



ODT Service Help

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1. Introduction to ODT Service

1.1. ODT Service Permissions

In order to setup and process service, permission modeling is required to apply the proper level of security.

ODT Service has a service specific Permission Set called “ODT Service” which must be added to any users’ Permission Sets who require access to the service functionality.

All users require the D365 BASIC Permission Set as this is a required assignment for Microsoft Dynamics 365 Business Central.

In addition to the D365 BASIC and the ODT SERVICE Permission Sets, users will as well need to have other Dynamics 365 Business Central Permission Sets assigned to them in order to setup and/or process service quotes and tickets.

It may also be necessary to assign users the LOCAL permission set if they do not already have such permissions.

Example 1

The user who would be responsible for setting up Dynamics 365 Business Central, such as perhaps creating separate the General Product Posting Groups and General Posting Setup for Service would require the Permission Sets allowing them to do this.

Example 2

An Order Processor who would be entering and/or processing rentals will still require the Permissions Sets that are needed for a Sales Order Processor who would be entering, shipping and invoicing a Sales Order. As the ODT Service is built upon the Jobs module, users would also need the applicable Jobs and Journal, Post Permission Sets.

For information on assigning Permission Sets to Users or User Groups, see the Dynamics 365 Business Central help.

1.2. ODT Service Overview

1.2.1. Overview

Anyone who relies on servicing equipment in their business knows how important it is to both handle repairs, and manage ongoing planned maintenance. Improperly handling equipment preparation, return inspections and repairs can mean the loss of an expensive piece of equipment, because simple service was not carried out in a timely manner.

Should a company be servicing equipment for customers, the ability to manage equipment servicing and repairs in a timely manner is essential.

Fully integrated with Microsoft Dynamics 365 Business Central, the ODT Service functionality has been added to the Business Manager and Order Processor role centers, which provides you with a service focused interface that works from one database.

ODT Service extends the power of Microsoft Dynamics 365 Business Central, Jobs, by providing you with specialized tools that streamline daily business operations for servicing equipment.

The license required for ODT Service is the Essential license for Business Central.

As the default User Experience is Essential on the Company Information, this does not need to be modified.

The ODT Service 365 app adds the following functionality on top of Jobs:

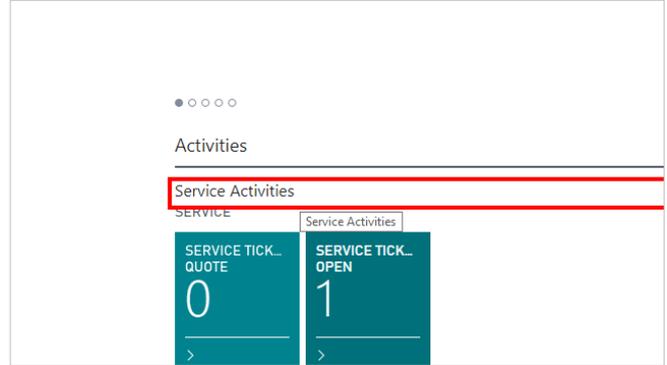
- Service units, which track service work performed on customer or internal units. Internal units, can optionally be linked to Items and Fixed Assets for informational purposes. From the Service Unit, the Service History and Service Ledger Entries are provided for tracking and analysis purposes.
- Service templates are user defined service templates, which can be used to set up predefined service. A combination of service templates can be defined in a service template to create a service plan for a group of equipment.
- Service Checklists can be created on a service template, which flow through to the Service Quote and/or Service Ticket, when the Service Template is assigned to the lines. Technicians can print the checklist and/or enter the checklist findings.
- Service Quotes can be used when servicing external customer equipment. The Service Quote is suitable for front line staff to create and modify service work and create a service ticket. Upon creation of a Service Quote, a Job is automatically created.
- Service Tickets can be used for both internal and external equipment servicing. The Service Ticket is suitable for front line staff and/or service technicians to create and modify service work in a simple work order format. Upon creation of a Service Ticket, a Job is automatically created.
- Planned Maintenance features can be used to create and process tickets for service that is performed at a later date. Planned Maintenance is suitable for front line staff and/or service technicians when scheduling service work that occurs after a specific period of time, or other scenarios where it is known

in advance service is required.

1.2.2. Business Manager Profile

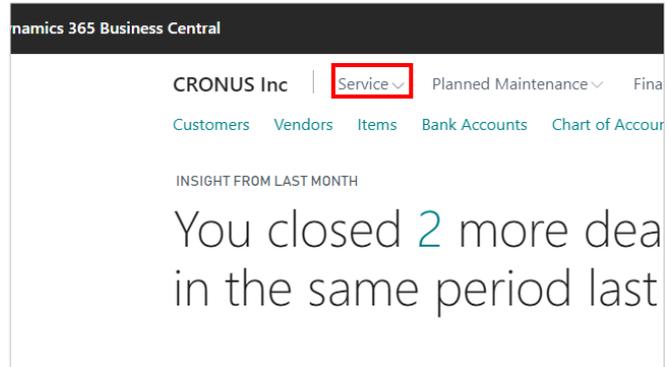
Click on the label **Service Activities**

Within the Activities part, there are 2 cues for open service tickets.
One for open Service Ticket Quotes and the other for open Service Tickets.

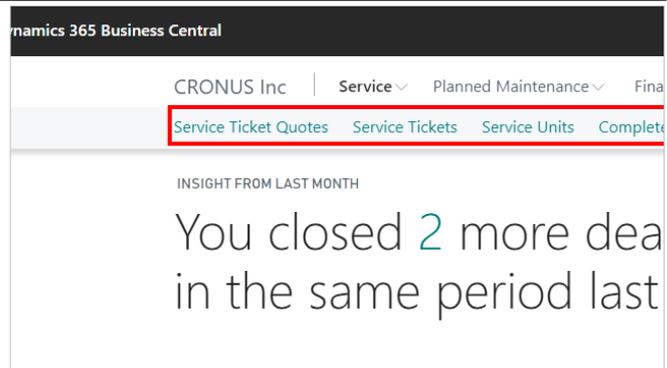


Click on the navigation menu item popup **Service**

On the main command bar of the Business Manager Profile the Service menu option is for ODT Service and contains sub-menu options.



Service sub-menu options

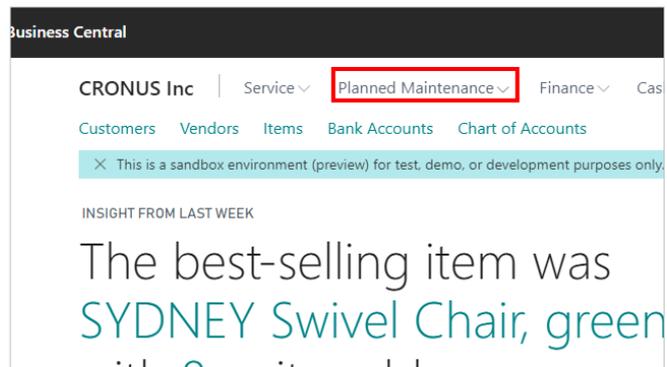


The Service sub-menu options include:

- Service Ticket Quotes, which opens a listing of open Service Ticket Quotes.
- Service Tickets, which opens a listing of open Service Tickets.
- Service Units, which opens a listing of Service Units.
- Completed Service Tickets, which opens a listing of Completed Service Tickets.

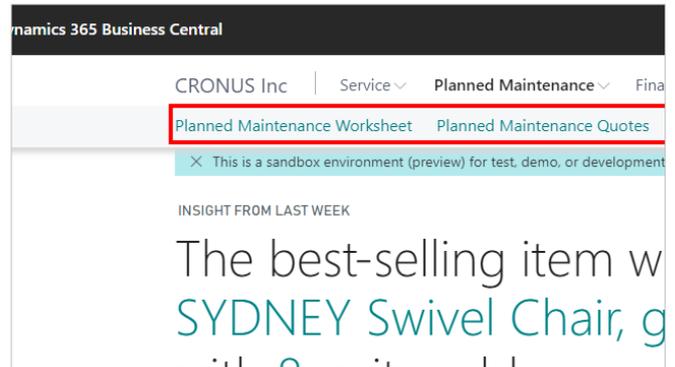
Click on the navigation menu item popup **Planned Maintenance**

On the main command bar of the Business Manager Profile the Planned Maintenance menu option is for ODT Service and contains sub-menu options.



ODT Service Help

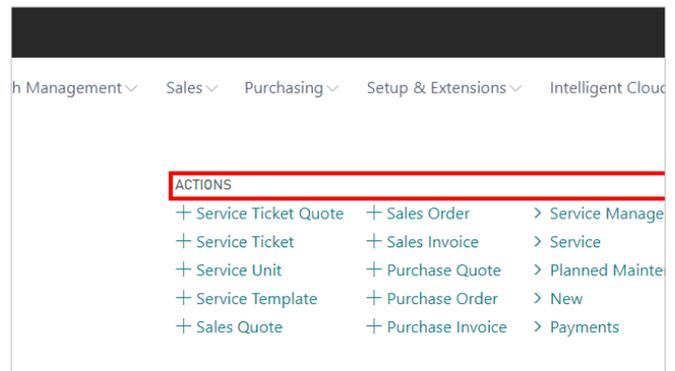
Planned Maintenance sub-menu options



The Planned Maintenance sub-menu options include:

- Planned Maintenance Worksheet, which opens the Planned Maintenance Worksheet.
- Planned Maintenance Quotes, which opens a listing of open Planned Maintenance Quotes.
- Planned Maintenance Tickets, which opens a listing of open Planned Maintenance Tickets.
- Service Units, which opens a listing of Service Units.
- Completed Planned Maintenance Tickets, which opens a listing of completed Planned Maintenance Tickets.
- Planned Maintenance Entry Archive, which opens a listing of Planned Maintenance Ticket history.

Click on **Actions**

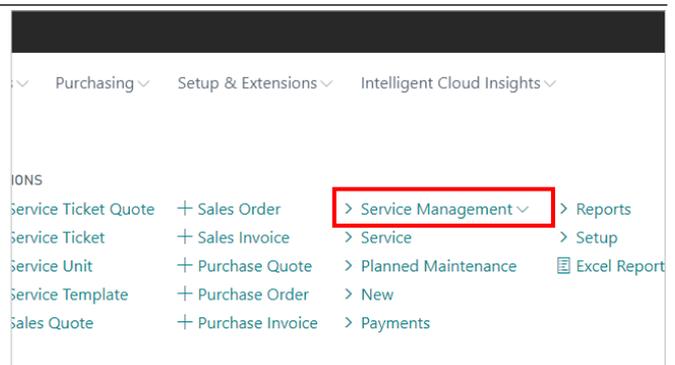


The Actions section of the profile contains the following options related to ODT Service:

Actions

- Service Ticket Quote, which opens a new Service Ticket Quote.
- Service Ticket, which opens a new Service Ticket.
- Service Unit, which opens a new Service Unit card.
- Service Management, which contains sub-menu options.
- Service, which contains sub-menu options.
- Planned Maintenance, which contains sub-menu options.

Click on the navigation menu item popup **Service Management**

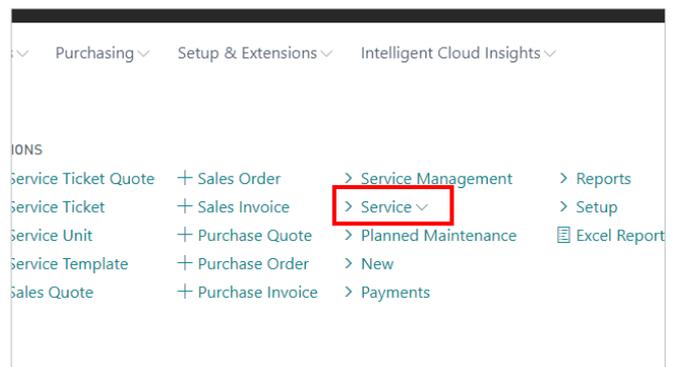


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The Service Management sub-menu options include:

- Service Management Setup, which is for the specification of the No. Series for Service Units, Service Tickets and Planned Maintenance Tickets.
- Service Ticket Types, which is used to setup the types of service tickets.
- Maintenance Groups, which is used to setup the Maintenance Groups. Maintenance Groups are mandatory and are assigned to Service Units and Service Templates. The Maintenance Group controls which Service Templates are available to select, based on the Service Unit entered on a quote or ticket.
- Service Templates are user defined service templates which can be used to set up predefined service. A combination of service templates can be defined for a service plan for a Maintenance Group of equipment.
- Service Units, which are used for tracking service work performed on customer or internal units. Internal equipment service units can optionally be linked to Items and Fixed Assets for informational purposes.
- Manufacturers, which is used to setup user defined codes for the specification of the company that manufactured the Service Unit.
- Models, which is used to setup user defined codes for the specification of the equipment models.
- Service Statuses, which are used to specify the current status of Service Tickets
- Service Unit Meter Worksheet, Which can update meter readings on multiple units
- ODT Service Online Help, provides direct access to the user help for ODT Service.
- Utility, which contains an option to update item costs across Service Templates

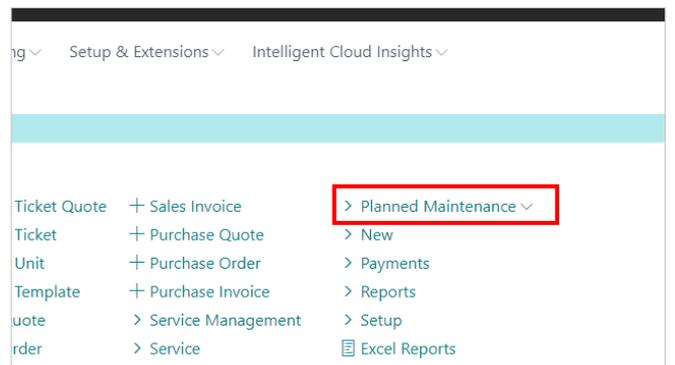
Click on the navigation menu item popup **Service**



The following Service sub-menu options display their respective listings.

- Service Ticket Quotes
- Service Tickets
- Service Units
- Completed Service Tickets

Click on the navigation menu item popup **Planned Maintenance**



The Planned Maintenance sub-menu options include:

- Planned Maintenance Worksheet, which can be used to filter, select, and process planned maintenance work for one or more Service Units. Users can also set up multiple different batch jobs

depending on the task they are performing.

- Planned Maintenance Entry Archive, which provides a history of actions performed on the Planned Maintenance Worksheet. When an entry on the worksheet is processed or deferred, it will be displayed in the archive along with information about what action was performed with that entry. The following Planned Maintenance sub-menu options display their respective listings:
- Planned Maintenance Quotes
- Planned Maintenance Tickets
- Service Units
- Completed Planned Maintenance Tickets

1.2.3. Sales Order Processor Profile

The following provides a brief listing of the ODT Service menu options available on the Sales Order Processor Profile. For additional information on these menu options, please review the Business Manager Profile above. The Service option on the Navigation bar contains the sub-menu options:

- Service Ticket Quotes
- Service Tickets
- Service Units
- Completed Service Tickets The Planned Maintenance option on the Navigation bar contains the sub-menu options:
- Planned Maintenance Worksheet
- Planned Maintenance Quotes
- Planned Maintenance Tickets
- Service Units

The Actions section on the profile contains the following ODT Service options:

- Service Ticket Quote
- Service Ticket
- Service
- Planned Maintenance In the Actions section, Service contains the following sub-menu options:
- Service Ticket Quotes
- Service Tickets
- Service Units
- Completed Service Tickets In the Actions section, Planned Maintenance contains the following sub-menu options:
- Planned Maintenance Worksheet
- Planned Maintenance Quotes
- Planned Maintenance Tickets

2. ODT Service Setups

2.1. Service Setup Overview

Before you can manage service processes, you must configure the rules and values that define the company's service policies.

First, you must define the general setup, such as which service documents are required and classification of the types of service. This general setup is typically performed once during the initial implementation.

The majority of the required setups for service is completed using the Business Manager profile.

NOTE:

On the initial creation of a company a notification will be displayed, which provides a link to open the Service Management Setup and another to open the ODT Service Online Help.

The basic setup available to be completed by organizations using the Service Management, includes the



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following setups:

- * No. Series setup, which is required for Service Units. The setup of Service Ticket No., and Planned Maintenance Ticket No. Series is optional.
- Service Management Setup is used for specifying the No. Series of the Service Units, Service Tickets and Planned Maintenance Tickets.
- Service Ticket Types are used to define the types of service the organization performs. For example, Regular Service and Walk Ins. The setup of Service Ticket Types is optional.
- Maintenance Groups, which is used for grouping various service templates that would apply to Service Units, which have been assigned to a Maintenance Group. The setup of Maintenance Groups is mandatory.
- Manufacturers, which are user defined codes used to specify the company that manufactured the Service Unit. For example, Bobcat, which manufactures Skid Steers. The setup of Manufacturers is optional.
- Models, which are user defined codes used to specify the Models of the product which the Manufacturers make. For example, the Bobcat could have models of S450 and S70. The setup of Models is optional.
- Service Templates, which are used to combine predefined service tasks including notes, items and resources that are included in a specific service. A simple example being an oil change, which would include a resource for the technician and items for the oil, oil filter and oil gasket. Setting up predefined Service Templates saves time in the creating of quotes and ticket. However, the setup of Service Templates is optional, as the service quote and ticket lines and the associated ticket details lines can be entered manually.
- Service Units, which define the product to be serviced, which requires the specification of the Manufacturer Code, Model No., Maintenance Group and the Customer that owns the produce. The customer can be an internal or a third party customer. The Service Unit can be linked to an item or Fixed Asset for informational purposes, when the product is owned by the organization. The setup of Service Units is mandatory.
- Customer for when servicing internally owned equipment. A separate Customer is mandatory, when an organization is servicing internally owned equipment.

For information on performing these setups, see the ODT Service Online Help category, ODT Service Setups.

Standard setups within Dynamics 365 Business Central include the following and are not covered in the ODT Servicing Setups as there are no modifications for service to the following:

- Items, which are to be included in the service templates or used in servicing the equipment.
- Resources, which are to be included in the service templates or used in servicing the equipment.
- Additional setups, which can be used in the templates or tickets, such as Standard text Codes and G/L accounts for miscellaneous type costs/charges, such as Shop Supplies.

To learn about setting up these, please refer to the Dynamics 365 Business Central online help.

IMPORTANT

The user help was created from a Dynamics 365 Business Central for North America, United States company. Therefore the help refers to Tax Group Code.

Should your organization be using the Rest of World version of Business Central, then throughout the help, consider Tax Group Code to refer to VAT Prod. Posting Group.

2.2. Service Financial Setups

2.2.1. How to Setup Service Management Setup

2.2.1.1. Overview

The Service Management Setup contains the fields for specifying the No. Series to be used for Service Units, Service Tickets and Planned Maintenance Tickets.

Only the Service Units No. Series is mandatory.

The Service Ticket Nos. and Planned Maintenance Ticket Nos. are optional.

If these are not setup and the fields are left blank on Service management Setup, then the Job No. Series is automatically used.

In order to setup Service Units, and to process service tickets the setup of the No. Series for Service Units is required.

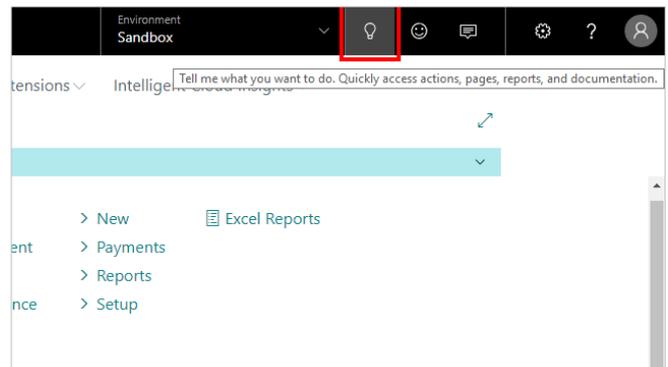
Subsequent to the setup of the No. Series, the No Series must be specified on the Service Management Setup.

2.2.1.2. How to Set Up No. Series for Service

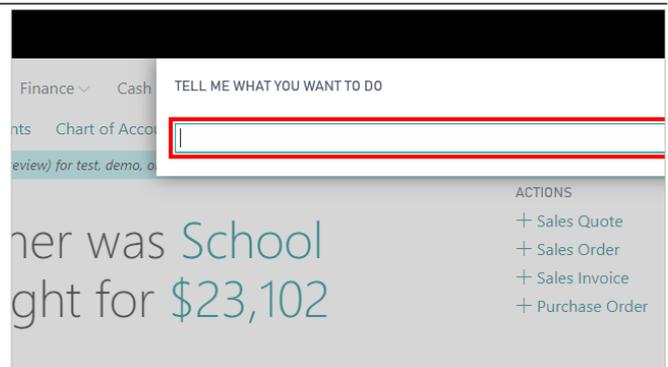
Business Manager Profile

The following steps demonstrate how to setup No. Series for Service Units, and Service and Planned Maintenance Ticket documents.

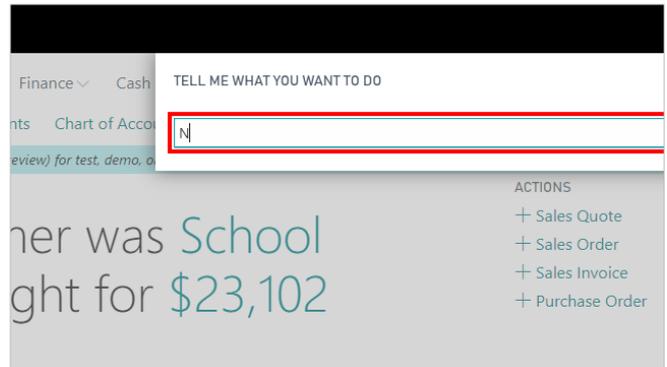
Click on the navigation menu item **Tell me what you want to do. Quickly access actions, pages, reports, and documentation.**



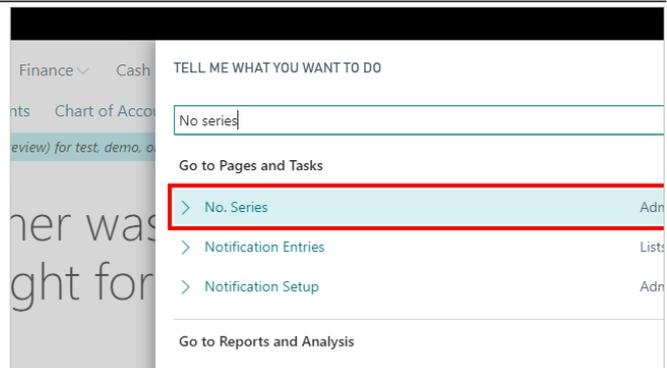
Click on the field **Type to start search:**



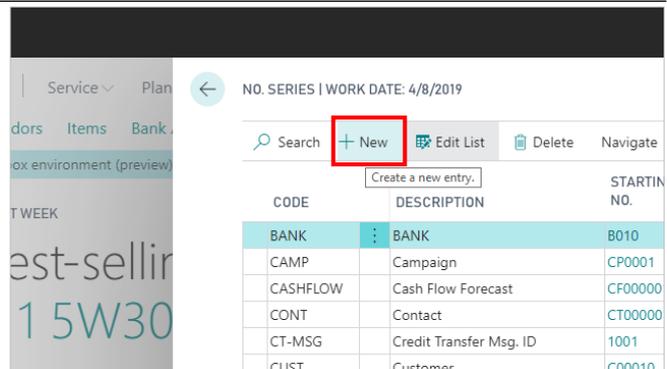
Enter the text **No series**.



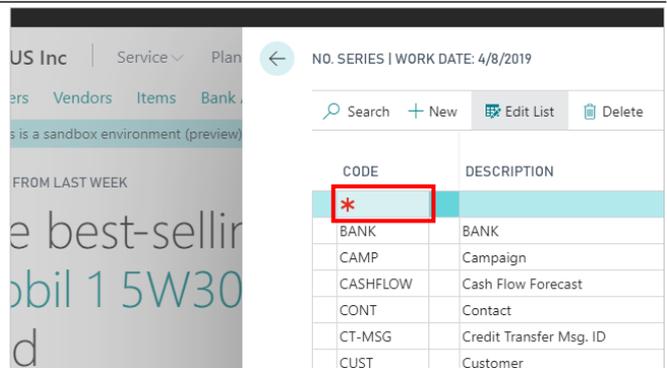
Click on **No. Series Administration**



Click on the navigation menu item **New**



Click on the cell **Code**



Enter the text **serv-unit**.

CODE	DESCRIPTION
* serv-unit	
BANK	BANK
CAMP	Campaign
CASHFLOW	Cash Flow Forecast
CONT	Contact
CT-MSG	Credit Transfer Msg. ID
CUST	Customer

Click on the cell **Description**

CODE	DESCRIPTION	STARTING NO.	ENDING NO.
* serv-unit			
BANK	BANK	B010	B990
CAMP	Campaign	CP0001	CP999
CASHFLOW	Cash Flow Forecast	CF000001	-
CONT	Contact	CT000001	CT10
CT-MSG	Credit Transfer Msg. ID	1001	2999
CUST	Customer	C00010	C999

Enter the text **Service Units**.

CODE	DESCRIPTION	STARTING NO.	ENDING NO.
SERV-UNIT	Service Units		
BANK	BANK	B010	B990
CAMP	Campaign	CP0001	CP999
CASHFLOW	Cash Flow Forecast	CF000001	-
CONT	Contact	CT000001	CT10
CT-MSG	Credit Transfer Msg. ID	1001	2999
CUST	Customer	C00010	C999

Click on **Default Nos.**

ENDING NO.	LAST DATE USED	LAST NO. USED	DE... NOS.	MA... NOS.
-	-	-	<input type="checkbox"/>	<input type="checkbox"/>
B990	-	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CP9999	-	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
-	-	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CT100000	-	CT000022	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2999	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
C99990	-	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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Click on the navigation menu item popup **Navigate**

NO.	DESCRIPTION	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO. USED
V-UNIT	Service Units	-	-	-	-
BANK	BANK	B010	B990	-	-
CAMP	Campaign	CP0001	CP9999	-	-
CASHFLOW	Cash Flow Forecast	CF000001	-	-	-
CONT	Contact	CT000001	CT100000	-	CT00002
CT-MSG	Credit Transfer Msg. ID	1001	2999	-	-

Click on the link **Lines**

NO.	DESCRIPTION
BANK	BANK
CAMP	Campaign
CASHFLOW	Cash Flow Forecast
CONT	Contact
CT-MSG	Credit Transfer Mso. ID

Click on the cell **Starting No.**

STARTING DATE	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO. USED

Enter the text **SU00001**.

STARTING DATE	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO. USED
	SU00001			

Click on the cell **Ending No.**

STARTING DATE	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO. USED	WARNI NO.
	SU00001				

Enter the text **SU99999**.

STARTING DATE	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO. USED	WARNI NO.
	SU00001	S			

Click on the back button

Business Central | No. Series > SERV-UNIT · Service Units

← NO. SERIES | ← SERV-UNIT · SERVICE UNITS

Click on the navigation menu item **New**

Central | No. Series

← NO. SERIES

Search + New Edit List Delete

CODE	DESCRIPTION	STARTING NO.
FA-JNL	Fixed Asset Journal	G05001
FAJNL-GL	Fixed Asset G/L Journal	F00001
FAJNL-GLR	Recurring Fixed Asset G/L ...	RF00001
GJNL-GEN	General Journal	G00001
GJNL-PMT	Payment Journal	G04001
GJNL-RCPT	Cash Receipts Journal	G02001

ODT Service Help

Click on the row menu button

P-RETORD	Purchase Return Order	1001
P-SHPT	Posted Purchase Shipment	105001
RES	Resource	R0010
S-BLK	Blanket Sales Order	1001
S-CR	Sales Credit Memo	S-CR1001
S-CR+	Posted Sales Credit Memo	PS-CR104001
SEGM	Segment	SM00001
SERV-UNIT	Service Units	SU00001
S-FIN	Finance Charge Memo	S-FIN1001
S-FIN+	Issued Finance Charge Me...	S-FIN106001
S-INV	Sales Invoice	S-INV102001
S-INV+	Posted Sales Invoice	PS-INV103001
SN1	SN Numbering	SN00001
SN2	SN Numbering	XYZ00001

Click on the menu item **New Line**

P-SHPT	Posted Purchase Shipment	1
RES	Resource	R
S-BLK	Blanket Sales Order	1
S-CR	Sales Credit Memo	S
S-CR+	Posted Sales Credit Memo	P
SEGM	Segment	S
SERV-UNIT	Service Units	S
New Line	Finance Charge Memo	S
Delete Line	Issued Finance Charge Me...	S
Select More	Sales Invoice	S
SN1	SN Numbering	S
SN2	SN Numbering	X
S-ORD	Sales Order	S

Click on the cell **Code**

P-RETORD	Purchase Return Order	10
P-SHPT	Posted Purchase Shipment	10
RES	Resource	RO
S-BLK	Blanket Sales Order	10
S-CR	Sales Credit Memo	S-
S-CR+	Posted Sales Credit Memo	PS
SEGM	Segment	SN
* []		
SERV-UNIT	Service Units	SU
S-FIN	Finance Charge Memo	S-
S-FIN+	Issued Finance Charge Me...	S-
S-INV	Sales Invoice	S-
S-INV+	Posted Sales Invoice	PS
SN1	SN Numbering	SN

Enter the text **serv-tix**.

P-RETORD	Purchase Return Order	10
P-SHPT	Posted Purchase Shipment	10
RES	Resource	RO
S-BLK	Blanket Sales Order	10
S-CR	Sales Credit Memo	S-
S-CR+	Posted Sales Credit Memo	PS
SEGM	Segment	SN
* [serv-tix]		
SERV-UNIT	Service Units	SU
S-FIN	Finance Charge Memo	S-
S-FIN+	Issued Finance Charge Me...	S-
S-INV	Sales Invoice	S-
S-INV+	Posted Sales Invoice	PS
SN1	SN Numbering	SN

ODT Service Help

Click on the cell **Description**

P-RETORD	Purchase Return Order	1001	2999
P-SHPT	Posted Purchase Shipment	105001	106999
RES	Resource	R0010	R9999
S-BLK	Blanket Sales Order	1001	2999
S-CR	Sales Credit Memo	S-CR1001	S-CR9999
S-CR+	Posted Sales Credit Memo	PS-CR104001	PS-CR9999
SEGM	Segment	SM00001	SM99999
* serv-tix			
SERV-UNIT	Service Units	SU00001	SU99999
S-FIN	Finance Charge Memo	S-FIN1001	S-FIN9999
S-FIN+	Issued Finance Charge Memo	S-FIN106001	S-FIN9999
S-INV	Sales Invoice	S-INV102001	S-INV9999
S-INV+	Posted Sales Invoice	PS-INV103001	PS-INV9999
SN1	SN Numbering	SN00001	SN99999

Enter the text **Service Tickets**.

P-RETORD	Purchase Return Order	1001	2999
P-SHPT	Posted Purchase Shipment	105001	106999
RES	Resource	R0010	R9999
S-BLK	Blanket Sales Order	1001	2999
S-CR	Sales Credit Memo	S-CR1001	S-CR9999
S-CR+	Posted Sales Credit Memo	PS-CR104001	PS-CR9999
SEGM	Segment	SM00001	SM99999
SERV-TIX			
SERV-UNIT	Service Units	SU00001	SU99999
S-FIN	Finance Charge Memo	S-FIN1001	S-FIN9999
S-FIN+	Issued Finance Charge Memo	S-FIN106001	S-FIN9999
S-INV	Sales Invoice	S-INV102001	S-INV9999
S-INV+	Posted Sales Invoice	PS-INV103001	PS-INV9999
SN1	SN Numbering	SN00001	SN99999

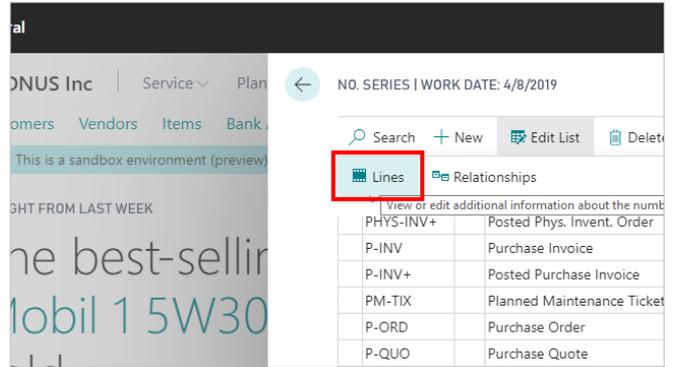
Click on **Default Nos.**

2999	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
106999	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
R9990	-	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2999	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S-CR2999	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PS-CR105999	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SM99999	-	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
-	-	-	<input type="checkbox"/>	<input type="checkbox"/>
SU99999	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S-FIN2999	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S-FIN107999	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S-INV103999	-	S-INV102221	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1 PS-INV104999	1/25/2019	PS-INV103214	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SN99999	-	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

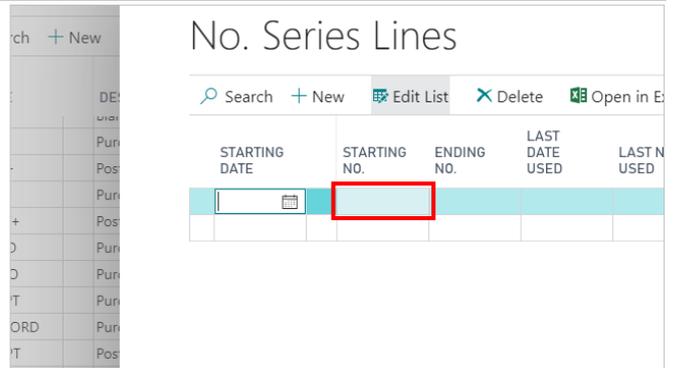
Click on the navigation menu item popup **Navigate**

arch + New Edit List Delete Navigate Open in Excel Navigate					
CODE	DESCRIPTION	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO USED
CR	Purchase Credit Memo	1001	2999	-	-
CR+	Posted Purchase Credit Memo	109001	1010999	-	-
IV	Purchase Invoice	107001	108999	-	107211
IV+	Posted Purchase Invoice	108001	109999	3/15/2019	108208
RD	Purchase Order	106001	107999	-	106004

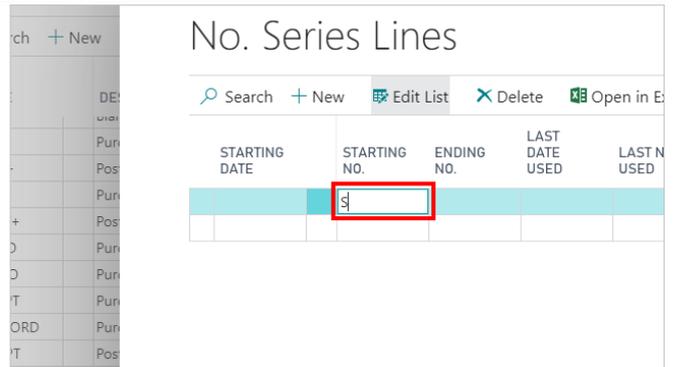
Click on the navigation menu item **Lines**



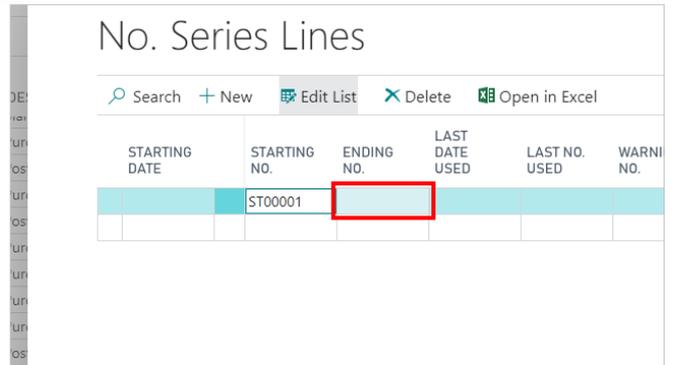
Click on the cell **Starting No.**



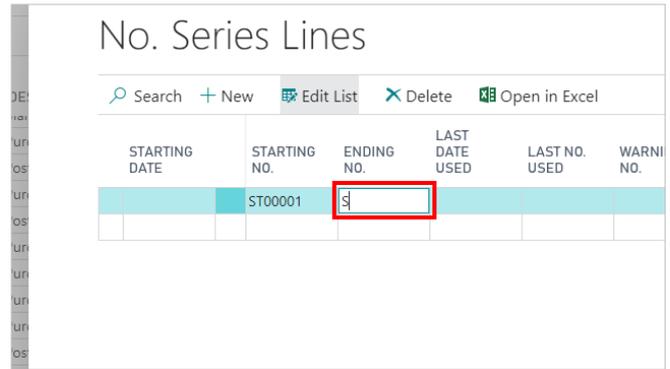
Enter the text **ST00001**.



Click on the cell **Ending No.**

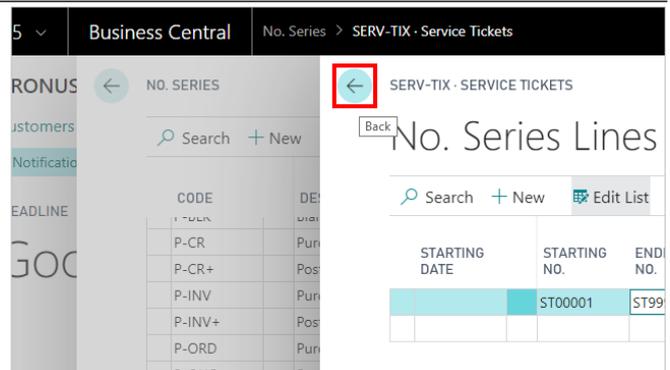


Enter the text **ST99999**.



STARTING DATE	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO. USED	WARNI NO.
	ST00001	9			

Click on the back button



Business Central No. Series > SERV-TIX - Service Tickets

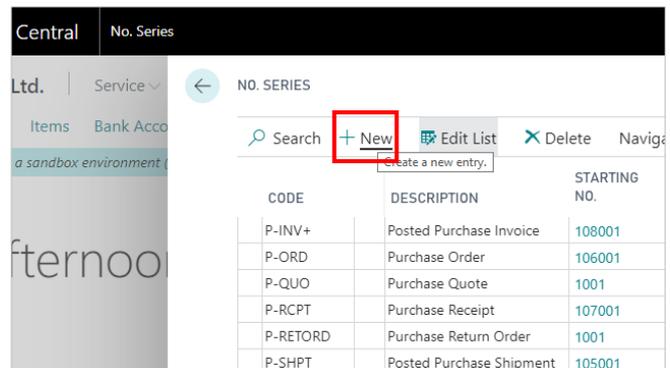
← NO. SERIES ← SERV-TIX - SERVICE TICKETS

Back

STARTING DATE	STARTING NO.	ENDING NO.
	ST00001	ST99999

The following demonstrates the setup of the No. Series for the Planned Maintenance Ticket Nos.

Click on the navigation menu item **New**



Central No. Series

← NO. SERIES

+ New Edit List Delete

CODE	DESCRIPTION	STARTING NO.
P-INV+	Posted Purchase Invoice	108001
P-ORD	Purchase Order	106001
P-QUO	Purchase Quote	1001
P-RCPT	Purchase Receipt	107001
P-RETORD	Purchase Return Order	1001
P-SHPT	Posted Purchase Shipment	105001

Click on the cell **Code**



P-RETORD	Purchase Return Order	10
P-SHPT	Posted Purchase Shipment	10
RES	Resource	RO
S-BLK	Blanket Sales Order	10
S-CR	Sales Credit Memo	S-
S-CR+	Posted Sales Credit Memo	PS
SEGM	Segment	SM
* SERV-TIX	Service Tickets	ST
SERV-UNIT	Service Units	SU
S-FIN	Finance Charge Memo	S-
S-FIN+	Issued Finance Charge Me...	S-
S-INV	Sales Invoice	S-
S-INV+	Posted Sales Invoice	PS



ODT Service Help

Enter the text **PM-TIX**.

	P-RETORD	Purchase Return Order	10
	P-SHPT	Posted Purchase Shipment	10
	RES	Resource	RC
	S-BLK	Blanket Sales Order	10
	S-CR	Sales Credit Memo	S-
	S-CR+	Posted Sales Credit Memo	PS
	SEGM	Segment	SM
	* P		
	SERV-TIX	Service Tickets	ST
	SERV-UNIT	Service Units	SU
	S-FIN	Finance Charge Memo	S-
	S-FIN+	Issued Finance Charge Me...	S-
	S-INV	Sales Invoice	S-
	S-INV+	Posted Sales Invoice	PS

Click on the cell **Description**

	P-RETORD	Purchase Return Order	1001	2999
	P-SHPT	Posted Purchase Shipment	105001	1069
	RES	Resource	R0010	R999
	S-BLK	Blanket Sales Order	1001	2999
	S-CR	Sales Credit Memo	S-CR1001	S-CR
	S-CR+	Posted Sales Credit Memo	PS-CR104001	PS-C
	SEGM	Segment	SM00001	SM99
	* PM-TIX			
	SERV-TIX	Service Tickets	ST00001	ST99
	SERV-UNIT	Service Units	SU00001	SU99
	S-FIN	Finance Charge Memo	S-FIN1001	S-FIN
	S-FIN+	Issued Finance Charge Me...	S-FIN106001	S-FIN
	S-INV	Sales Invoice	S-INV102001	S-INV
	S-INV+	Posted Sales Invoice	PS-INV103001	PS-IN

Enter the text **Planned Maintenance Tickets**.

	P-RETORD	Purchase Return Order	1001	2999
	P-SHPT	Posted Purchase Shipment	105001	1069
	RES	Resource	R0010	R999
	S-BLK	Blanket Sales Order	1001	2999
	S-CR	Sales Credit Memo	S-CR1001	S-CR
	S-CR+	Posted Sales Credit Memo	PS-CR104001	PS-C
	SEGM	Segment	SM00001	SM99
	PM-TIX			
	SERV-TIX	Service Tickets	ST00001	ST99
	SERV-UNIT	Service Units	SU00001	SU99
	S-FIN	Finance Charge Memo	S-FIN1001	S-FIN
	S-FIN+	Issued Finance Charge Me...	S-FIN106001	S-FIN
	S-INV	Sales Invoice	S-INV102001	S-INV
	S-INV+	Posted Sales Invoice	PS-INV103001	PS-IN

Click on **Default Nos.**

2999	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
106999	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
R9990	-	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2999	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S-CR2999	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PS-CR105999	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SM99999	-	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
-	-	-	<input type="checkbox"/>	<input type="checkbox"/>
ST99999	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SU99999	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S-FIN2999	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S-FIN107999	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S-INV103999	-	S-INV102221	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1 PS-INV104999	1/25/2019	PS-INV103214	<input checked="" type="checkbox"/>	<input type="checkbox"/>

ODT Service Help

Click on the navigation menu item popup **Navigate**

CODE	DESCRIPTION	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO USED
ORD	Purchase Order	106001	107999	--	106004
QUO	Purchase Quote	1001	2999	--	--
RCP	Purchase Receipt	107001	108999	3/15/2019	107208
RETORD	Purchase Return Order	1001	2999	--	--
SHPT	Posted Purchase Shipment	105001	106999	--	--
RES	Resource	R0010	R9990	--	--

Click on the navigation menu item **Lines**

NO.	DESCRIPTION
P-ORD	Purchase Order
P-QUO	Purchase Quote
P-RCP	Purchase Receipt
P-RETORD	Purchase Return Order
P-SHPT	Posted Purchase Shipment
RES	Resource

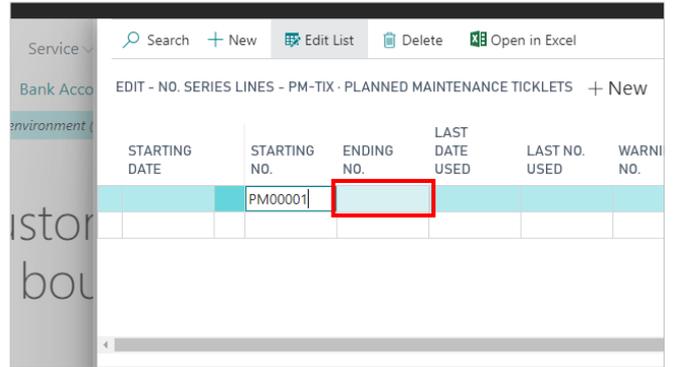
Click on the cell **Starting No.**

STARTING DATE	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO USED

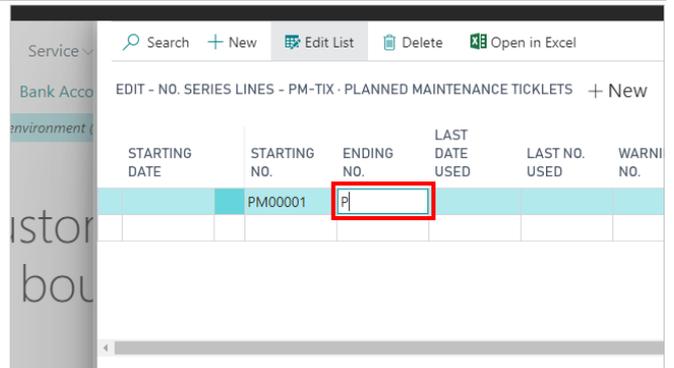
Enter the text **PM00001**.

STARTING DATE	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO USED
	PM			

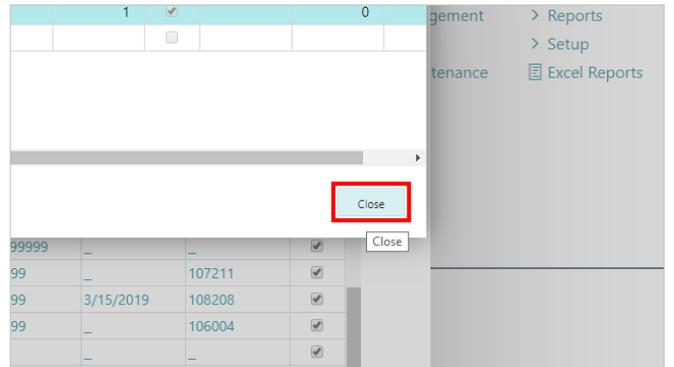
Click on the cell **Ending No.**



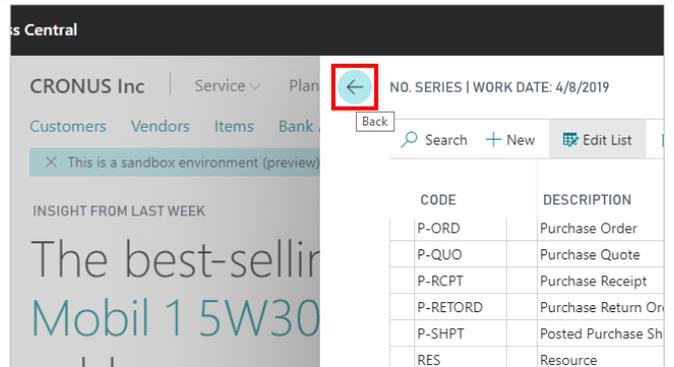
Enter the text **PM99999**.



Click on the button **Close**



Click on the back button



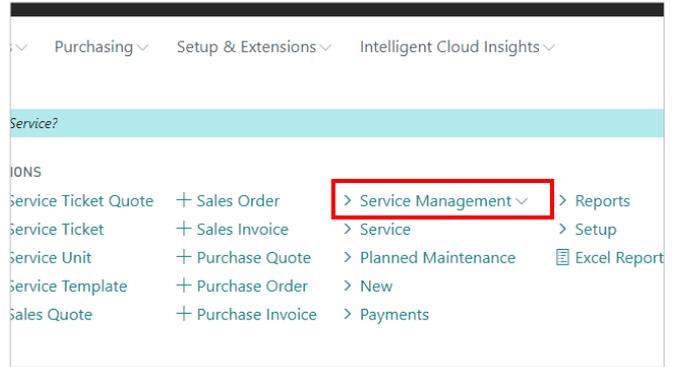
2.2.1.3. How to Set Up Service Management Setup

Business Manager Profile

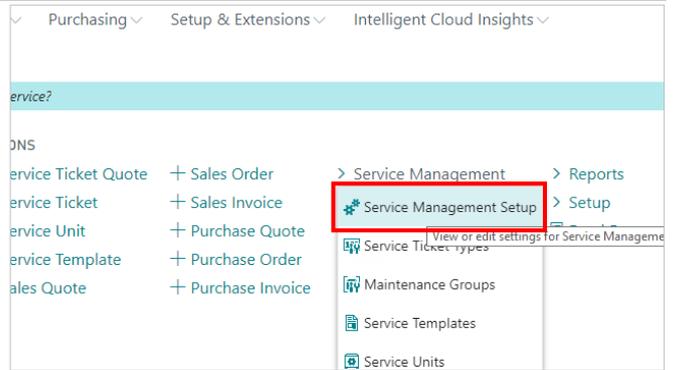
The following steps demonstrate how to assign the No. Series for Service Units, and Service and Planned Maintenance documents, on the Service Management Setup.

