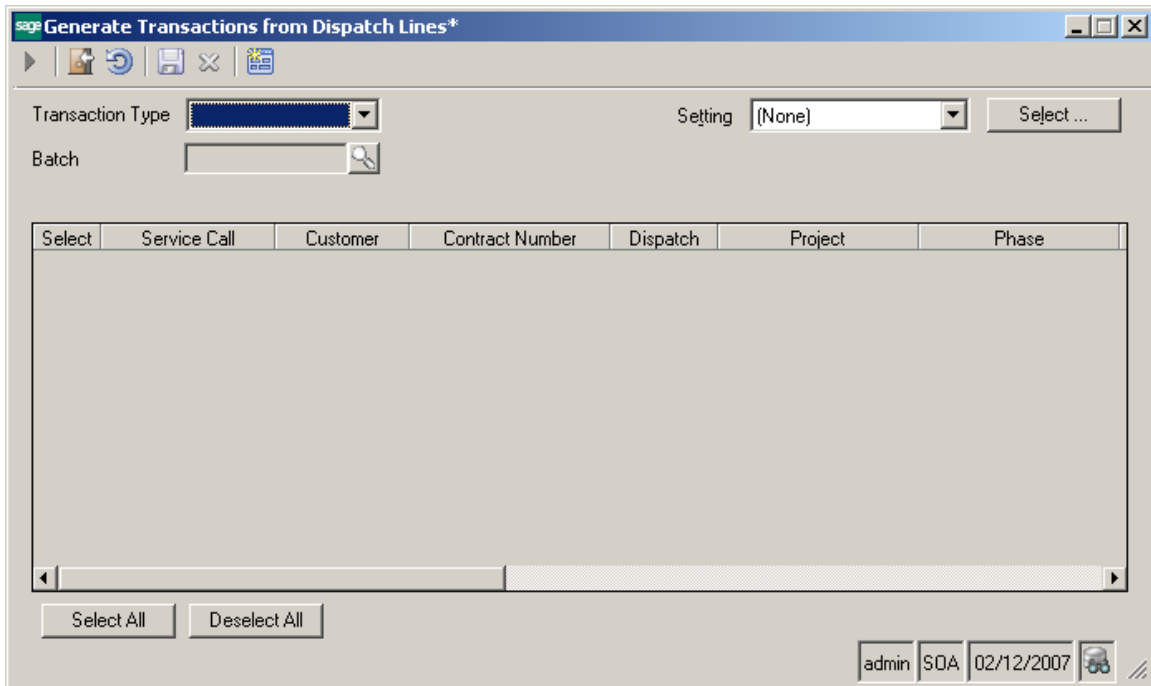
You can also specify the **Header Text Color** for headers, **Header Times Text Color** for Times, **Empty Cell Background Color**, **Active Cell Border Color**, and the **Selection Background Color** for selected cells.