ODT Service Help

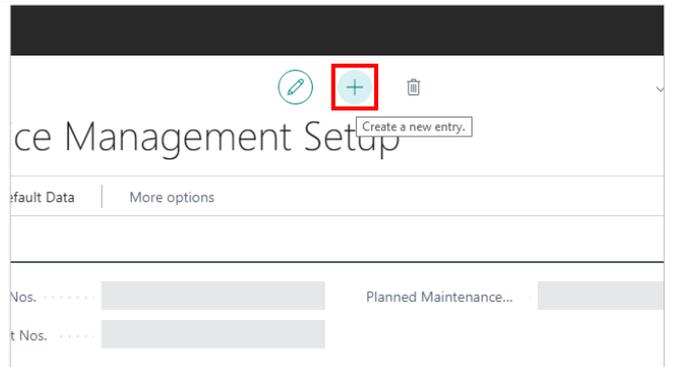
Click on the navigation menu item popup **Service Management**



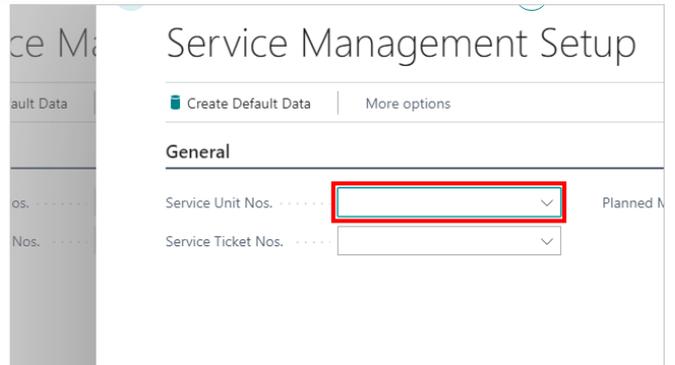
Click on the navigation menu item **Service Management Setup**



Click on the action **New**



Click on the field **Service Unit Nos.**





ODT Service Help

Click on the link in cell **Code** with the value **SERV-UNIT**

A screenshot of a dropdown menu for the 'Service Ticket Nos.' field. The menu is open, showing a list of options with columns for 'CODE' and 'DESCRIPTION'. The option 'SERV-UNIT' is highlighted with a red box. Other options include 'S-CR+', 'SEGM', 'SERV-TIX', and 'S-F'. A '+ New' button is at the bottom.

CODE	DESCRIPTION
S-CR+	Posted Sales Credit Memo
SEGM	Segment
SERV-TIX	Service Tickets
SERV-UNIT	Service Units
S-F	Select record "SERV-UNIT" Price Charge Memo

Click on the field **Service Ticket Nos.**

A screenshot of the 'Service Management Setup' form. The 'Service Ticket Nos.' field is highlighted with a red box and contains the value 'SERV-UNIT'. The 'Service Unit Nos.' field is also visible and contains 'SERV-UNIT'. There are buttons for 'Create Default Data' and 'More options'.

Click on the link in cell **Code** with the value **SERV-TIX**

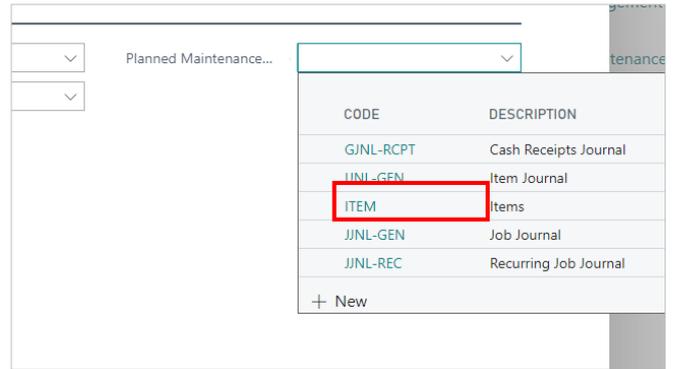
A screenshot of a dropdown menu for the 'Service Ticket Nos.' field. The menu is open, showing a list of options with columns for 'CODE' and 'DESCRIPTION'. The option 'SERV-TIX' is highlighted with a red box. Other options include 'S-CR', 'S-CR+', 'SEGM', and 'SERV-UNIT'. A '+ New' button is at the bottom.

CODE	DESCRIPTION
S-CR	Sales Credit Memo
S-CR+	Posted Sales Credit Memo
SEGM	Segment
SERV-TIX	Service Tickets
SERV-UNIT	Select record "SERV-TIX" Price Units

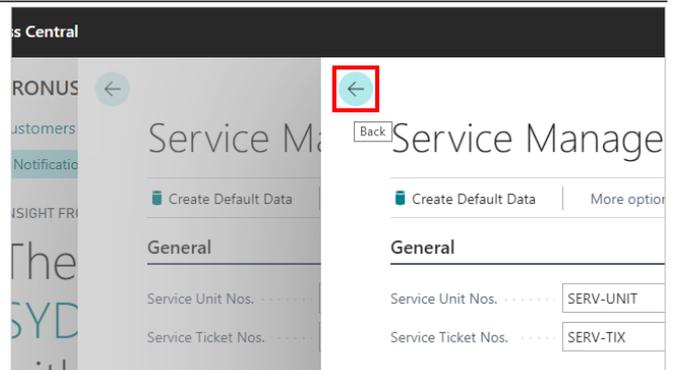
Click on the field **Planned Maintenance Ticket Nos.**

A screenshot of the 'Service Management Setup' form. The 'Planned Maintenance Ticket Nos.' field is highlighted with a red box. There are other dropdown menus visible on the form.

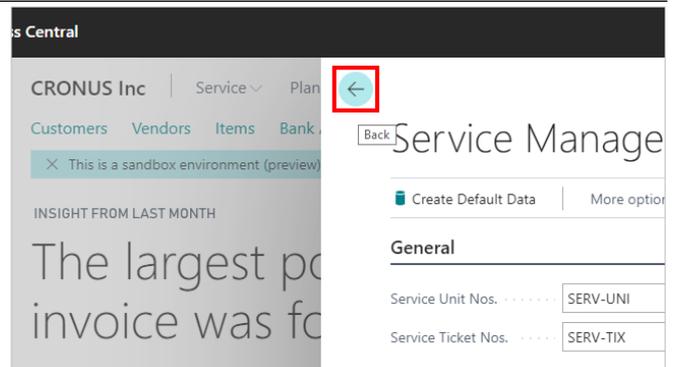
Click on the link in cell **Code** with the value **CASHFLOW**



Click on the back button



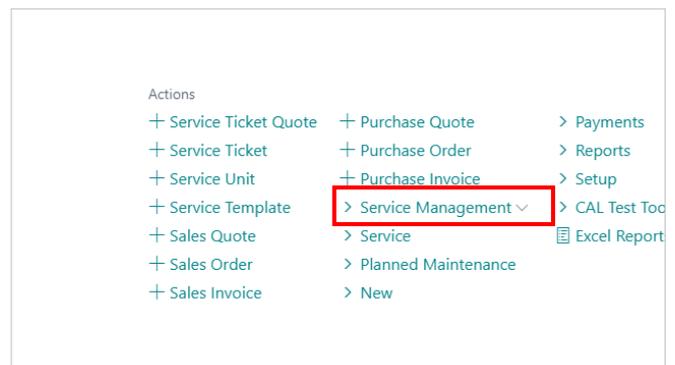
Click on the back button



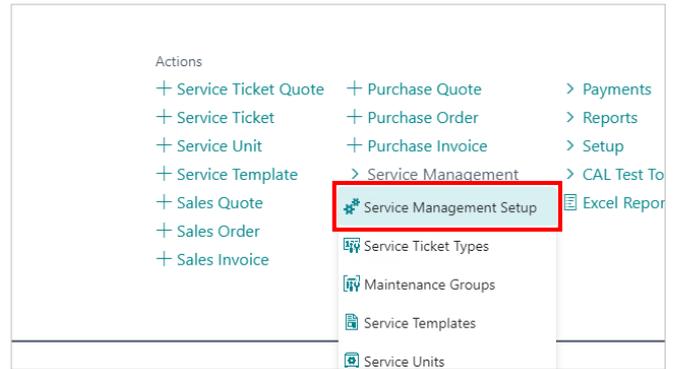
2.2.1.4. How to set up the Service Unit Filter

Service Management Setup includes an option that will filter the service units available on tickets to only those that are owned by the customer the ticket is assigned to. The following demonstrates how to enable this feature.

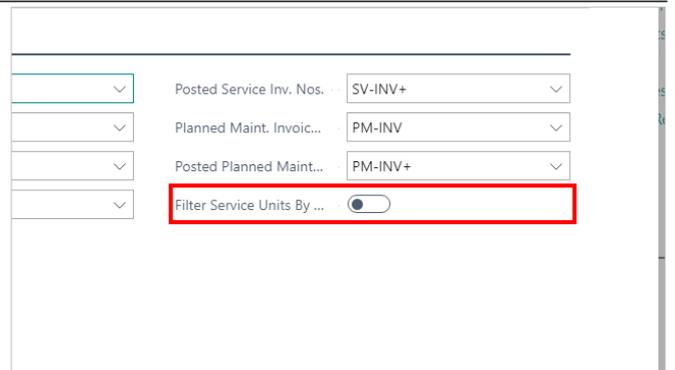
Click on the navigation menu item popup **Service Management**



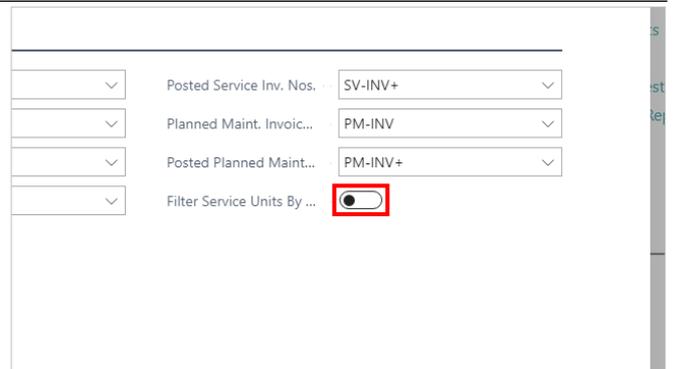
Click on the navigation menu item **Service Management Setup**



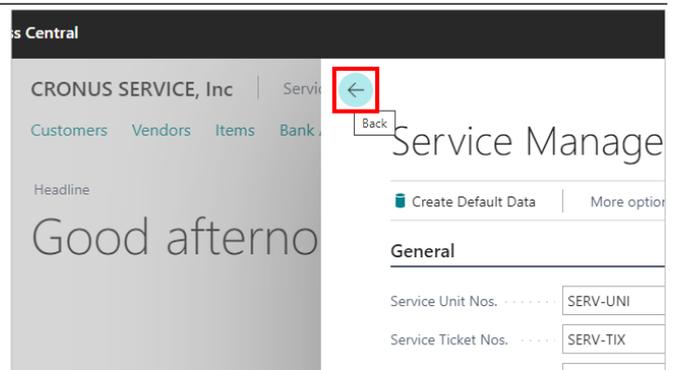
Click on **Filter Service Units By Customer No.**



Click on the toggle field **Filter Service Units By Customer No.**



Click on the back button



2.2.2. How to Setup an Internal Customer for Servicing

2.2.2.1. Overview

ODT Service includes the ability to service and track the servicing of company owned equipment.

In the Jobs module, which ODT Service enhances for servicing, a Bill-to Customer is mandatory.

Therefore, in order to automatically set the Service Ticket Details to "Cost Tracking Only", which in turn sets the Job Planning Lines to "Budget Only", a new tab called "Service" has been added to the Customer Card.

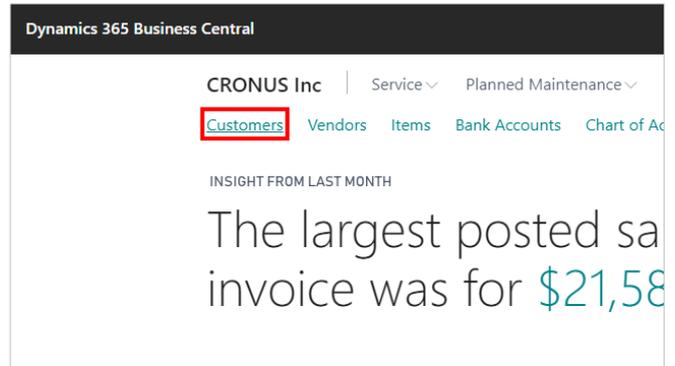
The field called Internal, must be enabled on the customer(s) to be used when servicing company owned equipmen.

2.2.2.2. How to Setup an Internal Customer

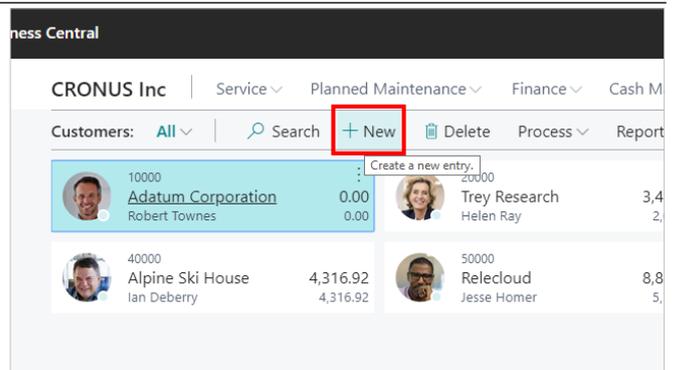
Business Manager Profile

The following demonstrates the setting up of a Customer for servicing internally owned equipment.

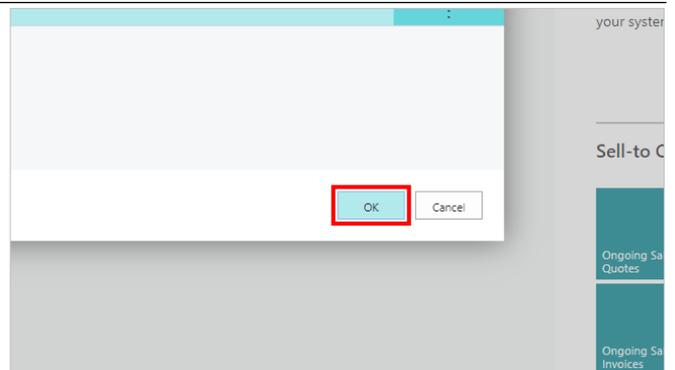
Click on the navigation menu item **Customers**



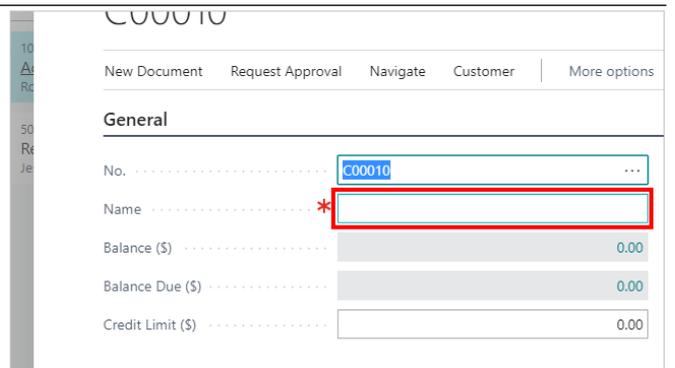
Click on the navigation menu item **New**



Click on the button **OK**



Click on the field **Name**





Enter the text **Internal Servicing Customer**.

Click on **Tax Liabe, Yes**

Click on the field **Tax Area Code**

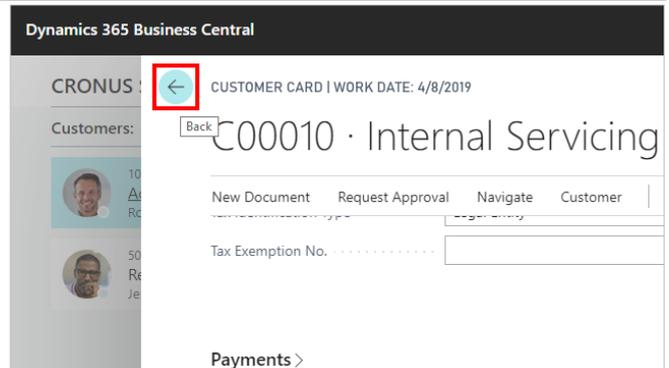
Click on the link in cell **Code** with the value **ATLANTA, GA**

Click on **Internal Customer, No**

By default, No is the setting on this field. By clicking on the field, the setting will be changed to Yes.



Click on the back button



2.3. How to Setup Service Ticket Types

2.3.1. Overview

Service Ticket Types are used to define the types of service the organization performs. The use of service types provides additional analysis capability by segregating the types of service that an organization performs. For example, Regular Service and Walk Ins.

The setup of Service Ticket Types is optional.

NOTE:

In a future release for the ODT Service integration to the ODT Rentals App, some examples that might be used are Pre-Rental and Post Rental Return.

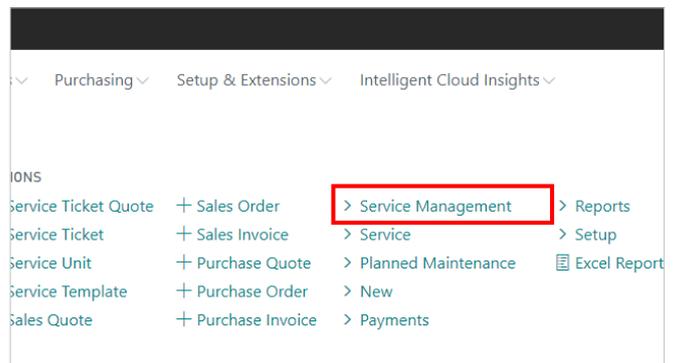
2.3.2. How to Setup Service Ticket Types

Business Manager Profile

The following demonstrates how to setup a Service Ticket Type.

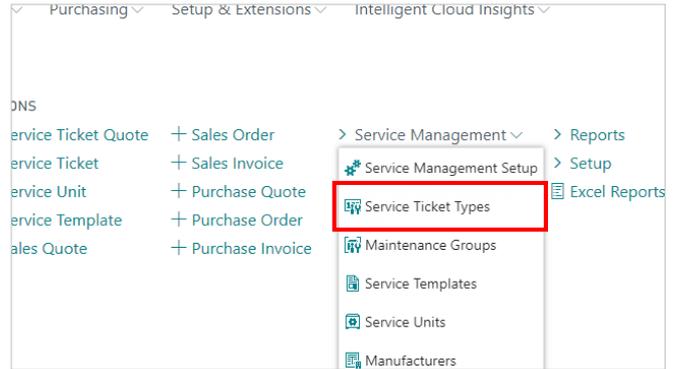
For information on each field, point to the caption, and a short description of the field will be provided.

Click on the navigation menu item popup **Service Management**

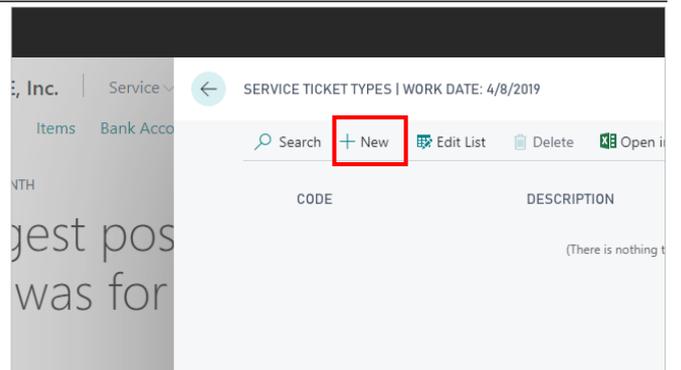


ODT Service Help

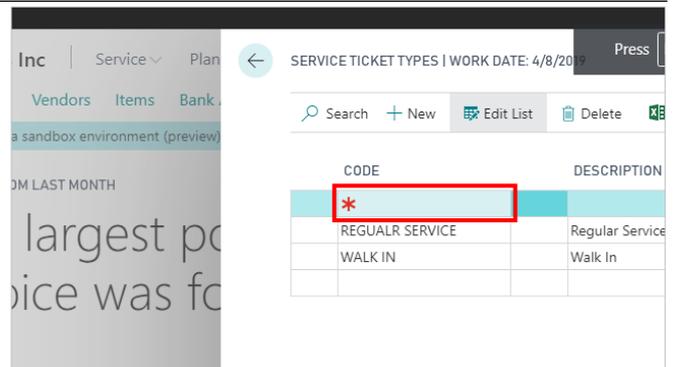
Click on the navigation menu item **Service Ticket Types**



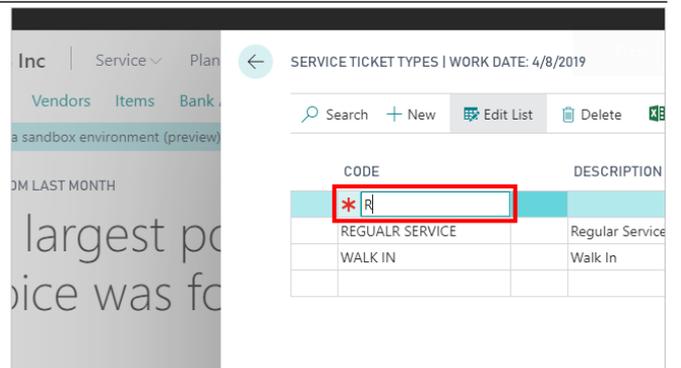
Click on the navigation menu item **New**



Click on the cell **Code**



Enter the text **Regular Service**.



ODT Service Help

Click on the cell **Description**

YEPES | WORK DATE: 4/8/2019 ✓ SAV

New Edit List Delete Open in Excel

DESCRIPTION	APPLIES TO TICKET TYPE
	Service

Enter the text **Regular Service**.

YEPES | WORK DATE: 4/8/2019 ✓ SAV

New Edit List Delete Open in Excel

DESCRIPTION	APPLIES TO TICKET TYPE
Regular Service	Service

Click on the cell **Applies to Ticket Type**

YEPES | WORK DATE: 4/8/2019 ✓ SAV

New Edit List Delete Open in Excel

DESCRIPTION	APPLIES TO TICKET TYPE
Regular Service	Service

Click on **Service**

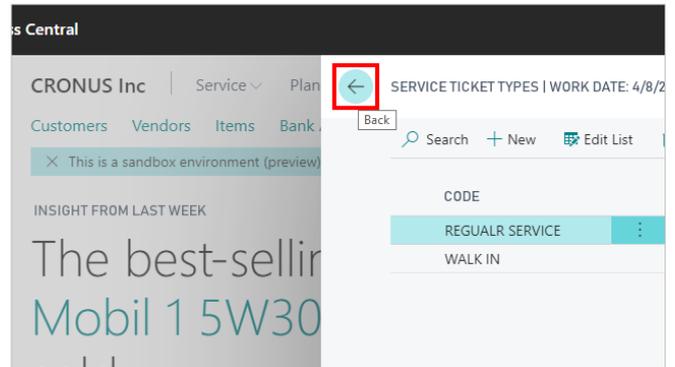
YEPES | WORK DATE: 4/8/2019 ✓ SAV

New Edit List Delete Open in Excel

DESCRIPTION	APPLIES TO TICKET TYPE
	Service

Repeat the steps starting at New, to create all the Ticket Types that the organization requires.

Click on the back button



2.4. How to Setup Maintenance Groups

2.4.1. Overview

Maintenance Groups, are used for grouping various service templates that would apply to Service Units, which have been assigned to a Maintenance Group.

For example, if the organization is performing service on Skid Steers, then a group would be created specifically for Skid Steers. This group would be specified on both the Service Unit(s) and the Service Templates created for the group.

The setup of Maintenance Groups is mandatory.

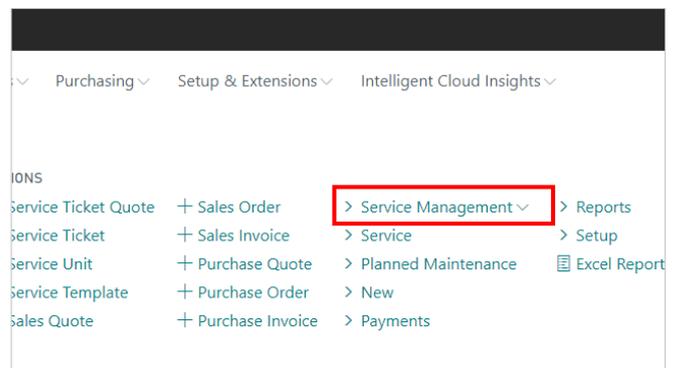
2.4.2. How to Setup Maintenance Groups

Business Manager Profile

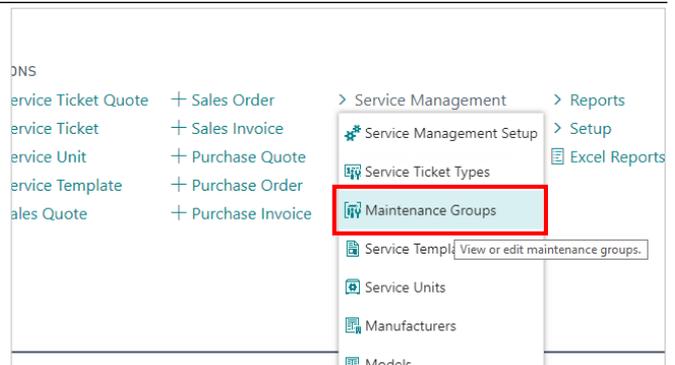
For information on each field, point to the caption, and a short description of the field will be provided.

The following demonstrates the setup of a Maintenance Group.

Click on the navigation menu item popup **Service Management**

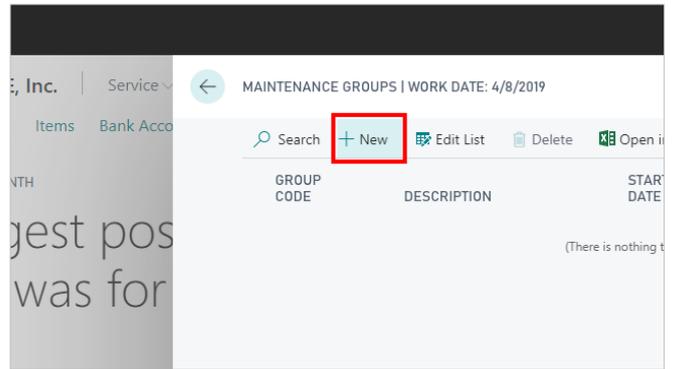


Click on the navigation menu item **Maintenance Groups**

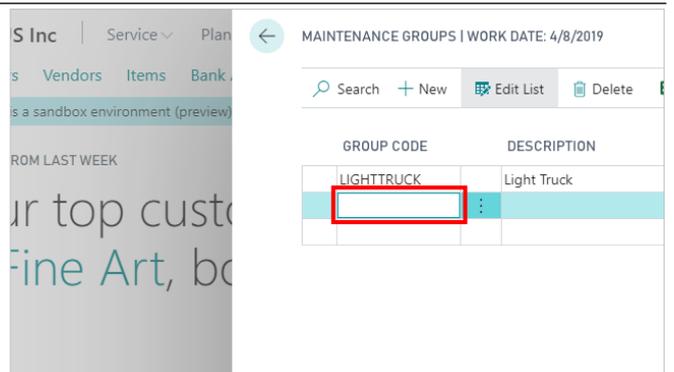


ODT Service Help

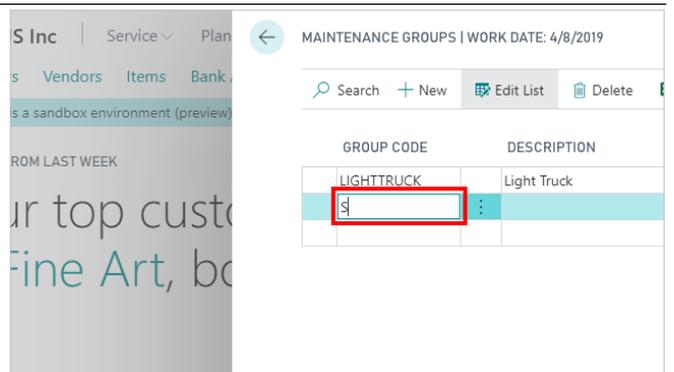
Click on the navigation menu item **New**



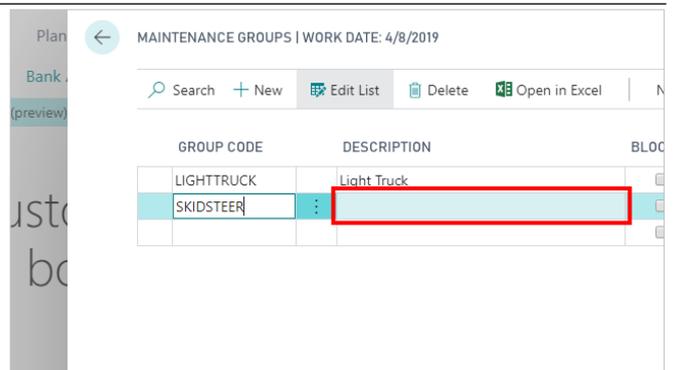
Click on the cell **Group Code**



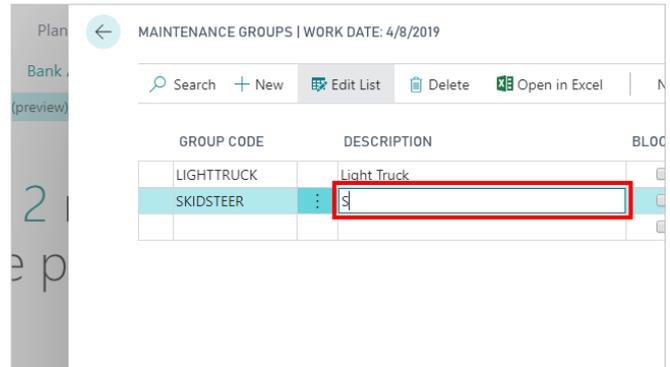
Enter the text **SKIDSTEER**.



Click on the cell **Description**

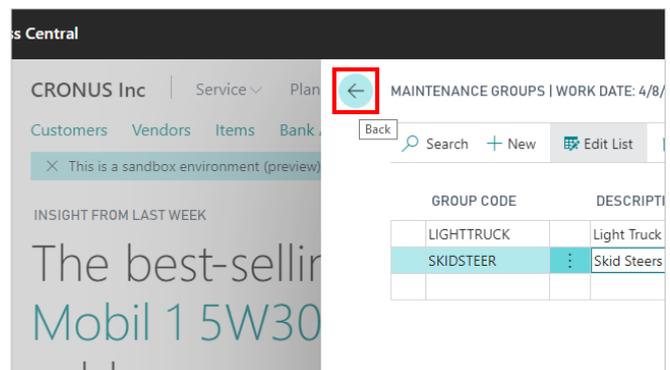


Enter the text **Skid Steers**.



Repeat the above steps to create the Maintenance Groups that the organizations requires.

Click on the back button



2.5. How to Setup Service Templates

2.5.1. Overview

Service Templates are used to setup predefined servicing activities.

Within a Service Template, service templates can be combined to create a service plan for a Maintenance Group of equipment.

Thus time is saved when creating service tickets for a piece of equipment.

For example, a service plan could consist of changing the oil, changing the air filter and a charge for shop supplies.

The oil change can be set up as a template and used stand alone. It can also be added to a template for a service plan as a nested template.

Likewise for the changing of the air filter.

The charge for the shop supplies would be an individual template line on the template for the service plan.

ODT Service also provides the ability to setup Checklists for each template, which can be printed for/by the technicians to checkoff the tasks as they are completed, and fill-in required findings, where applicable.

An example of a servicing checklist that many have encountered, is when you take your vehicle in for servicing. The technician discusses the findings with you and when paying your bill you are provided with the completed checklist.

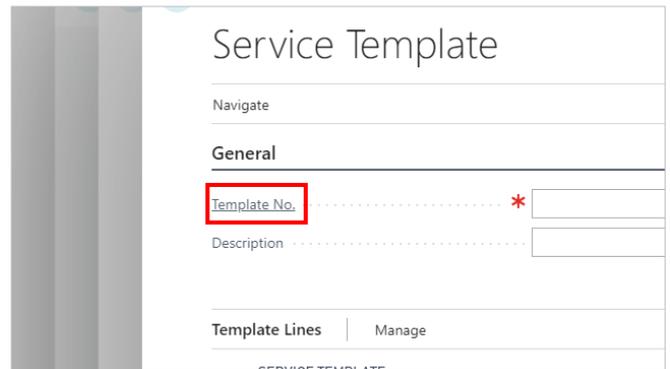
2.5.2. Service Template Field Information

The following provides a brief explanation of the fields on the General tab of a Service Template.

Click on the link **Template No.**

The Template No. field is used to define the template. The field allows for both alphabetic and numeric characters.

This field is mandatory.



The screenshot shows the 'Service Template' form. Under the 'General' section, the 'Template No.' field is highlighted with a red box and has a red asterisk next to it, indicating it is mandatory. The 'Description' field is also visible below it.

Click on the link **Description**

The description field is used to provide a longer definition of what the Service Template is for.



The screenshot shows the 'Service Template' form. Under the 'General' section, the 'Description' field is highlighted with a red box. The 'Template No.' field is visible above it, also with a red asterisk.

Click on the link **Template Type**

The Template Type field is for the specification of what type of tickets the template will be available to be used on.

There are 4 options available.

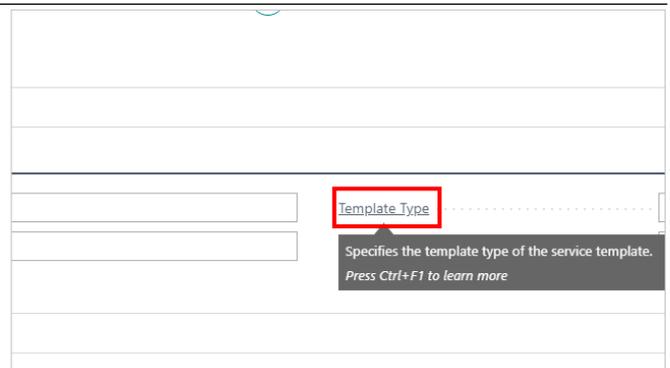
* All
Specifies the template will be available for selection for all types of tickets.

* Service
Specified the template will only be available for service tickets.

* Planned Maintenance
Specifies the template will only be available for Planned Maintenance tickets.

* Field
Specified the template will only be available for Field tickets.

NOTE:
Field functions are not in the current release. Therefore, this option is not to be selected at this time.



The screenshot shows the 'Service Template' form. Under the 'General' section, the 'Template Type' field is highlighted with a red box. A tooltip is visible over the field, stating: 'Specifies the template type of the service template. Press Ctrl+F1 to learn more.'

Click on the link **Maintenance Group Code**

The Maintenance Group is used to specify which group the template applies to.

As the Maintenance Group is specified on the Service Unit and the Service Template, then when creating quotes or tickets and adding a template, the list of templates is filtered to show only those that are related to the Service Units' Maintenance Group Code.

Thus saving time in locating the template to be selected.

The following provides a brief description of the fields on the Template Lines.

Click on the column header **Service Template No.**

This field is used for adding/nesting a service template to a template.

All related Template Details (job planning lines) for the nested template are included on the current template.

Click on the column header **Type**

The Type field is used when entering lines for a Resource, an Item, a G/L Account or Text.

Text can be either a description comment or a Standard Text Code.

NOTE:

When the Service Template No. field is populated the Type of Resource will be displayed.

This is just a default as it is the first option in the Type field, and it has no bearing on the line when the Service Template No. field is populated.

Click on the column header **No.**

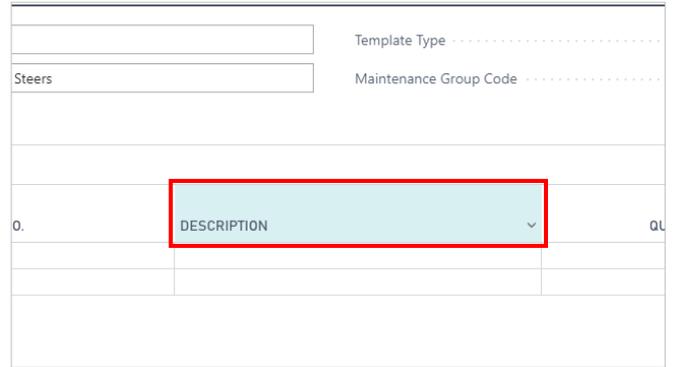
The No. field will be filtered based on the option selected in the Type field.

For example, if Resource is selected in the Type field, then the list in the No. field will display only Resources to select from.

Click on the column header **Description**

The description will default from the Service Template, Resource, Item, G/L Account and Standard Text Code, when selected.
The description can be overridden.

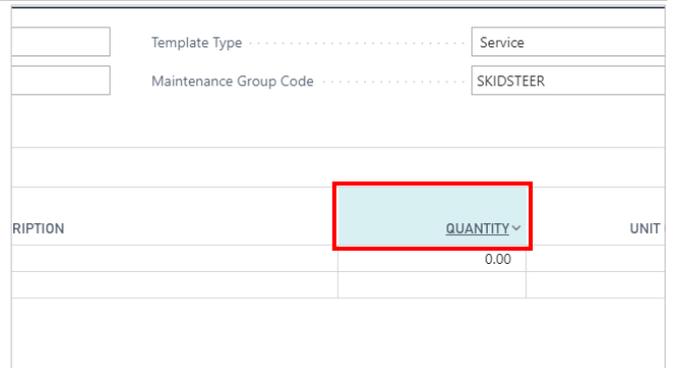
When the Type of Text is selected, then a description can be entered.



Click on the column header **Quantity**

The Quantity field is used to specify the quantity of the selected Resource, Item or G/L Account that apply to the service template/plan.

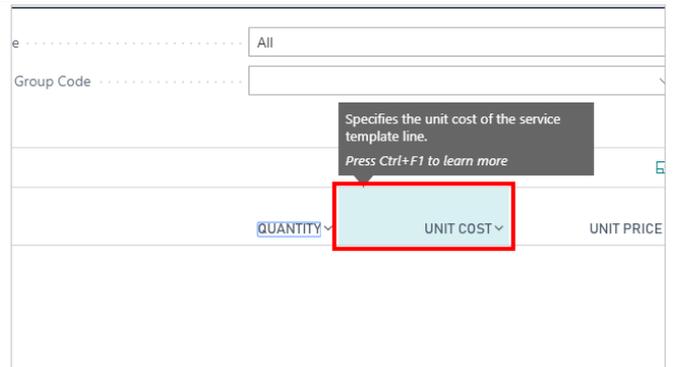
When the Service Template No. field is populated, then this field is not to be populated.



Click on the column header **Unit Cost**

The Unit Cost field will default the cost from the Resource and Item cards.
Should the type selected be G/L Account, then this field will need to be populated.

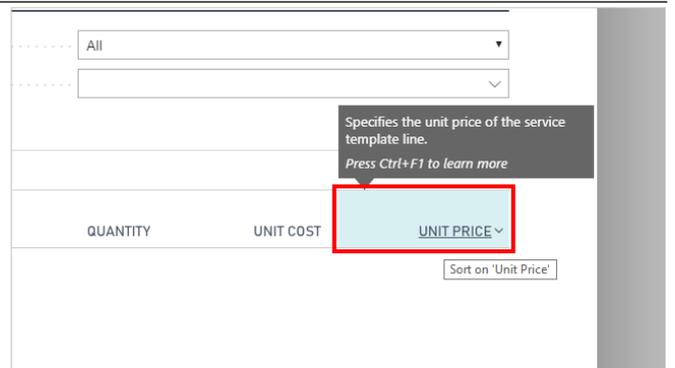
When the Service Template No. field is populated, then this field is not to be populated.



Click on the column header **Unit Price**

The Unit Price field will default the price from the Resource and Item cards.
Should the type selected be G/L Account, then this field will need to be populated.

When the Service Template No. field is populated, then this field is not to be populated.



2.5.3. How to Setup Service Templates

Business Manager Profile

For the example to be provided, setup of a resource, a G/L Account for shop supplies charge and 4 items are required before the Service Template Lines can be filled in.

These include the following:

- A Resource for Labor
- An Item for the Oil Filter
- An Item for the Oil Gasket

ODT Service Help

- An Item for the Oil
- An Item for an Air Filter for a Skid Steer
- G/L Account 40150 (for US company)

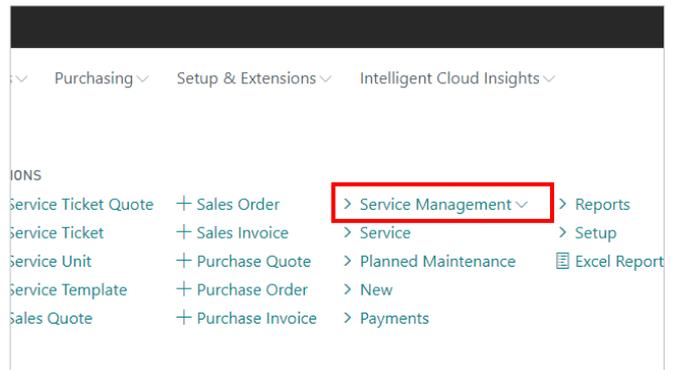
To learn how to setup Resources, G/L Accounts and Items, please refer to the Dynamics 365 Business Central Online help.

The demonstration of Service Templates includes the setup of 3 templates. The first 2 will be separate templates. The third template will contain the first 2 templates as nested templates.

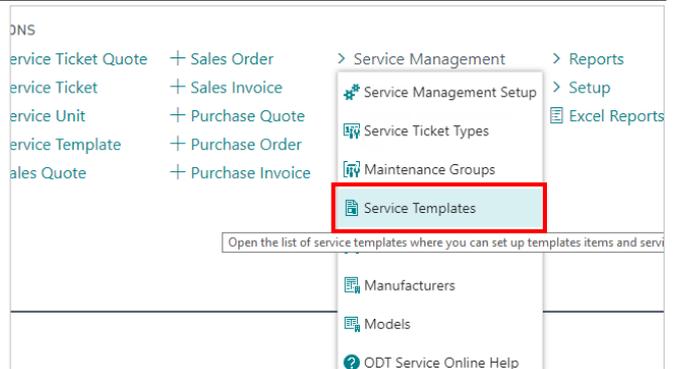
Nested templates provide a real time savings on creating the templates by reducing the time on setting up the templates.

The following demonstrates the setup of a template for an oil change for a Skid Steer.

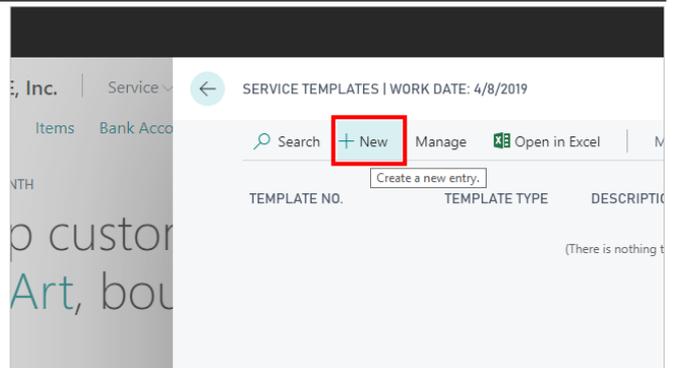
Click on the navigation menu item popup **Service Management**



Click on the navigation menu item **Service Templates**



Click on the navigation menu item **New**





Click on the field **Template No.**

emplate

..... *

.....

Manage

Enter the text **OilChange-SS.**

emplate

..... *

.....

Manage

Click on the field **Description**

EMPL - SS

.....

.....

..... OILCHANGE - SS

.....

Manage

DATE NO.	TYPE	NO.	DESCRIPTION
----------	------	-----	-------------

Enter the text **Oil Change for Skid Steers.**

EMPL - SS

.....

.....

..... OILCHANGE - SS

.....

Manage

DATE NO.	TYPE	NO.	DESCRIPTION
----------	------	-----	-------------



ODT Service Help

Click on the field **Template Type**

A screenshot of a web form. At the top, there are several empty text input fields. Below them is a dropdown menu with 'All' selected. The dropdown menu is highlighted with a red rectangle. Below the dropdown is another input field with 'All' and a dropdown arrow. At the bottom right, there is a small blue icon.

Click on the item **Service** in the list

A screenshot of a web form. At the top, there are several empty text input fields. Below them is a dropdown menu with 'All' selected. The dropdown menu is open, showing a list of options: 'All', 'Service', 'Planned Maintenance', and 'Service'. The 'Service' option is highlighted in blue. The entire dropdown menu is highlighted with a red rectangle. Below the dropdown is another input field with 'All' and a dropdown arrow. At the bottom right, there is a small blue icon.

Click on the field **Maintenance Group Code**

A screenshot of a web form. At the top, there are several empty text input fields. Below them is a dropdown menu with 'All' selected. The dropdown menu is highlighted with a red rectangle. Below the dropdown is another input field with a dropdown arrow. At the bottom right, there is a small blue icon.

Click on the link in cell **Group Code** with the value **SKIDSTEER**

A screenshot of a web form. At the top, there are several empty text input fields. Below them is a dropdown menu with 'All' selected. Below that is another input field with a dropdown arrow. Below that is a table with two columns: 'GROUP CODE' and 'DESCRIPTION'. The first row has 'SKIDSTEER' in the 'GROUP CODE' column and 'Skid Steers' in the 'DESCRIPTION' column. The 'SKIDSTEER' cell is highlighted with a red rectangle. Below the table is a '+ New' button and a 'Select record "SKIDSTEER"' button. Below that is a table with three columns: 'QUANTITY', 'UNIT COST', and 'UNIT PRICE'. The first row has '0.00' in the 'QUANTITY' column and '0.00' in the 'UNIT COST' column. At the bottom right, there is a small blue icon.

The following demonstrates the entry of the Template Lines for the oil change.



ODT Service Help

Click on the cell **Type** with the value **Resource Item**
G/L Account Text

Description Oil Change for Skid Steers

Template Lines | Manage

SERVICE TEMPLATE NO.	TYPE	NO.
	Resource	

Click Resource in the options displayed.

Template Lines | Manage

SERVICE TEMPLATE NO.	TYPE	NO.
	Resource	

- Resource
- Resource Item
- Resource G/L Account
- Text

Click on the cell **No.**

..... Oil Change for Skid Steers

Manage

TEMPLATE NO.	TYPE	NO.	DESCRIPTION
	Resource		

Click on the link in cell **No.** with the value **LABOR**

Manage

PLATE NO.	TYPE	NO.	DESCRIPTION
	Resource		

NO.	NAME
LABOR	Labor - Oil Change
LIN	Select record "LABOR" Irtn
MARK	Mark Hanson
MARY	Mary A. Dempsey
TIMOTHY	Timothy Sneath
+ New	



ODT Service Help

Click on the cell **Quantity** with the value **1.00**

The default quantity is 1.00. The quantity is to be overridden when it is to be a different number.

DESCRIPTION	QUANTITY	UNIT
- Oil Change	1.00	

Click on the cell **Unit Cost** with the value **22.25**

The Unit Cost defaults from the Resource Card.

QUANTITY	UNIT COST	UNIT PRICE
1.00	22.25	

Click on the cell **Unit Price** with the value **75.00**

The Unit Price defaults from the Resource card.

QUANTITY	UNIT COST	UNIT PRICE
1.00	22.25	75.00

Click on the cell **Type**

SERVICE TEMPLATE NO.	TYPE	NO.
	Resource	LABOR



ODT Service Help

Click on the item **Item** in the list

SERVICE TEMPLATE NO.	TYPE	NO.
	Resource	LABOR
	Resource	
	Item	
	Item	Count
	Text	

Click on the cell **No.**

TEMPLATE NO.	TYPE	NO.	DESCRIPTION
	Resource	LABOR	Labor - Oil Change
	Item		

Click on the link in cell **No.** with the value **1001**

TEMPLATE NO.	TYPE	NO.	DESCRIPTION
	Resource	LABOR	Labor - Oil Change
	Item		

NO.	DESCRIPTION	UNIT
1001	Oil Filter	PC
1003	Mobile Oil 5W30	PC
1004	Air Filter for Skid Steer	PC
1896-S	ATHENS Desk	PC

Click on the cell **Quantity** with the value **1.00**

The default quantity is 1.00. The quantity is to be overridden when it is to be a different number.

DESCRIPTION	QUANTITY	UNIT
- Oil Change	1.00	
ter	1.00	

ODT Service Help

Click on the cell **Unit Cost** with the value **3.50**

The Unit Cost defaults from the Item card.

	QUANTITY	UNIT COST	UNIT P
	1.00	22.25	
	1.00	3.50	

Click on the cell **Unit Price** with the value **11.75**

The Unit Price defaults from the Item card.

	QUANTITY	UNIT COST	UNIT PRICE
	1.00	22.25	75.00
	1.00	3.50	11.75

Click on the cell **Type**

Template Lines | Manage

SERVICE TEMPLATE NO.	TYPE	NO.
	Resource	LABOR
	Item	1001

Click on the item **Item** in the list

Template Lines | Manage

SERVICE TEMPLATE NO.	TYPE	NO.
	Resource	LABOR
	Item	1001

Resource dropdown menu options: Resource, Item, Item point, Item, Text



ODT Service Help

Click on the cell **No.**

TEMPLATE NO.	TYPE	NO.	DESCRIPTION
	Resource	LABOR	Labor - Oil Change
	Item	1001	Oil Filter
	Item		

Click on the link in cell **No.** with the value **1002**

NO.	DESCRIPTION
1001	Oil Filter
1002	Oil Gasket
1003	Oil 5W30
1004	Air Filter for Skid Steer
1896-S	ATHENS Desk

Click on the cell **Type**

SERVICE TEMPLATE NO.	TYPE	NO.
	Resource	LABOR
	Item	1001
	Item	1002
	Resource	

Click on the item **Item** in the list

SERVICE TEMPLATE NO.	TYPE	NO.
	Resource	LABOR
	Item	1001
	Item	1002
	Resource	



ODT Service Help

Click on the cell **No.**

TEMPLATE NO.	TYPE	NO.	DESCRIPTION
	Resource	LABOR	Labor - Oil Change
	Item	1001	Oil Filter
	Item	1002	Oil Gasket
	Item		

Click on the link in cell **No.** with the value **1003**

NO.	DESCRIPTION	UNIT
1001	Oil Filter	PC
1002	Oil Gasket	PC
1003	Mobile Oil 5W30	PC
10 Select record "1003" for Skid Steer		
1896-S	ATHENS Desk	PC
+ New		

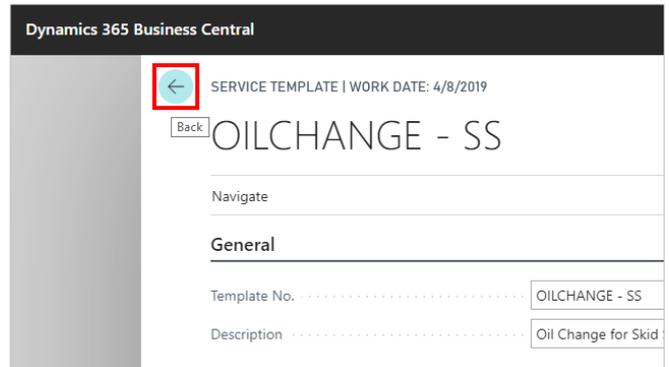
Click on the cell **Quantity** with the value **1.00**

DESCRIPTION	QUANTITY	UNIT
- Oil Change	1.00	
ter	1.00	
sket	1.00	
e Oil 5W30	1.00	

Enter the text **5**.

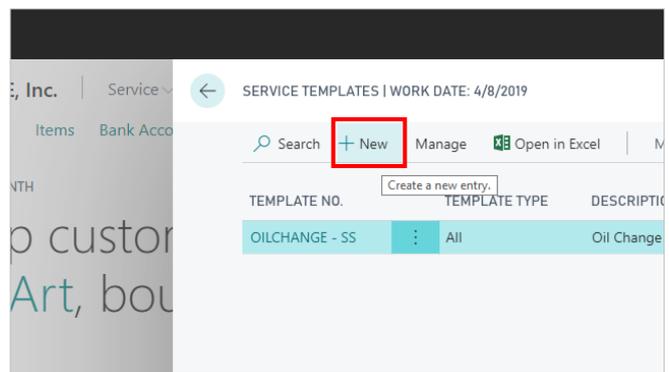
DESCRIPTION	QUANTITY	UNIT
- Oil Change	1.00	
ter	1.00	
sket	1.00	
e Oil 5W30	5	

Click on the back button



The following demonstrated the setup of a template for changing the air filter on a Skid Steer.

Click on the navigation menu item **New**



Double click on the field **Template No.**



Enter the text **AirFilter - SS.**





ODT Service Help

Click on the field **Description**

template

.....	* AirFilter - SS	Ter
.....		Ma

Manage

DATE NO.	TYPE	NO.	DESCRIPTION
----------	------	-----	-------------

Enter the text **Changing the Air Filter on Skid Steers.**

template

.....	AIRFILTER - SS	Ter
.....	q	Ma

Manage

DATE NO.	TYPE	NO.	DESCRIPTION
----------	------	-----	-------------

Click on the field **Template Type**

.....	All	▼
.....	All	▼

Manage

DATE NO.	TYPE	NO.	DESCRIPTION
----------	------	-----	-------------

Click on the item **Service** in the list

.....	All	▼
.....	All	▼
.....	Service	▼
.....	Service	Maintenance

Manage

QUANTITY	UNIT COST	UNIT PRICE
----------	-----------	------------

ODT Service Help

Click on the field **Maintenance Group Code**

Click on the link in cell **Group Code** with the value **SKIDSTEER**

QUANTITY	UNIT COST	UNIT PRICE
0.00	0.00	

Click on the cell **Type**

As Resource is the default Type, and this line entry is for a Resource, the Type does not need to be changed.

SERVICE TEMPLATE NO.	TYPE	NO.
	Resource	

Click on the cell **No.**

TEMPLATE NO.	TYPE	NO.	DESCRIPTION
	Resource		



ODT Service Help

Click on the link in cell **No.** with the value **LABOR**

Manage

PLATE NO.	TYPE	NO.	DESCRIPTION
	Resource		

NO.	NAME
LABOR	Labor - Oil Change
> select record "LABOR" Martin	
MARK	Mark Hanson
MARY	Mary A. Dempsey
TIMOTHY	Timothy Sneath
+ New	

Click on the cell **Description** with the value **Labor - Oil Change**

ter on Skid Steers Maintenance Group Code

Q.	DESCRIPTION	QU
LABOR	Labor - Oil Change	

Enter the text **Labor - Replace Air Filter.**

ter on Skid Steers Maintenance Group Code

Q.	DESCRIPTION	QU
LABOR	Labor - Replace Air Filter.	

Click on the cell **Type**

Template Lines | Manage

SERVICE TEMPLATE NO.	TYPE	NO.
	Resource	LABOR

Click on the item **Item** in the list

SERVICE TEMPLATE NO.	TYPE	NO.
	Resource	LABOR
	Resource	
	Item	
	Cost Amount	
	Item	
	Text	

Click on the cell **No.**

TEMPLATE NO.	TYPE	NO.	DESCRIPTION
	Resource	LABOR	Labor - Replace Air Filter
	Item		

Click on the link in cell **No.** with the value **1004**

NO.	DESCRIPTION	UNIT
1001	Oil Filter	PC
1002	Oil Gasket	PC
1003	Mobile Oil 5W30	PC
1004	Air Filter for Skid Steer	PC
	Select record "1004"	INS Desk

Click on the back button

Dynamics 365 Business Central

Service Template

Back

General

Template No. AIRFILTER - SS

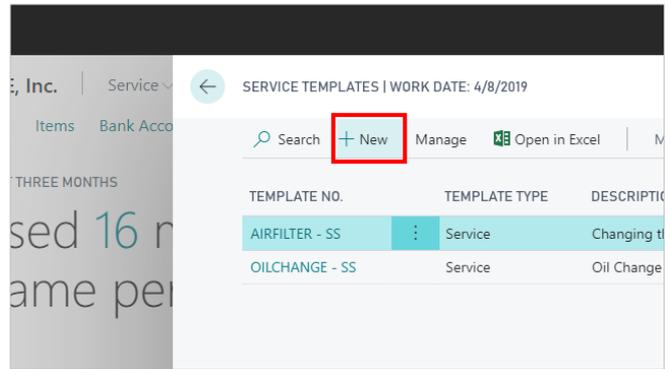
Description Changing the Air Filter

The following demonstrates the creating of a service template for a service plan.



ODT Service Help

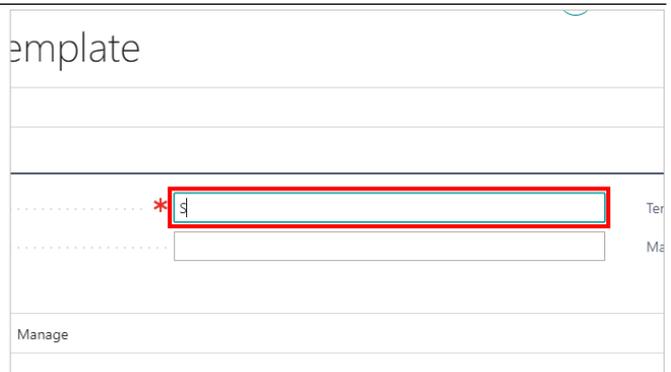
Click on the navigation menu item **New**



Click on the field **Template No.**



Enter the text **SS-General Service.**



Click on the field **Description**





ODT Service Help

Enter the text **Skid Steer General Service**.

emplate

SS-GENERAL SERVICE

Manage

DATE NO.	TYPE	NO.	DESCRIPTION
----------	------	-----	-------------

Click on the field **Template Type**

All

All
Service
Planned Maintenance
Field

QUANTITY UNIT COST UNIT PRICE

Click on the item **Service** in the list

All

All
Service
Planned Maintenance
Field

QUANTITY UNIT COST UNIT PRICE

Click on the field **Maintenance Group Code**

Service

QUANTITY UNIT COST UNIT PRICE



ODT Service Help

Click on the link in cell **Group Code** with the value **SKIDSTEER**

Service Type	Service		
Maintenance Group Code	<input type="text"/>		
	GROUP CODE	DESCRIPTION	
	SKIDSTEER	Skid Steers	
	+ New <input type="button" value="Select record 'SKIDSTEER'"/>		
	QUANTITY	UNIT COST	UNIT
	0.00	0.00	

Click on the cell **Type** with the value **Resource Item**
G/L Account Text

Select Resource.

Description	Skid Steer General Service		
Template Lines Manage			
SERVICE TEMPLATE NO.	TYPE	NO.	
	Resource	<input type="text"/>	
		<input type="text" value="Resource"/>	

Click on the cell **No.**

Description	Skid Steer General Service		
Manage			
TEMPLATE NO.	TYPE	NO.	DESCRIPTION
	Resource	<input type="text"/>	
	Resource		
	Item		
	G/L Account		
	Text		

Click on the link in cell **No.** with the value **LABOR**

Manage			
PLATE NO.	TYPE	NO.	DESCRIPTION
	Resource	<input type="text"/>	
		NO.	NAME
		LABOR	Labor - Oil Change
		LINDA	Linda Martin
		MARK	Mark Hanson
		MARY	Mary A. Dempsey
		TIMOTHY	Timothy Sneath
		+ New	



ODT Service Help

Click on the cell **Description** with the value **Labor - Oil Change**

Service	Maintenance Group Code	
0.	DESCRIPTION	QU
LABOR	Labor - Oil Change	

Enter the text **Labor - Lube**.

Service	Maintenance Group Code	
0.	DESCRIPTION	QU
LABOR		

Click on the cell **Quantity** with the value **1.00**

	Maintenance Group Code	SKIDSTEER
DESCRIPTION	QUANTITY	UNIT
- Lube	1.00	

Enter the text **.5**.

	Maintenance Group Code	SKIDSTEER
DESCRIPTION	QUANTITY	UNIT
- Lube		

ODT Service Help

Click on the cell **Service Template No.**

Template Lines			
Manage			
SERVICE TEMPLATE NO.	TYPE	NO.	
	Resource	LABOR	
	Resource		

Click on the lookup button in the cell **Service Template No.**

Template Lines			
Manage			
SERVICE TEMPLATE NO.	TYPE	NO.	
	Resource	LABOR	
	Resource		

Click on the link in cell **Template No.** with the value **OILCHANGE - SS**

Service Template

SEARCH + New Manage Open in Excel

SERVICE TEMPLATES + New

TEMPLATE NO.	TEMPLATE TYPE
AIRFILTER - SS	Service
OILCHANGE - SS	Service

Select record "OILCHANGE - SS"

Click on the cell **Service Template No.**

Template Lines			
Manage			
SERVICE TEMPLATE NO.	TYPE	NO.	
	Resource	LABOR	
OILCHANGE - SS	Resource		

ODT Service Help

Click on the lookup button in the cell **Service Template No.**

Template Lines			Manage
SERVICE TEMPLATE NO.	TYPE	NO.	
	Resource	LABOR	
OILCHANGE - SS	Resource		
AIRFILTER - SS	Resource		

Look up value

Click on the link in cell **Template No.** with the value **AIRFILTER - SS**

Service Template

SEARCH + New Manage Open in Excel

SERVICE TEMPLATES + New

TEMPLATE NO.	TEMPLATE TYPE
AIRFILTER - SS	Service
OILCHANGE - SS	Service

Select record "AIRFILTER - SS"

Click on the cell **Type**

Template Lines			Manage
SERVICE TEMPLATE NO.	TYPE	NO.	
	Resource	LABOR	
OILCHANGE - SS	Resource		
AIRFILTER - SS	Resource		

Click on the cell **Type** with the value **Resource Item G/L Account Text**

Template Lines			Manage
SERVICE TEMPLATE NO.	TYPE	NO.	
	Resource	LABOR	
OILCHANGE - SS	Resource		
AIRFILTER - SS	Resource		

Resource



ODT Service Help

Click on the item **G/L Account** in the list

SERVICE TEMPLATE NO.	TYPE	NO.
	Resource	LABOR
OILCHANGE - SS	Resource	
AIRFILTER - SS	Resource	
	Resource	

Resource

Resource

Item

G/L Account

G/L Account

Click on the cell **No.**

TEMPLATE NO.	TYPE	NO.	DESCRIPTION
	Resource	LABOR	Labor - Lube
GE - SS	Resource		Oil Change for Skid Steer
- SS	Resource		Changing the Air Filter
	G/L Account		

Click on the link in cell **No.** with the value **40150**

SS	Resource		Oil Change for Skid Steers
S	Resource		Changing the Air Filter on S
	G/L Account		

NO.	NAME	IN
40001	INCOME	In
40100	Income, Services	In
40150	Income - Shop Supplies	In
40200	Income, Product Sales	In
40250	Job Sales	In
40300	Sales Discounts	In
+ New		

Click on the cell **Unit Cost** with the value **0.00**

QUANTITY	UNIT COST	UNIT P
0.50	22.25	
0.00	0.00	
0.00	0.00	
1.00	0.00	

Enter the text **10.00**.

	QUANTITY	UNIT COST	UNIT PRICE
	0.50	22.25	
	0.00	0.00	
ts	0.00	0.00	
	1.00		

Click on the cell **Unit Price** with the value **0.00**

	QUANTITY	UNIT COST	UNIT PRICE
	0.50	22.25	75.00
	0.00	0.00	0.00
	0.00	0.00	0.00
	1.00	10.00	0.00

Enter the text **20.00**.

	QUANTITY	UNIT COST	UNIT PRICE
	0.50	22.25	75.00
	0.00	0.00	0.00
	0.00	0.00	0.00
	1.00	10.00	

2.5.4. How to Setup a Checklist

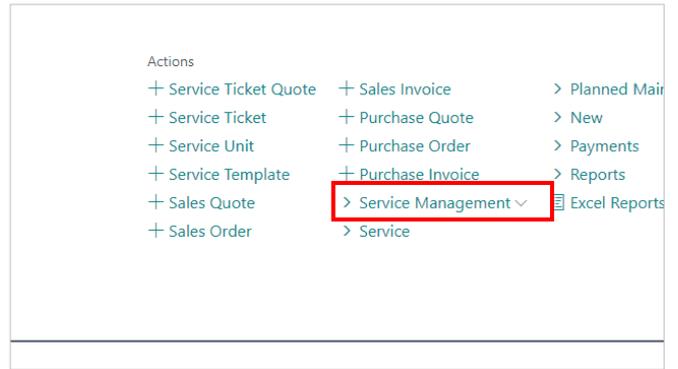
Checklists can be for the defining the details of specific tasks to be completed by the technician. The listing can be for a simple check box, recording of findings such as brake pad readings, the type oil used in an oil change, etc.

The list can be printed from the Service Ticket, where the technician can note findings and check that they have completed the task. The checklist findings can as well be entered into the checklist on the Service Ticket.

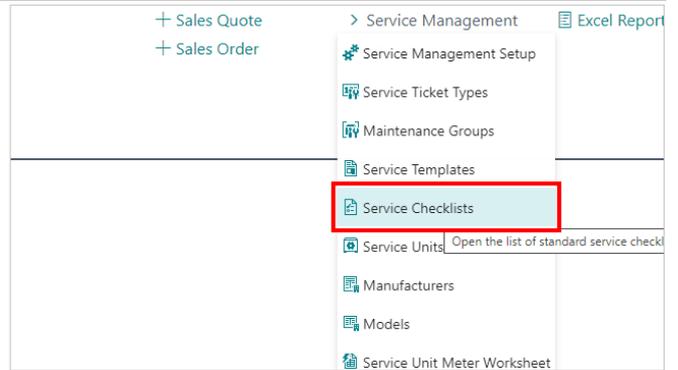
The following demonstrates the creating of a checklist for the Service Template for the Skid Steer General Service.

The following demonstrates how to set up a standard service checklist

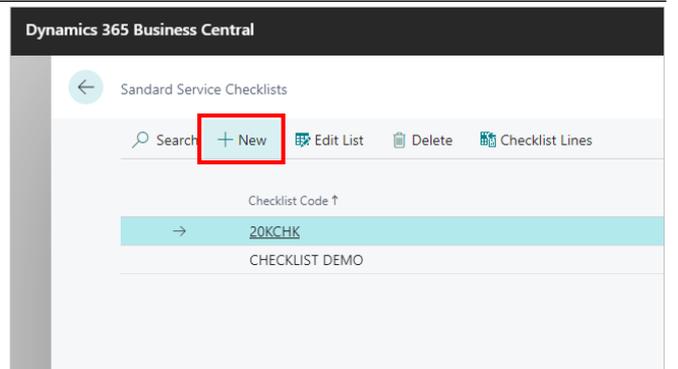
Click on the navigation menu item popup **Service Management**



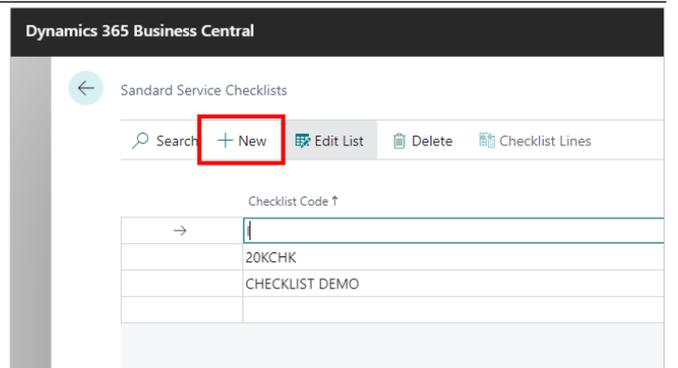
Click on the navigation menu item **Service Checklists**



Click on the navigation menu item **New**



Enter the text **Inspection**.



ODT Service Help

Click on **Description**

Standard Service Checklists	
	Description
<input type="checkbox"/>	20 K Checklist
<input type="checkbox"/>	001

Enter the text **Inspection list.**

Standard Service Checklists	
	Description
<input type="checkbox"/>	Inspection list
<input type="checkbox"/>	20 K Checklist
<input type="checkbox"/>	001

Click on the navigation menu item **Checklist Lines**

Business Central

Standard Service Checklists

Search + New Edit List Delete Checklist Lines

Checklist Code ↑	
INSPECTION	<input type="checkbox"/>
20KCHK	<input type="checkbox"/>
CHECKLIST DEMO	<input type="checkbox"/>

Click on the cell **Type** with the value **Text Boolean**
Decimal Named Value

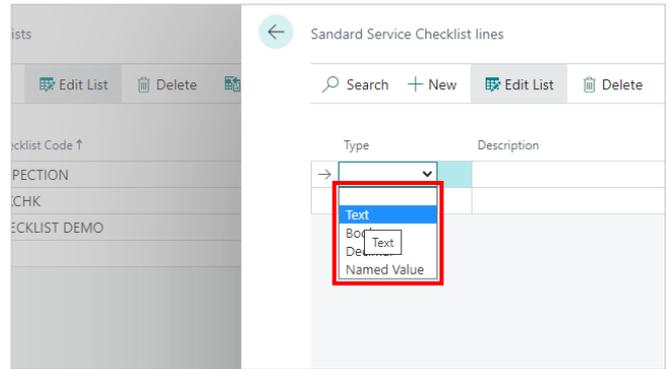
Standard Service Checklist lines

Search + New Edit List Delete

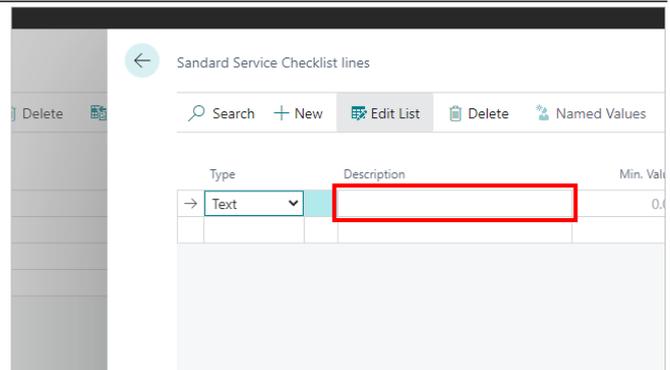
Type	Description
Text Boolean	
Decimal Named Value	

ODT Service Help

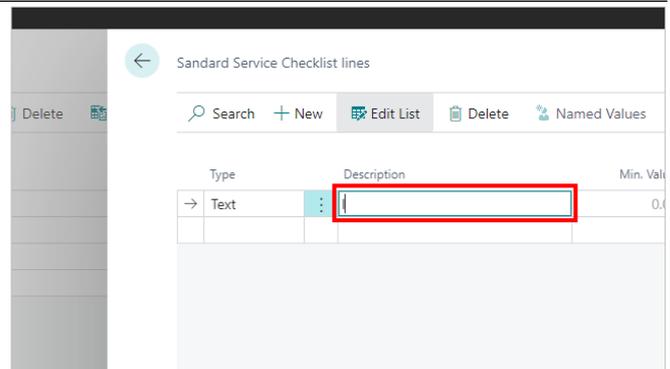
Click on the item **Text** in the list



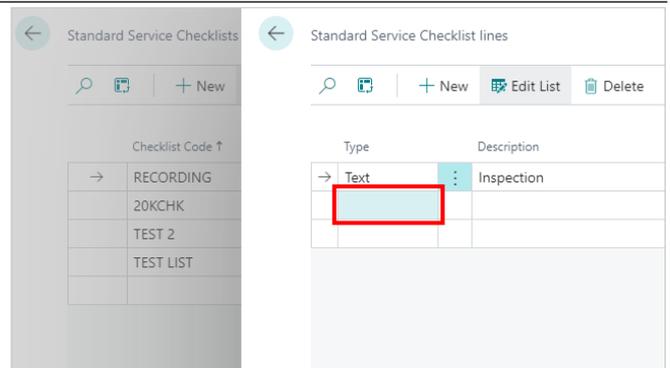
Click on the cell **Description**



Enter the text **Inspection**.

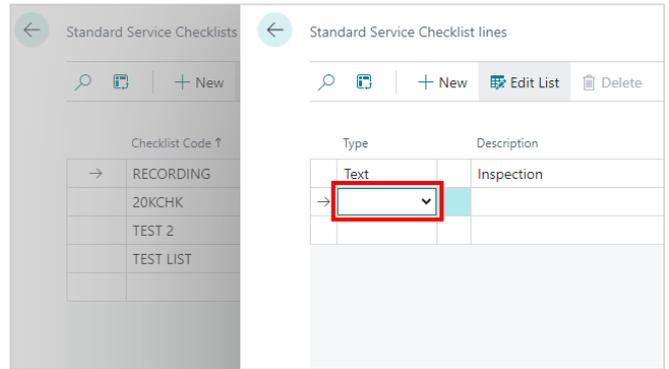


Click on the cell **Type**

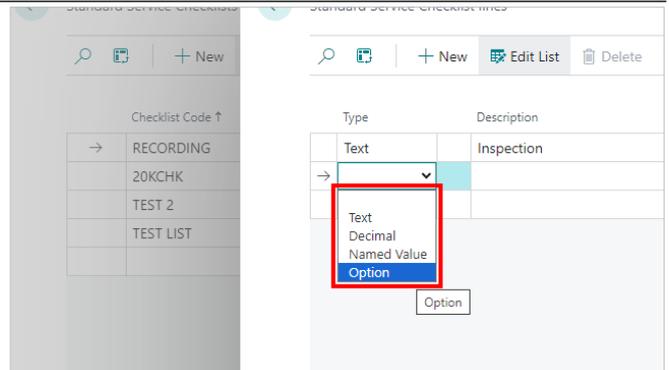


ODT Service Help

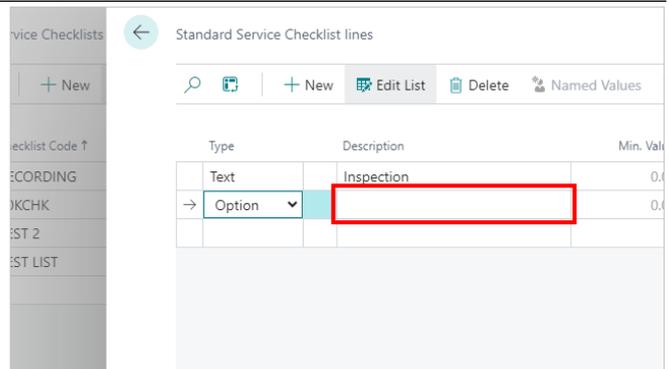
Click on the cell **Type**



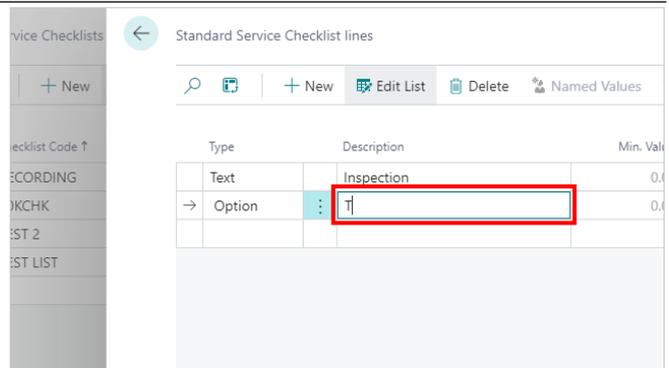
Click on the item **Option** in the list



Click on the cell **Description**

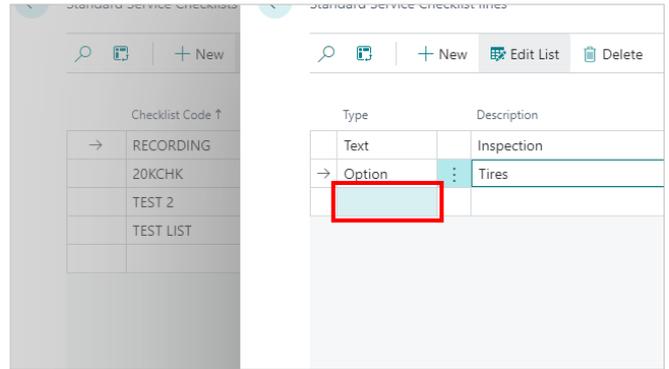


Enter the text **Tires**.



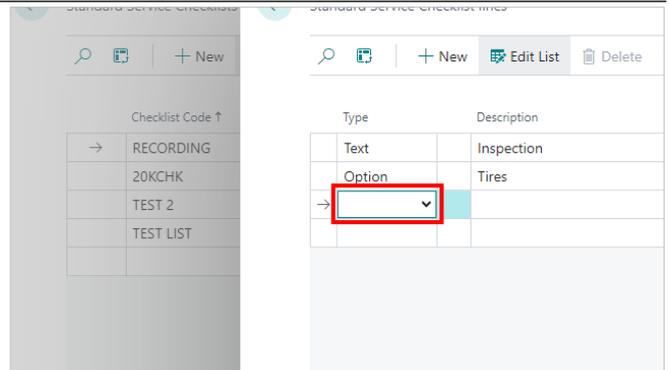
ODT Service Help

Click on the cell **Type**



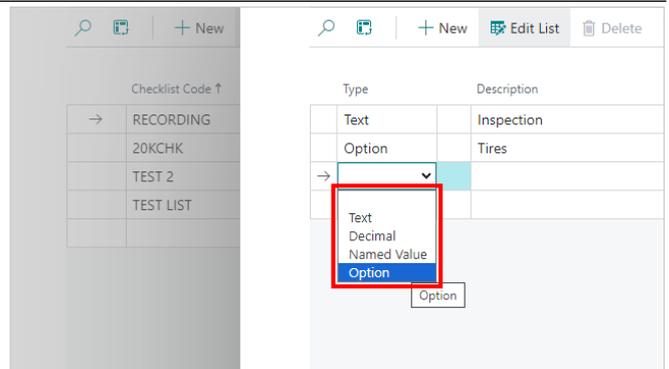
Type	Description
Text	Inspection
Option	Tires

Click on the cell **Type**



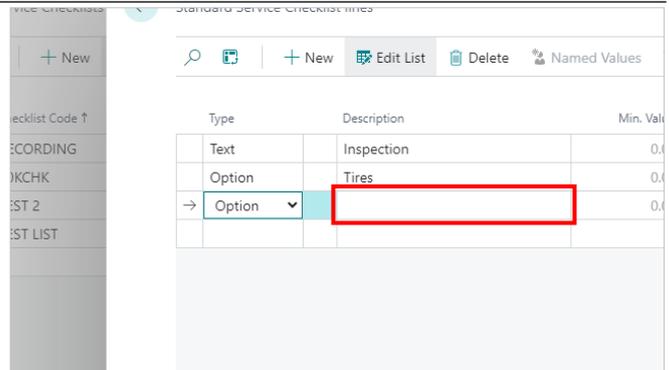
Type	Description
Text	Inspection
Option	Tires

Click on the item **Option** in the list



Type	Description
Text	Inspection
Option	Tires

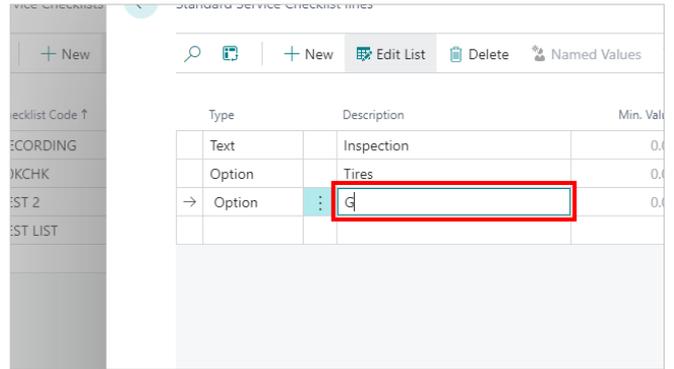
Click on the cell **Description**



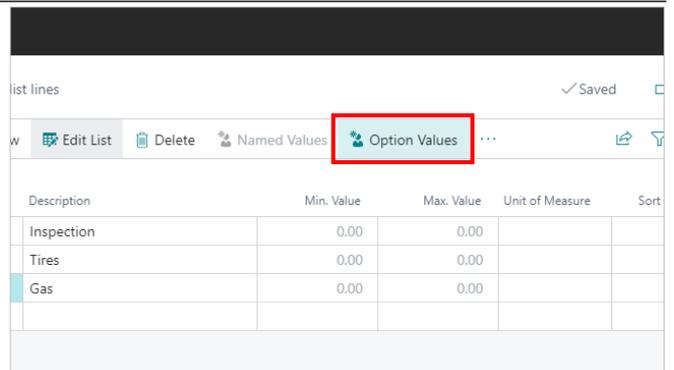
Type	Description	Min. Val
Text	Inspection	0.0
Option	Tires	0.0

ODT Service Help

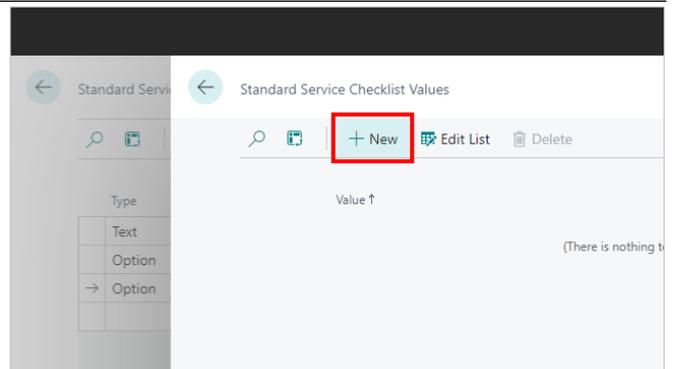
Enter the text **Gas**.



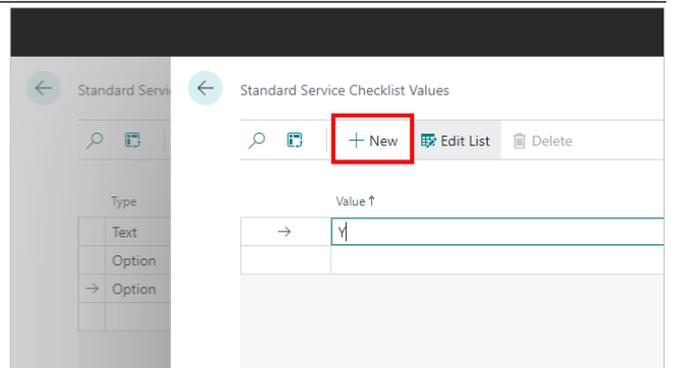
Click on the navigation menu item **Option Values**



Click on the navigation menu item **New**

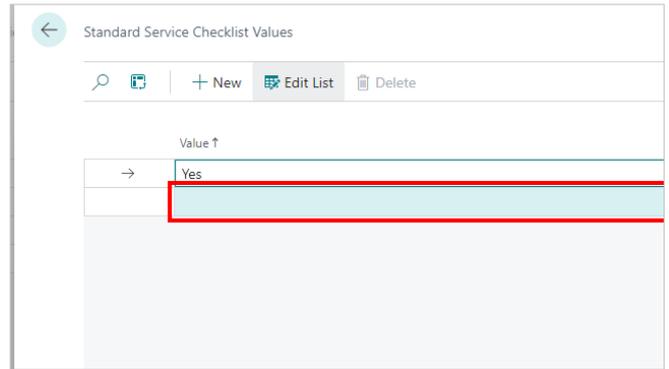


Enter the text **Yes**.

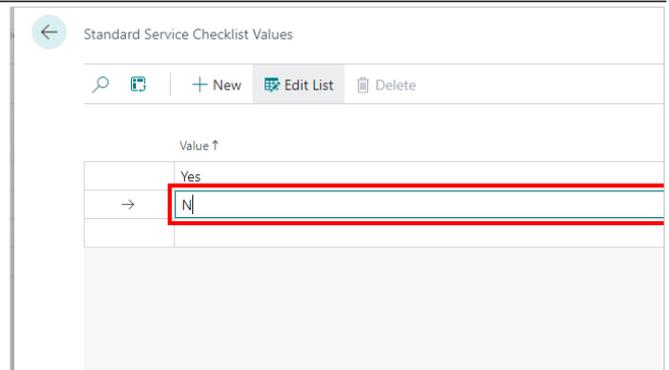


ODT Service Help

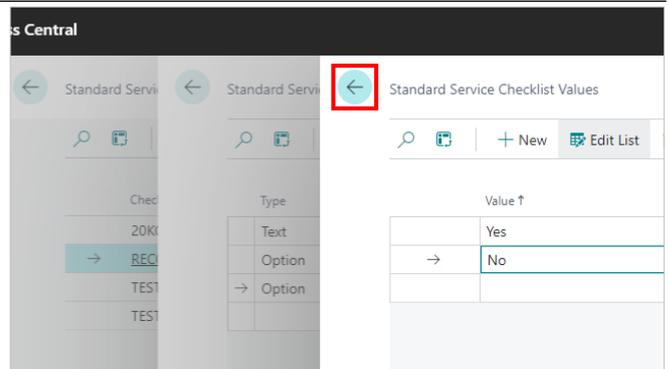
Click on the cell **Value**



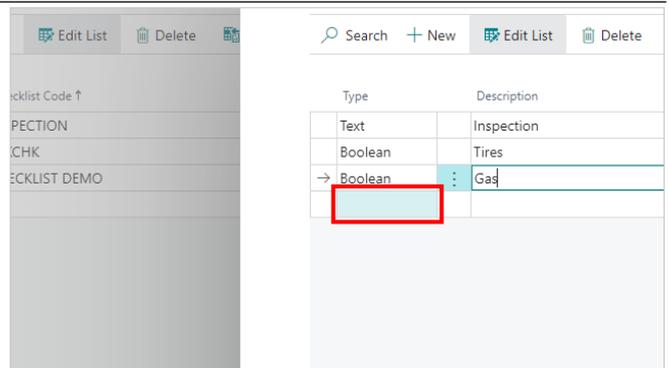
Enter the text **No**.



Click on the back button

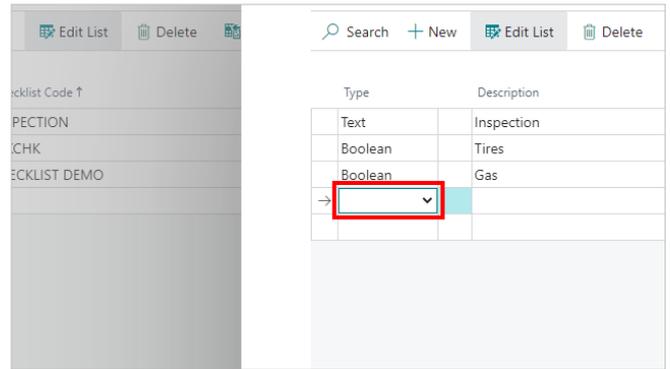


Click on **Type**



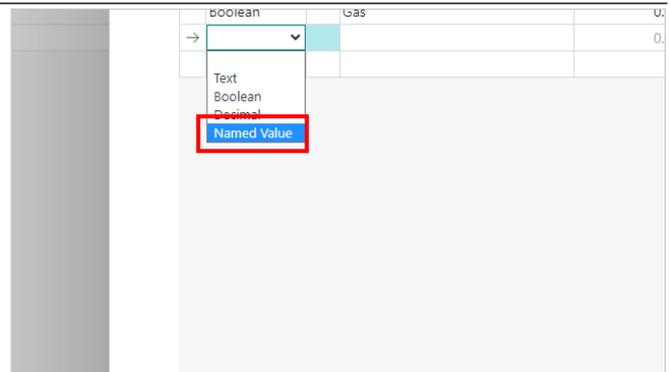
ODT Service Help

Click on the cell **Type** with the value **Text Boolean**
Decimal Named Value



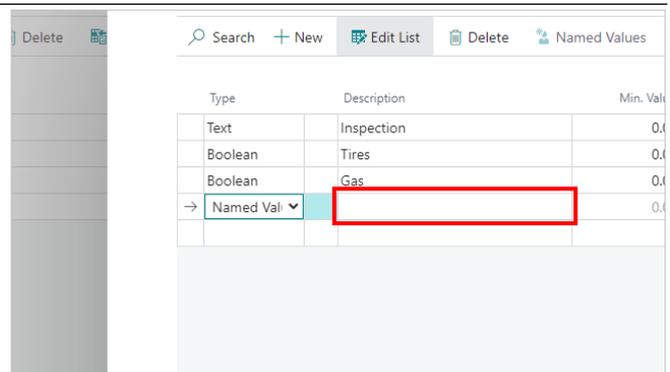
Type	Description
Text	Inspection
Boolean	Tires
Boolean	Gas
→ [Dropdown]	

Click on the item Named Value in the list



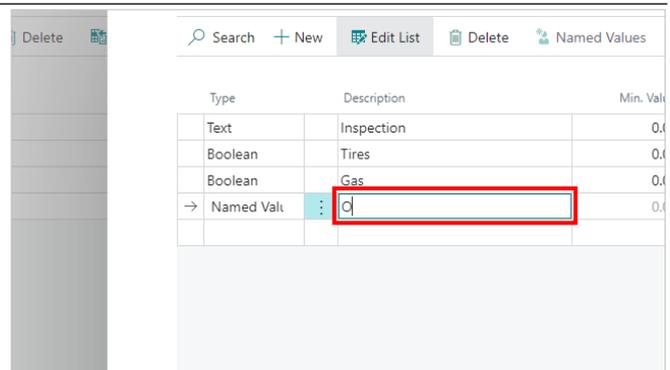
Type	Description	Min. Val
Text	Inspection	0.0
Boolean	Tires	0.0
Boolean	Gas	0.0
→ [Dropdown]		

Click on the cell **Description**



Type	Description	Min. Val
Text	Inspection	0.0
Boolean	Tires	0.0
Boolean	Gas	0.0
→ [Dropdown]		

Enter the text **Optionals**.



Type	Description	Min. Val
Text	Inspection	0.0
Boolean	Tires	0.0
Boolean	Gas	0.0
→ Named Val	Optionals	0.0

ODT Service Help

Click on **Type = 2, Description = Gas, Min. Value = 0**

Type	Description
Text	Inspection
Boolean	Tires
Boolean	Gas
Named Value	Optionals

Click on **Type = 4, Description = Optionals, Min. Value = 0**

Type	Description
Text	Inspection
Boolean	Tires
Boolean	Gas
Named Value	Optionals

Click on the navigation menu item **Named Values**

Type	Description	Min. Value	Max. Value	Unit
Text	Inspection	0.00	0.00	
Boolean	Tires	0.00	0.00	
Boolean	Gas	0.00	0.00	
Named Value	Optionals	0.00	0.00	

Click on the navigation menu item **New**

Standard Service Checklist Values

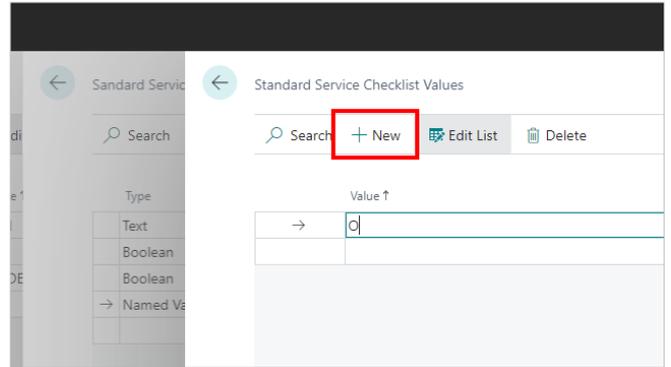
+ New Edit List Delete

Value ↑

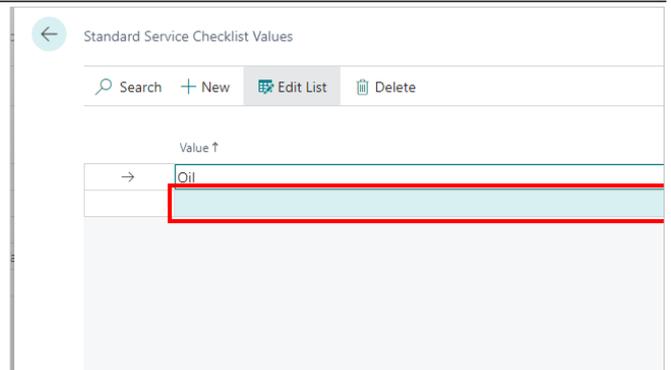
(There is nothing here)

ODT Service Help

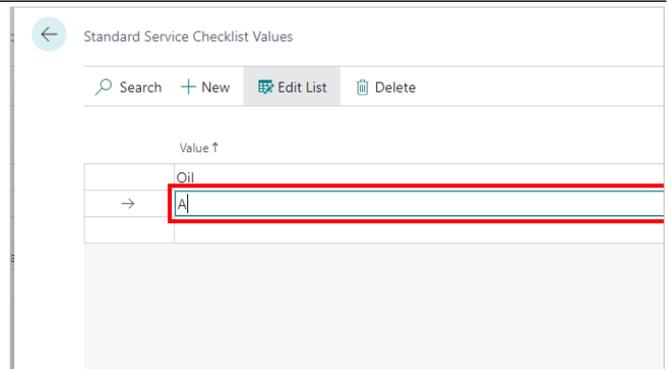
Enter the text **Oil**.



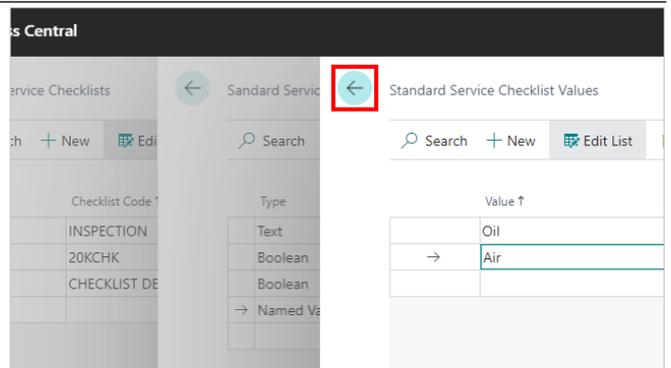
Click on **Value**



Enter the text **Air**.

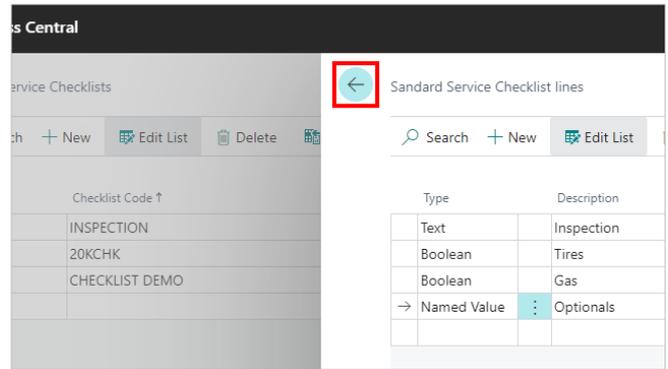


Click on the back button

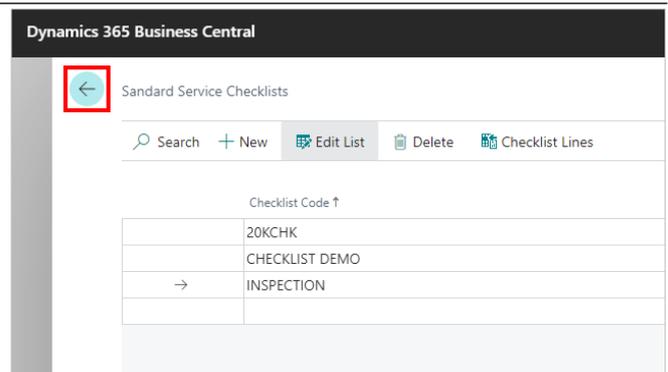


ODT Service Help

Click on the back button

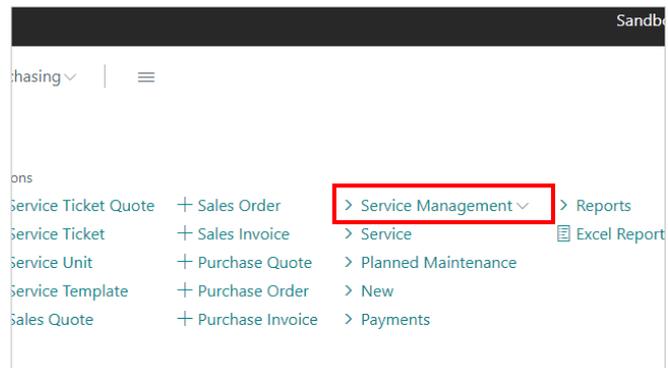


Click on the back button

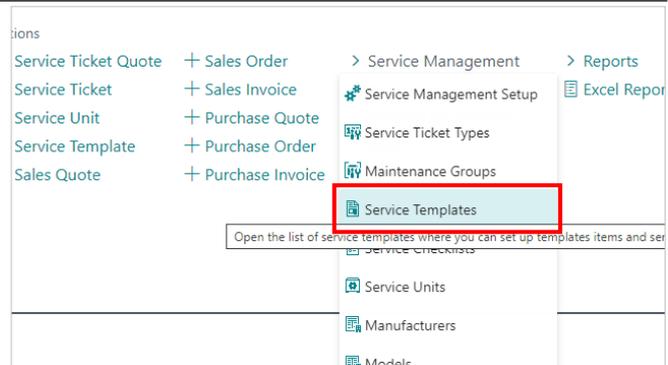


The following demonstrates how to add a checklist to a service template.

Click on the navigation menu item popup **Service Management**

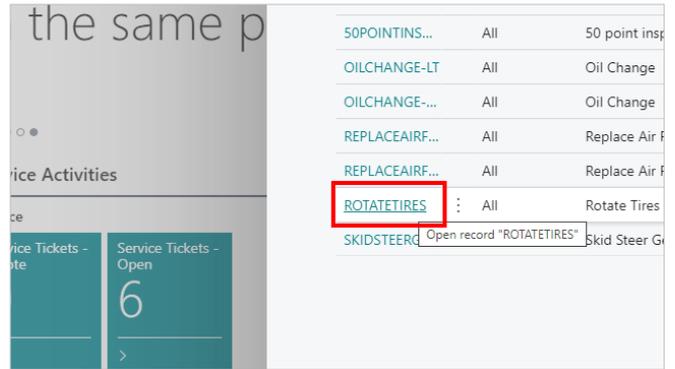


Click on the navigation menu item **Service Templates**

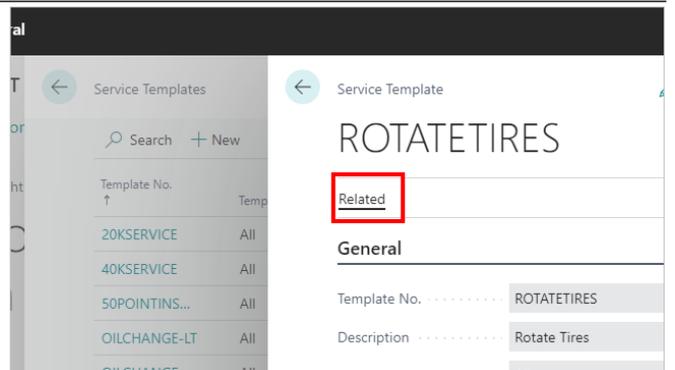


ODT Service Help

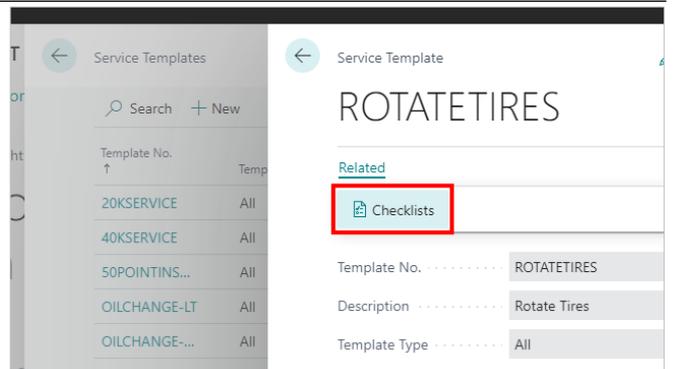
Click on the link in cell **Template No.** with the value **ROTATETIRES**



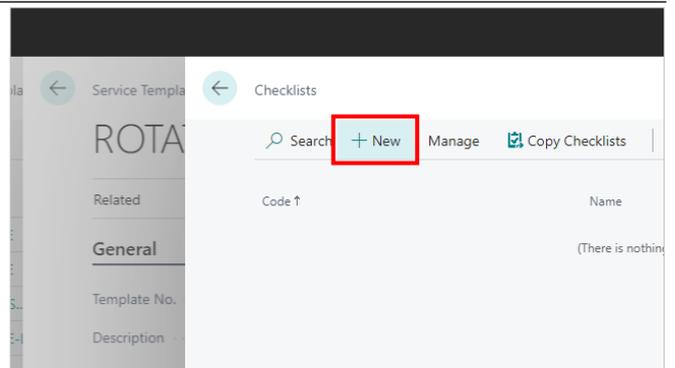
Click on the navigation menu item popup **Related**



Click on the navigation menu item **Checklists**



Click on the navigation menu item **New**



Click on the lookup button **Code**

Template Checklist

OTATETIRES

Code [dropdown] Name [text]

Checklist Details | Manage

Type	Description	Min. Value	Max. Value	Unit of Measure
------	-------------	------------	------------	-----------------

Click on the link in cell **Checklist Code** with the value **INSPECTION**

General

Code [dropdown] Name [text]

Checklist Details | Manage

Type	Description	Min. Value	Max. Value	Unit of Measure
------	-------------	------------	------------	-----------------

Click on the cell **Description**

Code [INSPECTION] Name [text]

Checklist Details | Manage

Type	Description	Min. Value	Max. Value	Unit of Measure
[arrow]	[red box]			0.00

After selecting the lines, they will automatically populate with values from the selected standard service checklist.