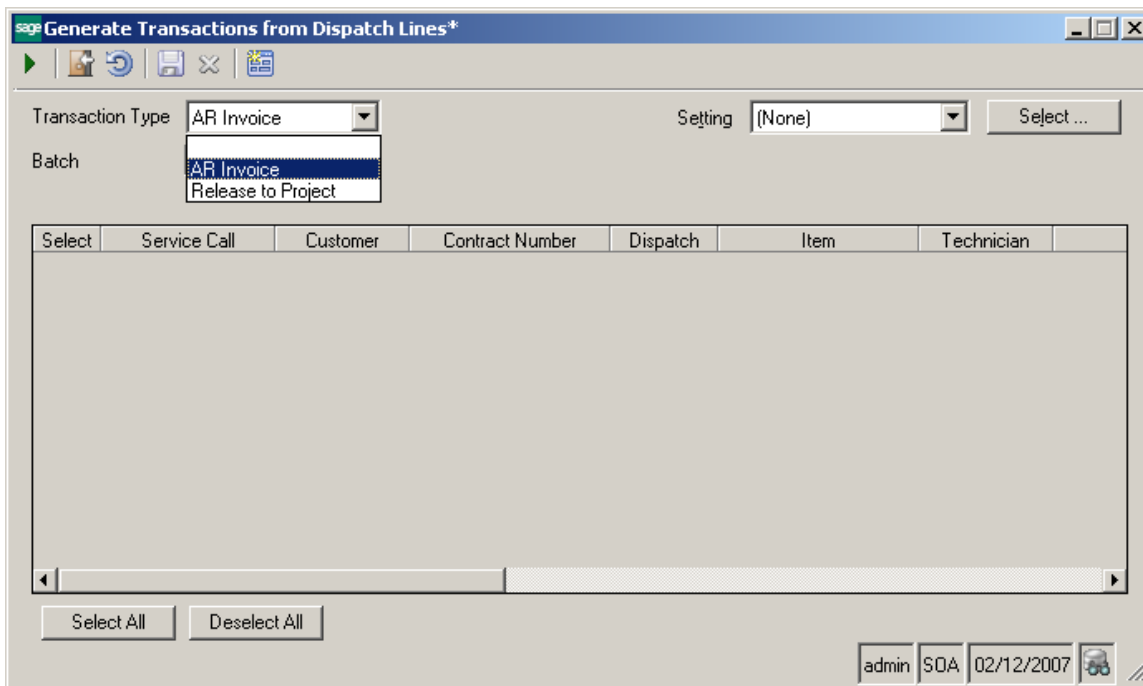
Transactions Generation

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.



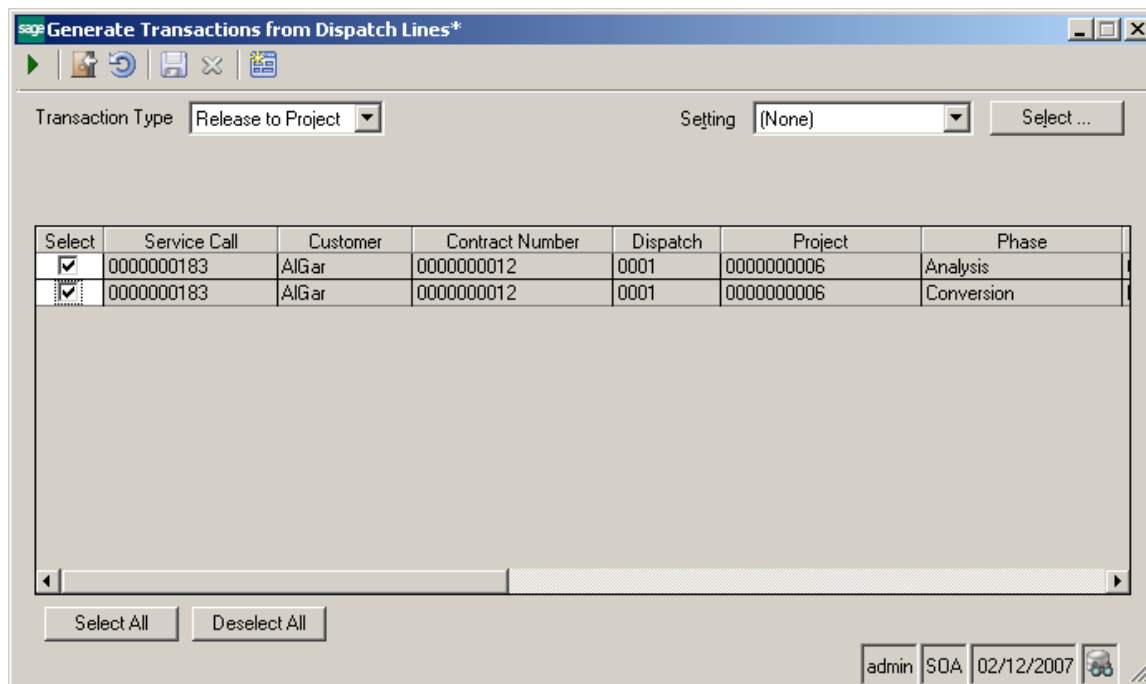
In case of *A/R Invoice* **Transaction Type**, you can specify also the **Batch** number for generated A/R invoices. For **Release To Project** Transaction Type the Batch field is not available. .

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

Field	Condition
Service Call	All
Dispatch Number	All
Customer	All
Warehouse	All
Item	All
Primary Technician	All
Dispatch Technician	All
Contract Number	All

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.

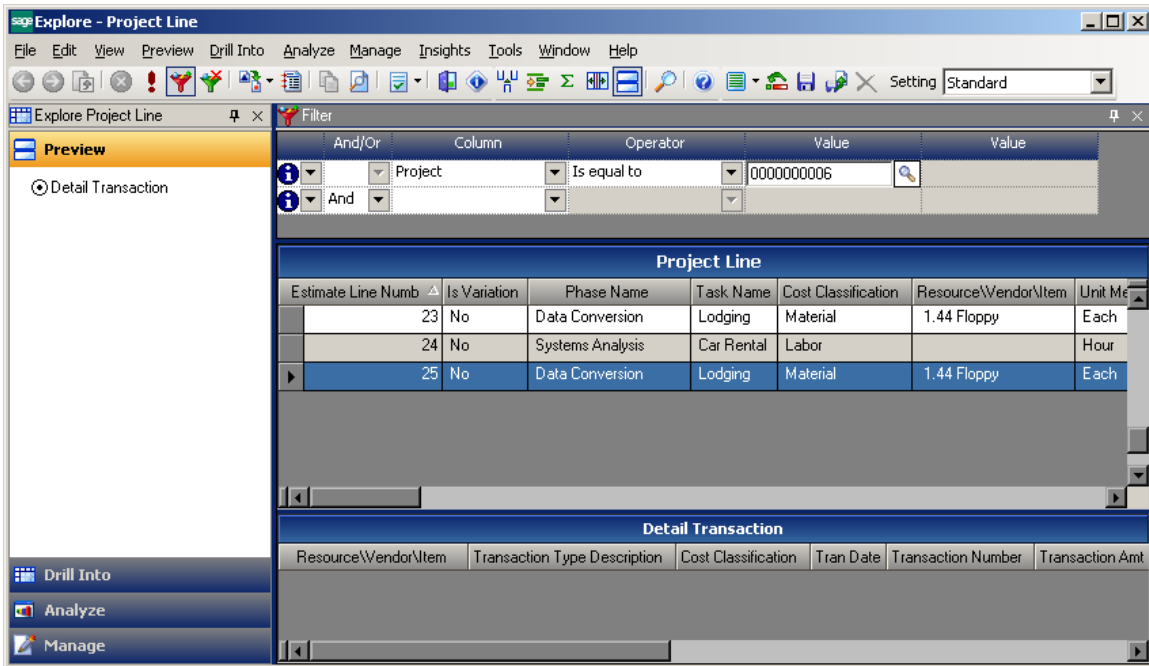
Note: In order to generate transactions the dispatches status should be completed. Otherwise, no selection will be done and you cannot generate transactions.



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.