Checklist Details | Manage

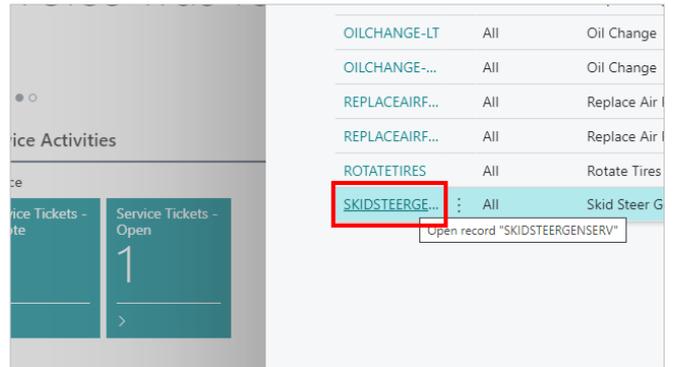
Type	Description	Min. Value
→ Text	Inspection	0.00
Boolean	Tires	0.00
Boolean	Gas	0.00
Named Value	Optionals	0.00

2.5.5. How to Copy an Existing Checklist

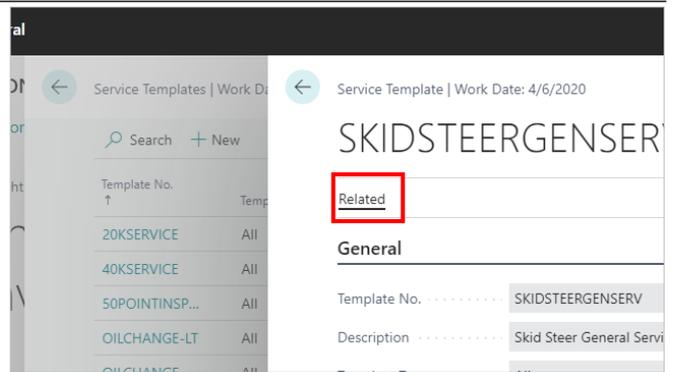
When creating checklists for service templates, you also have the option to copy existing checklists from one template to another.

ODT Service Help

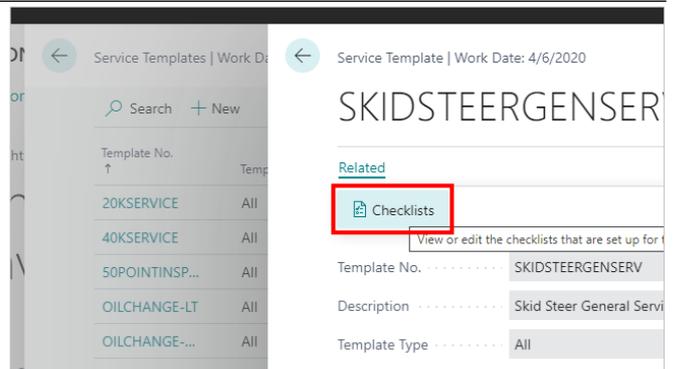
First, select the template that you will be adding a template to.
Click on the link in cell **Template No.** with the value **SKIDSTEERGENSERV**



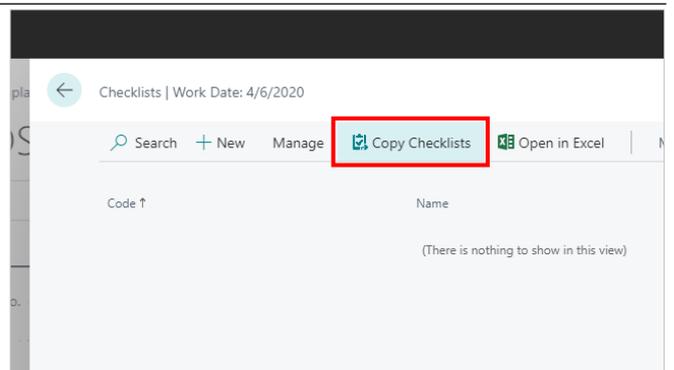
Click on the navigation menu item popup **Related**



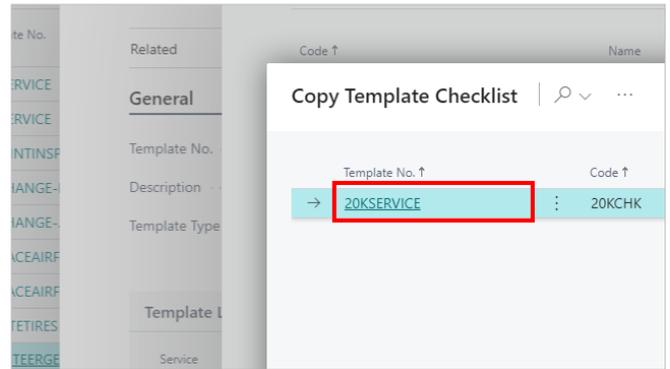
Click on the navigation menu item **Checklists**



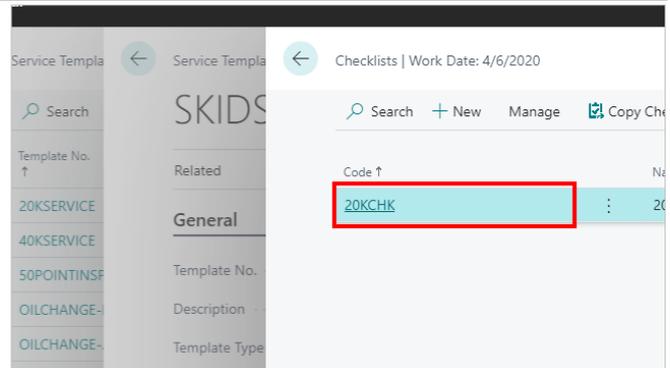
Click on the navigation menu item **Copy Checklists**



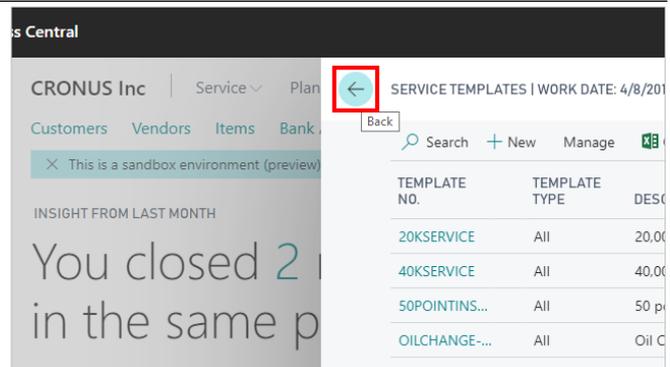
Select the template you want to copy
Click on the link in cell **Template No.** with the value **20KSERVICE**



Notice that the selected checklist has now been copied to the template.



Click on the back button



2.6. How to Setup Manufacturers

2.6.1. Overview

A listing of user defined Manufacturers can be setup to specify the company that manufactures the various Service Units. The Manufacturer is assigned on the Service Units.

For example, Bobcat, which manufactures Skid Steers.

Manufacturers setup is optional.

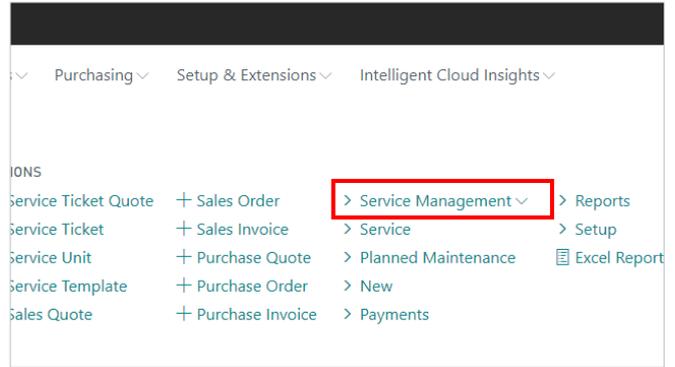
2.6.2. How to Setup Manufacturers

Business Manager Profile

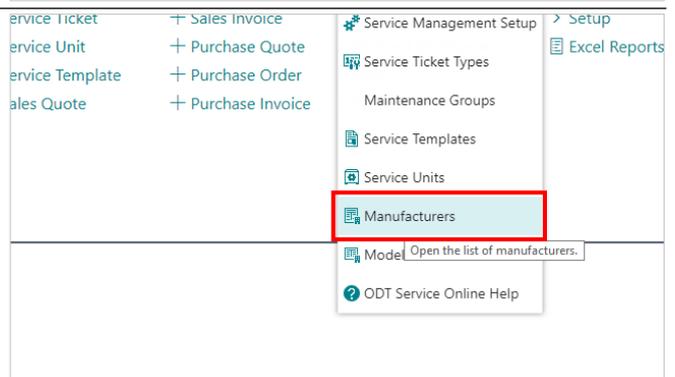
The following example demonstrates how to setup Manufacturers.

ODT Service Help

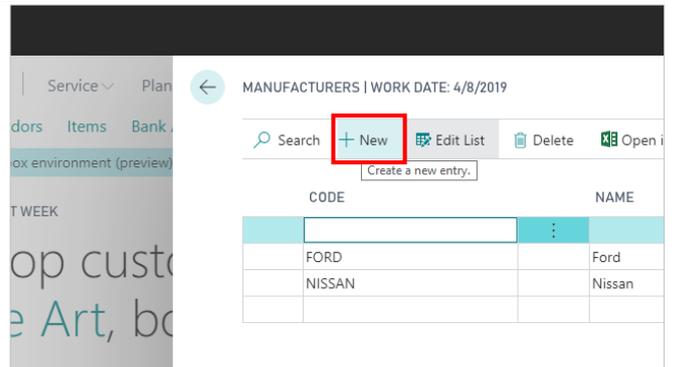
Click on the navigation menu item popup **Service Management**



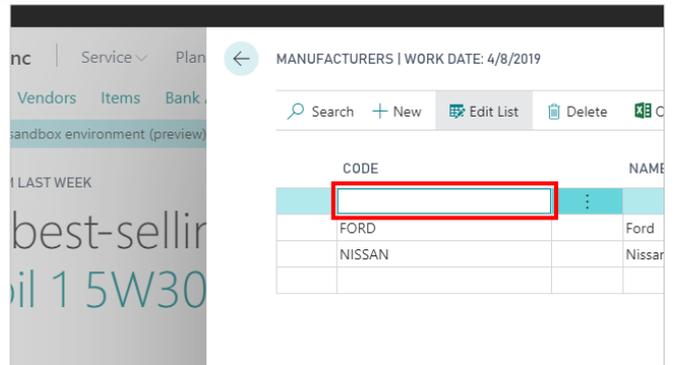
Click on the navigation menu item **Manufacturers**



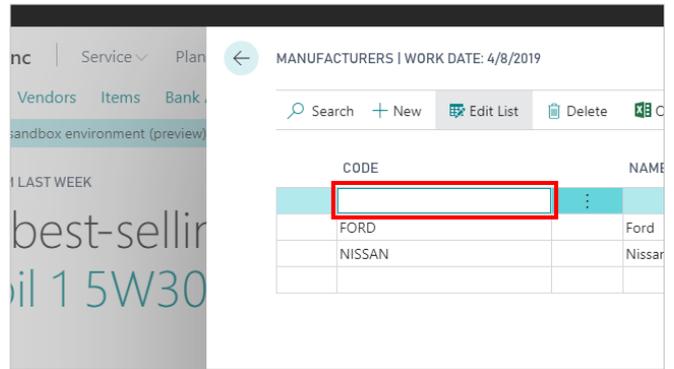
Click on the navigation menu item **New**



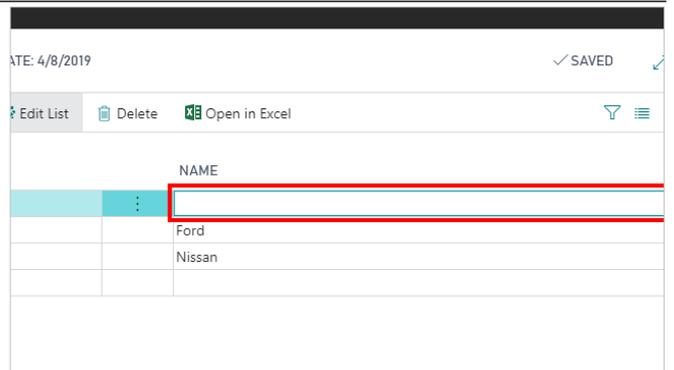
Click on the cell **Code**



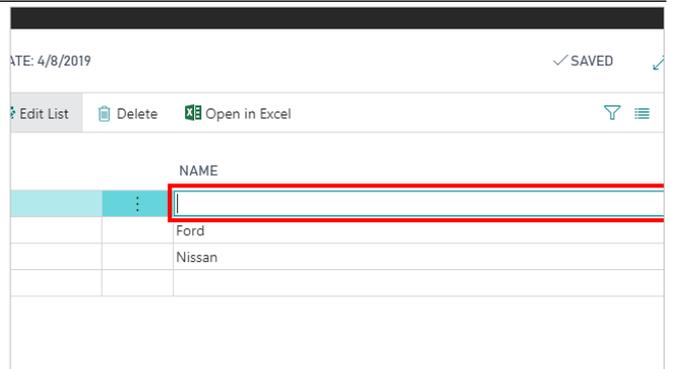
Enter the text **BOBCAT**.



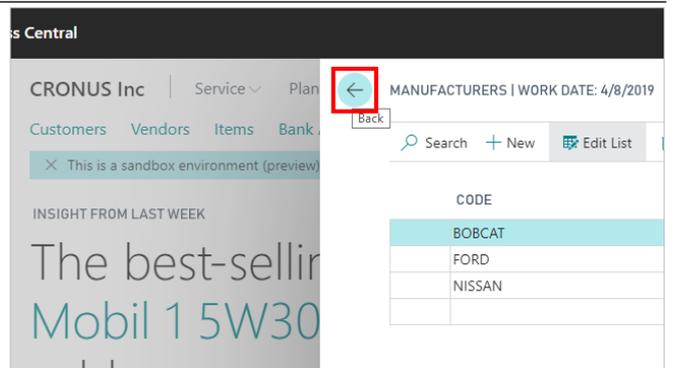
Click on the cell **Name**



Enter the text **Bobcat**.



Click on the back button



2.7. How to Setup Models

2.7.1. Overview

Models are user defined codes used to specify the Models of the product which the Manufacturers make. The Model is selected on the Service Unit from the listing. Thus providing a means for filtering the Service Units to locate a specific unit.

For example, Bobcat could have Skid Steer models of S450 and S70.

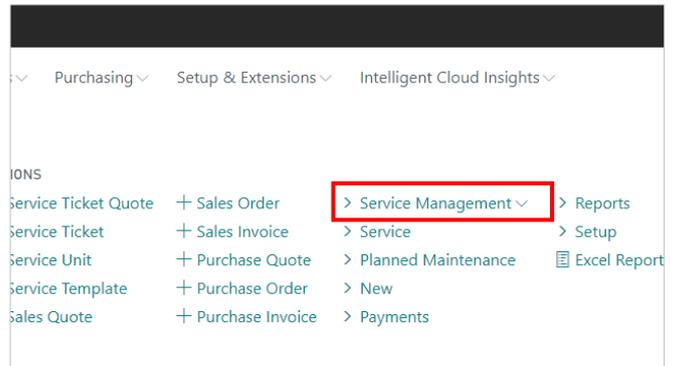
The setup of Models is optional.

2.7.2. How to Setup Models

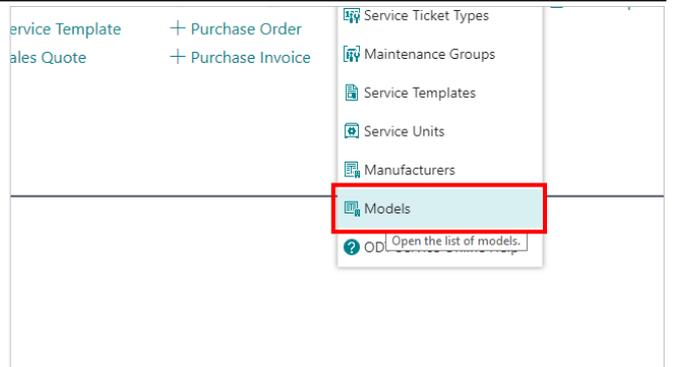
Business Manager Profile

The following demonstrates setting up the S450 Model of Skid Steers.

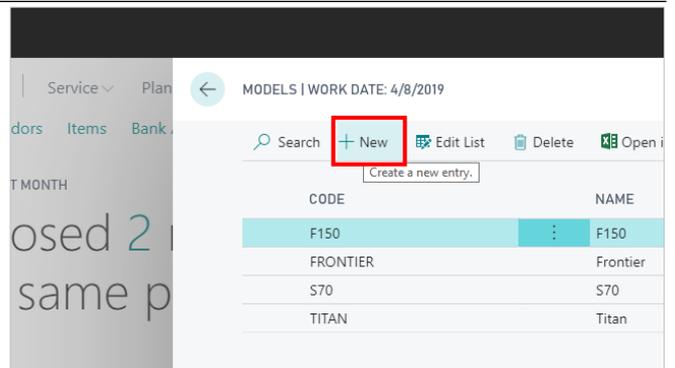
Click on the navigation menu item popup **Service Management**



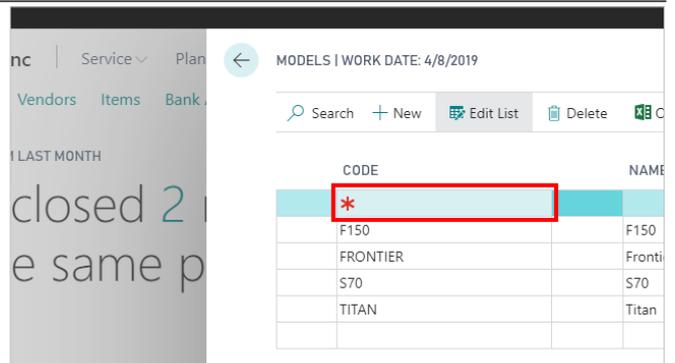
Click on the navigation menu item **Models**



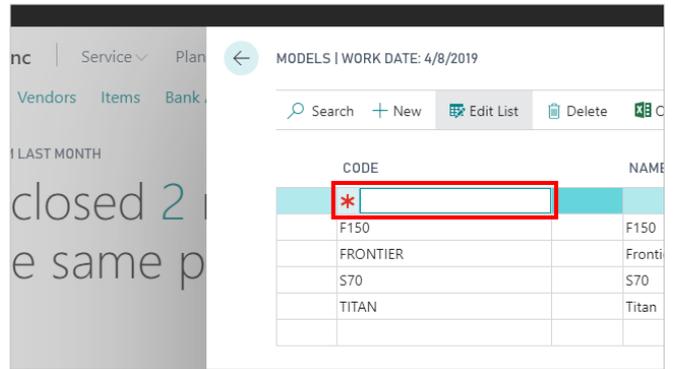
Click on the navigation menu item **New**



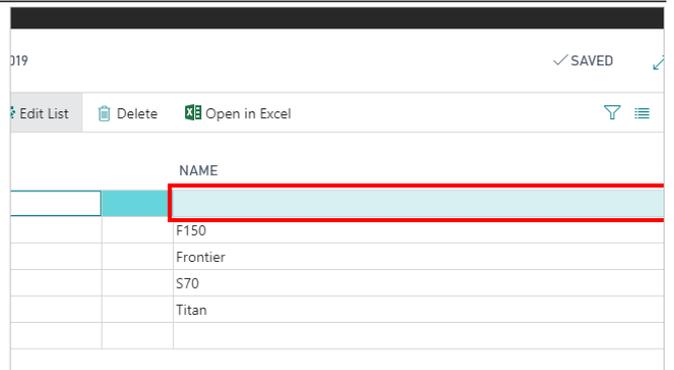
Click on the cell **Code**



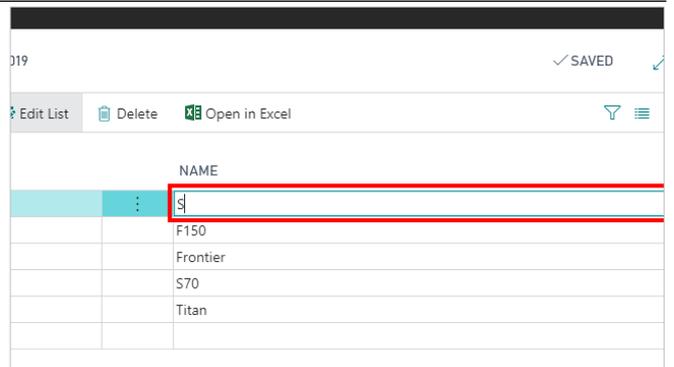
Enter the text **S450**.



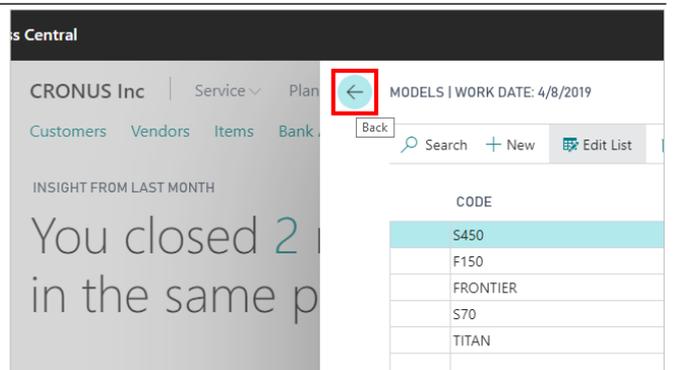
Click on the cell **Name**



Enter the text **S450**.



Click on the back button



2.8. How to Setup Service Units

2.8.1. Overview

Service Units define the product to be serviced and the setup is mandatory in order to use the ODT Service App.

Mandatory fields include the Service Unit No., Customer No. and Maintenance Group. All other fields are optional.

The customer can be an internal or a third party customer.

The Service Unit includes a number of equipment specific fields, which can be populated to enhance a users' ability to search for a unit. For example, the specification of a Manufacturer and a Model can aid in filtering the Service Unit list to locate the unit being searched by, or provide a view of the quantity of units having the same Manufacturer and Model.

The Service Unit can be linked to an Item or Fixed Asset for informational purposes, when the product is owned by the organization.

A Service Ticket can be automatically created directly from the Service Unit and can include a Service Template, if desired.

When clicking on the caption of a field, a brief description of the field is provided.

2.8.2. Service Unit Menu Options

Menu options displayed by default:

- Create Service Ticket Provides the ability to create a Service Ticket directly from the Service Unit.
- Create Service Ticket From Template Provides the ability to select a Service Template and create a Service Ticket directly from the Service Unit. Actions:
- Contains the options of Create Service Ticket and Create Service Ticket From Template.

Navigate:

- Statistics View statistical information about the Service Unit and service performed.
- Comments Provides the ability to add comments to a Service unit.
- Service History Displays a listing of Service Tickets which were completed, and provides the ability to "Navigate" to the Completed Service Ticket.
- Service Ledger Entries Displays a listing of Service ledger Entries created when processing a Service Ticket. On invoice records, the ability to view the posted invoice is provided in the Actions menu.
- Service Unit Meters Add and modify Service Meters assigned to the Service Unit. Service Meters are necessary in order to use Planned Maintenance features.

2.8.3. How to Setup a Service Unit

Business Manager Profile

The following example demonstrates the setup of a Service Unit which is owned by an external customer.

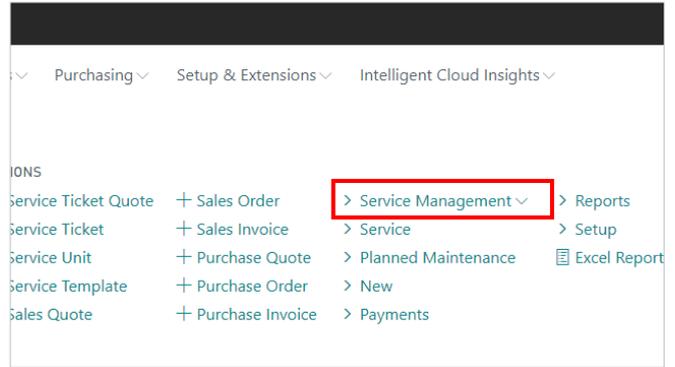
Only those fields that are mandatory, and those which were setup for the Manufacturer and Model have been included in the example.

To setup a Service Unit for company owned equipment the only mandatory field difference is that the customer selected would be the Internal Customer.

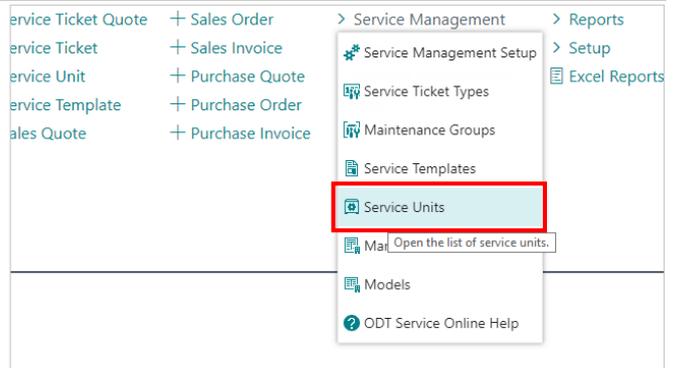
To learn about "How to Setup an Internal Customer for Servicing", go to the Financials Setups for Service category in the ODT Service Online Help.

ODT Service Help

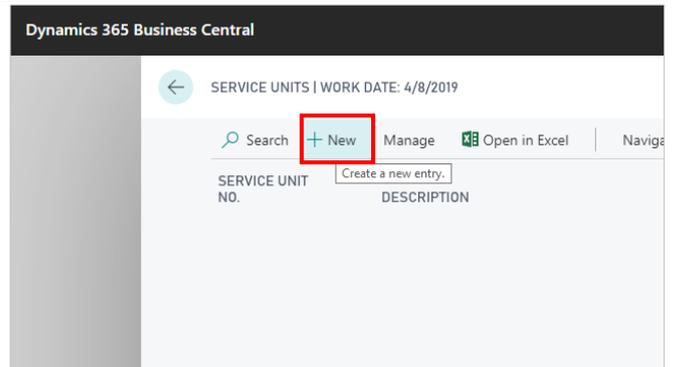
Click on the navigation menu item popup **Service Management**



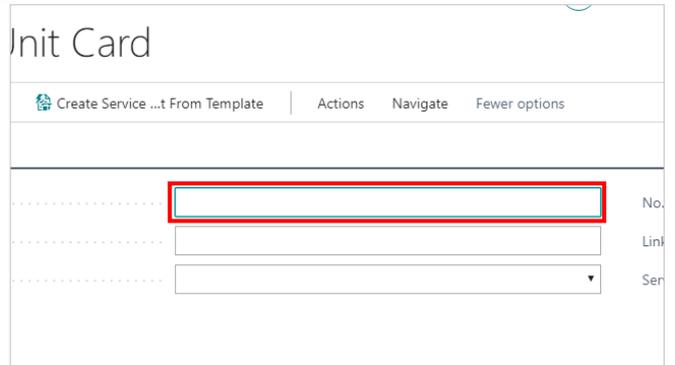
Click on the navigation menu item **Service Units**



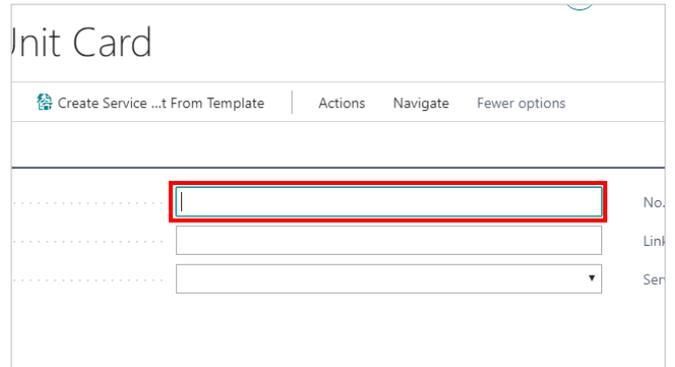
Click on the navigation menu item **New**



Click on the field **Service Unit No.**



Press the **Enter** key.



Init Card

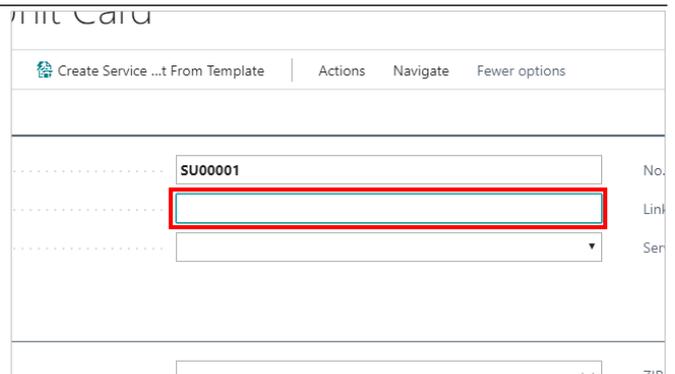
Create Service ...t From Template | Actions | Navigate | Fewer options

No. [Red Box]

Link [Red Box]

Ser [Red Box]

Click on the field **Description**



Init Card

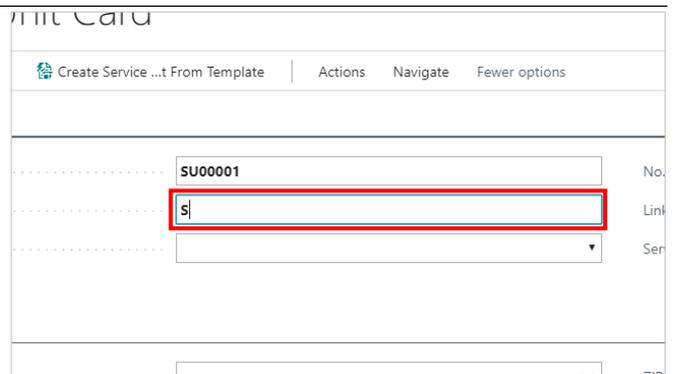
Create Service ...t From Template | Actions | Navigate | Fewer options

No. SU00001

Link [Red Box]

Ser [Red Box]

Enter the text **Skid Steer Loader**.



Init Card

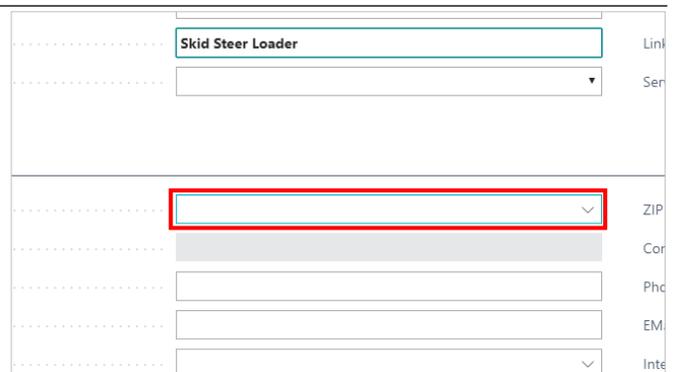
Create Service ...t From Template | Actions | Navigate | Fewer options

No. SU00001

Link [Red Box]

Ser [Red Box]

Click on the field **Customer No.**



Skid Steer Loader

Link [Red Box]

Ser [Red Box]

ZIP [Red Box]

Cor [Red Box]

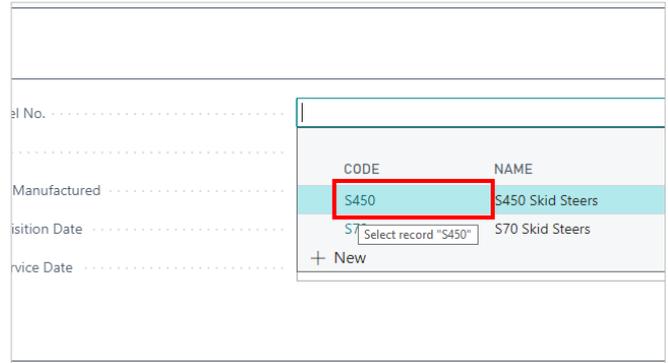
Phc [Red Box]

EM [Red Box]

Inte [Red Box]

ODT Service Help

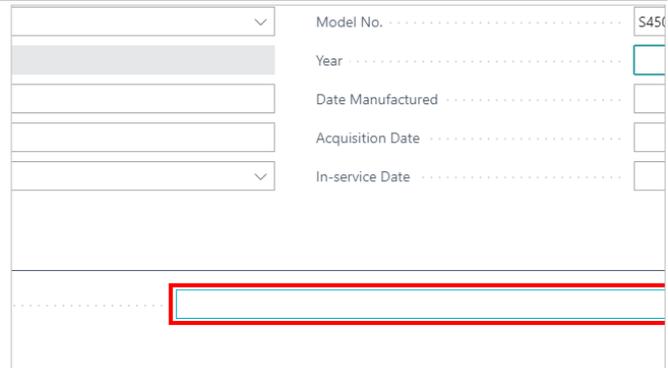
Click on the link in cell **Code** with the value **S450**



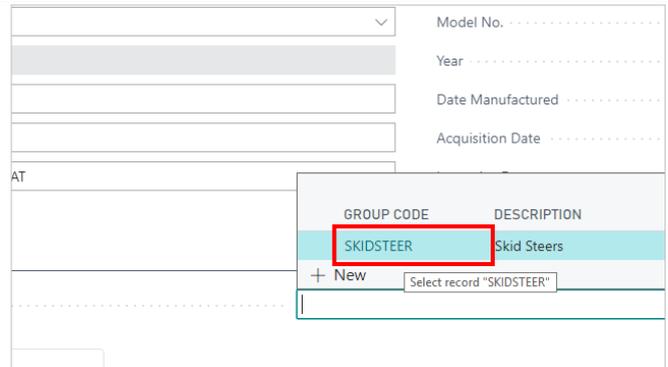
CODE	NAME
S450	S450 Skid Steers
S70	S70 Skid Steers

Click on the field **Maintenance Group Code**

NOTE:
This field is mandatory in order to include this unit on a Service Quote or Service Ticket.

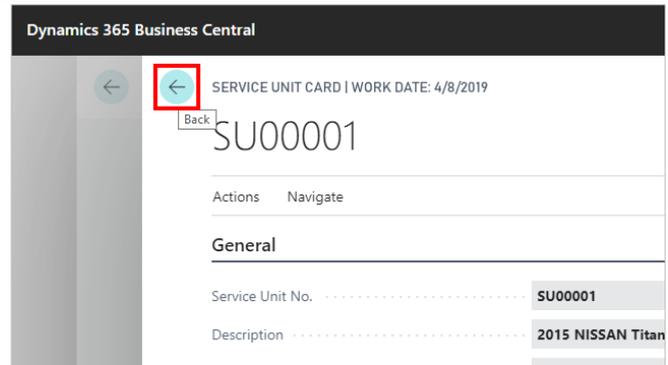


Click on the link in cell **Group Code** with the value **SKIDSTEER**



GROUP CODE	DESCRIPTION
SKIDSTEER	Skid Steers

Click on the back button



2.8.4. How to Link a Service Unit to a Fixed Asset

Business Manager Profile

The following demonstrates how to link a Service Unit to a Fixed Asset.

The Fixed Asset and Service Unit for internal servicing were created prior to this example.

NOTE:
The same process can be used when linking to an Item by selecting the Link Type of Item.

Click on the field **Link Type**

The screenshot shows a form with several fields. The 'Link Type' field, which currently contains 'Skid Steer Loader - Internal', is highlighted with a red rectangular box. Other visible fields include 'SU00002', 'C00010', and 'Internal Servicing Customer'.

Click on the item **Fixed Asset** in the list

The screenshot shows a dropdown menu that has been opened. The option 'Fixed Asset' is highlighted in blue and is enclosed in a red rectangular box. Other options visible include 'Item'.

Click on the field **No.**

The screenshot shows a form with a 'No.' field highlighted in red. The field is currently empty. Other fields visible include 'Link Type' and 'Internal Servicing Customer'.

Click on the link in cell **No.** with the value **FA000100**

The No. field list is automatically filtered based on the Link Type selected.

The screenshot shows a dropdown menu with a filtered list of items. The item 'FA000100 Skid Steer Loader S70' is highlighted in blue and enclosed in a red rectangular box. A tooltip is visible over the selection, containing the text '+ No. Select record "FA000100"'. Other fields visible include 'Description', 'Service Status', 'Code', and 'tact'.

The Link Description field can be refreshed by selecting F5 on your keyboard.

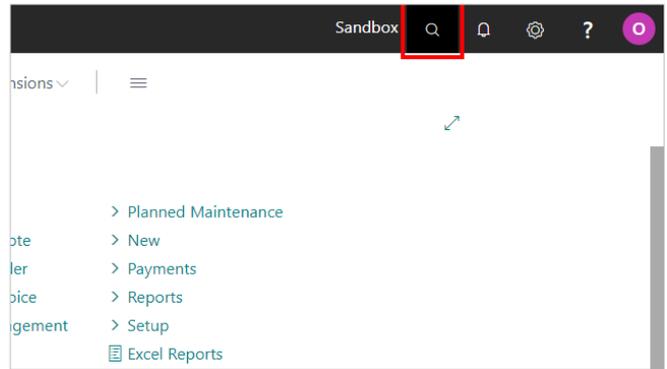
The field will be automatically updated when the unit card is closed.

2.8.5. How to Automatically Create a Service Unit from an Item

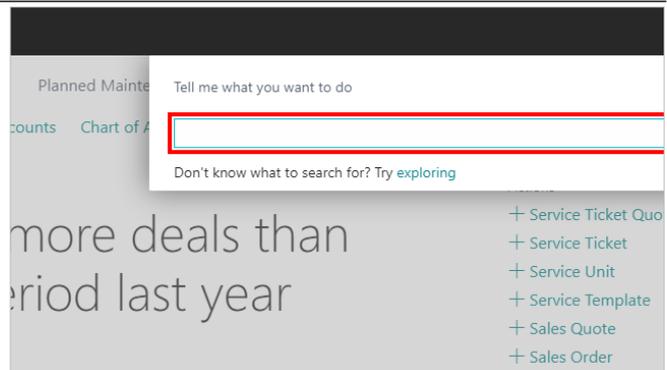
When using items that have SN tracking, It is possible for a Service Unit to be created automatically when an item has been purchased or been sold to a customer. The item will then be used as a template to create a related Service Unit. The following demonstrates this process.

ODT Service Help

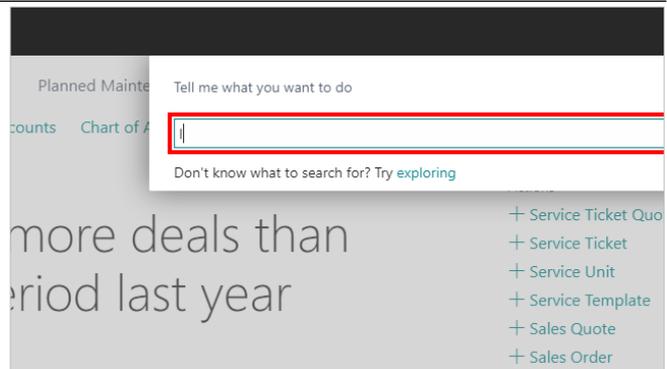
Click on the link **Tell me what you want to do.**
Quickly access actions, pages, reports, documentation, and apps and consulting services.



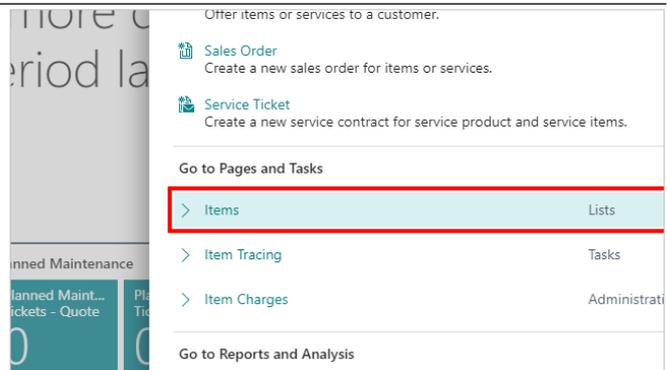
Click on the field **Type to start search:**



Enter the text **Item.**

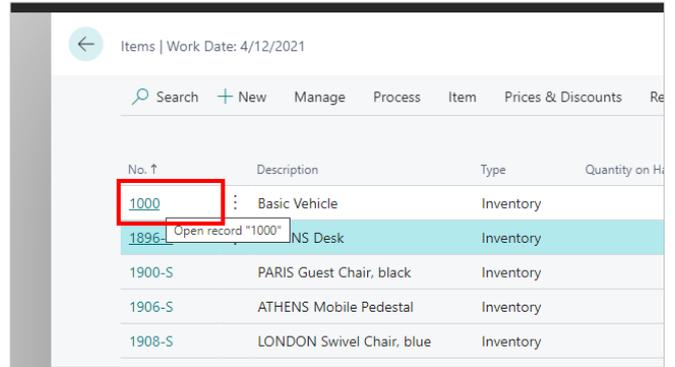


Click on **Items Lists** □



ODT Service Help

Click on the link for the Item that you wish to use to create Service Units.

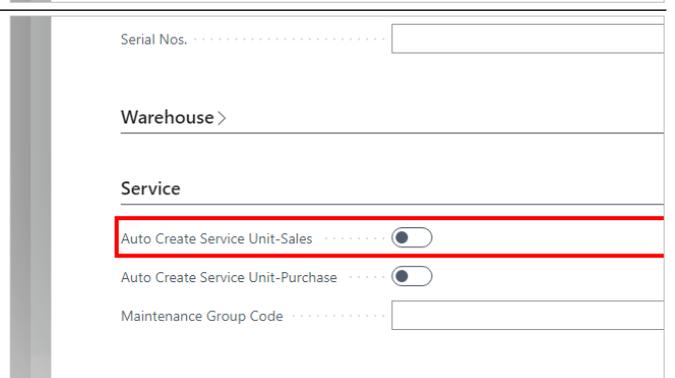


Ensure that the selected item has Serial Numbers enabled.

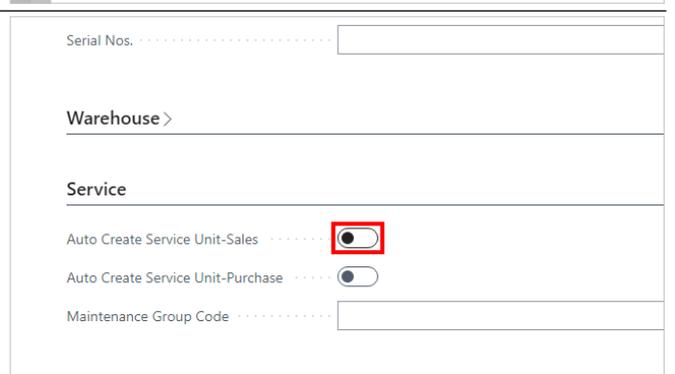


Under the Service Tab in the Item card, there are options to set up automatically creating service units when selling and when purchasing.

For demonstration purposes we will use Sales, however a similar process can be used to setup and process automatic creation on purchase.



Click on the toggle field **Auto Create Service Unit-Sales**



ODT Service Help

A Maintenance Group Code must also be selected. This is the Maintenance Group Code that will be used on the Service Unit created after this item is sold.

Serial Nos. SN1

Warehouse >

Service

Auto Create Service Unit-Sales

Auto Create Service Unit-Purchase

Maintenance Group Code

Click on the lookup button **Maintenance Group Code**

SN1

Expiration Calculation

Manufacturer

Warranty Policy

Warranty Type

Click on the link in cell **Group Code** with the value **LIGHTTRUCK**

Group Code ↑	Description
LIGHTTRUCK	Light Truck
SKIDSTEER	

+ New

Once the item card has been set up, a Service Unit will be created any time the item is sold.

Click on the navigation menu item **Sales Order**

Management ▾ Sales ▾ Purchasing ▾ Setup & Extensions ▾ | ≡

Actions

- + Service Ticket Quote
- + Service Ticket
- + Service Unit
- + Service Template
- + Sales Quote
- + Sales Order
- + Sales Invoice
- + Purchase Quote
- + Purchase Order
- + Purchase Invoice

> Service Manager

> Service

> Planned Maintenance

> New

> Payments

Click on the lookup button **Customer Name**

Prepare Order Request Approval Print/Send Navigate More options

Due Date
Requested Delivery Date
External Document No.
Status

Click on the link in cell **No.** with the value **10000**

Release Posting Prepare Order Request Approval Print/Send Navigate More options

Customers | 🔍 + New ...

No. ↑	Name
→ 10000	Adatum Corporation
20000	Trey Research
30000	School of Fine Art
40000	Alpine Ski House
50000	Relecloud

Click on the lookup button in the cell **No.**

Order Date 4/12/2021

Lines | Manage More options

Type	No.	Description	Location Co
→ Item	*	*	

Look up value for No.

Subtotal Excl. Tax (USD)

Click on the link in cell **No.** with the value **1000**
Note that the customer selected is the customer that will be assigned to the Service Unit that gets created.

Lines | Manage More options

Type	No.	Description	Location
→ Item	*	*	

No. ↑	Description	Bas	Mé
→ 1000	Basic Vehicle	PC	
1896-S	ATHENS Desk	PC	
1900-S	PARIS Guest Chair, black	PC	
1906-S	ATHENS Mobile Pedestal	PC	
1908-S	LONDON Swivel Chair, blue	PC	

+ New



ODT Service Help

Click on the cell **Location Code**

No.	Description	Location Code	Quantity	Qty. to Assemble to Order
1000	Basic Vehicle	*		

Click on the link in cell **Code** with the value **EAST**

Description	Location Code	Quantity	Qty. to Assemble to Order	Rese
Basic Vehicle	WEST	1		

- EAST East Warehouse
- MAIN Main Warehouse
- WEST West Warehouse

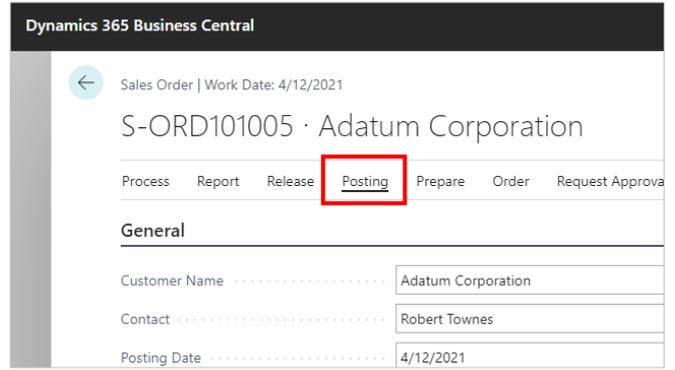
Click on the cell **Quantity**

Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quant
Basic Vehicle	WEST	*		

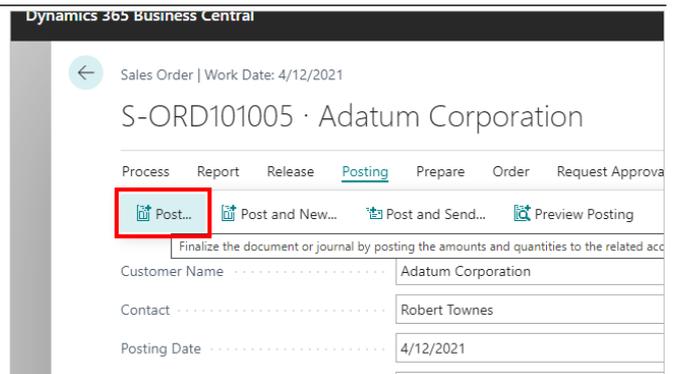
Enter the text **1**.

Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quant
Basic Vehicle	WEST	*		

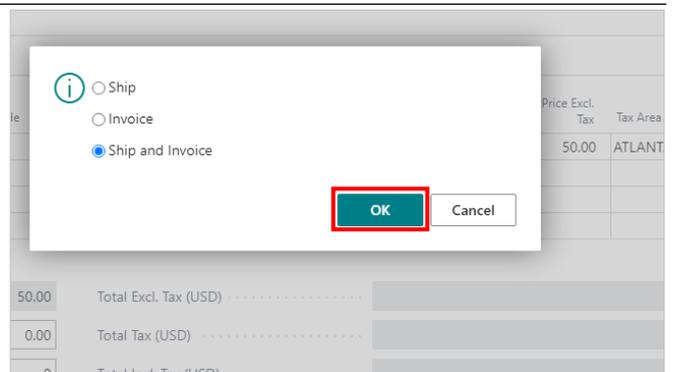
Click on the navigation menu item popup **Posting**



Click on the navigation menu item **Post...**

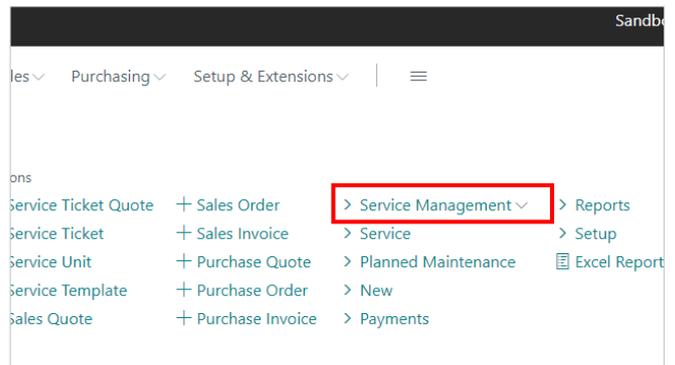


Click on the button **OK**

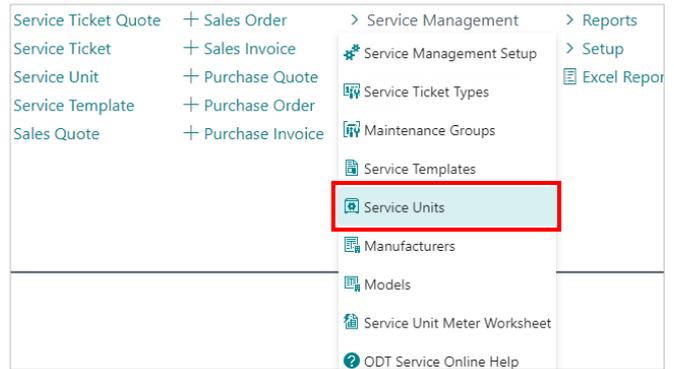


After the sale, a new Service Unit will have been created.

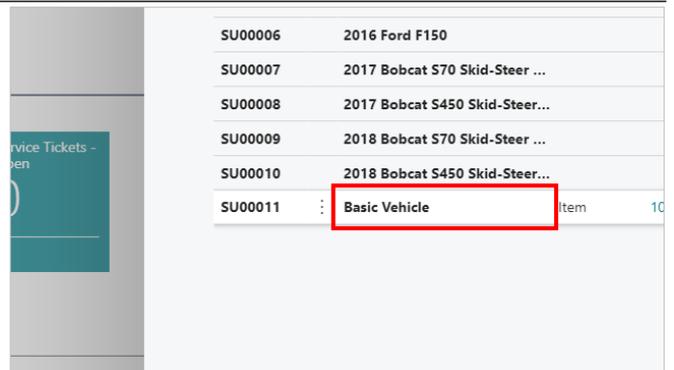
Click on the navigation menu item popup **Service Management**



Click on the navigation menu item **Service Units**



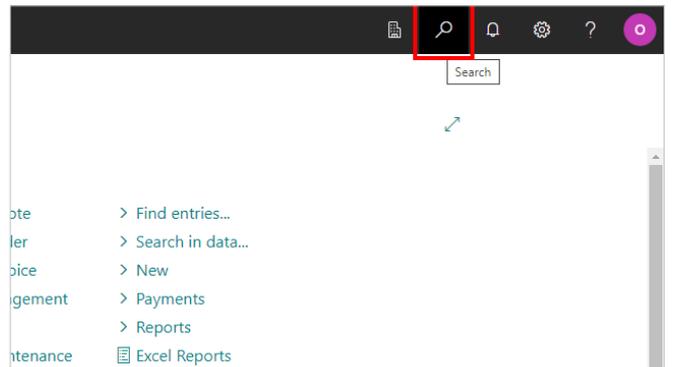
Notice that a new Service Unit has been created based on the item that was sold.



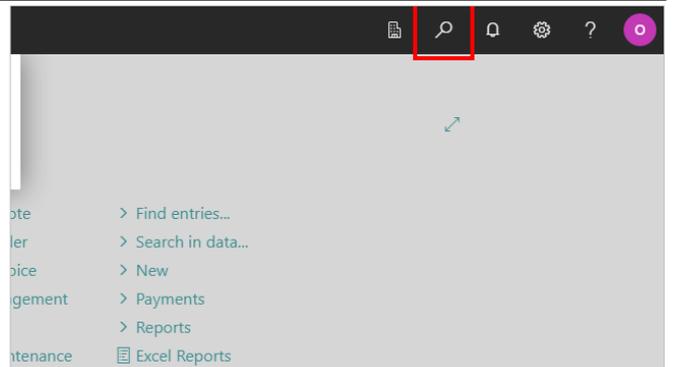
2.8.6. How to Automatically Create a Service Unit from a Fixed Asset

It is possible for a Service Unit to be created automatically when a Fixed Asset is purchased or sold. The Fixed Asset will be used as a template to create a related Service Unit. The following demonstrates this process.

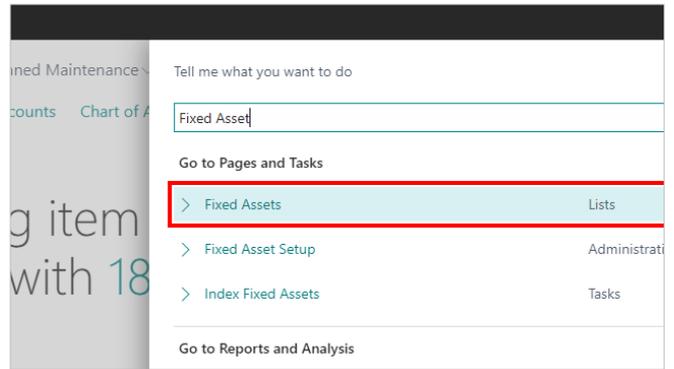
Click on the button **Search**



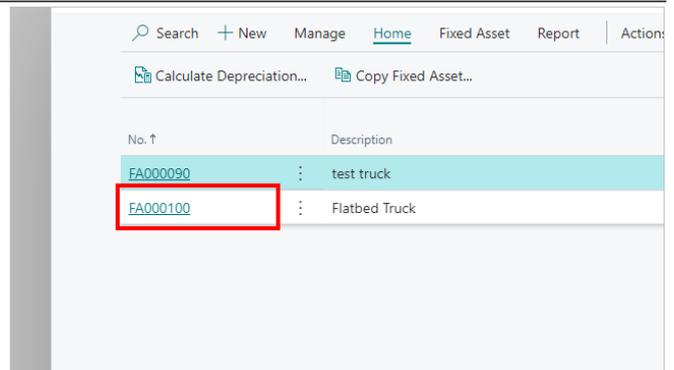
Enter the text **Fixed Asset**.



Click on **Fixed Assets Lists** □

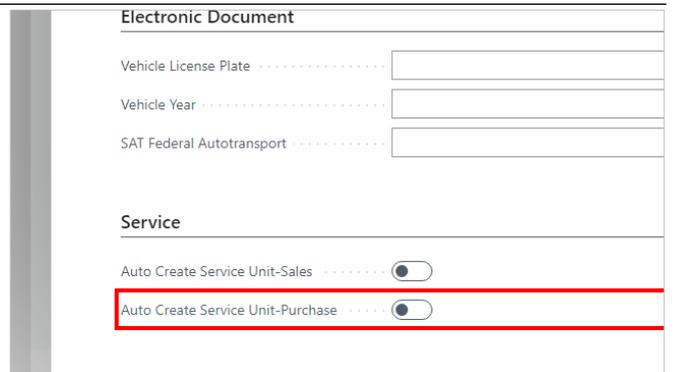


Click on the link in cell **No.** with the value **FA000100**

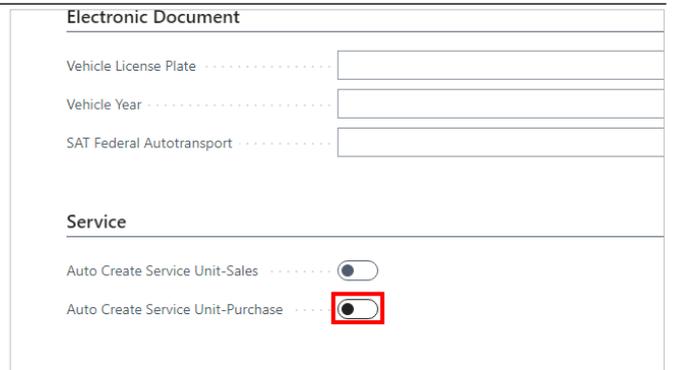


Under the Service tab of the Fixed Asset, there are options to enable Automatically Creating Service Units on sale and on purchase.

For demonstration purposes we will use Purchase, however a similar process can be used to enable and process Automatically Creating units when selling.



Click on the toggle field **Auto Create Service Unit-Purchase**



ODT Service Help

A Maintenance Group Code must also be selected. This is the Maintenance Group Code that will be used on the Service Unit created after this Fixed Asset is purchased.

Click on the lookup button **Maintenance Group Code**

Click on the link in cell **Group Code** with the value **LIGHTTRUCK**

Group Code ↑	Description
LIGHTTRUCK	Light Truck
SKIDSTEER	Select record "LIGHTTRUCK"

Once the Fixed Asset card has been set up, a Service Unit will be created any time the Fixed Asset is purchased.

Click on the navigation menu item **Purchase Order**

ODT Service Help

Click on the lookup button **Vendor Name**

Approval Order | More options

Generate Whse. Receipt Create Inventory Put-away/Pick... Send Intercompany Purchase Order

Vendor Invoice No. ...

Choose a value for Vendor Name

Status

Click on the link in cell **No.** with the value **10000**

Print/Send Request Approval Order | More options

Release Create Whse. Receipt

Vendors

No. ↑	Name
10000	Fabrikam, Inc.
20000	Consultants
30000	Graphic Design Institute
40000	Wide World Importers
50000	Nod Publishers
81000	Raw material supplier

Click on the field **Vendor Invoice No.**

Company Purchase Order Archive Document

Show more

Vendor

Vendor No.

Balance (\$)

Balance (L)

Outstandi

Amt. Rcd.

Enter the text **12345**.

Company Purchase Order Archive Document

Show more

Vendor

Vendor No.

Balance (\$)

Balance (L)

Outstandi

Amt. Rcd.

ODT Service Help

Click on the lookup button in the cell **Type**

Click on the link in cell **Option Values** with the value **Fixed Asset**

Click on the cell **No.**

Click on the link in cell **No.** with the value **FA000100**



Click on the cell **Quantity**

Status Open				
Location Code	Bin Code	Quantity	Reserved Quantity	Unit of Measure Code
		*	-	
0.00 Total Excl. Tax (USD)				

Enter the text **1**.

Status Open				
Location Code	Bin Code	Quantity	Reserved Quantity	Unit of Measure Code
		* 1	-	
0.00 Total Excl. Tax (USD)				

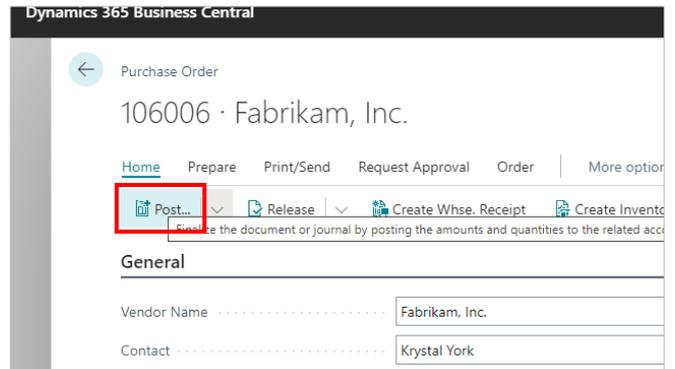
Click on the cell **Direct Unit Cost Excl. Tax**

/2022 Status						
Quantity	Reserved Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Tax Group Code	
1	-		*	ATLANTA, GA	NONTAXABLE	
0.00 Total Excl. Tax (USD)						

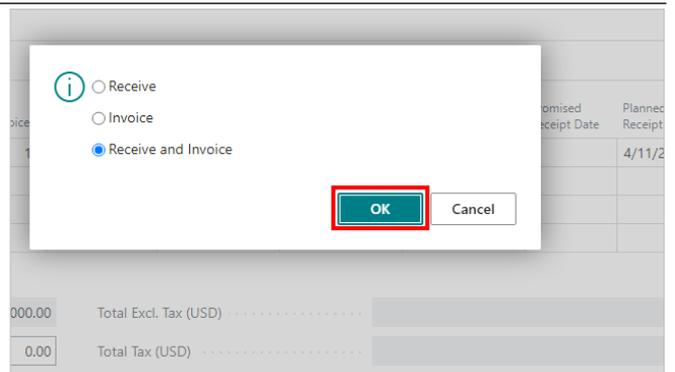
Enter the text **10000**.

/2022 Status						
Quantity	Reserved Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Tax Group Code	
1	-		* 10000	ATLANTA, GA	NONTAXABLE	
0.00 Total Excl. Tax (USD)						

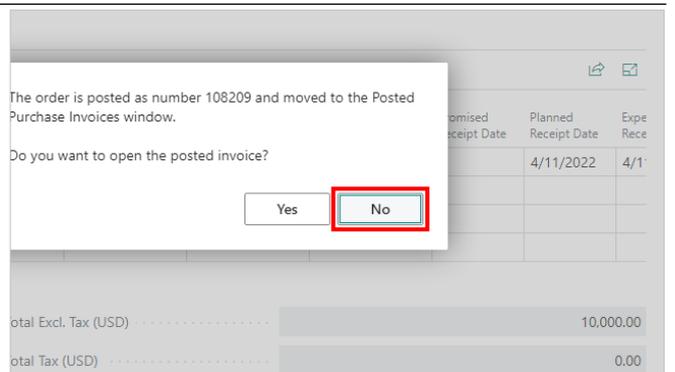
Click on the navigation menu item **Post...**



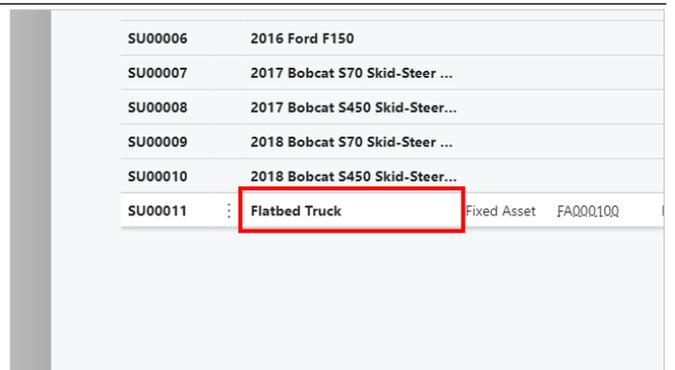
Click on the button **OK**



Click on the button **No**



Notice that a new Service Unit has been created based on the Fixed Asset that was purchased.

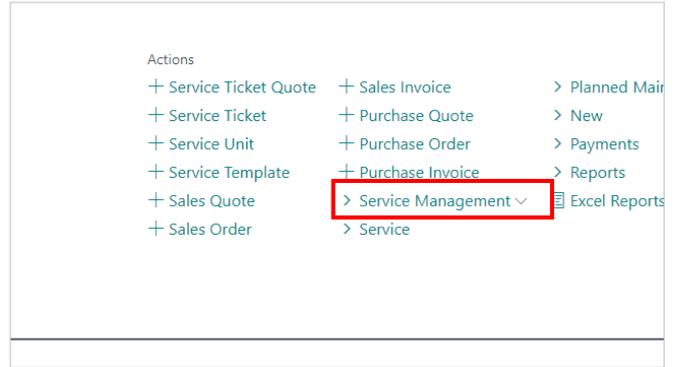


2.9. How to Setup Service Status

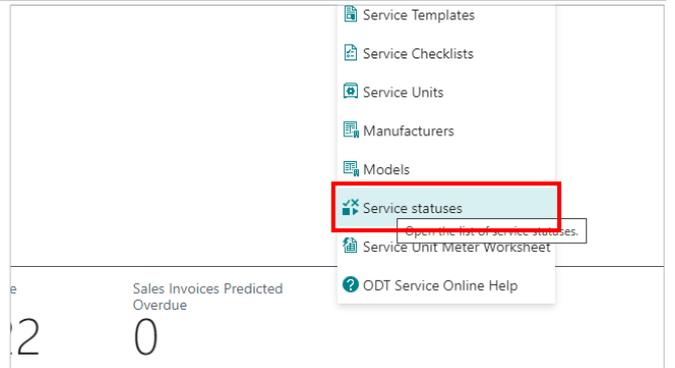
The following demonstrates how to set up a list of Service statuses for use with service tickets.

ODT Service Help

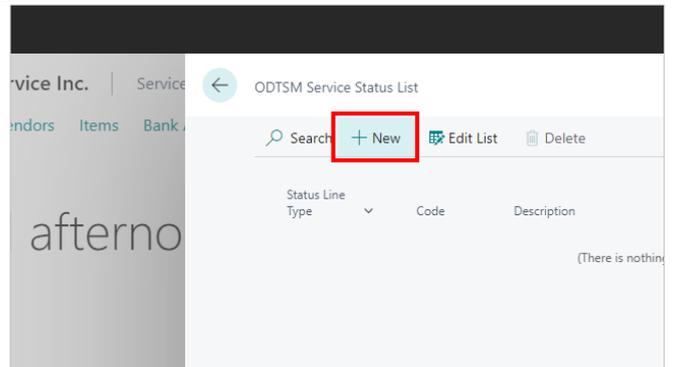
Click on the navigation menu item popup **Service Management**



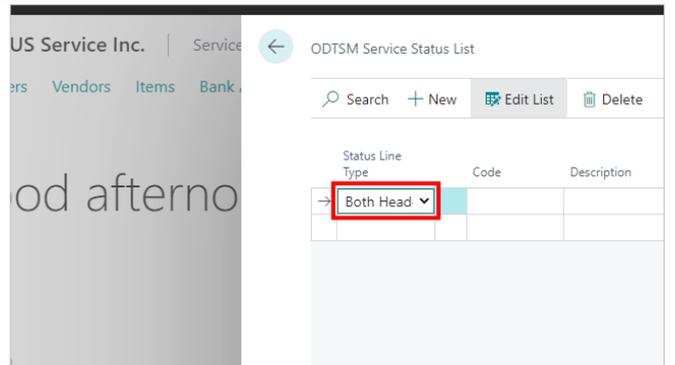
Click on the navigation menu item **Service statuses**



Click on the navigation menu item **New**



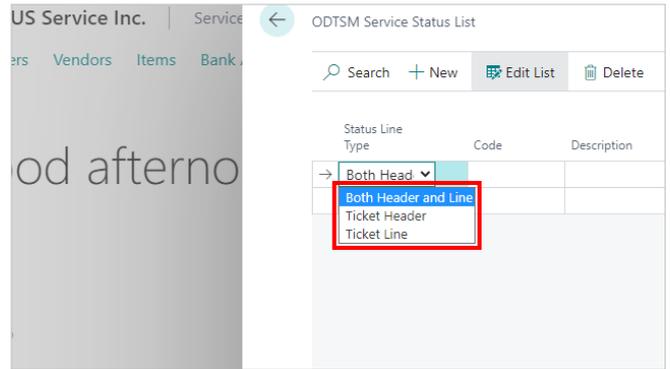
Click on the cell **Status Line Type**



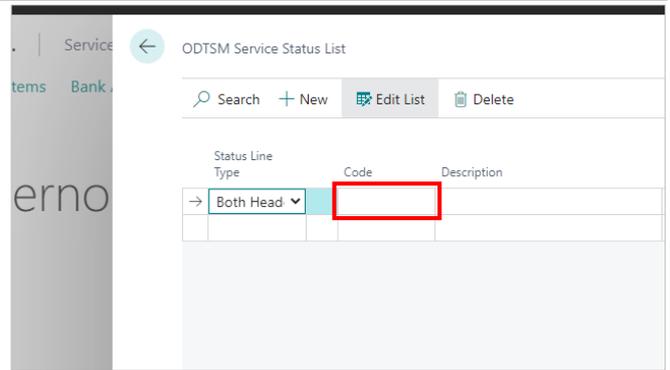
ODT Service Help

A Service Status can be set to apply to the Ticket Header, the Ticket Line, or both. This example will be set to both.

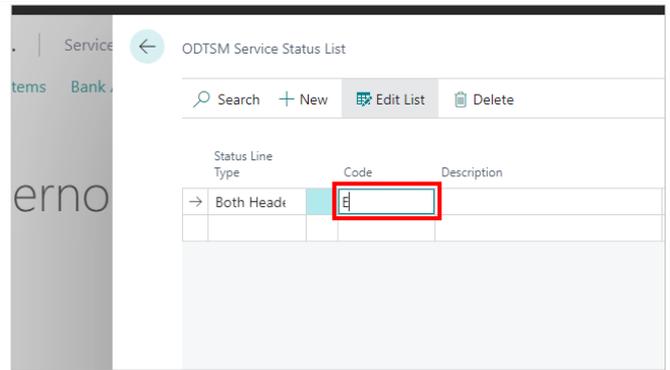
Click on the value Both Header and Line Ticket Header Ticket Line



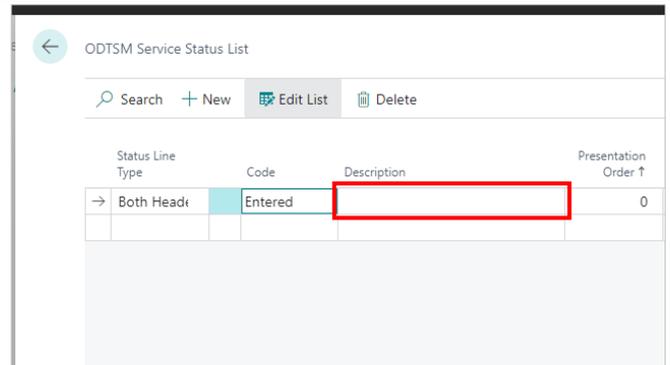
Click on the cell **Code**



Enter the text **Entered**.



Click on the cell **Description**



ODT Service Help

Enter the text **Initial entry**.

Status Line Type	Code	Description	Presentation Order ↑
→ Both Headr	ENTERED	[Red Box]	0

Click on the cell **Presentation Order** with the value **0**

Code	Description	Presentation Order ↑	State	Insert Status Hea...	Insert Status Line	M	C
ENTERED	Initial entry	0	Pending	<input type="checkbox"/>	<input type="checkbox"/>		

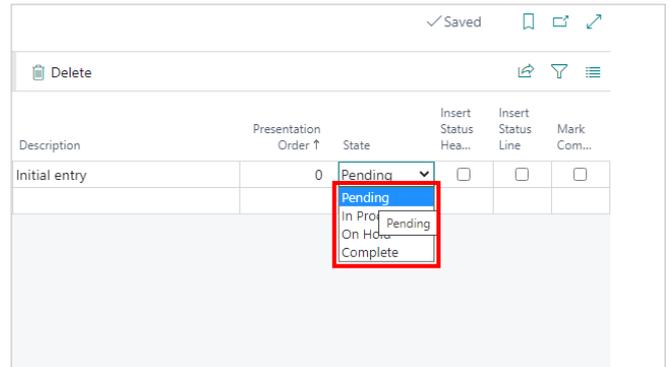
Presentation Order indicates at what position in the lookup list this status will appear. If you wish for certain statuses to appear closer to the top of the list or organized a certain way, the Presentation Order can be changed to allow this.
Enter the text **0**.

Code	Description	Presentation Order ↑	State	Insert Status Hea...	Insert Status Line	M	C
ENTERED	Initial entry	0	Pending	<input type="checkbox"/>	<input type="checkbox"/>		

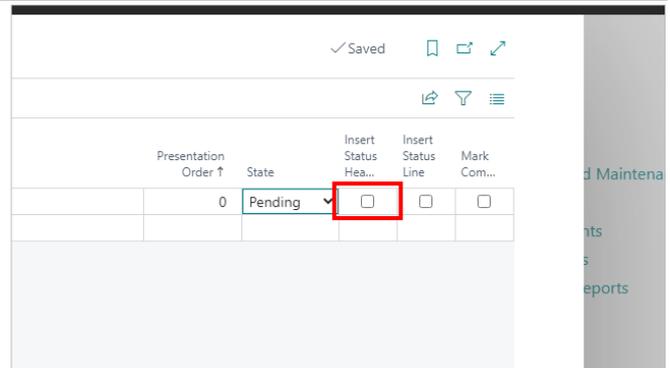
Click on the cell **State**

Description	Presentation Order ↑	State	Insert Status Hea...	Insert Status Line	Mark Com...
Initial entry	0	Pending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

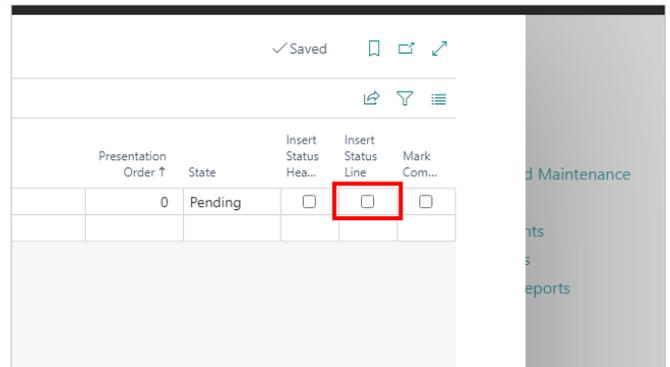
click on the option Pending



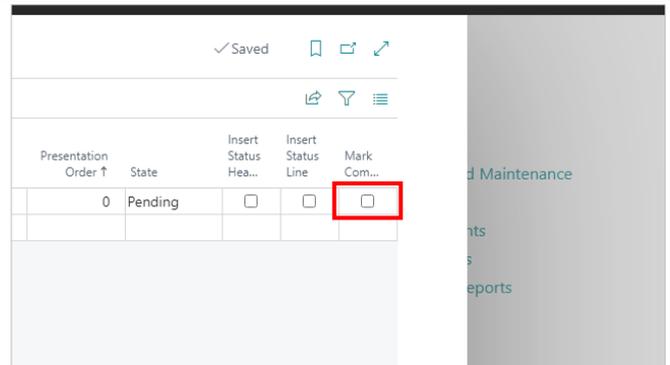
The **Insert Status Header** option will automatically assign this status to the header of a Service Ticket upon ticket creation.



The **Insert Status Line option** will automatically assign this status to a Ticket Line when a line is added to a Service Ticket



The **Mark Complete** option will automatically attempt to mark the Service Ticket as complete when this status is assigned to the Service Ticket header



The **Update Service Unit Status** option will cause the status of the Service Unit to change when this ticket status is selected.

resentation Order ↑	State	Def... Stat... Hea...	Def... Stat... Line	Mark Co...	Upd... Serv... Unit Stat...	Service Unit Status
0	Pending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

The **Service Unit Status** field specifies what status is assigned to the Service Unit when Update Service Unit Status is enabled.

State	Def... Stat... Hea...	Def... Stat... Line	Mark Co...	Upd... Serv... Unit Stat...	Service Unit Status
Pending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

2.10. Service Planned Maintenance Setup

2.10.1. How to Setup Service Unit Meters

2.10.1.1. Overview

Service Unit Meters provide a way to keep track of usage information such as mileage and hours of service.

Assigning a Service Unit Meter is required in order to use Planned Maintenance functions.

2.10.1.2. How to Setup a Service Unit Meter

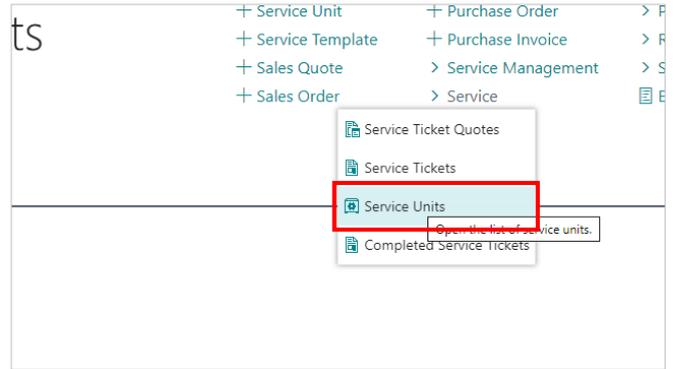
Business Manager Profile

Click on the navigation menu item popup **Service**

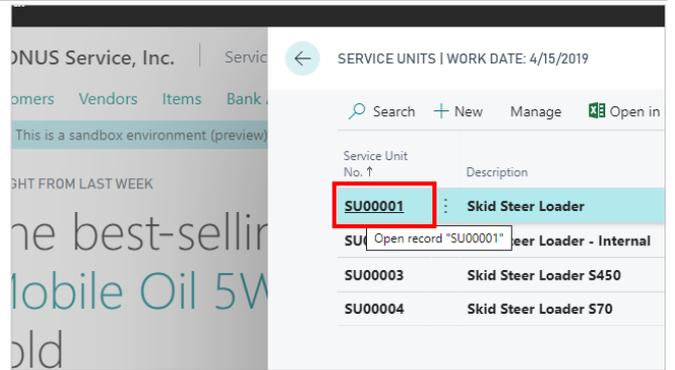
ACTIONS		
+ Service Ticket Quote	+ Sales Invoice	> Planned Maintenance
+ Service Ticket	+ Purchase Quote	> New
+ Service Unit	+ Purchase Order	> Payments
+ Service Template	+ Purchase Invoice	> Reports
+ Sales Quote	> Service Management	> Setup
+ Sales Order	> Service	> Excel Reports

ODT Service Help

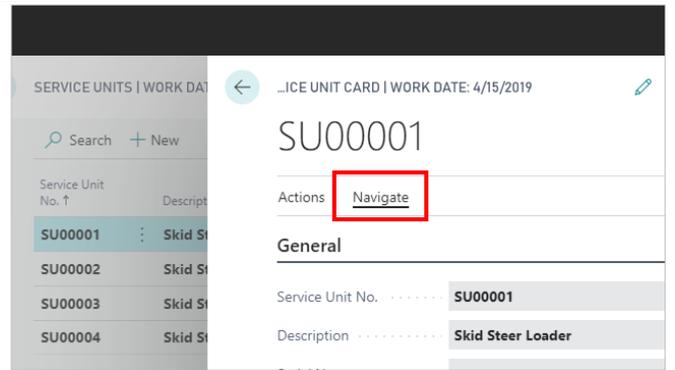
Click on the navigation menu item **Service Units**



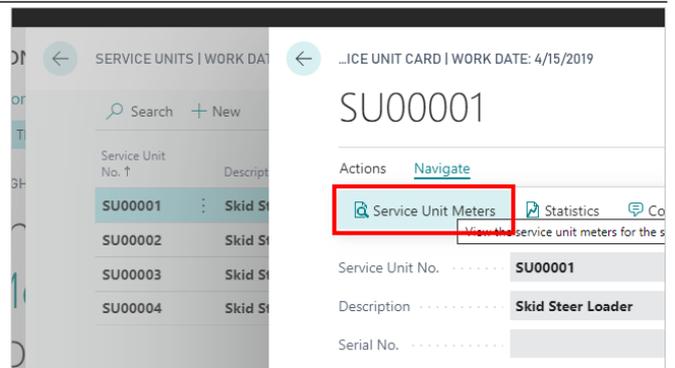
Click on the link in cell **Service Unit No.** with the value **SU00001**



Click on the navigation menu item popup **Navigate**

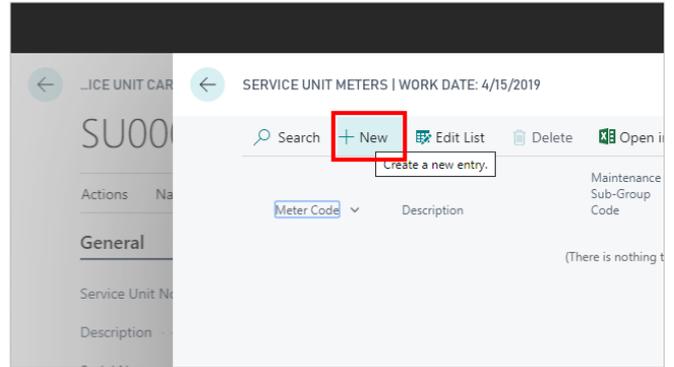


Click on the navigation menu item **Service Unit Meters**

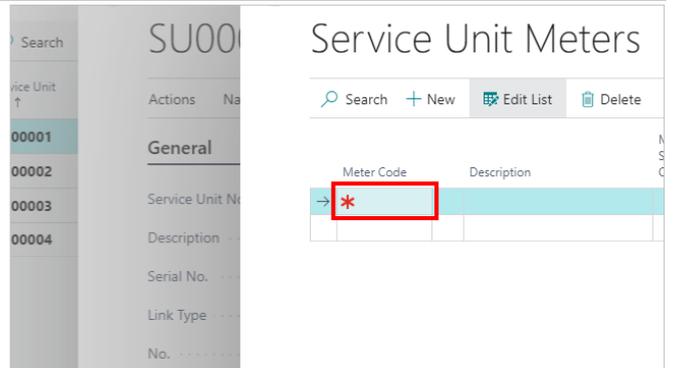


ODT Service Help

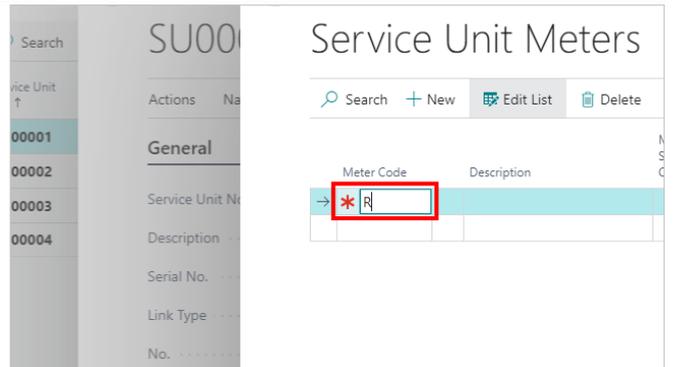
Click on the navigation menu item **New**



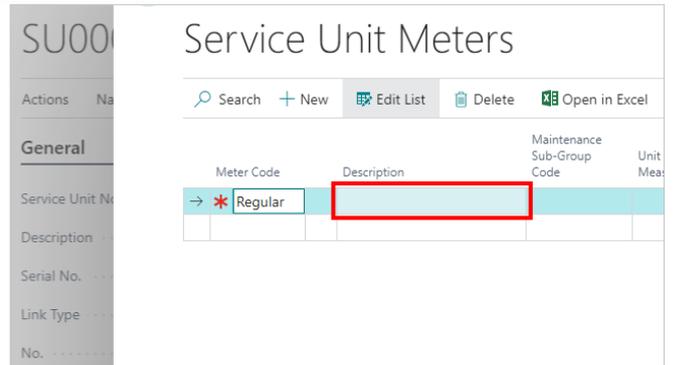
Click on the cell **Meter Code**



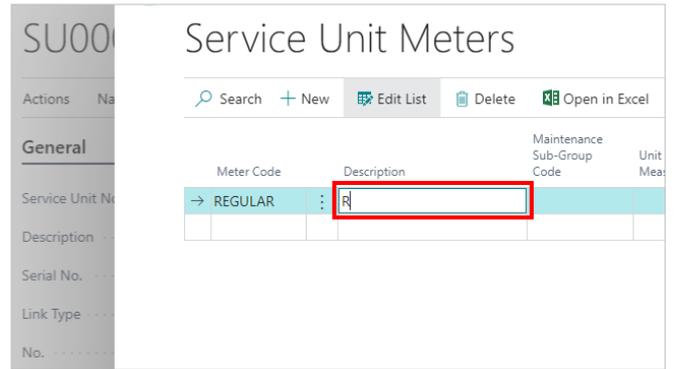
Enter the text **Regular**.



Click on the cell **Description**

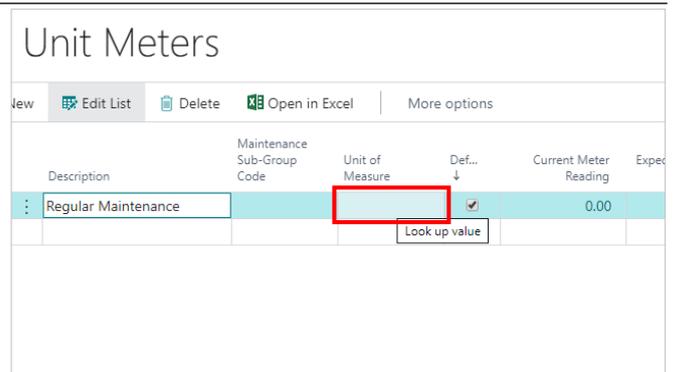


Enter the text **Regular Maintenance**.



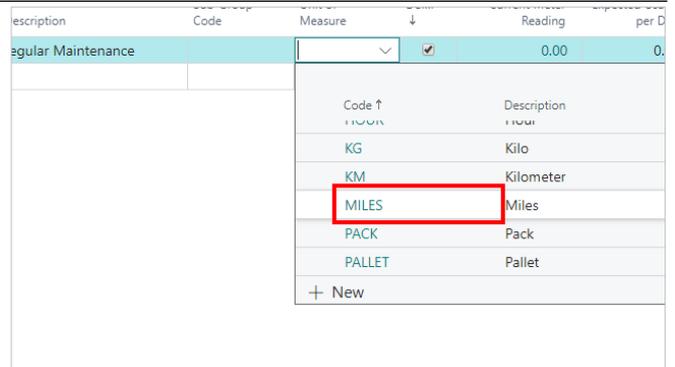
Meter Code	Description	Maintenance Sub-Group Code	Unit Meas
REGULAR	<input type="text" value="Regular Maintenance"/>		

Click on the cell **Unit of Measure**



Description	Maintenance Sub-Group Code	Unit of Measure	Def...	Current Meter Reading	Exp...
Regular Maintenance		<input type="text" value="MILES"/>	<input checked="" type="checkbox"/>	0.00	

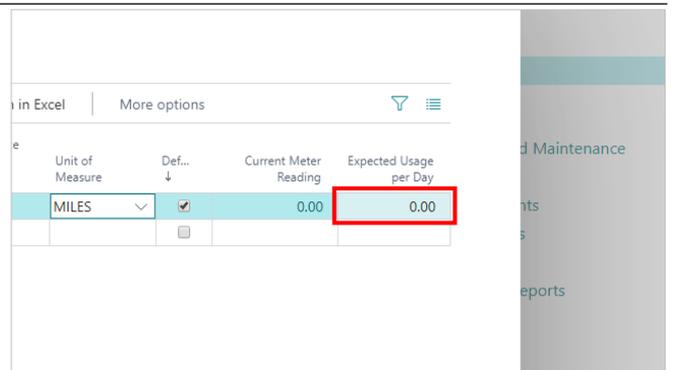
Click on the link in cell **Code** with the value **MILES**



Description	Code	Measure	Reading	per D
Regular Maintenance		<input type="text" value="MILES"/>	0.00	0.

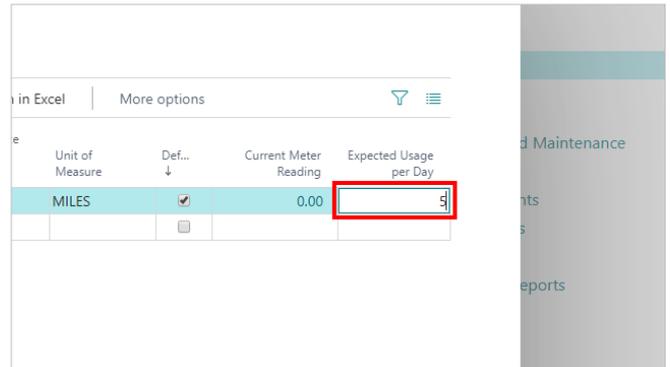
- Code ↑
- KG Kilo
- KM Kilometer
- MILES Miles**
- PACK Pack
- PALLET Pallet
- + New

Click on the cell **Expected Usage per Day** with the value **0.00**



Unit of Measure	Def...	Current Meter Reading	Expected Usage per Day
MILES	<input checked="" type="checkbox"/>	0.00	<input type="text" value="0.00"/>

Enter the text **50**.

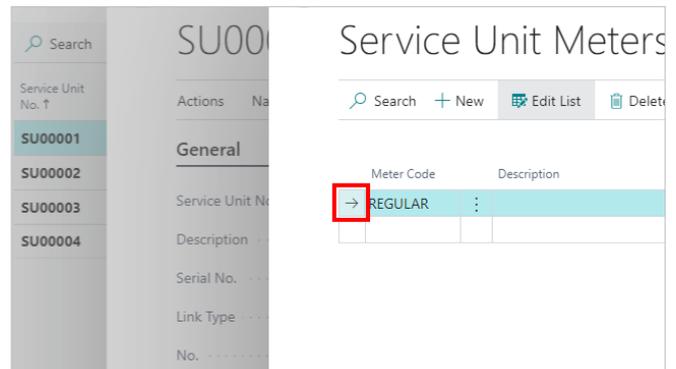


2.10.1.3.

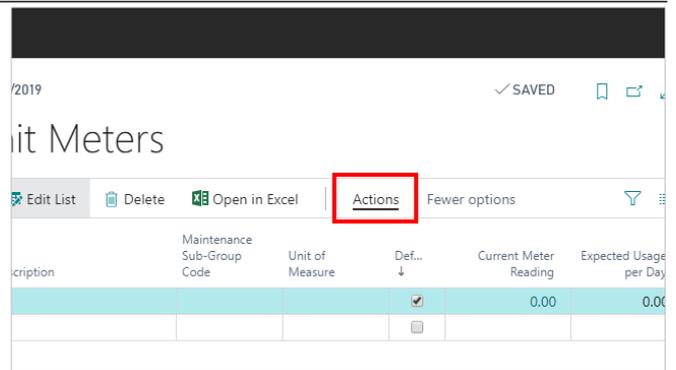
How to Update a Service Unit Meter

Business Manager Profile

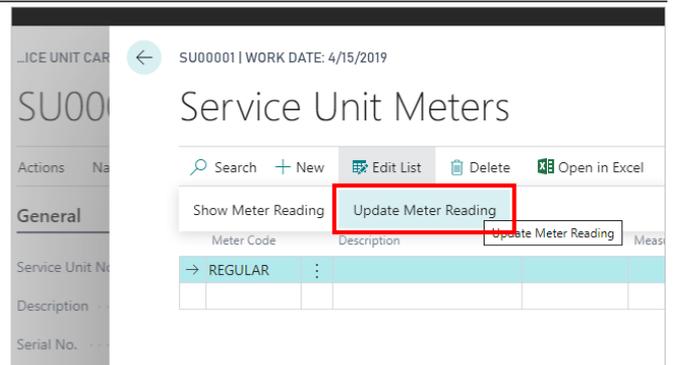
Click on the Service Meter.



Click on the navigation menu item popup **Actions**

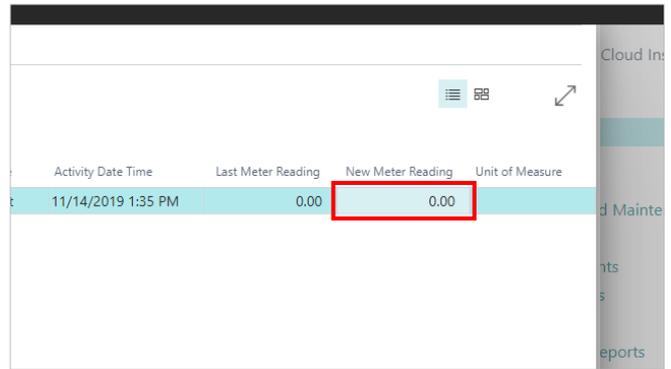


Click on the navigation menu item **Update Meter Reading**

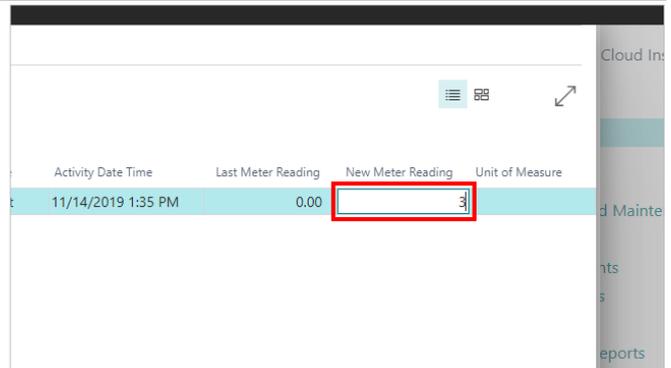


ODT Service Help

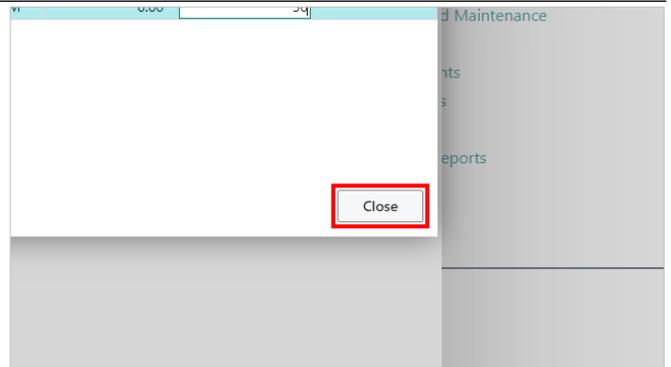
Click on the cell **New Meter Reading** with the value **0.00**



Enter the text **30**.



Click on the button **Close**

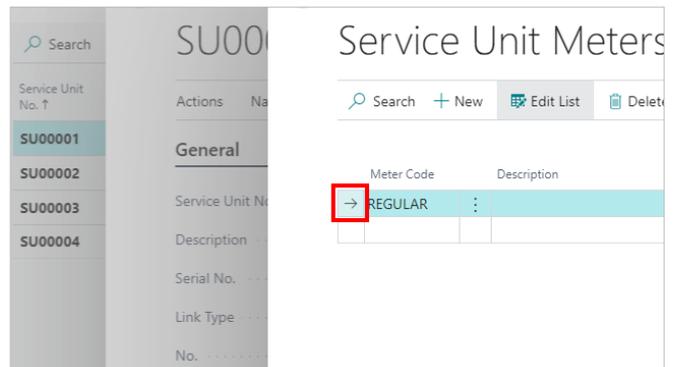


2.10.1.4.

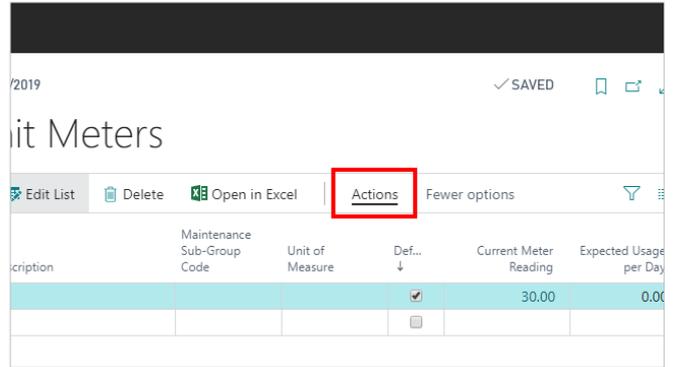
How to View Service Meter Usage History

Business Manager Profile

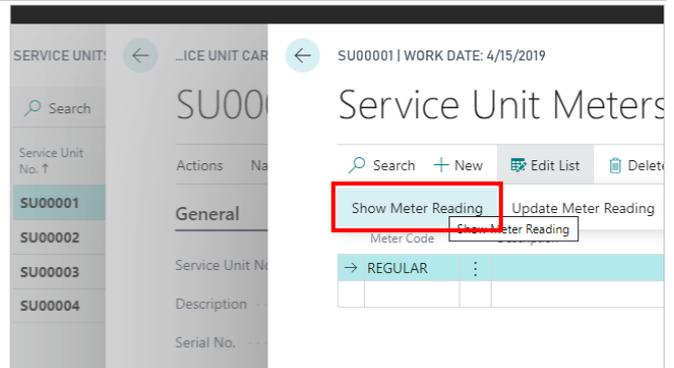
Click on the Service Meter.



Click on the navigation menu item popup **Actions**



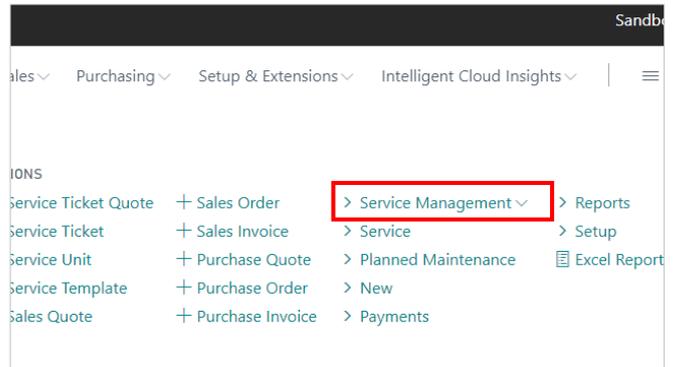
Click on the navigation menu item **Show Meter Reading**



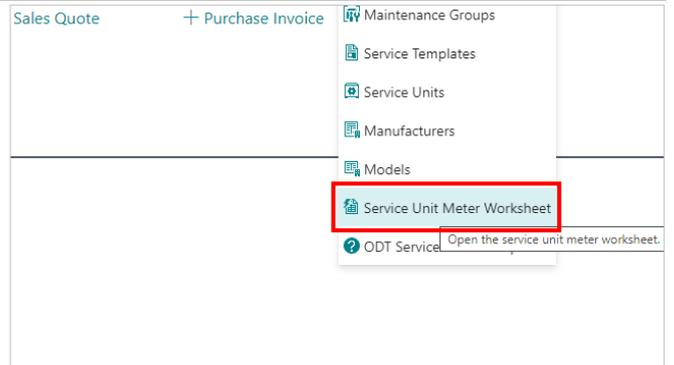
2.10.1.5. How to Bulk Update Service Meters

ODT Service provides a worksheet that can be used to update multiple service meters at the same time.

Click on the navigation menu item popup **Service Management**



Click on the navigation menu item **Service Unit Meter Worksheet**



ODT Service Help

The worksheet will display a list of all currently available service meters, along with their current meter readings.

Service Unit No. ↑	Maintenance Sub-Group Code ↑	Meter Code ↑	De
SU00001		ODOM	
SU00002		ODOM	
SU00007		HOUR	
SU00008		HOUR	

Fill in the new meter readings for all service meters you wish to update.