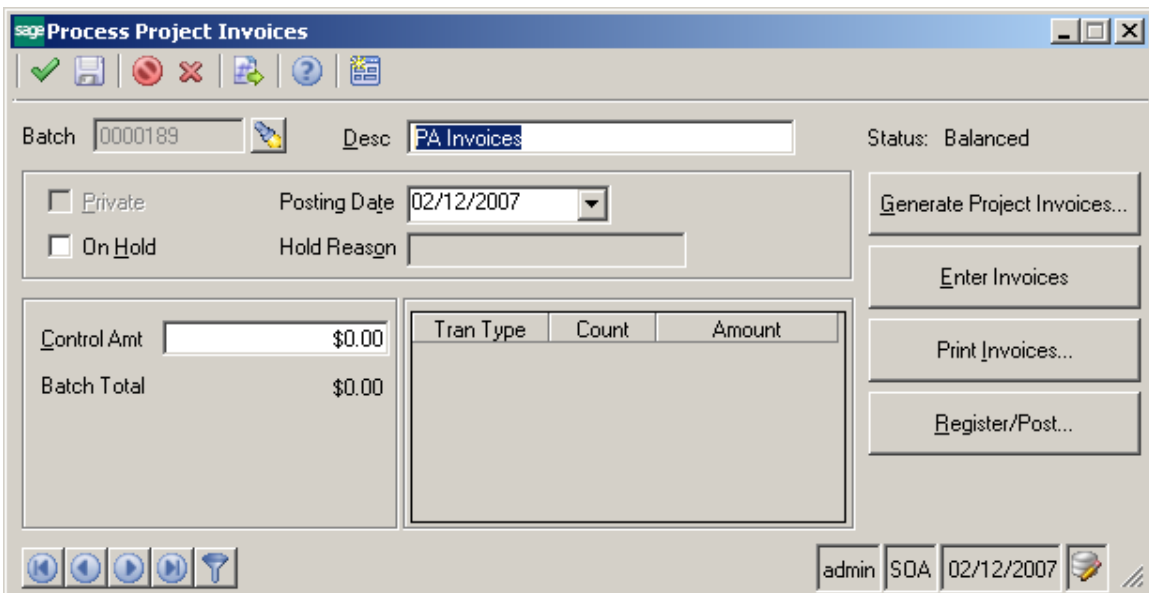
Click the **Proceed** button to generate transactions. After transaction generation from dispatch lines, the corresponding dispatch status automatically will be set to **Close** if all dispatch lines have been included in the transaction generation process. Also the **Service Call** status will be set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

Invoice: Invoice No 0000001112 Project: 0000000006 PO: Customer: AIGar Alicia Garage Doors

Header | Detail | Totals

Customer: Bill To: AIGar Alicia Garage Doors Ship To: AIGar Alicia Garage Doors Contact: Tom Jackson Class: NE

Invoice: Invoice Date: 02/12/2007 Apply To: Reason: Commission Plan: 1585

Shipping: Ship Via: UPS F.O.B.: Terms: Payment Terms: 2%TenNet30 Due Date: 03/14/2007 Discount Date: 02/22/2007

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

sage Add Lines - [Project: 0000000006]

Select

Field	Condition
Phase	All
Task	All
Resource	All
Vendor	All
Item	All
Start Date	All
Complete Date	All

Mark All Clear All

Select	Amt Remain to Bill	Write-off Amount	Amt to Bill	Est. Sales	Act. Sales	Pt
<input type="checkbox"/>	350.00	0.00	350.00	350.00	0.00	Develop
<input type="checkbox"/>	1,320.00	0.00	1,320.00	1,320.00	0.00	Develop
<input type="checkbox"/>	1,400.00	0.00	1,400.00	1,400.00	0.00	Config
<input type="checkbox"/>	26.00	0.00	26.00	26.00	0.00	Acct Mgr
<input type="checkbox"/>	1,020.00	0.00	1,020.00	1,020.00	0.00	Analysis
<input type="checkbox"/>	52.00	0.00	52.00	52.00	0.00	Conversi
<input checked="" type="checkbox"/>	1,020.00	0.00	1,020.00	1,020.00	0.00	Analysis
<input checked="" type="checkbox"/>	52.00	0.00	52.00	52.00	0.00	Conversi

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The selected lines will added as invoice lines.

Invoice No: 0000001112
 Project: 0000000006
 Customer: AIGar
 Phase: Analysis
 Task: Car Rental
 Est. Sale: 1,020.00
 Act. Sale: 0.00

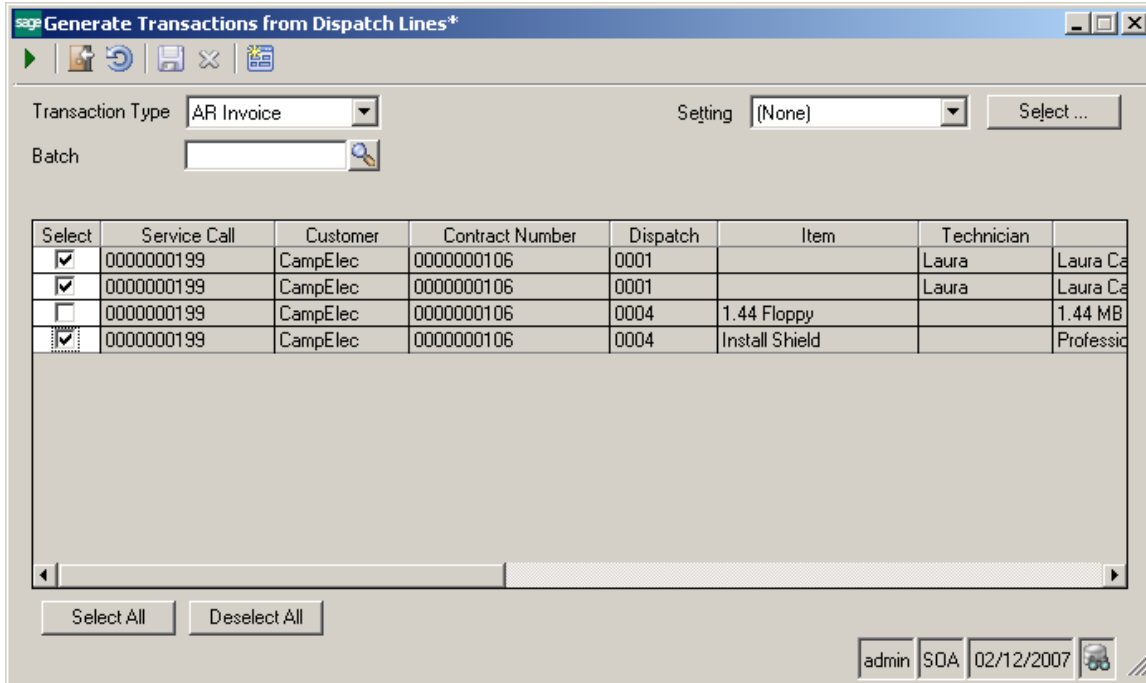
Item	Item Desc	Qty	UOM
1	Analysis - Car Rental	17.0000	
2	1.44 MB Floppy Drive	2.0000	
3			

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

Batch: 0000189
 Desc: PA Invoices
 Status: Balanced
 Posting Date: 02/12/2007
 Batch Total: \$1,075.38

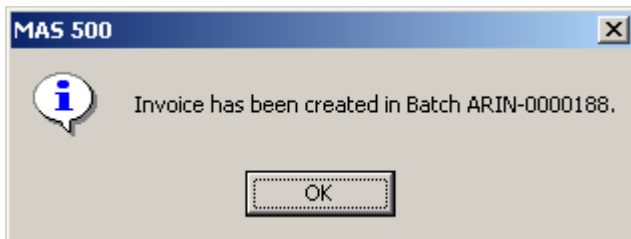
Tran Type	Count	Amount
IN	1	1,075.38

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).

Batch: 0000188 Desc: AR Invoices Status: Balanced

Private Posting Date: 02/12/2007
 On Hold Hold Reason:

Department:
 Bank Account: Checking - Corp

Control Amt: \$0.00
 Batch Total: \$2,422.00

Tran Type	Count	Amount
IN	1	2,422.00

Buttons: Select Recurring..., Select Shipments..., Enter Invoices..., Print Invoices..., Register/Post...