Click on the cell **New Meter Reading**

Meter Code ↑	Default	Current Meter Reading	New Meter Reading
ODM	<input checked="" type="checkbox"/>	0.00	
ODM	<input checked="" type="checkbox"/>	0.00	
JR	<input checked="" type="checkbox"/>	0.00	
JR	<input checked="" type="checkbox"/>	0.00	

Enter the text **1000**.

Meter Code ↑	Default	Current Meter Reading	New Meter Reading
ODM	<input checked="" type="checkbox"/>	0.00	
ODM	<input checked="" type="checkbox"/>	0.00	
JR	<input checked="" type="checkbox"/>	0.00	
JR	<input checked="" type="checkbox"/>	0.00	

Click on the cell **New Meter Reading**

Meter Code ↑	Default	Current Meter Reading	New Meter Reading
ODM	<input checked="" type="checkbox"/>	0.00	1000
ODM	<input checked="" type="checkbox"/>	0.00	
JR	<input checked="" type="checkbox"/>	0.00	
JR	<input checked="" type="checkbox"/>	0.00	



ODT Service Help

Enter the text **1500**.

er Code ↑	Default	Current Meter Reading	New Meter Reading
DM	<input checked="" type="checkbox"/>	0.00	1,000.00
DM	<input checked="" type="checkbox"/>	0.00	<input type="text"/>
JR	<input checked="" type="checkbox"/>	0.00	
JR	<input checked="" type="checkbox"/>	0.00	

Click on the cell **New Meter Reading**

er Code ↑	Default	Current Meter Reading	New Meter Reading
DM	<input checked="" type="checkbox"/>	0.00	1,000.00
DM	<input checked="" type="checkbox"/>	0.00	1500
JR	<input checked="" type="checkbox"/>	0.00	
JR	<input checked="" type="checkbox"/>	0.00	

Enter the text **1530**.

er Code ↑	Default	Current Meter Reading	New Meter Reading
DM	<input checked="" type="checkbox"/>	0.00	1,000.00
DM	<input checked="" type="checkbox"/>	0.00	1,500.00
JR	<input checked="" type="checkbox"/>	0.00	<input type="text"/>
JR	<input checked="" type="checkbox"/>	0.00	

Click on the cell **New Meter Reading**

er Code ↑	Default	Current Meter Reading	New Meter Reading
DM	<input checked="" type="checkbox"/>	0.00	1,000.00
DM	<input checked="" type="checkbox"/>	0.00	1,500.00
JR	<input checked="" type="checkbox"/>	0.00	1530
JR	<input checked="" type="checkbox"/>	0.00	

ODT Service Help

Enter the text **2400**.

Meter Code ↑	Default	Current Meter Reading	New Meter Reading
DM	<input checked="" type="checkbox"/>	0.00	1,000.00
DM	<input checked="" type="checkbox"/>	0.00	1,500.00
JR	<input checked="" type="checkbox"/>	0.00	1,530.00
JR	<input checked="" type="checkbox"/>	0.00	<input type="text"/>

When you are finished filling in the new service meter readings, close the page and the new readings will be saved.

Click on the back button

CRONUS Service, Inc. | Service

Customers Vendors Items Bank

INSIGHT FROM LAST MONTH

The largest po invoice was fo

← SERVICE UNIT METER WORKSHEET | WORK

Back

Search + New Edit List

Service Unit No. ↑ Maintenance Group Code

SU00001		
SU00002		
SU00007		
→ SU00008	:	

Click on the navigation menu item popup **Service Management**

Sandb

Sales ▾ Purchasing ▾ Setup & Extensions ▾ Intelligent Cloud Insights ▾

FUNCTIONS

- Service Ticket Quote + Sales Order > **Service Management ▾** > Reports
- Service Ticket + Sales Invoice > Service > Setup
- Service Unit + Purchase Quote > Planned Maintenance > Excel Report
- Service Template + Purchase Order > New
- Sales Quote + Purchase Invoice > Payments

Click on the navigation menu item **Service Unit Meter Worksheet**

Sales Quote + Purchase Invoice

- Maintenance Groups
- Service Templates
- Service Units
- Manufacturers
- Models
- Service Unit Meter Worksheet**
- ODT Service Online Help

Open the service unit meter wor

ODT Service Help

Notice that the current meter readings have now been updated with the new readings entered previously.

Maintenance Sub-Group Code ↑	Meter Code ↑	Default	Current Meter Reading	New Meter R
	ODOM	<input checked="" type="checkbox"/>	1,000.00	
	ODOM	<input checked="" type="checkbox"/>	1,500.00	
	HOUR	<input checked="" type="checkbox"/>	1,530.00	
	HOUR	<input checked="" type="checkbox"/>	2,400.00	

2.10.2. How to Setup Planned Maintenance Schedules

2.10.2.1. Overview

Planned Maintenance Schedules are used to identify what types of service should be used for Planned Maintenance, and under what conditions they should occur.

Planned Maintenance Schedules are required in order to use Planned Maintenance functions.

2.10.2.2. How to Setup a Planned Maintenance Schedule

Business Manager Profile

Click on the navigation menu item popup **Service Management**

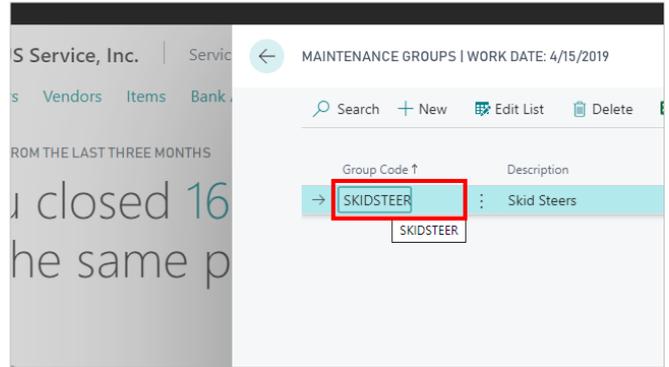
ACTIONS		
+ Service Ticket Quote	+ Sales Invoice	> Planned Maint
+ Service Ticket	+ Purchase Quote	> New
+ Service Unit	+ Purchase Order	> Payments
+ Service Template	+ Purchase Invoice	> Reports
+ Sales Quote	> Service Management	> Setup
+ Sales Order	> Service	Excel Reports

Click on the navigation menu item **Maintenance Groups**

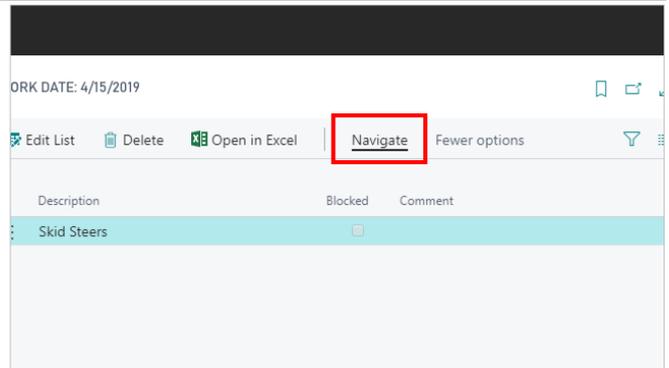
+ Service Ticket	+ Purchase Quote	> New
+ Service Unit	+ Purchase Order	> Payments
+ Service Template	+ Purchase Invoice	> Reports
+ Sales Quote	> Service Management	> Setup
+ Sales Order	Service Management Setup	Excel Reports
	Service Ticket Types	
	Maintenance Groups	View or edit maintenance groups.
	Service Templates	
	Service Units	
	Manufacturers	
	Models	

ODT Service Help

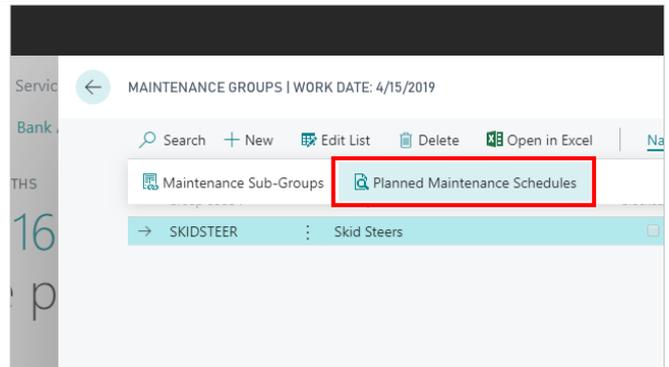
Click on the cell **Group Code** with the value **SKIDSTEER**



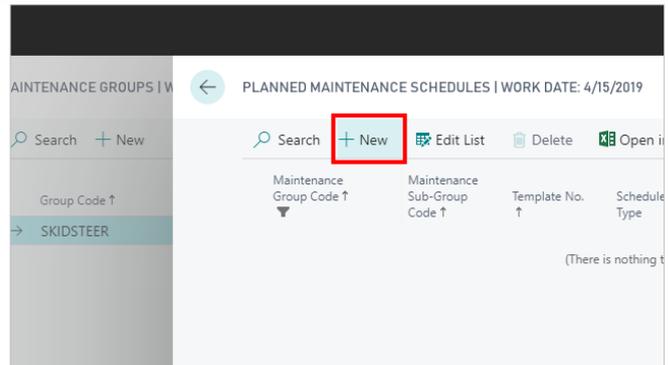
Click on the navigation menu item popup **Navigate**



Click on the link **Planned Maintenance Schedules**



Click on the navigation menu item **New**



Click on the cell **Template No.**

Maintenance Group Code	Maintenance Sub-Group Code	Template No.	Schedule Type	Maintenan... Period
→ SKIDSTEER		[Red Box]	Fixed Usage	

Only templates with a type of Planned Maintenance or All will be displayed.
Click on the link in cell **Template No.** with the value **SS-GENERAL SERVICE**

Maintenance Group Code	Maintenance Sub-Group Code	Template No.	Schedule Type	Maintenan... Period	Usa
→ SKIDSTEER		[Dropdown]	Fixed Usage		0.

Template No.	Description
→ SS-GENERAL SERVICE	Skid Steer General Service

Templates can either be of type Usage (a metric such as mileage) or Period (a period of time), and can be either fixed or recurring. The following example uses a type of Recurring Usage.

Click on the cell **Schedule Type**

Maintenance Group Code	Maintenance Sub-Group Code	Template No.	Schedule Type	Maintenan... Period	Usage	Usag
SKIDSTEER		SS-GENERAL ...	Fixed Usage		0.00	

Click on the item **Recurring Usage** in the list

Maintenance Group Code	Maintenance Sub-Group Code	Template No.	Schedule Type	Maintenan... Period	Usage	Usag
SKIDSTEER		SS-GENERAL ...	[Dropdown]		0.00	

Fixed Usage
Recurring Usage
Fixed Period
Recurri... Recurring Usage
Recurring Usage & Period

ODT Service Help

Click on the cell **Usage** with the value **0.00**

Template No.	Schedule Type	Maintenan... Period	Usage	Usage UOM	Bloc...	Serv Stat
SS-GENERAL ...	Recurring		0.00			

Enter the text **30.**

Template No.	Schedule Type	Maintenan... Period	Usage	Usage UOM	Bloc...	Serv Stat
SS-GENERAL ...	Recurring Usa		30			

Click on the cell **Usage UOM**

Maintenance Group Code	Usage	Usage UOM	Bloc...	Service Status	No. Of Days
→ SKIDSTEER	30.00				0

Click on the link in cell **Code** with the value **MILES**

Code	Description
KG	Kilo
KM	Kilometer
MILES	Miles
PACK	Pack
PALLET	Pallet

Click on the cell Service Status

TENANCE SCHEDULES | WORK DATE: 4/15/2019 NOT SAVED

New Edit List Delete Open in Excel

Usage	Usage UOM	Bloc...	Service Status	No. Of Days For Service	Service Cost
30.00	MILES			0.00	0.00

Click on the item **Requires minor service** in the list

TENANCE SCHEDULES | WORK DATE: 4/15/2019 NOT SAVED

New Edit List Delete Open in Excel

Usage	Usage UOM	Bloc...	Service Status	No. Of Days For Service	Service Cost
30.00	MILES			0.00	0.00

Requires minor service
Requires major service
In shop
Expired

Click on the cell **No. Of Days For Service** with the value **0.00**

EDULES | WORK DATE: 4/15/2019 NOT SAVED

Edit List Delete Open in Excel

Usage	Usage UOM	Bloc...	Service Status	No. Of Days For Service	Service Cost	Service Price
30.00	MILES		Requires r	0.00	0.00	0.00

Enter the text **0.5**. Press the **Enter** key.

EDULES | WORK DATE: 4/15/2019 NOT SAVED

Edit List Delete Open in Excel

Usage	Usage UOM	Bloc...	Service Status	No. Of Days For Service	Service Cost	Service Price
30.00	MILES		Requires min	0.5	0.00	0.00

3. Processing Service

3.1. Service Processing Overview

3.1.1. Processing Overview

You can create a service quote or service ticket to record your agreement with a customer to service the equipment or record the service to be completed on your own company equipment.



ODT Service Help

A Job is created automatically when a service quote or ticket is created using the quote or ticket no. as the Job No.

When servicing external customer equipment, you can negotiate with the customer by first creating a service quote. You can then print the quote to send to the customer. After the customer confirms they agree with the quote, you can convert the quote to a Service Ticket.

When not using Service Quotes, then from the Service Ticket, you can send a service ticket confirmation to record your obligation to service the products as agreed.

The following describes the sequence of tasks for processing using ODT Service:

- Create a service quote, where you offer services on negotiable terms before converting the quote to a service ticket. This use of service quotes is optional.
- Create a service ticket to record your agreement with a customer to service product(s) on certain payment terms or to record the tasks to be performed on servicing company owned product(s).
- Perform the service as recorded on the service ticket.
- Record and confirm the usage of resources, items and if applicable, G/L Account charges
- Invoice the customer, should the ticket be for an external customer.
- Mark the service ticket as complete.

ODT Service enhances the Jobs module by creating the Service Quotes and Service Tickets, which provide a work order type interface on top of the Jobs.

When either a quote or ticket is created, a Job is automatically created using the quote or ticket no. as the Job No. in the Jobs list.

In addition to creating a Service Ticket from the Actions – Service Ticket option, or from the Service Ticket – Open Cue, a Service Ticket can be created automatically from a Service Unit card.

On the Service Quote and Service Ticket, the Ticket Units/Line section are essentially Job Task lines.

The Service Quote and Service, the Ticket Details are essentially the related Job Planning Lines.

The Ticket Details, Line Type field of, Time and Materials, equates to the Jobs, Line Type, Both Budget and Billable.

The Ticket Details, Line Type field of, Cost Tracking Only, equates to the Jobs, Line Type, Budget.

When adding a service template to a ticket, the Ticket Units/Lines and Ticket Details records are automatically created.

IMPORTANT

By default, the Line Type field is set to Time and Materials.

It is only when the Customer card has the Internal Customer field, on the Service tab enabled, the Line Type will be set to Cost Tracking only.

From the service ticket, when you create and post the actual usage, the related job ledger entry, G/L entry, item ledger and value entries and resource ledger entries records are created.

Posting the sales invoice will create the related job ledger, general ledger, tax ledger, customer ledger and resource ledger entries in your system.

Marking the service ticket as complete will set the Job status to “Completed”.

3.2. Service Ticket Overview

3.2.1. Service Ticket Overview

ODT Service enhances the Jobs module by creating the Service Quotes and Service Tickets, which provide a

ODT Service Help

work order type interface on top of the Jobs.

When either a quote or ticket is created, a Job is automatically created using the quote or ticket no. as the Job No. in the Jobs list.

In addition to creating a Service Ticket from the Actions – Service Ticket option, or from the Service Ticket – Open Cue, a Service Ticket can be created automatically from a Service Unit card.

On the Service Quote and Service Ticket, the Ticket Units/Line section are essentially Job Task lines.

On the Service Quote and Service, the Service Ticket Details, accessed from the Ticket Units/Lines, are essentially the related Job Planning Lines.

On the Service Ticket Details, the Line Type field of, Time and Materials, equates to the Jobs, Line Type, Both Budget and Billable.

On the Service Ticket Details, the Line Type field of, Cost Tracking Only, equates to the Jobs, Line Type, Budget.

When adding a service template to a ticket, the Ticket Units/Lines and Ticket Details records are automatically created.

IMPORTANT

By default, the Line Type field is set to Time and Materials.

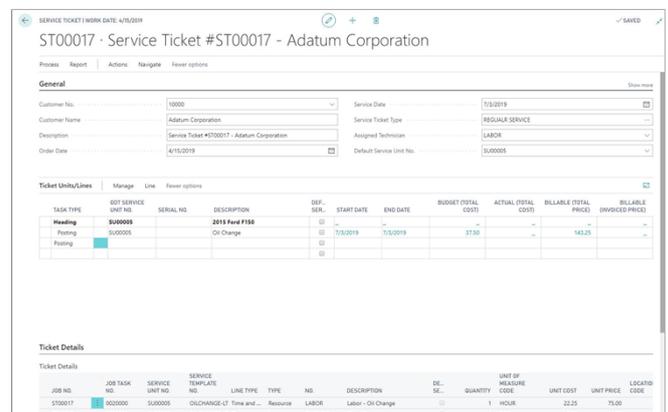
It is only when the Customer card has the Internal Customer field, on the Service tab enabled, the Line Type will be set to Cost Tracking only.

From the service ticket, when you create and post the actual usage, the related job ledger entry, G/L entry, item ledger and value entries and resource ledger entries records are created.

Posting the sales invoice will create the related job ledger, general ledger, tax ledger, customer ledger and resource ledger entries in your system.

Marking the service ticket as complete will set the Job status to “Completed”.

The following picture displays a Service Ticket.



3.2.2. Service Ticket Menu Options

Service Ticket main menu options:

The following provides a brief overview of these options.

Process:

- Add Service Template

This option is used to add a service template to the Ticket Units/Lines for the service unit that is specified on the General tab of the ticket.



ODT Service Help

- Confirm Actuals

This option is used to automatically create a Job Journal for the actuals usage for resources, items, etc. and open the journal.

When a user runs this menu option the first time a Job Journal Batch will be automatically created for the user based on their Microsoft Dynamics 365 Business Central User ID.

- View Job Journal

This option will open the Job Journal Batch related to the user and contain any records which have not been posted as yet that were created when the Confirm Actuals was ran. The records displayed will contain multiple ticket records should the journals not be posted after running the Confirm Actuals.

- Create Service Sales Invoice

This option is used to create the Service Sales Invoice, which is used when servicing an external customers' equipment. A pop-up will occur asking if the user would like to open the invoice, where the Service invoice can be printed and then posted.

NOTE

On the invoice, there is a menu option to print a Service Sales Invoice in a format similar to the Service Ticket document.

- Mark Complete

This option is to be used only when the servicing has been completed, usage has been posted, and if applicable a service invoice created and posted. This option will set the status on the Job card for the ticket to "Completed".

Report:

- Print

Provides the ability to print the service ticket.

Actions – contains the same options as noted in Process

Navigate:

- Dimensions

Provides the ability to view and/or add Dimensions to the ticket.

- Sales Invoices/Credit Memos

Displays a listing of both open and posted Sales Invoices/Credit Memos for the ticket. A menu option is available to open the document on the listing.

NOTE:

Currently Credit Memos cannot be created directly from a Service Ticket

- Checklist

When a service template that is added to the Ticket units/Lines contains a Checklist(s), then this option will open a listing of the Checklist(s). On the listing a user can open and print the checklist and/or fill in the checklist findings.

3.2.3. General Tab

The General tab is used to specify the customer, order date, service date, which are mandatory.

The following fields are not mandatory and will be explained in detail in the help on Service for Internal Equipment and Service for External Customers.

- Service Ticket Type
- Assigned Technician



- Default Service Unit

There are two additional fields available when “Show more” is selected on the General tab. Information is provided on these fields in the notes below on Date fields.

- Starting Date
- Ending Date

General Tab – Date fields:

- Order Date:

The date defaults from the users’ work date and can be overridden.

- Service Date:

The date defaults from the users’ work date and can be overridden.

When there are no records in the Ticket Units/Lines tab, then when the lines are created the Service Date will be used as both Start Date and End Date on the lines.

Should there be records in the Ticket Units/Lines tab and the Service Date is overridden, then a pop-up confirmation will occur. When Yes is selected, then the Starting Date and Ending Date on the General tab will be populated. In addition, the Start Date and End Date on the lines will be updated.

- Starting Date:

When the Service Date is left as the default date, then this field is blank. This field can be overridden.

When overridden, if start date is later than any lines, it will prompt you to update lines.

When new lines are added then on the Ticket Details, the Planning Date will be set to Starting Date specified.

- Ending Date:

When the Service Date is left as the default date, then this field is blank. This field can be overridden.

When overridden if the date is earlier than the current date, and there are records in the Ticket Units/Lines tab, then a pop-up confirmation will occur. When Yes is selected, then the End Date on the lines will be updated.

3.2.4. Ticket Units/Lines

On the Service Quote and Service Ticket, the Ticket Units/Line section are essentially Job Task lines.

The majority of the fields are the same as on Job Task Lines. ODT Service has added the ODT Service Unit No. field to the lines. The Job Task Nos. on the Job created, are automatically populated for the users and thus are not displayed on the Service Ticket.

The view a brief description of the field on the Tickets Units/Lines a tool tip is available and can be viewed by pointing to the column name.

NOTE:

The Defer Service field is not functional in this release, however, is planned for a future release.

When a Default Service Unit is specified on the General tab, a Heading Type line is automatically created on the Ticket units/Lines. From here records can be added to the lines in two ways.

- By adding a Service Template for the unit using the menu option of Add Service Template.
- By manually entering a Posting Type line beneath the Heading line and then going to the Ticket Details for that line and entering the Ticket Detail records (planning lines).

When the Default Service Unit field on the General Tab is blank, manually entry of the Ticket Units/Lines can be done.

The first record must be a Heading Type line with the Service Unit specified, followed by related Posting Type lines.

If a Default Service Unit on the General tab is not entered, then when add a Heading Type line and select a unit, the Default Service Unit No. field on the General tab is automatically populated.

Should another Heading type line be added for a different unit, then the General tab field is automatically cleared.

Menu options on the Ticket Units/Lines.

Manage:

- New Line
- Delete Line
- Add Service Template

This menu option is only available when the cursor is on a Heading Type line with a Service Unit specified.

- View Service Ticket Details

This menu option is only available when the cursor is on a Posting Type line.

Should a Posting Type line exist from adding a Service Template to the ticket, then the details related to that line will open. Only from this selection can the Ticket Details be modified.

Should the Posting Type line be manually entered, then the Service Ticket Details list will open. In the Service Ticket Details users can enter the detailed records for comments, resources, items, and G/L Accounts which are related to the line.

Line:

- Dimensions, which provides the standard options, for viewing and/or editing the Dimensions for the line.
- Create Service Sales Invoice, which provides the ability to invoice on per line basis.

Ticket Details Tab

The Ticket Details tab is a view only of the Service Ticket Details for easy reference for users.

3.2.5. Service Ticket Details

The Service Ticket Details, accessed from the Ticket Units/Lines, are essentially the related Job Planning Lines.

When adding a service template to a ticket, the Ticket Units/Lines and Service Ticket Details records are automatically created.

The quantity, unit cost and unit price can be modified on the Service Ticket Detail records. Additional lines can as well be manually added.

When the Service Ticket Details opens, it is filtered to the Ticket Units/Lines that was selected. This Job Task No. filter can be cleared to view all detail lines for the ticket.

For information on the fields, point to cursor to the column name.

3.3. Service for Internal Equipment

3.3.1. Overview of Internal Equipment Servicing

3.3.1.1. Overview

ODT Service is essentially an enhancement to the Jobs module. Servicing of internal equipment can be easily accomplished. There are two specific setups required for the servicing of internally owned equipment. The Jobs module requires a Customer be specified on a job. Therefore, when servicing internally owned equipment, a Customer will be required, which must have the field, Internal Customer, enabled on the Service tab.

To learn how to setup an internal customer for servicing internal equipment, please see the ODT Service Online Help, ODT Service Setups, Financial Setups for Service - How to Setup an Internal Customer for Servicing.

For internal servicing, the internal customer must be assigned to the company owned equipment on the Service Unit cards.

To learn about setting up Service Units, see ODT Service Online Help, ODT Service Setups, Service Units Setup.

A review of the ODT Service Online Help, Service Processing Overview and Service Ticket Overview, located within the category, Processing Service, is highly recommended, prior to using Service Tickets.

3.3.2. How to Enter and Process an Internal Service Ticket

3.3.2.1. Overview

A Service Ticket for internally owned equipment can be created by:

- From the main menu option, Service, by selecting Service Tickets, which opens the Service Ticket list where New can be selected.
- From the Actions part of the profile by selecting, +Service Ticket.
- From the Actions part of the profile by selecting, Service, then Service Tickets.
- From the Activities Cue, Service Tickets Open and then selecting New.
- From the Service Unit, which is to be serviced.

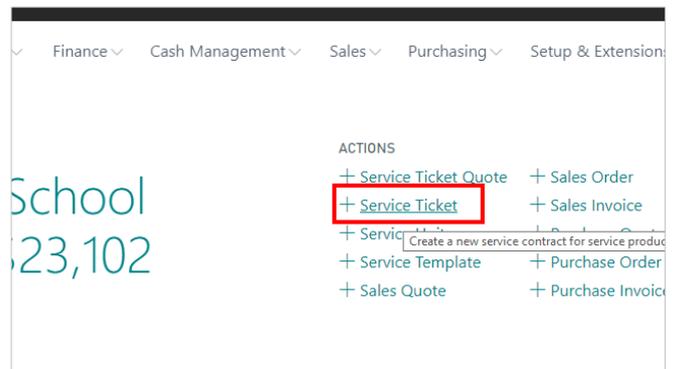
3.3.2.2. How to Create an Internal Service Ticket from Actions

Sales Order Process Profile

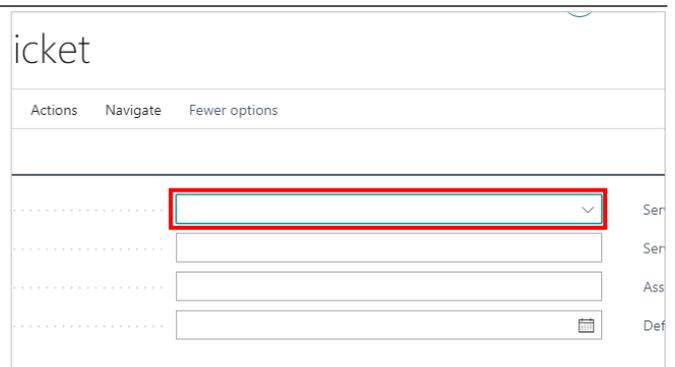
The same steps can be used when a user has the Business Manager Profile.

The following demonstrates the creation of a Service Ticket from the Actions, +Service Ticket option.

Click on the navigation menu item **Service Ticket**



Click on the field **Customer No.**



ODT Service Help

Click on the field **Service Ticket Type**

Click on the lookup button **Service Ticket Type**

Click on the link in cell **Code** with the value **REGULARSERVICE**

The specification of a Ticket Type is optional.

The use of the Ticket Type to specify differing types of servicing can be beneficial for analysis of past servicing.

Click on the field **Assigned Technician**

The technician/resource who is to perform the service can be assigned on the header of the ticket. This is optional.

Click on the field **Default Service Unit No.**

When a service ticket is for a single product, then when this field is populated, a Heading type Ticket Unit/Line, will automatically be created.

If the selected Service Unit is already on another open ticket, a message will be displayed to indicate this and confirm if you want to proceed.

This selection of a Default Service Unit is optional.

NO.	NAME	TYPE	BASE OF MEAS
LABOR	Labor - Oil Change	Person	HOUR
LINDA	Linda Martin	Person	HOUR
MARK	Mark Hanson	Person	HOUR
MARY	Mary A. Dempsey	Person	HOUR
TIMOTHY	Timothy Soath	Person	HOUR

Click on the link in cell **Service Unit No.** with the value **SU00002**

SERVICE UNIT NO.	DESCRIPTION
SU00002	Skid Steer Loader - Internal

3.3.2.3. How to Add a Service Template to a Ticket

The listing of the Service Templates available is filtered to display only those templates, which have the same Maintenance Group as on the Service Unit.

When adding a Service Template from the Ticket main menu, Process, Add Service Template, then the Default Service Unit, Maintenance Group is used in the filtering of the available Service Templates.

When adding a Service Template from the Ticket Units/Lines tab via Manage - Add Service Template, the available templates is filtered by the Maintenance Group of the Service Unit on the selected line with a Task Type of Heading.

The following demonstrates the adding of a service template from the Ticket main menu.

Click on the navigation menu item popup **Process**

Dynamics 365 Business Central

SERVICE TICKET | WORK DATE: 4/8/2019

ST00001 · Service Ticket #S

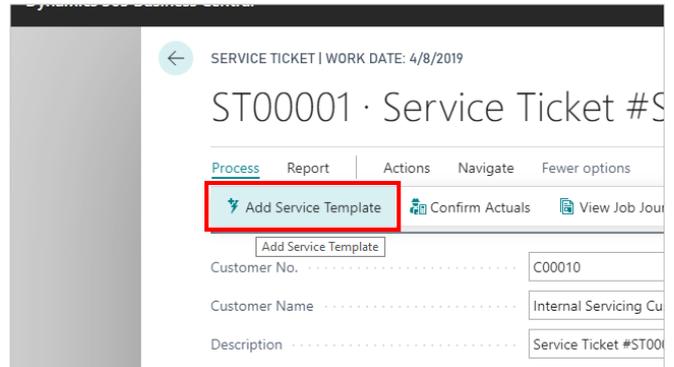
Process Report Actions Navigate Fewer options

General

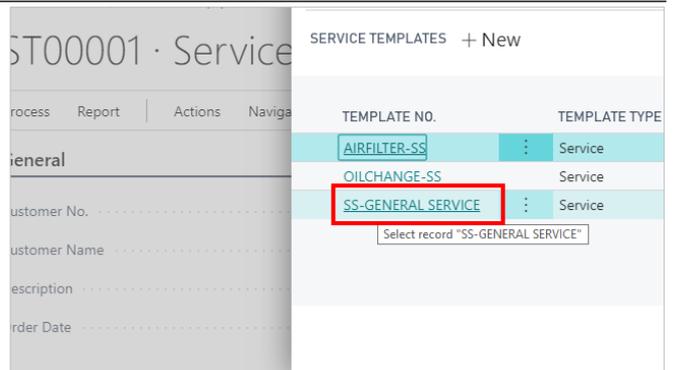
Customer No. C00010

Customer Name Internal Servicing Cu

Click on the navigation menu item **Add Service Template**



Click on the link in cell **Template No.** with the value **SS-GENERAL SERVICE**



3.3.2.4. How to Enter Manual Lines on a Service Ticket

The following demonstrates the entry and configuration of a manually entered line in the Ticket Units/Lines tab for the same Service Unit as used when adding the Service Template.

Click on the cell **Description**

	SU00002	Skid Steer Loader - Internal		
total	SU00002	Skid Steer General Service	<input type="checkbox"/>	-
	SU00002	Labor - Lube	<input type="checkbox"/>	4/1
	SU00002	Oil Change for Skid Steers	<input type="checkbox"/>	4/1
	SU00002	Air Filter for Skid Steers	<input type="checkbox"/>	4/1
	SU00002	Income - Shop Supplies	<input type="checkbox"/>	4/1
	SU00002	Skid Steer General Service	<input type="checkbox"/>	-
			<input type="checkbox"/>	

Enter the text **test Battery**. Press the **Arrow down** key.

	SU00002	Skid Steer Loader - Internal		
total	SU00002	Skid Steer General Service	<input type="checkbox"/>	-
	SU00002	Labor - Lube	<input type="checkbox"/>	4/1
	SU00002	Oil Change for Skid Steers	<input type="checkbox"/>	4/1
	SU00002	Air Filter for Skid Steers	<input type="checkbox"/>	4/1
	SU00002	Income - Shop Supplies	<input type="checkbox"/>	4/1
	SU00002	Skid Steer General Service	<input type="checkbox"/>	-
		test Battery	<input type="checkbox"/>	

ODT Service Help

Press the **Arrow up** key.

The ODT Service Unit No. field will automatically be populated with the same Service Unit No., when moving off and back to the line as the Task Type is left as the default of Posting.

	SU00002	Skid Steer Loader - Internal		-
tal	SU00002	Skid Steer General Service		-
	SU00002	Labor - Lube		4/19
	SU00002	Oil Change for Skid Steers		4/19
	SU00002	Air Filter for Skid Steers		4/19
	SU00002	Income - Shop Supplies		4/19
	SU00002	Skid Steer General Service		-
		Test Battery		-

Click on the navigation menu item popup **Manage**

Process Report Actions navigate Fewer options

Customer Name Internal Servicing Customer

Description Service Ticket #ST00001 - Internal Servicing Customer

Order Date 4/8/2019

Ticket Units/Lines **Manage** Line Fewer options

New Line Delete Line Add Service Template View Service Ticket Details

TASK TYPE	UNIT NO.	SERIAL NO.	DESCRIPTION
Heading	SU00002		Skid Steer
Begin-Total	SU00002		Skid Steer
Posting	SU00002		Labor - Lu

Click on the link **View Service Ticket Details**

Internal Servicing Customer

Service Ticket #ST00001 - Internal Servicing Customer

4/8/2019

s/Lines **Manage** Line Fewer options

Delete Line Add Service Template **View Service Ticket Details**

TASK TYPE	UNIT NO.	SERIAL NO.	DESCRIPTION
g	SU00002		Skid Steer Loader - Internal
-Total	SU00002		Skid Steer General Service
ing	SU00002		Labor - Lube
ing	SU00002		Oil Change for Skid Steers
ina	SU00002		Air Filter for Skid Steers

Click on the navigation menu item **New**

Dynamics 365 Business Central

SERVICE TICKET DETAILS | WORK DATE: 4/8/2019

Search **New** Edit List Delete Item Available

Create a new entry.

JOB NO.	JOB TASK NO.	SERVICE UNIT NO.	SERVICE TEMPLATE NO.

The Task No. Field is automatically populated on the line.

ODT Service Help

Click on the cell **Line Type** with the value **Cost Tracking Only Fixed Price Billing Time and Materials**

Note that the Line Type is automatically set to Cost Tracking Only.

This occurs as the Customer card has the field, Internal customer, enabled.

JOB TASK NO.	SERVICE UNIT NO.	SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESC
0080000			Cost Tracking	Resource		

Click on the cell **Type** with the value **Resource Item G/L Account Text**

Select the applicable type to be used for the line.

In this example the line is for a technician to perform a task, therefore, Resource is used.

SERVICE UNIT NO.	SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION
SU00002		Cost Tracking	Resource		

Click on the cell **No.**

SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION
	Cost Tracking	Resource		

Click on the link in cell **No.** with the value **LABOR**

SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION	DE...	SE...
	Cost Tracking	Resource				

NO.	NAME
LABOR	Labor - Oil Change
Select record "LABOR" Martin	
MARK	Mark Hanson
MARY	Mary A. Dempsey
TIMOTHY	Timothy Sneath
+ New	

ODT Service Help

Enter the text **Labor - Check Battery**.

The description will default from Resource card selected and can be overridden to be indicative of the task to be performed.

SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION	DE... SE...
	Cost Tracking	Resource	LABOR		

Click on the cell **Quantity**

DESCRIPTION	DE... SE...	QUANTITY	UNIT OF MEASURE CODE	UNIT COST
Labor - Check Battery			HOUR	22.25

Enter the text **.25**.

Enter the budgeted quantity for performing the task.

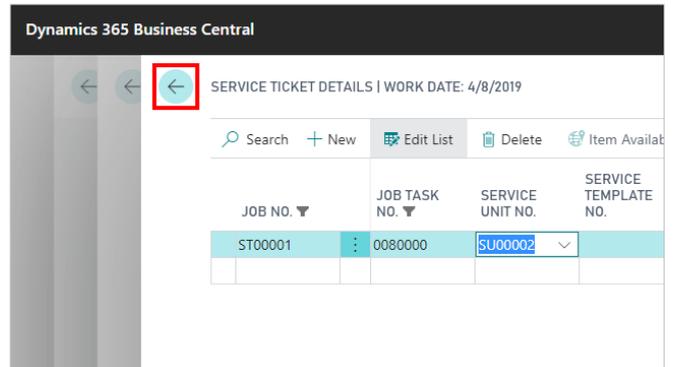
DESCRIPTION	DE... SE...	QUANTITY	UNIT OF MEASURE CODE	UNIT COST
Labor - Check Battery		.25	HOUR	22.25

Click on the cell **Service Unit No.** with the value **SU00002**

Note that the Service Unit No. is automatically populated.

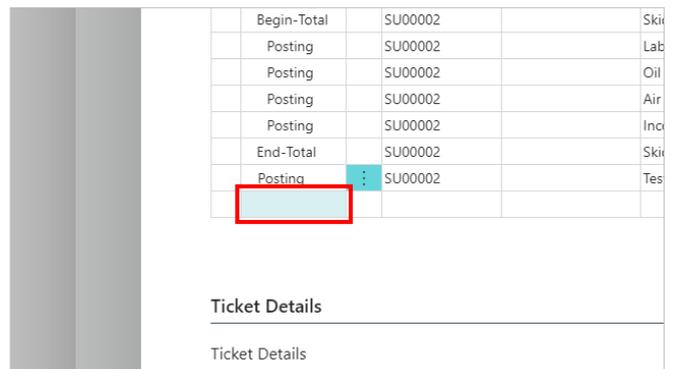
JOB NO.	JOB TASK NO.	SERVICE UNIT NO.	SERVICE TEMPLATE NO.	LINE TYPE	TYF
ST00001	0080000	SU00002		Cost Tracking	Res

Click on the back button

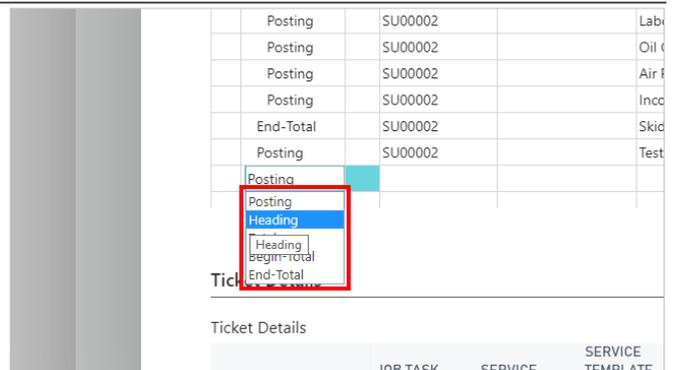


The following demonstrates the manual entry of lines for a different Service Unit on the Ticket Units/Lines tab and the configuration of the Service Ticket Detail lines.

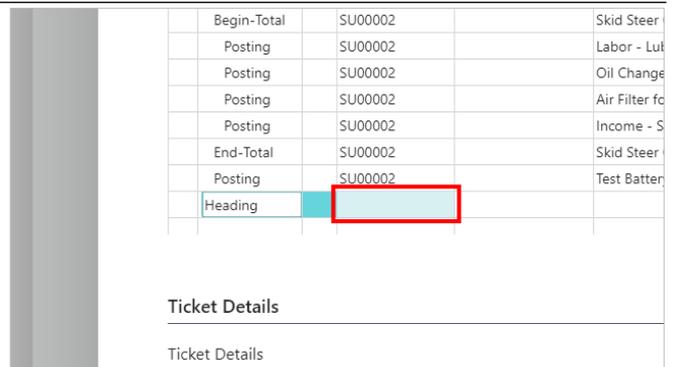
Click on the cell **Task Type**



Click on the item **Heading** in the list



Click on the cell **ODT Service Unit No.**





ODT Service Help

Click on the lookup button in the cell **ODT Service Unit No.**

Begin-Total	SU00002		Skid Steer General Service
Posting	SU00002		Labor - Lube
Posting	SU00002		Oil Change for Skid Steer
Posting	SU00002		Air Filter for Skid Steers
Posting	SU00002		Income - Shop Supplies
End-Total	SU00002		Skid Steer General Service
Posting	SU00002		Test Battery
Heading		⋮	

Look up value

Ticket Details

Ticket Details

Click on the link in cell **Service Unit No.** with the value **SU00003**

Select the Service Unit to be added to the ticket.

NOTE:

The Default Service Unit field on the General tab will automatically be cleared, as ticket is now for multiple units.

SERVICE TICKET | WORK DATE: 4/8/2019

ST00001 · Service

Process Report Actions Navigation

Customer Name

Description

Order Date

SERVICE UNITS + New

SERVICE UNIT NO.	DESCRIPTION
SU00002	Skid Steer Loader - Internal
SU00003	Skid Steer Loader S450

Select record "SU00003"

Ticket Units/Lines Manage Line

Click on the cell **Task Type**

Posting	SU00002		Labor - Lube
Posting	SU00002		Oil Change for Skid Steer
Posting	SU00002		Air Filter for Skid Steers
Posting	SU00002		Income - Shop Supplies
End-Total	SU00002		Skid Steer General Service
Posting	SU00002		Test Battery
Heading	SU00003		Skid Steer Loader S450
Heading			

Ticket Details

Ticket Details

SERVICE

Click on the item **Posting** in the list

Posting	SU00002		Oil Change for Skid Steer
Posting	SU00002		Air Filter for Skid Steers
Posting	SU00002		Income - Shop Supplies
End-Total	SU00002		Skid Steer General Service
Posting	SU00002		Test Battery
Heading	SU00003		Skid Steer Loader S450
Heading			

Ticket Details

Ticket Details

JOB NO.	JOB TASK NO.	SERVICE UNIT NO.	SERVICE TEMPLATE NO.



ODT Service Help

Click on the cell **Description**

	SU00002		Labor - Lube	<input type="checkbox"/>	4/1
	SU00002		Oil Change for Skid Steers	<input type="checkbox"/>	4/1
	SU00002		Air Filter for Skid Steers	<input type="checkbox"/>	4/1
	SU00002		Income - Shop Supplies	<input type="checkbox"/>	4/1
	SU00002		Skid Steer General Service	<input type="checkbox"/>	-
	SU00002		Test Battery	<input type="checkbox"/>	4/1
	SU00003		Skid Steer Loader S450	<input type="checkbox"/>	-
				<input type="checkbox"/>	
Is					
SERVICE					

Enter the text **Check fluid levels**. Press the **Arrow up** key.

	SU00002		Oil Change for Skid Steers	<input type="checkbox"/>	4/1
	SU00002		Air Filter for Skid Steers	<input type="checkbox"/>	4/1
	SU00002		Income - Shop Supplies	<input type="checkbox"/>	4/1
	SU00002		Skid Steer General Service	<input type="checkbox"/>	-
	SU00002		Test Battery	<input type="checkbox"/>	4/1
	SU00003		Skid Steer Loader S450	<input type="checkbox"/>	-
			d	<input type="checkbox"/>	-
				<input type="checkbox"/>	
Is					
SERVICE					

Press the **Arrow down** key.

	SU00002		Oil Change for Skid Steers	<input type="checkbox"/>	4/1
	SU00002		Air Filter for Skid Steers	<input type="checkbox"/>	4/1
	SU00002		Income - Shop Supplies	<input type="checkbox"/>	4/1
	SU00002		Skid Steer General Service	<input type="checkbox"/>	-
	SU00002		Test Battery	<input type="checkbox"/>	4/1
	SU00003		Skid Steer Loader S450	<input type="checkbox"/>	-
			Check fluid levels	<input type="checkbox"/>	-
				<input type="checkbox"/>	
Is					
SERVICE					

Click on the navigation menu item popup **Manage**

Process Report Actions Navigate Fewer options

Customer Name Internal Servicing Customer

Description Service Ticket #ST00001 - In

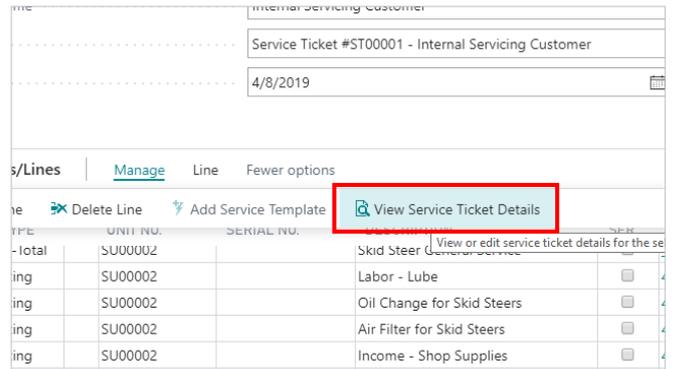
Order Date 4/8/2019

Ticket Units/Lines **Manage** Line Fewer options

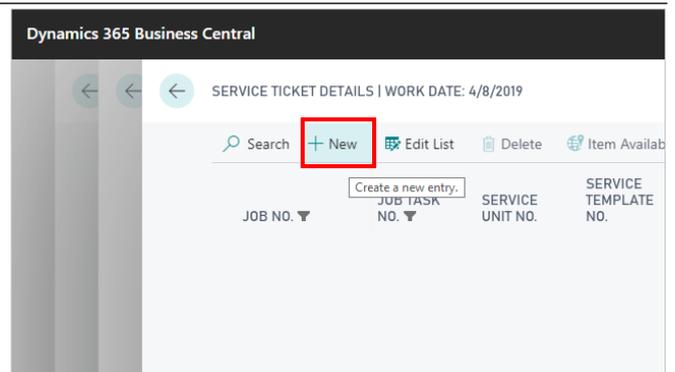
TASK TYPE	ODT SERVICE UNIT NO.	SERIAL NO.	DESCRIP
Begin - total	SU00002		Skid Steer
Posting	SU00002		Labor - Lube
Posting	SU00002		Oil Change
Posting	SU00002		Air Filter for

ODT Service Help

Click on the navigation menu item **View Service Ticket Details**

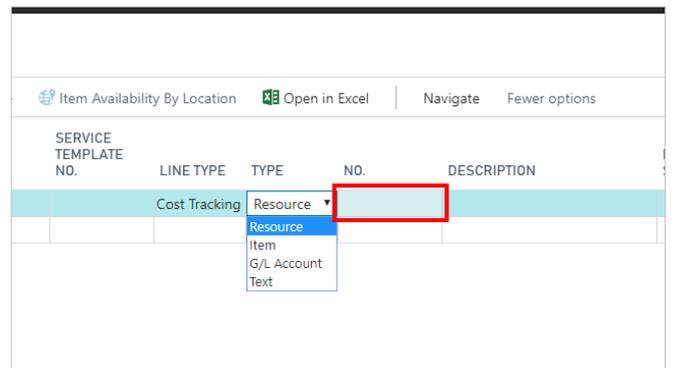


Click on the navigation menu item **New**

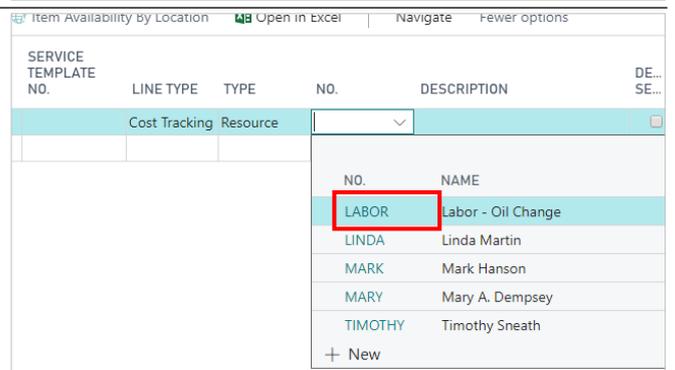


As the line is to be for a technician default type of Resource will be used.

Click on the cell **No.**



Click on the link in cell **No.** with the value **LABOR**





ODT Service Help

Click on the cell **Description** with the value **Labor - Oil Change**

LINE TYPE	TYPE	NO.	DESCRIPTION	DE... SE...	QUA
Cost Tracking	Resource	LABOR	Labor - Oil Change	<input type="checkbox"/>	

Enter the text **Labor - Check Fluid Levels.**

LINE TYPE	TYPE	NO.	DESCRIPTION	DE... SE...	QUA
Cost Tracking	Resource	LABOR	<input type="text" value="Labor - Check Fluid Levels"/>	<input type="checkbox"/>	

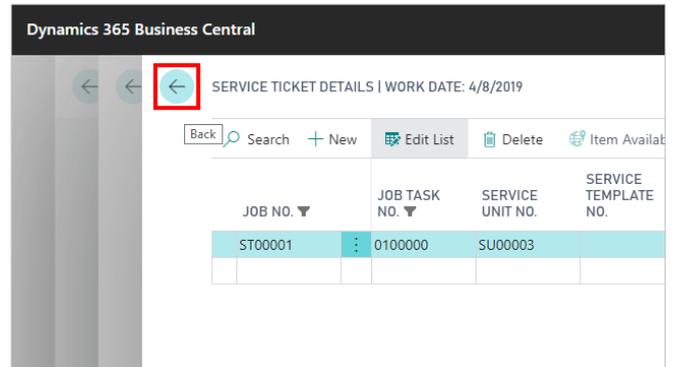
Click on the cell **Quantity**

DESCRIPTION	DE... SE...	QUANTITY	UNIT OF MEASURE CODE	UNIT COST
Labor - Check Fluid Levels	<input type="checkbox"/>	<input type="text" value=""/>	HOUR	22.25

Enter the text **.25.**

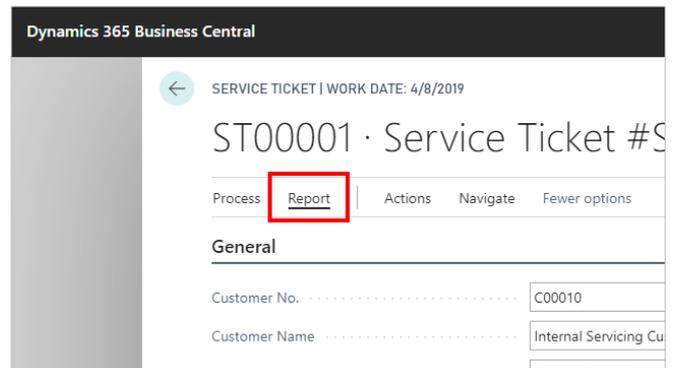
DESCRIPTION	DE... SE...	QUANTITY	UNIT OF MEASURE CODE	UNIT COST
Labor - Check Fluid Levels	<input type="checkbox"/>	<input type="text" value=".25"/>	HOUR	22.25

Click on the back button

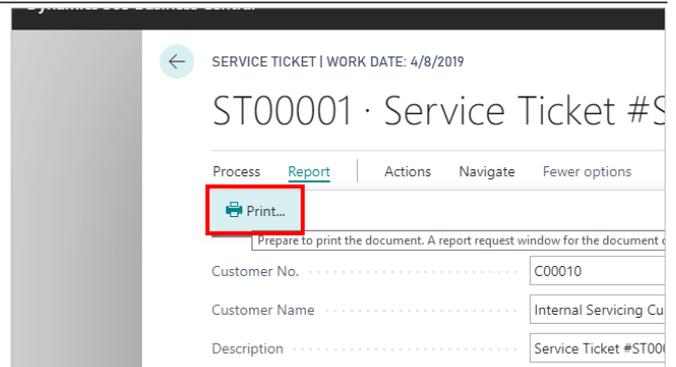


3.3.2.5. How to Print the Service Ticket

Click on the navigation menu item popup **Report**

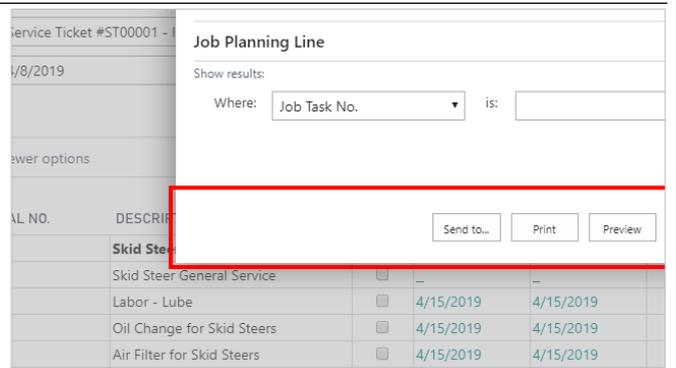


Click on the navigation menu item **Print...**



Click on **Send to... Print Preview Cancel**

The standard Microsoft Dynamics 365 Business Central, printing options are available to select from.





ODT Service Help

The following picture displays the Service Ticket document.

Service Ticket Page 1
June 7, 2019

Service Ticket #ST00001 - Internal Servicing Customer
Assigned Technician:
Service Date: 4/15/2019

Internal Servicing Customer CRONUS SERVICE, Inc.
7122 South Ashford Street
Westminster
Atlanta, 31772

Description	Task Type	No.	Quantity	Unit Price	Total Price
SU00002-Skid Steer Loader - Internal					
Skid Steer General Service					
Labor - Lube					
Labor - Lube	Resource	LABOR	0.5	75.00	37.50
			Parts: 0.00	Labor: 37.50	Other: 0.00
Oil Change for Skid Steers					
Labor - Oil Change	Resource	LABOR	1	75.00	75.00
Oil Filter	Item	1001	1	11.75	11.75
Oil Gasket	Item	1002	1	2.75	2.75
Mobile Oil SW30	Item	1003	5	10.75	53.75
			Parts: 68.25	Labor: 75.00	Other: 0.00
Air Filter for Skid Steers					
Labor - Replace Air Filter	Resource	LABOR	0.5	75.00	37.50
Air Filter for Skid Steer	Item	1004	1	20.75	20.75
			Parts: 20.75	Labor: 37.50	Other: 0.00
Income - Shop Supplies					
Income - Shop Supplies	G/L Account	40150	1	20.00	20.00
			Parts: 0.00	Labor: 0.00	Other: 20.00
Test Battery					
Labor - Check Battery	Resource	LABOR	0.25	75.00	18.75
			Parts: 0.00	Labor: 18.75	Other: 0.00
			Parts: 89.00	Labor: 168.75	Other: 20.00
					Total SU00002: 277.75
SU00003-Skid Steer Loader S450					
Check fluid levels					
Labor - Check Fluid Levels	Resource	LABOR	0.25	75.00	18.75
			Parts: 0.00	Labor: 18.75	Other: 0.00
					Total Parts: 89.00
					Total Labor: 187.50
					Total Other: 20.00
					Total Service Ticket #ST00001 - Internal Servicing Customer 296.50

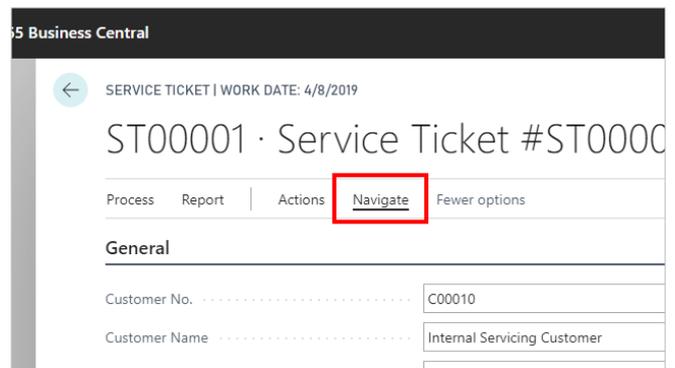
3.3.2.6. Service Template Checklists

Should the Service Template(s) added to a Service Ticket contain a Checklist(s), then the checklist(s) can be printed for or by the technician for reference and the recording of their findings.

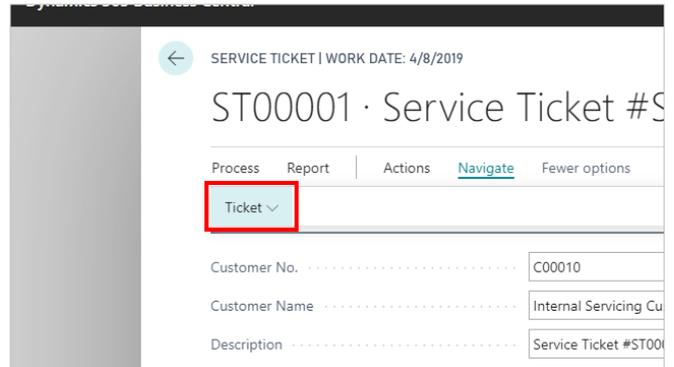
Additionally the technicians' findings can be entered onto the Service Ticket Checklist.

The following demonstrates the printing of a Service Template Checklist.

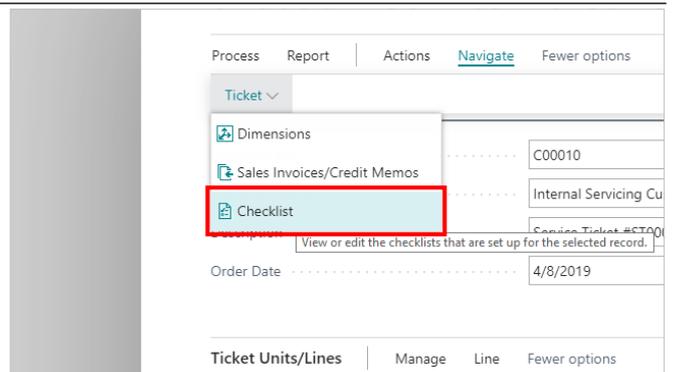
Click on the navigation menu item popup **Navigate**



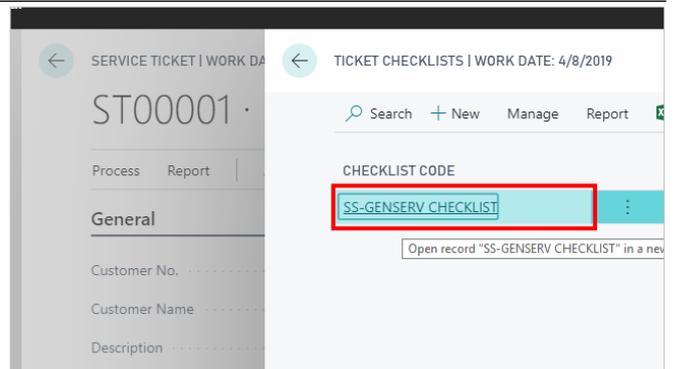
Click on the navigation menu item popup **Ticket**



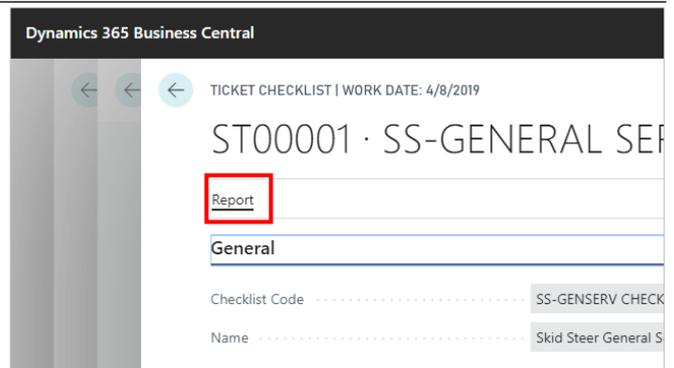
Click on the link **View or edit the checklists that are set up for the selected record.**



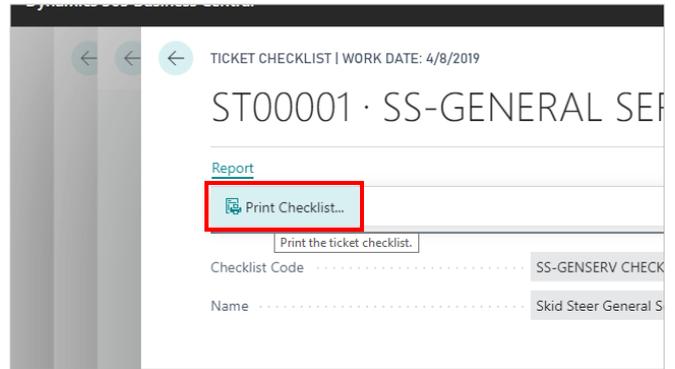
Click on the link in cell **Checklist Code** with the value **SS-GENSERV CHECKLIST**



Click on the navigation menu item popup **Report**

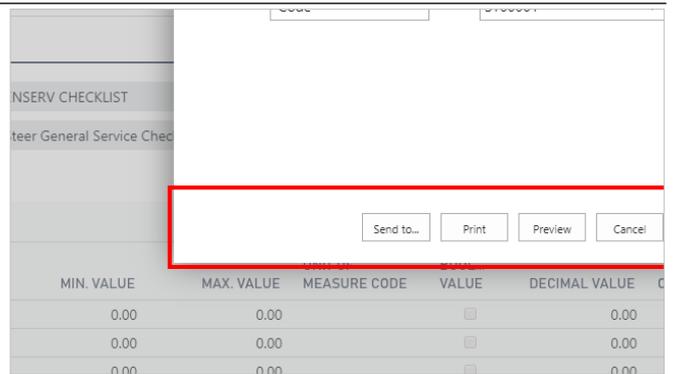


Click on the navigation menu item **Print Checklist...**

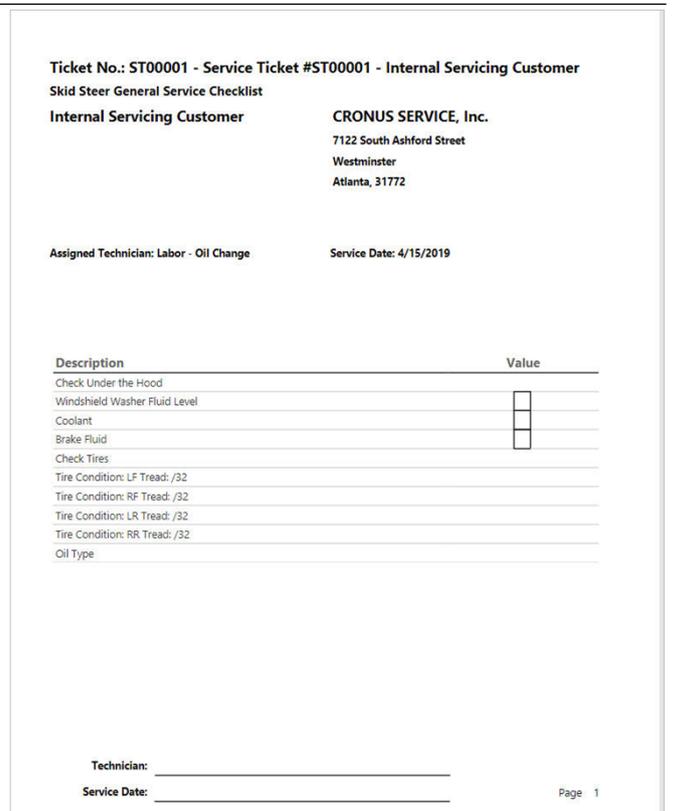


Click on **Send to... Print Preview Cancel**

The standard Microsoft Dynamics 365 Business Central, printing options are available to select from.



The following picture displays the Checklist document which is for the template, SS-General Service.



The following demonstrates the entering of the technicians' results from completing the checklist tasks.

The entry is optional.



ODT Service Help

Click on the cell **Description** with the value **Coolant**

Checklist Details		Manage
DESCRIPTION		MIN. V.
Check Under the Hood		
Windshield Washer Fluid Level	:	
Coolant	:	
Brake Fluid	Coolant	
Check Tires		
Tire Condition: LF Tread: /32		
Tire Condition: RF Tread: /32		
Tire Condition: LR Tread: /32		
Tire Condition: RR Tread: /32		

Click on **Boolean Value**

LUE	MAX. VALUE	UNIT OF MEASURE CODE	BOOL... VALUE	DECIMAL VALUE	OPTION VALUE
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input checked="" type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	

Click on the cell **Description** with the value **Brake Fluid**

Checklist Details		Manage
DESCRIPTION		MIN. V.
Check Under the Hood		
Windshield Washer Fluid Level	:	
Coolant	:	
Brake Fluid	:	
Check Tires		
Tire Condition: LF Tread: /32		
Tire Condition: RF Tread: /32		
Tire Condition: LR Tread: /32		
Tire Condition: RR Tread: /32		
Oil Type		

Click on **Boolean Value**

LUE	MAX. VALUE	UNIT OF MEASURE CODE	BOOL... VALUE	DECIMAL VALUE	OPTION VALUE
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input checked="" type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	



ODT Service Help

Click on the cell **Decimal Value** with the value **0.00**

MAX. VALUE	UNIT OF MEASURE CODE	BOOL... VALUE	DECIMAL VALUE	OPTION VALUE
0.00		<input type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
		<input type="checkbox"/>		

Click on the cell **Decimal Value** with the value **0.00**

MAX. VALUE	UNIT OF MEASURE CODE	BOOL... VALUE	DECIMAL VALUE	OPTION VALUE
0.00		<input type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
		<input type="checkbox"/>		

Enter the text **20**.

MAX. VALUE	UNIT OF MEASURE CODE	BOOL... VALUE	DECIMAL VALUE	OPTION VALUE
0.00		<input type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
		<input type="checkbox"/>		

Click on the cell **Decimal Value** with the value **0.00**

MAX. VALUE	MEASURE CODE	VALUE	DECIMAL VALUE	OPTION VALUE
0.00		<input type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	20	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
		<input type="checkbox"/>		



ODT Service Help

Enter the text **21**.

MAX. VALUE	MEASURE CODE	VALUE	DECIMAL VALUE	OPTION VALUE
0.00		<input type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	20.00	
32.00		<input type="checkbox"/>	21	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
		<input type="checkbox"/>		

Click on the cell **Decimal Value** with the value **0.00**

0.00		<input type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	20.00	
32.00		<input type="checkbox"/>	21	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
		<input type="checkbox"/>		

Enter the text **10**.

0.00		<input type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	20.00	
32.00		<input type="checkbox"/>	21.00	
32.00		<input type="checkbox"/>	10	
32.00		<input type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
		<input type="checkbox"/>		

Click on the cell **Decimal Value** with the value **0.00**

0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	20.00	
32.00		<input type="checkbox"/>	21.00	
32.00		<input type="checkbox"/>	10	
32.00		<input type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
		<input type="checkbox"/>	0.00	



ODT Service Help

Enter the text **8**.

0.00	<input checked="" type="checkbox"/>	0.00
0.00	<input checked="" type="checkbox"/>	0.00
0.00	<input checked="" type="checkbox"/>	0.00
0.00	<input type="checkbox"/>	0.00
32.00	<input type="checkbox"/>	20.00
32.00	<input type="checkbox"/>	21.00
32.00	<input type="checkbox"/>	10.00
32.00	<input type="checkbox"/>	8
0.00	<input type="checkbox"/>	0.00
	<input type="checkbox"/>	

For records where there are various options to select from, the following demonstrates this for the Oil Type line.

Click on the cell **Option Value**

<input checked="" type="checkbox"/>	0.00
<input checked="" type="checkbox"/>	0.00
<input type="checkbox"/>	0.00
<input type="checkbox"/>	20.00
<input type="checkbox"/>	21.00
<input type="checkbox"/>	10.00
<input type="checkbox"/>	8
<input type="checkbox"/>	0.00
<input type="checkbox"/>	

Click on the lookup button in the cell **Option Value**

0.00	
0.00	
0.00	
20.00	
21.00	
10.00	
8.00	
0.00	

Look up value

Click on the link in cell **Value** with the value **Mobil**

20.00	
21.00	
10.00	
8.00	
0.00	

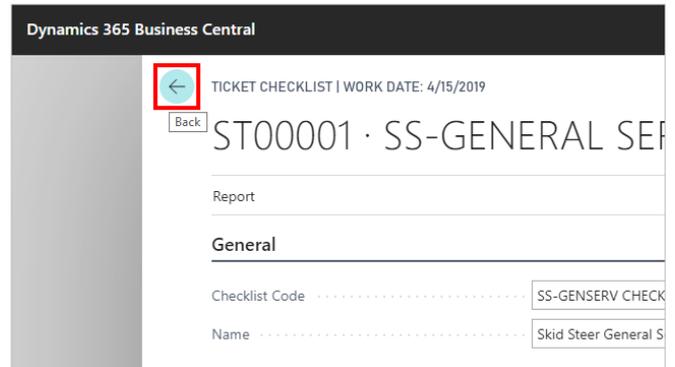
VALUE

Mobil

Select record "Mobil"

+ New Select from full list

Click on the back button



3.3.2.7. How to Process the Usage Actuals for the Ticket

The following demonstrates the confirmation of actual quantities for all the Service Ticket Detail lines when the actuals are the same as the budgeted quantities.

Should the actuals be different from the budgeted quantities, then on the Ticket Detail Lines, the quantity should be revised to reflect the actual quantities prior to running the Confirm Actuals.

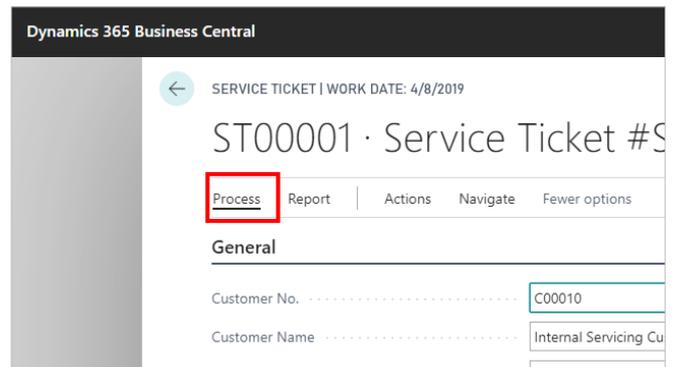
Alternatively, the quantity can be revised on the Job Journal records prior to posting the journal when only a portion of the usage is to be posted at the specified posting date.

This process automatically creates records in a Job Journal, which automatically opens and must be posted to record the usage on the ticket and job.

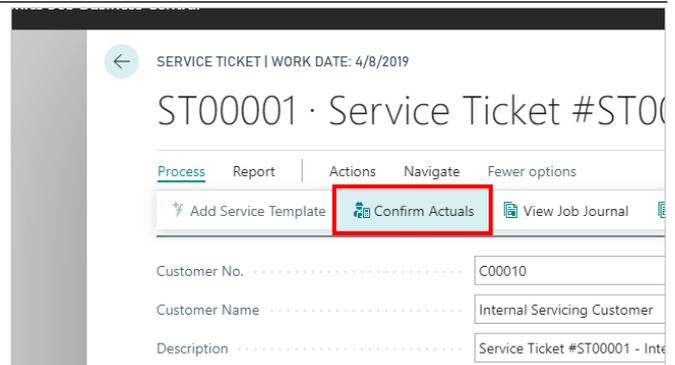
NOTE:

The first time a user completes the following steps a Job Journal Batch will automatically be created for the user.

Click on the navigation menu item popup **Process**



Click on the link **Confirm Actuals**



Should only some of the Ticket Detail records to be have the usage calculated, then filters can be set on the following tabs of Job Task and Job Planning Lines on the Confirm Actuals request page.

ODT Service Help

Click on **Job Task**

Document No: DCS10000
 Service Ticket #ST0000
 Posting Date: 4/15/2019
 4/8/2019
 Template Name: JOB
 Batch Name: ASTAPLETO

Manage	Line	Fewer options
ODT SERVICE UNIT NO. SERIAL NO. DESC		
SU00002		Skid S
SU00002		Labor
SU00002		Oil Ch
SU00002		Air Fil

Show results:
 Where: Job No. is:
 And: Job Task No. is:

Click on **Job Planning Line**

SU00002		Skid S
SU00002		Labor
SU00002		Oil Ch
SU00002		Air Fil
SU00002		Incom
SU00002		Skid S
SU00002		Test B
SU00003		Skid S
SU00003		Check

Show results:
 Where: Job No. is:
 And: Job Task No. is:

Show results:
 Where: Type is:
 And: No. is:
 And: Planning Date is:

Click on the button **OK**

Where: is:
 Where: is:
 Posting Date: is:
 Priority Date: is:

OK Cancel

Click on the button **OK**

Items were successfully transferred to the journal.

OK

	(TOTAL COST)	ACTUAL (TOTAL COST)	BILLA
	11.13		
4/15/2019 4/15/2019	37.50		
4/15/2019 4/15/2019	15.38		
4/15/2019 4/15/2019	10.00		
	85.13		
4/15/2019 4/15/2019	5.56		

The Job Journal will automatically open for review and modification, if needed.

NOTE: Should you wish to change the Line Type field, you must first clear the Job Planning Line No. field.

ODT Service Help

Click on the navigation menu item popup **Process**

Dynamics 365 Business Central

Manage **Process** Prepare Post/Print Job Line Actions Na

EDIT - JOB JOURNALS - ASTAPLETON · ODT\ASTAPLETON JOURNAL

Batch Name

LINE TYPE	BIN CODE	WORK TYPE CODE	UNIT OF MEASURE CODE	QUANTITY
			HOUR	0.5
			HOUR	1
			PCS	1
			PCS	1

Click on the navigation menu item popup **Post/Print**

Dynamics 365 Business Central

Manage Process Prepare **Post/Print** Job Line Actions Na

Reconcile Calc. Remaining Usage...

Batch Name

LINE TYPE	BIN CODE	WORK TYPE CODE	UNIT OF MEASURE CODE	QUANTITY
			HOUR	0.5
			HOUR	1
			PCS	1
			PCS	1

Click on the navigation menu item **Post**

Dynamics 365 Business Central

Manage Process Prepare Post/Print Job Line Actions Na

Post Post and Print

Finalize the document or journal by posting the amounts and quantities to the related account

Batch Name

LINE TYPE	BIN CODE	WORK TYPE CODE	UNIT OF MEASURE CODE	QUANTITY
			HOUR	0.5
			HOUR	1
			PCS	1
			PCS	1

Click on the button **Yes**

25 4.25 4.25 4.25 20.75 20.75 (

00 10.00 10.00 10.00 20.00 20.00 (

25 22.25 5.56 5.56 75.00 18.75 (

18.75 (

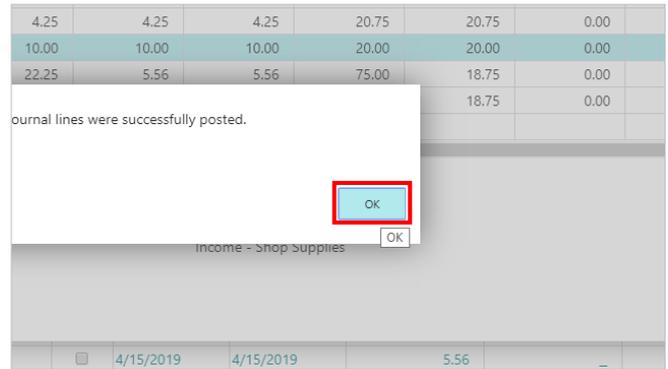
Do you want to post the journal lines?

Yes No

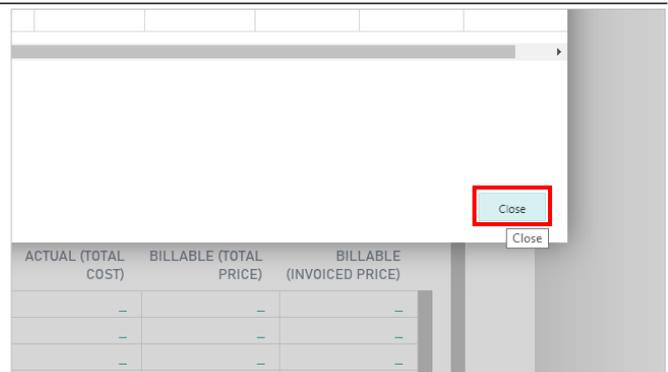
Income - Shop Supplies

4/15/2019 4/15/2019 5.56

Click on the button **OK**



Click on the button **Close**



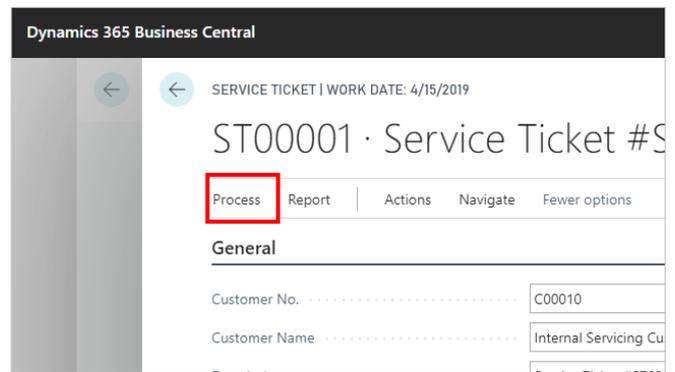
3.3.2.8. How to Close the Ticket

As this Service Ticket is for servicing internally owned equipment, no invoicing of the ticket is to occur.

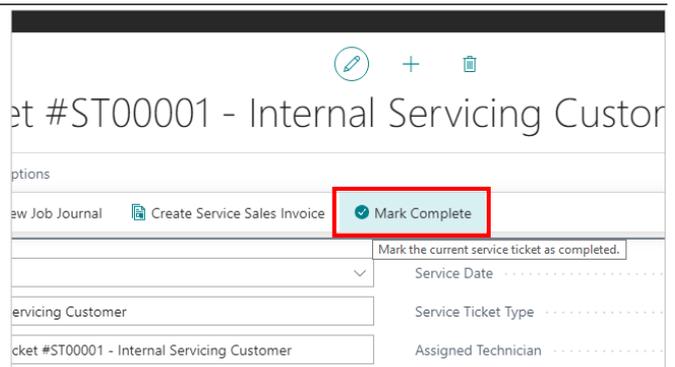
The final step is to mark the ticket as completed once all usage has been posted. This will set the Status on the Job card to Completed.

The following demonstrates this process.

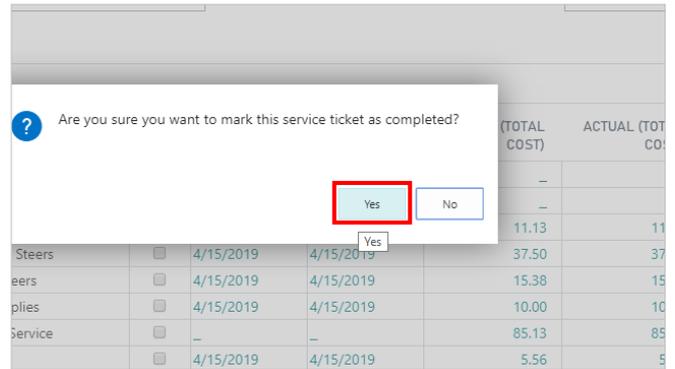
Click on the navigation menu item popup **Process**



Click on the navigation menu item **Mark Complete**



Click on the button **Yes**

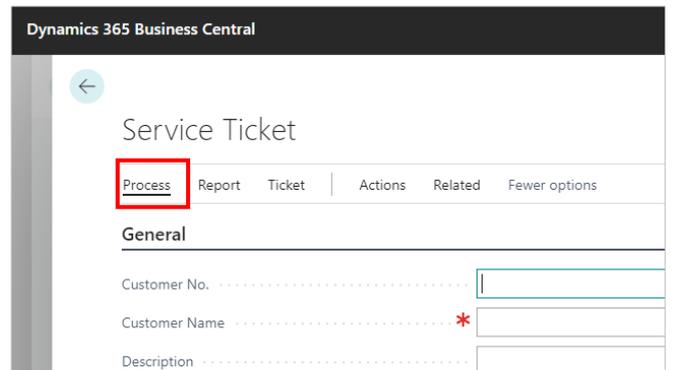


3.3.2.9. How to use the Copy Document Feature

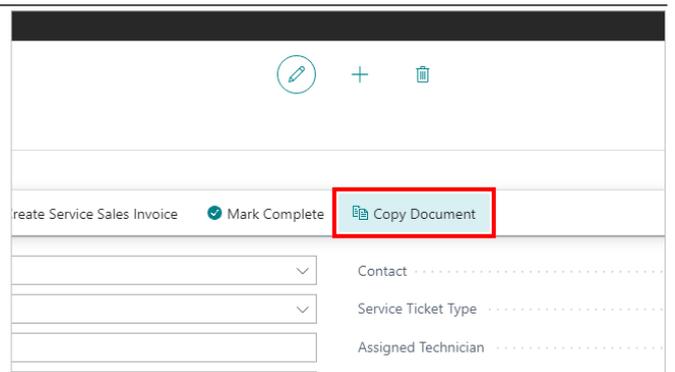
The following demonstrates how to use the Copy Document Feature.

Please note that the Service Ticket that will be used for this example was created in advance.

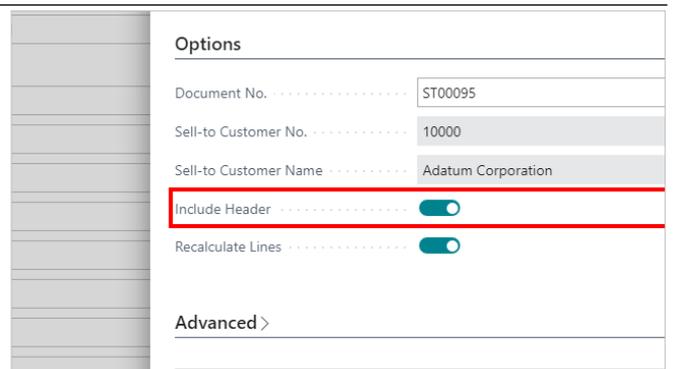
Click on the navigation menu item popup **Process**



Click on the navigation menu item **Copy Document**

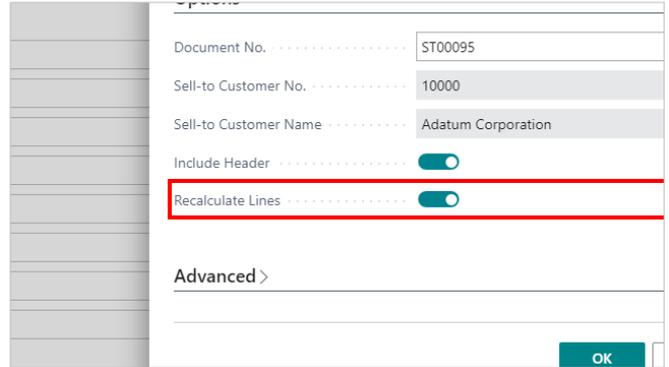


The Include Header toggle can be used to toggle if information from the header of the selected ticket is copied. It is enabled by default if a customer has not been selected before copying, and is disabled by default if a customer has been selected before copying.

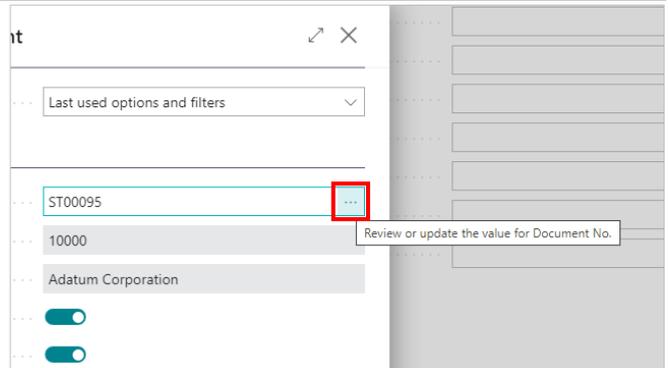


ODT Service Help

The Recalculate Lines toggle can be used to toggle if service lines that get copied should have their prices recalculated after being copied.

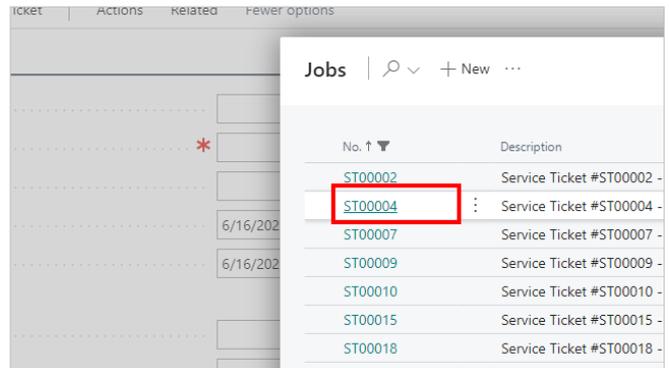


Click on the lookup button **Document No.**

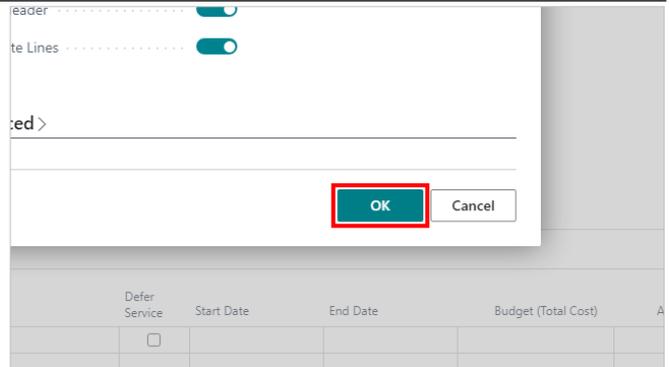


Select the service ticket that you want to copy.

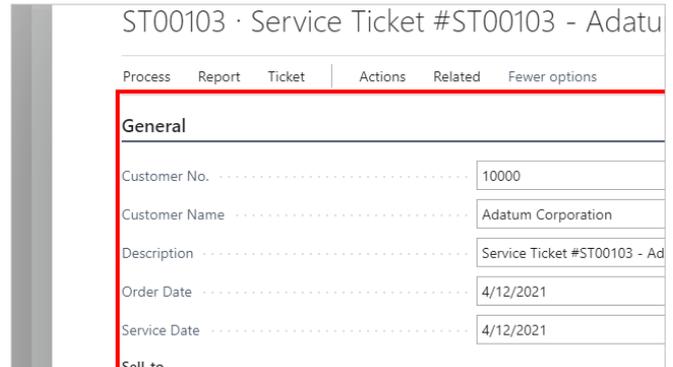
Click on the link in cell **No.** with the value **ST00004**



Click on the button **OK**



Notice that information from the selected ticket has now been copied to the current service ticket.



ST00103 · Service Ticket #ST00103 - Adatu

Process	Report	Ticket	Actions	Related	Fewer options
General					
Customer No.	10000				
Customer Name	Adatum Corporation				
Description	Service Ticket #ST00103 - Ad				
Order Date	4/12/2021				
Service Date	4/12/2021				
Sell-to					

3.4. Service for External Equipment

3.4.1. Overview of External Customer Equipment Servicing

3.4.1.1. Overview

ODT Service is essentially an enhancement to the Jobs module, servicing of internal equipment can be easily accomplished.

There are two specific setups required for the servicing of external Customer owned equipment.

The Jobs module requires a Customer be specified on a job.

Therefore, when servicing Customer owned equipment, a Customer will be required.

Service Quotes are available, should your organization provide quotes, prior to converting the quote to a Service Ticket. Service Quotes are optional.

The Service Quote and Service Ticket can be entered, printed and processed from the Business Manager or Sale Order Processor Profiles.

A review of the ODT Service Online Help, Service Processing Overview and Service Ticket Overview, located within the category, Processing Service, is highly recommended, prior to using Service Quotes or Service Tickets.

3.4.2. How to Process External Customer Service Quotes

3.4.2.1. Overview

A Service Quote can be created:

- From the main menu option, Service, by selecting Service Ticket Quotes, which opens the Service Ticket Quote list where New can be selected.
- From the Actions part of the profile by selecting, +Service Ticket Quote.
- From the Actions part of the profile by selecting, Service, then Service Ticket Quote.
- From the Activities Cue, Service Ticket Quote and then selecting New.

The Service Ticket Quote is to be converted to a Service Ticket upon approval from the Customer.

Should the Customer decide they do not want to go forward with the servicing, then the Service Ticket Quote can be canceled by selecting Process, then Cancel Ticket.

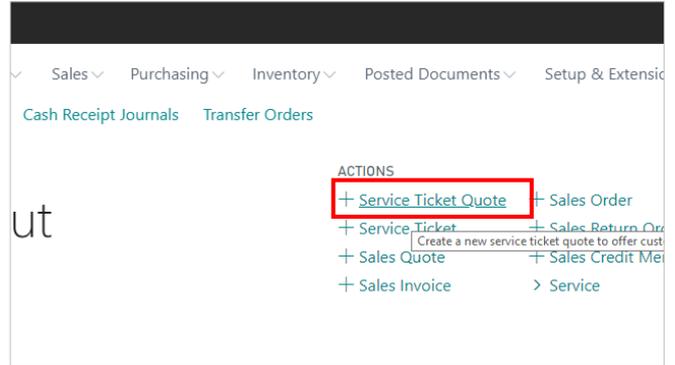
3.4.2.2. How to Create a Service Ticket Quote from Actions

Sales Order Process Profile

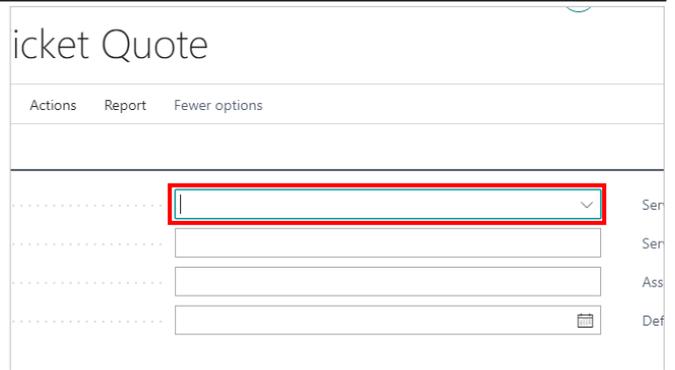
The same steps can be used when a user has the Business Manager Profile.

The following demonstrates the creation of a Service Ticket Quote from the Actions, +Service Ticket Quote option.

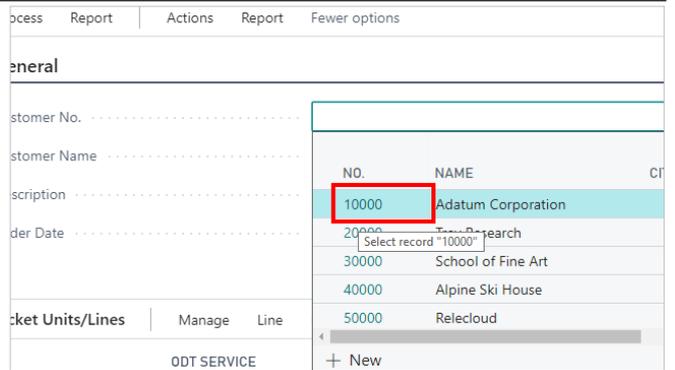
Click on the navigation menu item **Service Ticket Quote**



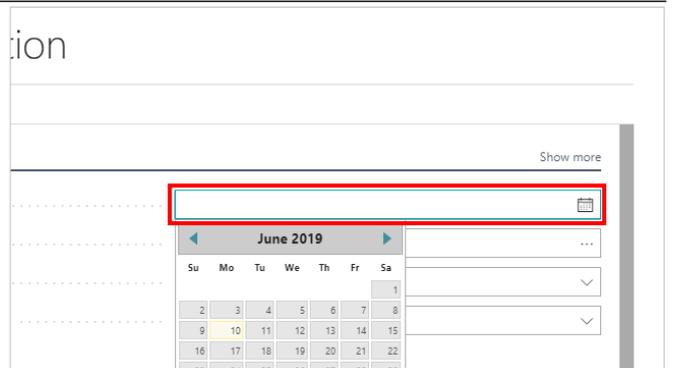
Click on the field **Customer No.**



Click on the link in cell **No.** with the value **10000**
Select the applicable Customer.



Click on the field **Service Date**



ODT Service Help

Click on the link **Previous**

Corporation

Service Date |

Service Ticket Type  **June 2019** 

Assigned Technician

Default Service Unit No.

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

Click on the link **Previous**

Corporation

Service Date |

Service Ticket Type  **June 2019** 

Assigned Technician

Default Service Unit No.

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

Click on a date in the calendar

Select the date on which the service is to be performed, if different from the defaulted date, from the Users' Work Date.

Service Date |

Service Ticket Type  **April 2019** 

Assigned Technician

Default Service Unit No.

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Today Done

END DATE	BUDGET (TOTAL COST)	ACTUAL (TOTAL COST)	BILLABLE (TOTAL PRICE)	BILL (INVOICED)

Click on the field **Service Ticket Type**

Corporation

Service Date |

Service Ticket Type 

Assigned Technician

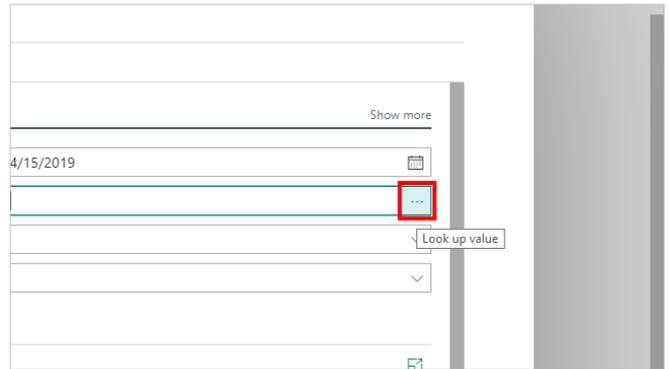
Default Service Unit No.

...

...

ODT Service Help

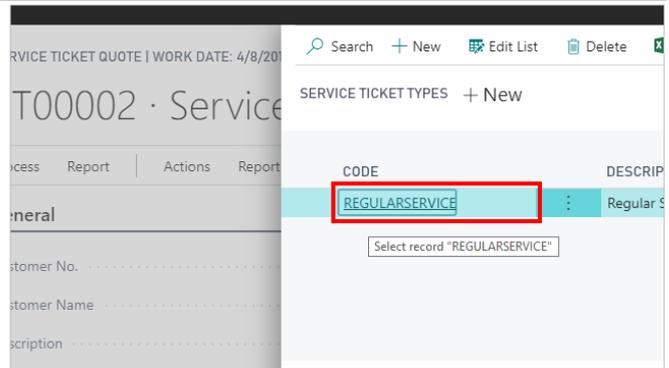
Click on the lookup button **Service Ticket Type**



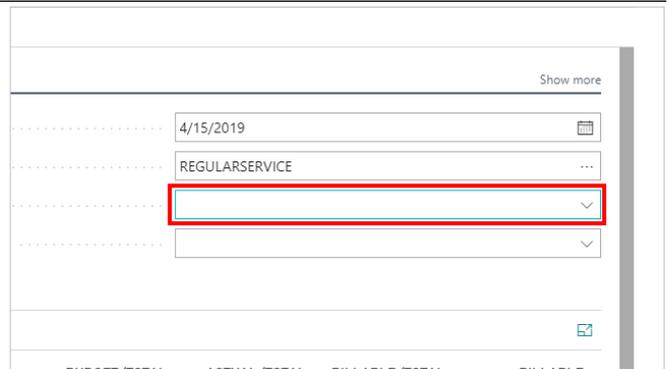
Click on the link in cell **Code** with the value **REGULARSERVICE**

The specification of a Ticket Type is optional.

The use of the Ticket Type to specify differing types of servicing can be beneficial for analysis of past servicing.

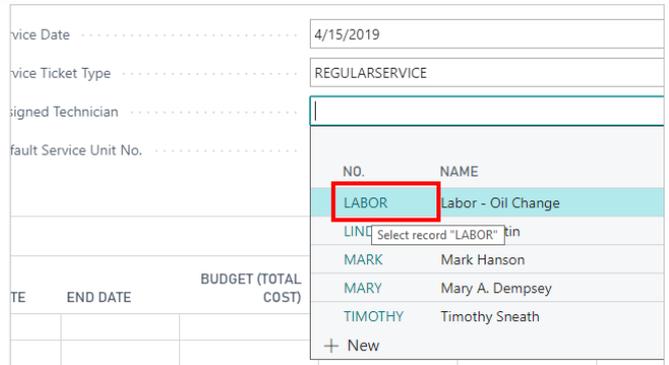


Click on the field **Assigned Technician**



Click on the link in cell **No.** with the value **LABOR**

The specification of an Assigned Technician is optional.



Click on the field **Default Service Unit No.**

When a service ticket quote is for a single product, then when this field is populated, a Heading type Ticket Unit/Line, will automatically be created.

If the selected service unit is already on another open service ticket, a message will be displayed to indicate this and confirm if you want to proceed.

This selection of a Default Service Unit is optional.

The screenshot shows a form with several fields. The 'Default Service Unit No.' field is a dropdown menu with a red box around it. The selected value is 'SU00001'. Other fields include '4/15/2019', 'REGULARSERVICE', and 'LABOR'. At the bottom, there are columns for 'BUDGET (TOTAL COST)', 'ACTUAL (TOTAL COST)', 'BILLABLE (TOTAL PRICE)', and 'BILLABLE (INVOICED PRICE)'.

Click on the link in cell **Service Unit No.** with the value **SU00001**

The screenshot shows a table with columns 'SERVICE UNIT NO.' and 'DESCRIPTION'. The row for 'SU00001' is highlighted with a red box. The description is 'Skid Steer Loader S450'. Below it, there is a row for 'SU000' with a description 'Steer Loader S70' and a link 'Select record "SU00001"'. There is also a '+ New' button.

3.4.2.3. How to Add a Service Template to a Quote

The listing of the Service Templates available is filtered to display only those templates, which have the same Maintenance Group as on the Service Unit.

When adding a Service Template from the Ticket main menu, Process, Add Service Template, then the Default Service Unit, Maintenance Group is used in the filtering of the available Service Templates.

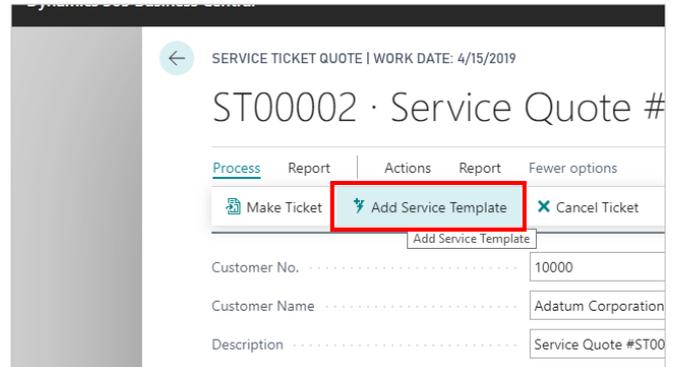
When adding a Service Template from the Ticket Units/Lines tab via Manage - Add Service Template, the available templates is filtered by the Maintenance Group of the Service Unit on the selected line with a Task Type of Heading.

The following demonstrates the adding of a service template from the Ticket main menu.

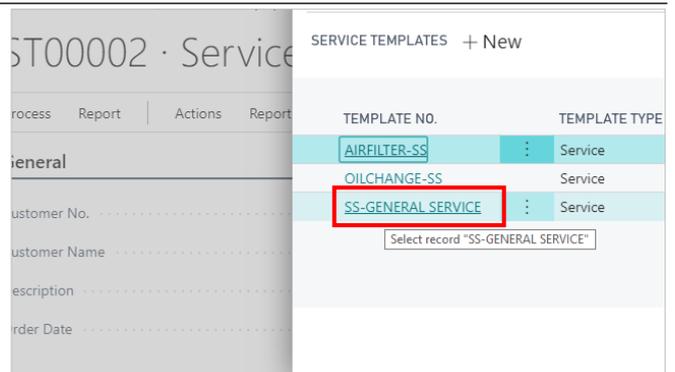
Click on the navigation menu item popup **Process**

The screenshot shows the Dynamics 365 Business Central interface. The title bar says 'Dynamics 365 Business Central'. The main content area shows 'SERVICE TICKET QUOTE | WORK DATE: 4/15/2019' and 'ST00002 · Service Quote #'. Below this, there is a navigation bar with 'Process', 'Report', 'Actions', 'Report', and 'Fewer options'. The 'Process' button is highlighted with a red box. Below the navigation bar, there is a 'General' section with fields for 'Customer No.' (10000) and 'Customer Name' (Adatum Corporation).