Status Bar: admin SOA 02/12/2007

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

The screenshot shows the 'Enter Invoices' window with the following details:

- Invoice No:** 0000001111
- Customer:** CampElec (Campbell Electric)
- Item:** Laura Callahan
- Quantity:** 45.0000
- Unit Price:** 10.000
- Sales Amount:** 450.00
- Est. Sale:** 0.00
- Act. Sale:** 0.00

	Item	Item Desc	Qty	UOM
1		Laura Callahan	45.0000	
2		Laura Callahan	44.0000	
3		Professional Series	1.0000	
4				

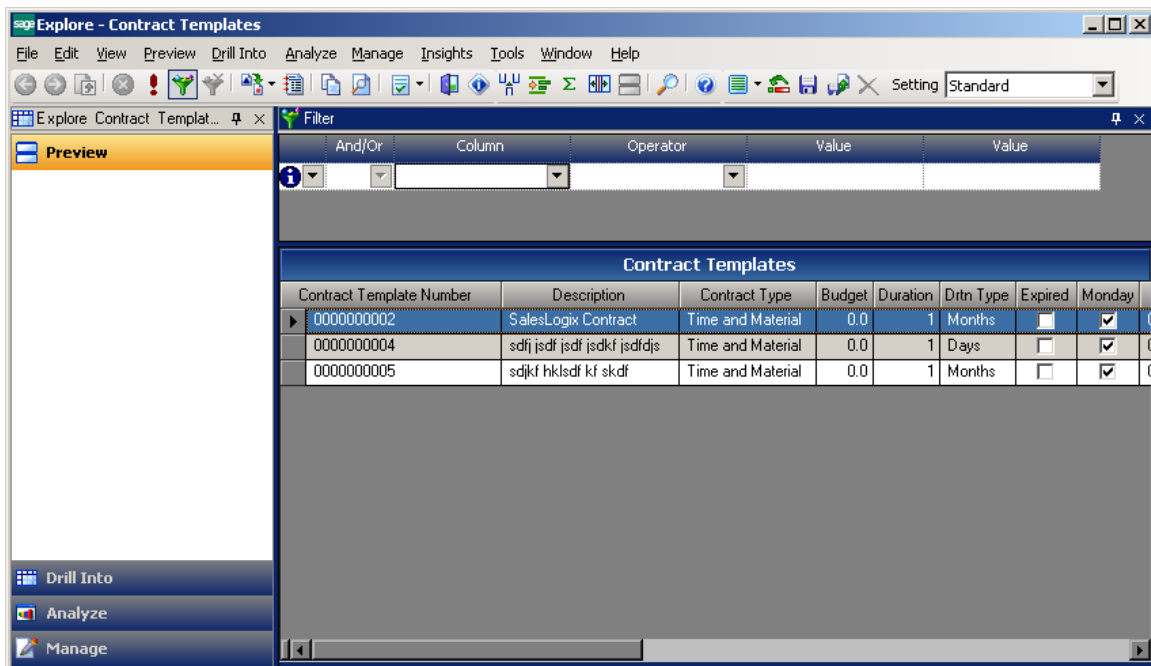
At the bottom of the window, there is a status bar with the text '*** Invoice On Hold ***', user 'admin', 'SOA', and date '02/12/2007'.

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 inquire.

Contract Template



Explore – Service Contract

Service Contracts

Contract Number	Description	Contract Type	Customer	Customer Name
000000012	New Service Contract for Programming Division	Time and Material	AlGar	Alicia Garage Doors
0000000106	djfh jsdth sdjfh jsdthfhsdf	Time and Material	CampElec	Campbell Electric
0000000107	xcmx nmsdf ndsmfn dmfvnds jfn	Time and Material	BlackWel	Blackwell Emulsion Co.

Contract Template

Contract Template Number	Description	Contract Type	Budget	Duration	Drtn Type	Expired	Monday	Star
0000000002	SalesLogix Contract	Time and Material	0.0	1	Months	<input type="checkbox"/>	<input checked="" type="checkbox"/>	08:00

Explore – Services Calls

Service Calls

Call Number	Description	Project	Contract Number	Customer	Customer Name
0000000224	SO-0000000289; LN- Cable Tester			AlGar	Alicia Garage Doors
0000000225	SO-0000000289; LN- Cable Tester			AlGar	Alicia Garage Doors
0000000226	SO-0000000289; LN- Cable Tester			AlGar	Alicia Garage Doors
0000000227	SO-0000000289; LN- Cable Tester			AlGar	Alicia Garage Doors
0000000228	SO-0000000289; LN- Cable Tester			AlGar	Alicia Garage Doors
0000000229	SO-0000000289; LN- Cable Tester			AlGar	Alicia Garage Doors

Dispatches

Dispatch Number	Call Number	Call Description	Technician	Technician Name	Task Type	Dispatch Date	Start Date
0001	0000000225	SO-0000000289	Brad5	Brad Thompson	Accountin	02/12/2007	02/12/2007
0002	0000000225	SO-0000000289	Brad5	Brad Thompson	Sales	02/12/2007	02/12/2007

Explore – Dispatches

Dispatch Number	Call Number	Call Description	Technician	Technician Name	Task Type	Dispatch Date
0001	0000000183	First Phase Installation	Sales1	Sales Manager	Accounting	02/12/2007
0002	0000000183	First Phase Installation	Tom7	Tom Brady	Sales	02/12/2007
0003	0000000183	First Phase Installation	Tom7	Tom Brady	Doctor DDD	02/12/2007
0001	0000000191	djs ds sdkvj sdk dijf sdjkjhnk	Karen	Karen Ghalechyan	Accounting	02/12/2007
0002	0000000191	djs ds sdkvj sdk dijf sdjkjhnk	Karen	Karen Ghalechyan	Sales	02/12/2007
0003	0000000191	djs ds sdkvj sdk dijf sdjkjhnk	Karen	Karen Ghalechyan	Doctor DDD	02/12/2007

Call Number	Call Description	Dispatch Number	Line No	Line Type	Line Status	Work Type	Item	Item Description
0000000183	First Phase Installation	0001	1	Labor	Closed	Program		Tom Brady
0000000183	First Phase Installation	0001	2	Item	Closed		1.44 Floppy	1.44 MB

Explore – Technicians

Technician	Name	Cost	Rate	Resource	Resource Name	Vendor	Vendor Name
Bill2	Bill Johnson	27.00	22.00	CD	Chuck Darwin	ACS	Advanced Computer Solutions
Bill3	Bill Levine	29.00	24.00	DJ	Dorothy Johanson	AdvCons	Advantage Consulting
Bob13	Bob Shone	27.00	23.00	JB	John Bonner	AITab	Alfred Tabasco
Brad5	Brad Thompson	7.00	6.00	JV	Jules Vertut	AITrade	Atlantic Trade Shows
Donna9	Donna Brown	26.00	22.00	MR	Martha Rudwick	CATax	California Franchise Tax Board
Fred11	Fred Buyer	1.00	1.00	NE	Nancy Eldridge	CD	Chuck Darwin
George12	George Profit	17.00	14.00	NS	Ned Simon	CreatCat	Creative Catering

Resource Name	Inactive Resource	Inactive Date	Division Name	User	E-mail	Job Title Description
Chuck Darwin			Consulting	admin	Chuck.Darwin@soa.com	Consultant

Explore – Routings

The screenshot shows the 'Explore - Routings' application window. The interface includes a menu bar (File, Edit, View, Preview, Drill Into, Analyze, Manage, Insights, Tools, Window, Help), a toolbar, and a filter section. The main content area is divided into two sections: 'Routings' and 'Routing Lines'.

Routings Table:

Description	Routing Number
hbjbhjhnh	0000000001
▶ Test 1 VB	0000000002
02/21/200	0000000003

Routing Lines Table:

Routing Number	Step	Description	Generate Service Call	Task	Task Description	Nature	Nature Description
▶ 0000000002	00001	Installation	<input checked="" type="checkbox"/>	Doctor	Doctor DDD	NatCode 1	Test Nat Code 1
0000000002	00002	Deployment	<input checked="" type="checkbox"/>	Sales	Sales	N1	Repairing
0000000002	00003		<input checked="" type="checkbox"/>	Sales	Sales	N1	Repairing

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.