Click on the navigation menu item **Add Service Template**



Click on the link in cell **Template No.** with the value **SS-GENERAL SERVICE**



The lines will automatically be populated with the template lines, of the selected Service Template.

3.4.2.4. How to Enter Manual Lines on a Service Ticket Quote

The following demonstrates the entry and configuration of a manually entered line in the Ticket Units/Lines tab for the same Service Unit as used when adding the Service Template.

Click on the cell **Description**

	SU00001	Skid Steer Loader S450		
	SU00001	Skid Steer General Service		-
	SU00001	Labor - Lube		6/1
	SU00001	Oil Change for Skid Steers		6/1
	SU00001	Air Filter for Skid Steers		6/1
	SU00001	Income - Shop Supplies		6/1
	SU00001	Skid Steer General Service		-

Enter the text **Test Battery**.

The ODT Service Unit No. field will automatically be populated with the same Service Unit No., when moving off and back to the line, as the Task Type is left as the default of Posting.

	SU00001	Skid Steer Loader S450		
	SU00001	Skid Steer General Service		-
	SU00001	Labor - Lube		6/1
	SU00001	Oil Change for Skid Steers		6/1
	SU00001	Air Filter for Skid Steers		6/1
	SU00001	Income - Shop Supplies		6/1
	SU00001	Skid Steer General Service		-

ODT Service Help

Click on the navigation menu item popup **Manage**

Customer No. 10000
 Customer Name Adatum Corporation
 Description Service Quote #ST00002 - A
 Order Date 4/8/2019

Ticket Units/Lines **Manage** Line Fewer options

TASK TYPE	ODT SERVICE UNIT NO.	SERIAL NO.	DESCRIP
Heading	SU00001		Skid Steer
Begin-Total	SU00001		Skid Steer
Posting	SU00001		Labor - Lu

Click on the navigation menu item **View Service Ticket Details**

Adatum Corporation
 Service Quote #ST00002 - Adatum Corporation
 4/8/2019

s/Lines **Manage** Line Fewer options

Delete Line Add Service Template **View Service Ticket Details**

TYPE	UNIT NO.	SERIAL NO.	DESCRIP	SER...
g	SU00001		Skid Steer Labor	View or edit service ticket details for th
total	SU00001		Skid Steer General Service	<input type="checkbox"/>
g	SU00001		Labor - Lube	<input type="checkbox"/>
g	SU00001		Oil Change for Skid Steers	<input type="checkbox"/>
ia	SU00001		Air Filter for Skid Steers	<input type="checkbox"/>

Click on the navigation menu item **New**

Dynamics 365 Business Central

SERVICE TICKET DETAILS | WORK DATE: 4/15/2019

Search **+ New** Edit List Delete Item Availab

Create a new entry.

JOB NO. ▼	JOB TASK NO. ▼	SERVICE UNIT NO.	SERVICE TEMPLATE NO.

The Task No. Field is automatically populated on the line.

Note that the Line Type is automatically set to Time and Materials, when servicing external customer equipment.

Click on the cell **Type** with the value **Resource Item G/L Account Text**

Select the applicable type to be used for the line.

In this example the line is for a technician to perform a task, therefore, Resource is used.

E: 4/15/2019

Delete Item Availability By Location Open in Excel Navigate Fewer opti

SERVICE UNIT NO.	SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION
		Time and Ma	Resource		

Click on the cell **No.**

SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION
	Time and Mat	Resource		

Click on the link in cell **No.** with the value **LABOR**

SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION	DE... SE...
	Time and Mat	Resource			

NO.	NAME
LABOR	Labor - Oil Change
MARTIN	Mark Hanson
MARY	Mary A. Dempsey
TIMOTHY	Timothy Sneath
+ New	

Click on the cell **Description** with the value **Labor - Oil Change**

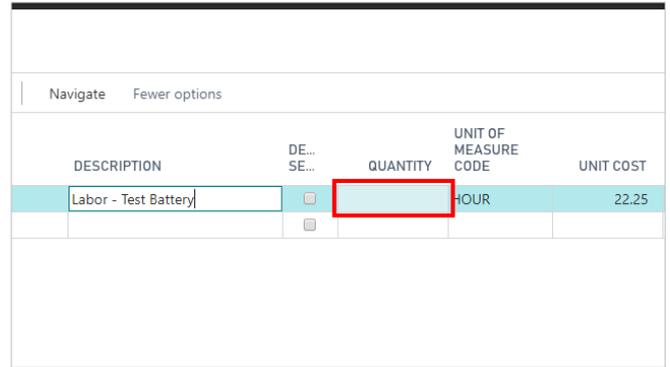
The description will default from Resource card selected and can be overridden to be indicative of the task to be performed.

SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION	DE... SE...	QUA...
	Time and Mat	Resource	LABOR	Labor - Oil Change		

Enter the text **labor - Test Battery**.

SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION	DE... SE...	QUA...
	Time and Mat	Resource	LABOR	La		

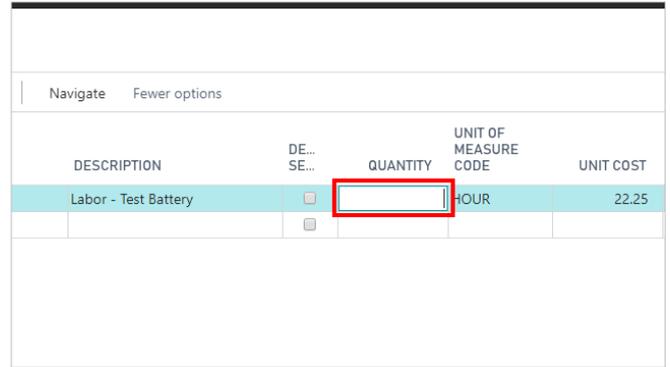
Click on the cell **Quantity**



DESCRIPTION	DE... SE...	QUANTITY	UNIT OF MEASURE CODE	UNIT COST
Labor - Test Battery			HOUR	22.25

Enter the text **.25**.

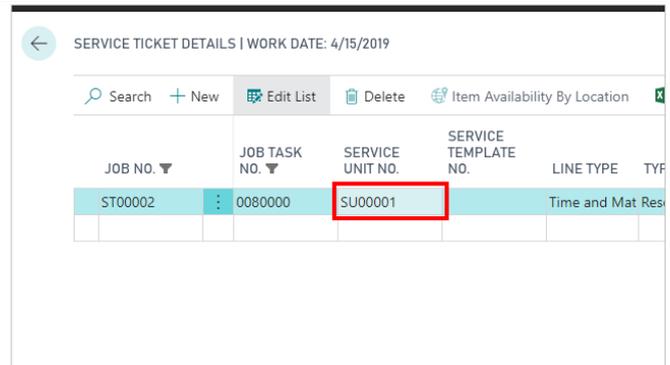
Enter the budgeted quantity for performing the task.



DESCRIPTION	DE... SE...	QUANTITY	UNIT OF MEASURE CODE	UNIT COST
Labor - Test Battery		.25	HOUR	22.25

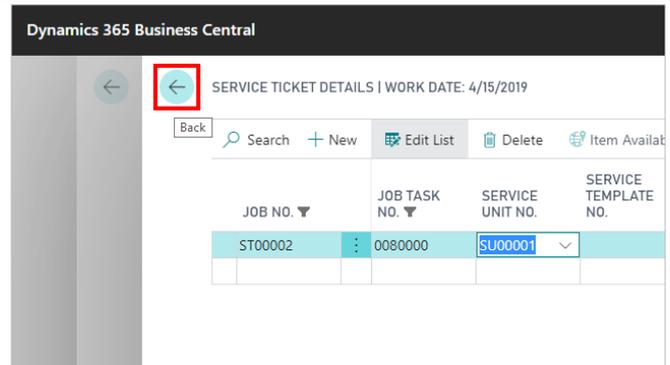
Click on the cell **Service Unit No.** with the value **SU00001**

Note that the Service Unit No. is automatically populated.



JOB NO.	JOB TASK NO.	SERVICE UNIT NO.	SERVICE TEMPLATE NO.	LINE TYPE	TYF
ST00002	0080000	SU00001		Time and Mat Res	

Click on the back button



Dynamics 365 Business Central

← SERVICE TICKET DETAILS | WORK DATE: 4/15/2019

JOB NO.	JOB TASK NO.	SERVICE UNIT NO.	SERVICE TEMPLATE NO.
ST00002	0080000	SU00001	

The following demonstrates the manual entry of lines for a different Service Unit on the Ticket Units/Lines tab and the configuration of the Service Ticket Detail lines.



ODT Service Help

Click on the cell **Task Type**

Begin-Total	SU00001		Skid
Posting	SU00001		Lab
Posting	SU00001		Oil
Posting	SU00001		Air
Posting	SU00001		Incc
End-Total	SU00001		Skid
Posting	SU00001		Test

Ticket Details

Ticket Details

Click on the item **Heading** in the list

Posting	SU00001		Lab
Posting	SU00001		Oil
Posting	SU00001		Air
Posting	SU00001		Incc
End-Total	SU00001		Skid
Posting	SU00001		Test

Ticket Details

Ticket Details

Click on the cell **ODT Service Unit No.**

Begin-Total	SU00001		Skid Steer
Posting	SU00001		Labor - Lube
Posting	SU00001		Oil Change
Posting	SU00001		Air Filter for
Posting	SU00001		Income - S
End-Total	SU00001		Skid Steer
Posting	SU00001		Test Batter

Ticket Details

Ticket Details

Click on the lookup button in the cell **ODT Service Unit No.**

Begin-Total	SU00001		Skid Steer General Servic
Posting	SU00001		Labor - Lube
Posting	SU00001		Oil Change for Skid Steer
Posting	SU00001		Air Filter for Skid Steers
Posting	SU00001		Income - Shop Supplies
End-Total	SU00001		Skid Steer General Servic
Posting	SU00001		Test Battery

Ticket Details

Ticket Details



ODT Service Help

Click on the link in cell **Service Unit No.** with the value **SU00004**

The screenshot shows a dropdown menu for selecting a service unit. The menu is titled "SERVICE TICKET QUOTE | WORK DATE: 4/15/2025" and "ST00002 · Service". It lists several service units with their descriptions:

SERVICE UNIT NO.	DESCRIPTION
SU00001	Skid Steer Loader S450
SU00004	Skid Steer Loader S70

The "SU00004" option is highlighted with a red box, and a "Select record 'SU00004'" button is visible below it.

Click on the cell **Description**

SU00001	Labor - Lube	6/1
SU00001	Oil Change for Skid Steers	6/1
SU00001	Air Filter for Skid Steers	6/1
SU00001	Income - Shop Supplies	6/1
SU00001	Skid Steer General Service	-
SU00001	Test Battery	6/1
SU00004	Skid Steer Loader S70	-

Enter the text **Check Fluid Levels.**

SU00001	Labor - Lube	6/1
SU00001	Oil Change for Skid Steers	6/1
SU00001	Air Filter for Skid Steers	6/1
SU00001	Income - Shop Supplies	6/1
SU00001	Skid Steer General Service	-
SU00001	Test Battery	6/1
SU00004	Skid Steer Loader S70	-

The ODT Service Unit No. field will automatically be populated with the same Service Unit No., when moving off and back to the line, as the Task Type is left as the default of Posting.

Press the **Arrow down** key.

SU00001	Labor - Lube	6/1
SU00001	Oil Change for Skid Steers	6/1
SU00001	Air Filter for Skid Steers	6/1
SU00001	Income - Shop Supplies	6/1
SU00001	Skid Steer General Service	-
SU00001	Test Battery	6/1
SU00004	Skid Steer Loader S70	-
	Check Fluid Levels	

ODT Service Help

Press the **Arrow up** key.

	SU00001	Oil Change for Skid Steers	<input type="checkbox"/>	6/1
	SU00001	Air Filter for Skid Steers	<input type="checkbox"/>	6/1
	SU00001	Income - Shop Supplies	<input type="checkbox"/>	6/1
	SU00001	Skid Steer General Service	<input type="checkbox"/>	-
	SU00001	Test Battery	<input type="checkbox"/>	6/1
	SU00004	Skid Steer Loader S70	<input type="checkbox"/>	-
		Check Fluid Levels	<input type="checkbox"/>	-
			<input type="checkbox"/>	-

Click on the navigation menu item popup **Manage**

Customer No.	10000
Customer Name	Adatum Corporation
Description	Service Quote #ST00002 - A
Order Date	4/8/2019

Ticket Units/Lines	Manage	Line	Fewer options
--------------------	---------------	------	---------------

TASK TYPE	ODT SERVICE UNIT NO.	SERIAL NO.	DESCRIP
Begin-Total	SU00001		Skid Steer
Posting	SU00001		Labor - Lube
Posting	SU00001		Oil Change
Posting	SU00001		Air Filter for

Click on the navigation menu item **View Service Ticket Details**

Customer Name	Adatum Corporation
Description	Service Quote #ST00002 - Adatum Corporation
Order Date	4/8/2019

s/Lines	Manage	Line	Fewer options
---------	---------------	------	---------------

✖ Delete Line	➕ Add Service Template	View Service Ticket Details
---------------	------------------------	------------------------------------

TYPE	UNIT NO.	SERIAL NO.	DESCRIPTION	SER...
total	SU00001		Skid Steer Gene	View or edit service ticket details for t
g	SU00001		Labor - Lube	<input type="checkbox"/>
g	SU00001		Oil Change for Skid Steers	<input type="checkbox"/>
g	SU00001		Air Filter for Skid Steers	<input type="checkbox"/>
g	SU00001		Income - Shop Supplies	<input type="checkbox"/>

Click on the navigation menu item **New**

Dynamics 365 Business Central

← SERVICE TICKET DETAILS | WORK DATE: 4/15/2019

Search **+ New** Edit List Delete Item Availab

Create a new entry.

JOB NO. ▼	JOB TASK NO. ▼	SERVICE UNIT NO.	SERVICE TEMPLATE NO.
-----------	----------------	------------------	----------------------

As the line is to be for a technician, a default type of Resource will be used.

ODT Service Help

Click on the cell **No.**

SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION
	Time and Mat	Resource		

Click on the link in cell **No.** with the value **LABOR**

SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION	DE... SE...
	Time and Mat	Resource			

NO.	NAME
LABOR	Labor - Oil Change
LIN	Select record "LABOR" tin
MARK	Mark Hanson
MARY	Mary A. Dempsey
TIMOTHY	Timothy Sneath
+ New	

Click on the cell **Description** with the value **Labor - Oil Change**

SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION	DE... SE...	QUA
	Time and Mat	Resource	LABOR	Labor - Oil Change		

Enter the text **Labor - Check Fluid Levels.**

SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION	DE... SE...	QUA
	Time and Mat	Resource	LABOR	Labor - Check Fluid Levels.		

Click on the cell **Quantity**

DESCRIPTION	DE... SE...	QUANTITY	UNIT OF MEASURE CODE	UNIT COST
Labor - Check Fluid Levels			HOUR	22.25

Enter the text **.25**.

Enter the quantity of time it will take to perform the task.

DESCRIPTION	DE... SE...	QUANTITY	UNIT OF MEASURE CODE	UNIT COST
Labor - Check Fluid Levels		.25	HOUR	22.25

Click on the back button

Dynamics 365 Business Central

← SERVICE TICKET DETAILS | WORK DATE: 4/15/2019

JOB NO. ▼	JOB TASK NO. ▼	SERVICE UNIT NO.	SERVICE TEMPLATE NO.
ST00002	0100000	SU00004	

3.4.2.5.

How to Print the Service Ticket

Click on the navigation menu item popup **Report**

Dynamics 365 Business Central

← SERVICE TICKET | WORK DATE: 4/8/2019

ST00003 · Service Ticket #9

Process **Report** Actions Navigate Fewer options

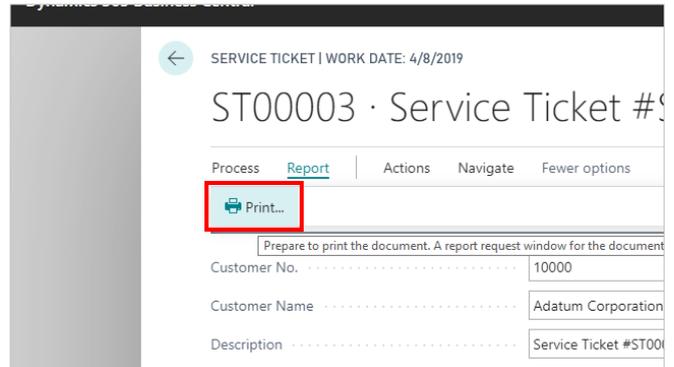
General

Customer No. 10000

Customer Name Adatum Corporation

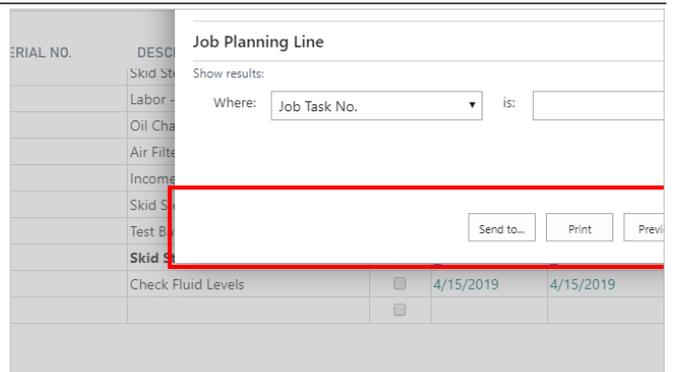


Click on the navigation menu item **Print...**



Click on **Send to... Print Preview Cancel**

The standard Microsoft Dynamics 365 Business Central, printing options are available to select from.



The following picture displays the Service Ticket document.

Service Ticket Page 1
June 10, 2019

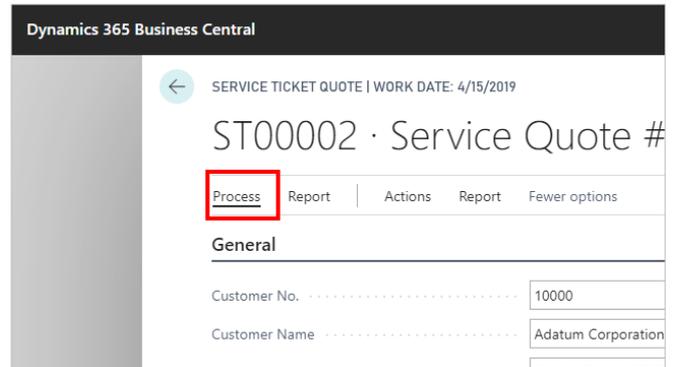
Service Ticket #ST00003 - Adatum Corporation
Assigned Technician: LABOR
Service Date: 4/15/2019

Adatum Corporation
Robert Townes
192 Market Square
Atlanta, GA 31772
USA

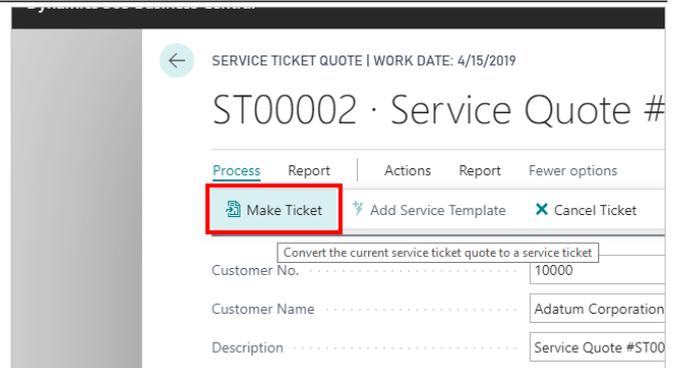
CRONUS SERVICE, Inc.
7122 South Ashford Street
Westminster
Atlanta, 31772

Description	Task Type	No.	Quantity	Unit Price	Total Price
SU00001-Skid Steer Loader S450					
<i>Skid Steer General Service</i>					
Labor - Lube					
Labor - Lube	Resource	LABOR	0.5	75.00	37.50
Parts: 0.00			Labor: 37.50		Other: 0.00
Oil Change for Skid Steers					
Labor - Oil Change	Resource	LABOR	1	75.00	75.00
Oil Filter	Item	1001	1	11.75	11.75
Oil Gasket	Item	1002	1	2.75	2.75
Mobile Oil 5W30	Item	1003	5	10.75	53.75
Parts: 68.25			Labor: 75.00		Other: 0.00
Air Filter for Skid Steers					
Labor - Replace Air Filter	Resource	LABOR	0.5	75.00	37.50
Air Filter for Skid Steer	Item	1004	1	20.75	20.75
Parts: 20.75			Labor: 37.50		Other: 0.00
Income - Shop Supplies					
Income - Shop Supplies	G/L Account	40150	1	20.00	20.00
Parts: 0.00			Labor: 0.00		Other: 20.00
Test Battery					
Labor - Test Battery	Resource	LABOR	0.25	75.00	18.75
Parts: 0.00			Labor: 18.75		Other: 0.00
Parts: 89.00			Labor: 168.75		Other: 20.00
					Total SU00001: 277.75
SU00004-Skid Steer Loader S70					
					Total Parts: 89.00
					Total Labor: 187.50
					Total Other: 20.00
					Total Service Ticket #ST00003 - Adatum Corporation: 296.50

Click on the navigation menu item popup **Process**

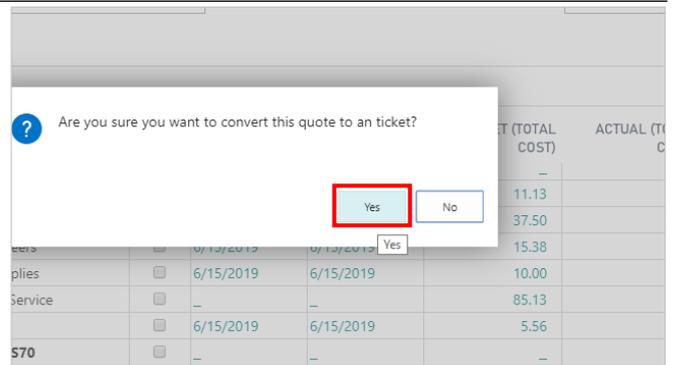


Click on the navigation menu item **Make Ticket**



Click on the button **Yes**

Upon selecting Yes, the Service Ticket will open.



3.4.3. How to Process External Customer Service Tickets

3.4.3.1. Overview

A Service Ticket for customer owned equipment can be created:

- From the main menu option, Service, by selecting Service Tickets, which opens the Service Ticket list where New can be selected.
- From the Actions part of the profile by selecting, +Service Ticket.
- From the Actions part of the profile by selecting, Service, then Service Tickets.
- From the Activities Cue, Service Tickets Open and then selecting New.
- From the Service Unit, which is to be serviced.

It is highly recommending to review the help, Service Ticket Overview.

3.4.3.2. How to Create an Internal Service Ticket from Actions

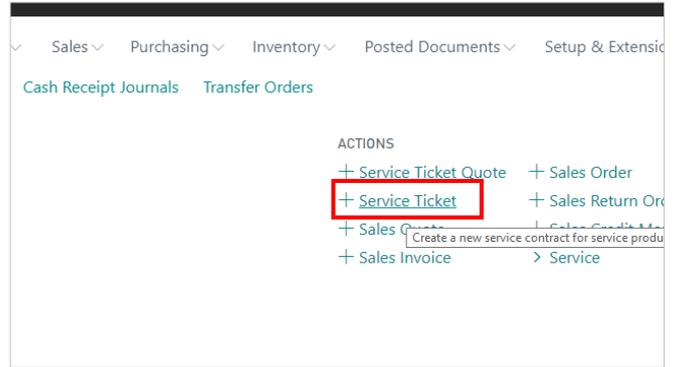
Sales Order Process Profile

The same steps can be used when a user has the Business Manager Profile.

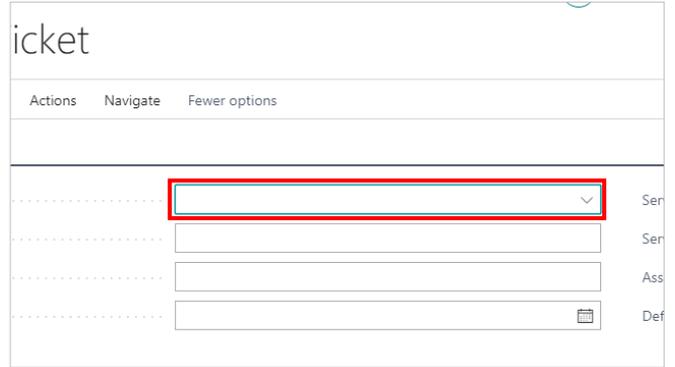
The following demonstrates the creation of a Service Ticket from the Actions, +Service Ticket option.

ODT Service Help

Click on the navigation menu item **Service Ticket**

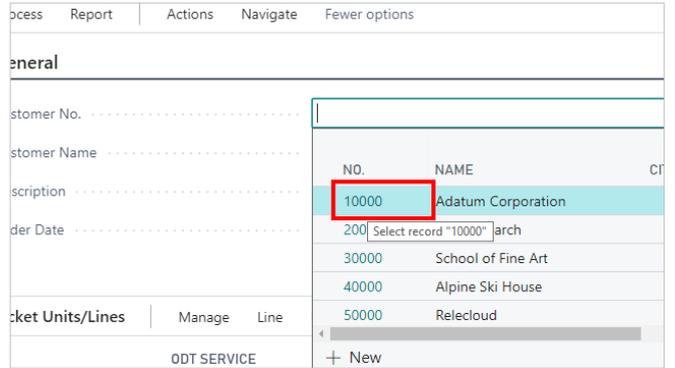


Click on the field **Customer No.**

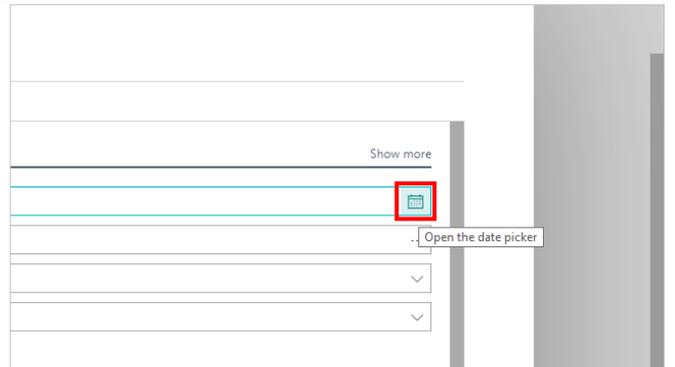


Click on the link in cell **No.** with the value **10000**

Select the applicable customer.



Click on the link **Open the date picker**





ODT Service Help

Click on **Previous** **Next** **June 2019**

Corporation

Service Date 4/8/2019

Service Ticket Type **June 2019**

Assigned Technician

Default Service Unit No.

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

Click on the link **Previous**

Corporation

Service Date 4/8/2019

Service Ticket Type **May 2019**

Assigned Technician

Default Service Unit No.

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Click on a date in the calendar

Select the date on which the service is to be performed, if different from the defaulted date, from the Users' Work Date.

Service Date 4/8/2019

Service Ticket Type **April 2019**

Assigned Technician

Default Service Unit No.

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Today Done

END DATE	BUDGET (TOTAL COST)	ACTUAL (TOTAL COST)	BILLABLE (TOTAL PRICE)	BIL (INVOICED)

Click on the field **Service Ticket Type**

ODT

4/15/2019

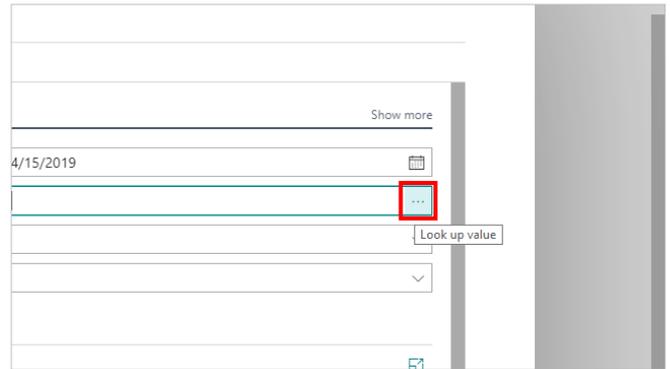
...

...

...

ODT Service Help

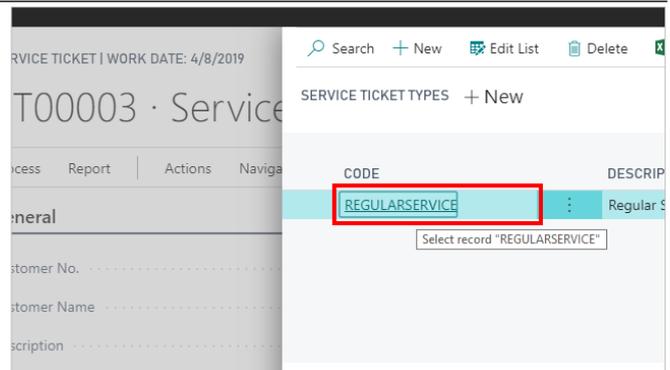
Click on the lookup button **Service Ticket Type**



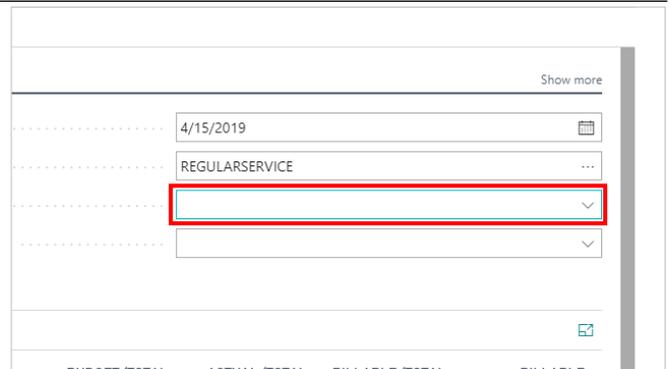
Click on the link in cell **Code** with the value **REGULARSERVICE**

The specification of a Ticket Type is optional.

The use of the Ticket Type to specify differing types of servicing can be beneficial for analysis of past servicing.



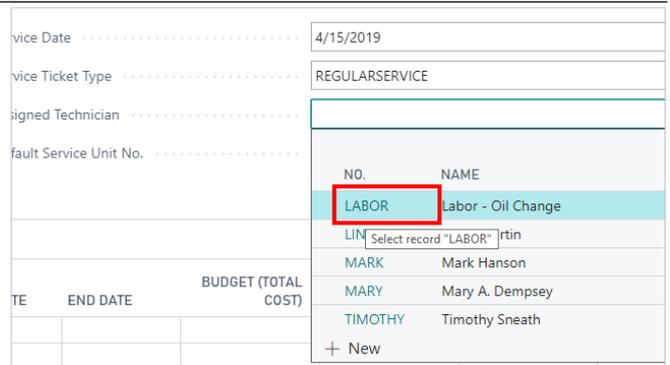
Click on the field **Assigned Technician**



Click on the link in cell **No.** with the value **LABOR**

The technician/resource who is to perform the service can be assigned on the header of the ticket.

The selection of an Assigned Technician is optional.



Click on the field **Default Service Unit No.**

When a service ticket is for a single product, then when this field is populated, a Heading type Ticket Unit/Line, will automatically be created.

If the selected Service Unit is already on another open ticket, a message will be displayed to indicate this and confirm if you want to proceed.

This selection of a Default Service Unit is optional.

Click on the link in cell **Service Unit No.** with the value **SU00001**

3.4.3.3. How to Add a Service Template to a Ticket

The listing of the Service Templates available is filtered to display only those templates, which have the same Maintenance Group as on the Service Unit.

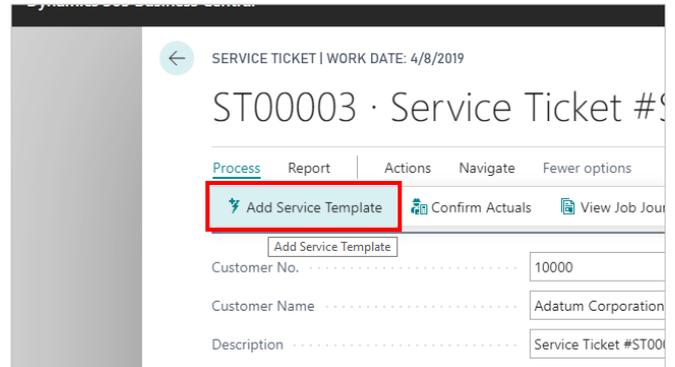
When adding a Service Template from the Ticket main menu, Process, Add Service Template, then the Default Service Unit, Maintenance Group is used in the filtering of the available Service Templates.

When adding a Service Template from the Ticket Units/Lines tab via Manage - Add Service Template, the available templates is filtered by the Maintenance Group of the Service Unit on the selected line with a Task Type of Heading.

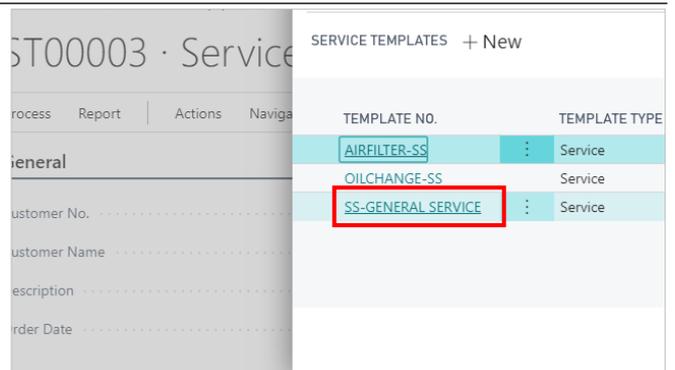
The following demonstrates the adding of a service template from the Ticket main menu.

Click on the navigation menu item popup **Process**

Click on the navigation menu item **Add Service Template**



Click on the link in cell **Template No.** with the value **SS-GENERAL SERVICE**



The lines will automatically be populated with the template lines, of the selected Service Template.

3.4.3.4. How to Enter Manual Lines on a Service Ticket

The following demonstrates the entry and configuration of a manually entered line in the Ticket Units/Lines tab for the same Service Unit as used when adding the Service Template.

Click on the cell **Description**

	SU00001	Skid Steer Loader S450		
total	SU00001	Skid Steer General Service	<input type="checkbox"/>	-
	SU00001	Labor - Lube	<input type="checkbox"/>	4/1
	SU00001	Oil Change for Skid Steers	<input type="checkbox"/>	4/1
	SU00001	Air Filter for Skid Steers	<input type="checkbox"/>	4/1
	SU00001	Income - Shop Supplies	<input type="checkbox"/>	4/1
	SU00001	Skid Steer General Service	<input type="checkbox"/>	-
			<input type="checkbox"/>	
			<input type="checkbox"/>	

Enter the text **Test Battery**. Press the **Arrow down** key.

The ODT Service Unit No. field will automatically be populated with the same Service Unit No., when moving off and back to the line. The Task Type is left as the default of Posting.

	SU00001	Skid Steer Loader S450		
total	SU00001	Skid Steer General Service	<input type="checkbox"/>	-
	SU00001	Labor - Lube	<input type="checkbox"/>	4/1
	SU00001	Oil Change for Skid Steers	<input type="checkbox"/>	4/1
	SU00001	Air Filter for Skid Steers	<input type="checkbox"/>	4/1
	SU00001	Income - Shop Supplies	<input type="checkbox"/>	4/1
	SU00001	Skid Steer General Service	<input type="checkbox"/>	-
			<input type="checkbox"/>	
			<input type="checkbox"/>	

ODT Service Help

Press the **Arrow up** key.

	SU00001		Skid Steer Loader S450		-
tal	SU00001		Skid Steer General Service		-
	SU00001		Labor - Lube		4/19
	SU00001		Oil Change for Skid Steers		4/19
	SU00001		Air Filter for Skid Steers		4/19
	SU00001		Income - Shop Supplies		4/19
	SU00001		Skid Steer General Service		-
			Test Battery		-

Click on the navigation menu item popup **Manage**

Customer No. 10000

Customer Name Adatum Corporation

Description Service Ticket #ST00003 - A

Order Date 4/8/2019

Ticket Units/Lines **Manage** Line Fewer options

TASK TYPE	ODT SERVICE UNIT NO.	SERIAL NO.	DESCRIP
Heading	SU00001		Skid Steer
Begin-Total	SU00001		Skid Steer
Posting	SU00001		Labor - Lu

Click on the navigation menu item **View Service Ticket Details**

Adatum Corporation

Service Ticket #ST00003 - Adatum Corporation

4/8/2019

s/Lines **Manage** Line Fewer options

[Delete Line](#)
[Add Service Template](#)
[View Service Ticket Details](#)

View or edit service ticket details for the selected

g	SU00001		Skid Steer Loader S450
-Total	SU00001		Skid Steer General Service
ing	SU00001		Labor - Lube
ing	SU00001		Oil Change for Skid Steers
ina	SU00001		Air Filter for Skid Steers

Click on the navigation menu item **New**

Dynamics 365 Business Central

SERVICE TICKET DETAILS | WORK DATE: 4/8/2019

[Search](#)
[New](#)
[Edit List](#)
[Delete](#)
[Item Availab](#)

Create a new entry.

JOB NO. ▼	JOB TASK NO. ▼	SERVICE UNIT NO.	SERVICE TEMPLATE NO.
-----------	----------------	------------------	----------------------

The Task No. Field is automatically populated on the line.

Note that the Line Type is automatically set to Time and Materials, when servicing external customer equipment.

As the line is to be for a technician the default type of Resource will be used.



ODT Service Help

Click on the cell **No.**

SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION
	Time and Mat Resource			

Click on the link in cell **No.** with the value **LABOR**

SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION	DE... SE...
	Time and Mat Resource				

NO.	NAME
LABOR	Labor - Oil Change
LINDA	Linda Martin
MARK	Mark Hanson
MARY	Mary A. Dempsey
TIMOTHY	Timothy Sneath
+ New	

Click on the cell **Description** with the value **Labor - Oil Change**

The default description will be from the Resource card selected and can be overridden to be indicative of the task to be performed.

SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION	DE... SE...	QUA
	Time and Mat Resource		LABOR	Labor - Oil Change		

Enter the text **Labor - Test Battery**.

SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION	DE... SE...	QUA
	Time and Mat Resource		LABOR			

Click on the cell **Quantity**

DESCRIPTION	DE... SE...	QUANTITY	UNIT OF MEASURE CODE	UNIT COST
Labor - Test Battery			HOURL	22.25

Enter the text **.25**.

Enter the quantity for performing the task.

DESCRIPTION	DE... SE...	QUANTITY	UNIT OF MEASURE CODE	UNIT COST
Labor - Test Battery		.25	HOURL	22.25

Click on the cell **Service Unit No.** with the value **SU00001**

Note that the Service Unit No. is automatically populated.

← SERVICE TICKET DETAILS | WORK DATE: 4/8/2019

Search + New Edit List Delete Item Availability By Location

JOB NO. ▼	JOB TASK NO. ▼	SERVICE UNIT NO.	SERVICE TEMPLATE NO.	LINE TYPE	TYF
ST00003	0080000	SU00001		Time and Mat Res	

Click on the back button

Dynamics 365 Business Central

← SERVICE TICKET DETAILS | WORK DATE: 4/8/2019

Back Search + New Edit List Delete Item Availat

JOB NO. ▼	JOB TASK NO. ▼	SERVICE UNIT NO.	SERVICE TEMPLATE NO.
ST00003	0080000	SU00001	

The following demonstrates the manual entry of lines for a different Service Unit on the Ticket Units/Lines tab and the configuration of the Service Ticket Detail lines.



ODT Service Help

Click on the cell **Task Type**

Begin-Total	SU00001		Skid
Posting	SU00001		Lab
Posting	SU00001		Oil
Posting	SU00001		Air
Posting	SU00001		Incc
End-Total	SU00001		Skid
Posting	SU00001		Tes

Ticket Details

Ticket Details

Click on the cell **Task Type** with the value **Posting**
Heading Total Begin-Total End-Total

Begin-Total	SU00001		Skid
Posting	SU00001		Lab
Posting	SU00001		Oil
Posting	SU00001		Air
Posting	SU00001		Incc
End-Total	SU00001		Skid
Posting	SU00001		Test

Ticket Details

Ticket Details

Click on the item **Heading** in the list

When adding a line for a different Service Unit, the Task Type must be set to Heading.

Posting	SU00001		Lab
Posting	SU00001		Oil
Posting	SU00001		Air
Posting	SU00001		Incc
End-Total	SU00001		Skid
Posting	SU00001		Test

Ticket Details

Ticket Details

Click on the cell **ODT Service Unit No.**

Begin-Total	SU00001		Skid Steer
Posting	SU00001		Labor - Lut
Posting	SU00001		Oil Change
Posting	SU00001		Air Filter fo
Posting	SU00001		Income - S
End-Total	SU00001		Skid Steer
Posting	SU00001		Test Batter

Ticket Details

Ticket Details



ODT Service Help

Click on the lookup button in the cell **ODT Service Unit No.**

Begin-Total	SU00001		Skid Steer General Service
Posting	SU00001		Labor - Lube
Posting	SU00001		Oil Change for Skid Steers
Posting	SU00001		Air Filter for Skid Steers
Posting	SU00001		Income - Shop Supplies
End-Total	SU00001		Skid Steer General Service
Posting	SU00001		Test Battery
Heading	:	...	

Look up value

Ticket Details

Ticket Details

Click on the link in cell **Service Unit No.** with the value **SU00004**

Select the Service Unit to be added to the ticket.

NOTE:

The Default Service Unit field on the General tab will automatically be cleared, as the ticket is now for multiple units.

SERVICE TICKET | WORK DATE: 4/8/2019

ST00003 · Service

Process Report Actions Naviga

General

Customer No.

Customer Name

Description

Order Date

SERVICE UNITS + New

SERVICE UNIT NO.	DESCRIPTION
SU00001	Skid Steer Loader S450
SU00004	Skid Steer Loader S70

Select record "SU00004"

Click on the cell **Description**

SU00001	Labor - Lube	4/1
SU00001	Oil Change for Skid Steers	4/1
SU00001	Air Filter for Skid Steers	4/1
SU00001	Income - Shop Supplies	4/1
SU00001	Skid Steer General Service	-
SU00001	Test Battery	4/1
SU00004	Skid Steer Loader S70	-

is

SERVICE

Enter the text **Check Fluid Levels**. Press the **Arrow down** key.

SU00001	Labor - Lube	4/1
SU00001	Oil Change for Skid Steers	4/1
SU00001	Air Filter for Skid Steers	4/1
SU00001	Income - Shop Supplies	4/1
SU00001	Skid Steer General Service	-
SU00001	Test Battery	4/1
SU00004	Skid Steer Loader S70	-

is

SERVICE

ODT Service Help

Press the **Arrow up** key.

	SU00001	Oil Change for Skid Steers	<input type="checkbox"/>	4/1
	SU00001	Air Filter for Skid Steers	<input type="checkbox"/>	4/1
	SU00001	Income - Shop Supplies	<input type="checkbox"/>	4/1
	SU00001	Skid Steer General Service	<input type="checkbox"/>	-
	SU00001	Test Battery	<input type="checkbox"/>	4/1
	SU00004	Skid Steer Loader S70	<input type="checkbox"/>	-
		Check Fluid Levels	<input type="checkbox"/>	

The ODT Service Unit No. field will automatically be populated with the same Service Unit No., when moving off and back to the line. The Task Type is left as the default of Posting.

Click on the navigation menu item popup **Manage**

Customer NO.	10000
Customer Name	Adatum Corporation
Description	Service Ticket #ST00003 - A
Order Date	4/8/2019

Ticket Units/Lines	Manage	Line	Fewer options
TASK TYPE	ODT SERVICE UNIT NO.	SERIAL NO.	DESCRIP
Begin-Total	SU00001		Skid Steer
Posting	SU00001		Labor - Luf
Posting	SU00001		Oil Change
Posting	SU00001		Air Filter fo

Click on the navigation menu item **View Service Ticket Details**

Customer NO.	10000
Customer Name	Adatum Corporation
Description	Service Ticket #ST00003 - Adatum Corporation
Order Date	4/8/2019

s/Lines	Manage	Line	Fewer options
Delete Line Add Service Template View Service Ticket Details			
TASK TYPE	UNIT NO.	SERIAL NO.	SER...
-Total	SU00001		Skid Steer
ing	SU00001		Labor - Lube
ing	SU00001		Oil Change for Skid Steers
ing	SU00001		Air Filter for Skid Steers
ing	SU00001		Income - Shop Supplies

Click on the navigation menu item **New**

Dynamics 365 Business Central			
SERVICE TICKET DETAILS WORK DATE: 4/8/2019			
Search	+ New	Edit List	Delete
Create a new entry.			
JOB NO. ▼	JOB TASK NO. ▼	SERVICE UNIT NO.	SERVICE TEMPLATE NO.

As the line is to be for a technician the default type of Resource will be used.

ODT Service Help

Click on the cell **Quantity**

DESCRIPTION	DE... SE...	QUANTITY	UNIT OF MEASURE CODE	UNIT COST
Labor - Check Fluid Levels			HOUR	22.25

Enter the text **.25**.

Enter the quantity of time it will take to perform the task.

DESCRIPTION	DE... SE...	QUANTITY	UNIT OF MEASURE CODE	UNIT COST
Labor - Check Fluid Levels		.25	HOUR	22.25

Click on the cell **Service Unit No.** with the value **SU00004**

← SERVICE TICKET DETAILS | WORK DATE: 4/8/2019

Search + New Edit List Delete Item Availability By Location

JOB NO. ▼	JOB TASK NO. ▼	SERVICE UNIT NO.	SERVICE TEMPLATE NO.	LINE TYPE	TYF
ST00003	0100000	SU00004		Time and Mat Res	

Click on the back button

Dynamics 365 Business Central

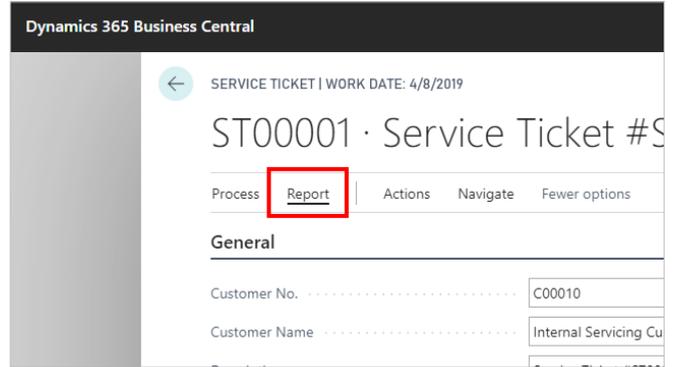
← SERVICE TICKET DETAILS | WORK DATE: 4/8/2019

Back Search + New Edit List Delete Item Availat

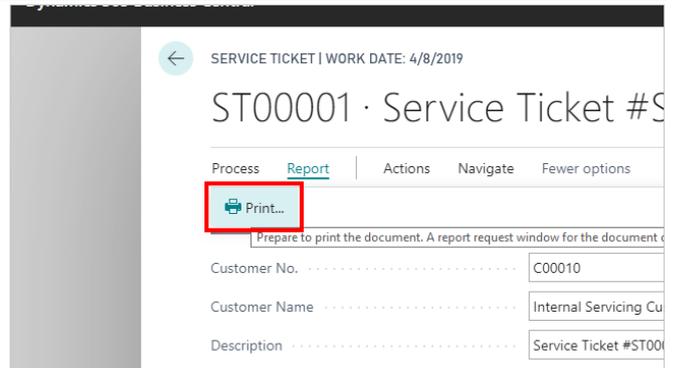
JOB NO. ▼	JOB TASK NO. ▼	SERVICE UNIT NO.	SERVICE TEMPLATE NO.
ST00003	0100000	SU00004	

3.4.3.5. How to Print the Service Ticket

Click on the navigation menu item popup **Report**

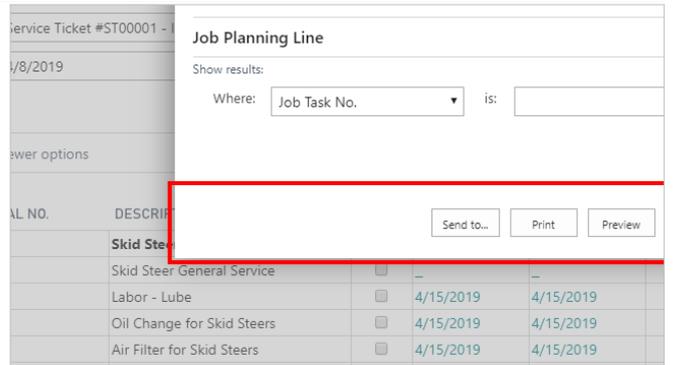


Click on the navigation menu item **Print...**



Click on **Send to... Print Preview Cancel**

The standard Microsoft Dynamics 365 Business Central, printing options are available to select from.





ODT Service Help

The following picture displays the Service Ticket document.

Service Ticket Page 1
June 7, 2019

Service Ticket #ST00001 - Internal Servicing Customer
Assigned Technician:
Service Date: 4/15/2019

Internal Servicing Customer: CRONUS SERVICE, Inc.
7122 South Ashford Street
Westminster
Atlanta, 31772

Description	Task Type	No.	Quantity	Unit Price	Total Price
SU00002-Skid Steer Loader - Internal					
Skid Steer General Service					
Labor - Lube					
Labor - Lube	Resource	LABOR	0.5	75.00	37.50
			Parts: 0.00	Labor: 37.50	Other: 0.00
Oil Change for Skid Steers					
Labor - Oil Change	Resource	LABOR	1	75.00	75.00
Oil Filter	Item	1001	1	11.75	11.75
Oil Gasket	Item	1002	1	2.75	2.75
Mobile Oil SW30	Item	1003	5	10.75	53.75
			Parts: 68.25	Labor: 75.00	Other: 0.00
Air Filter for Skid Steers					
Labor - Replace Air Filter	Resource	LABOR	0.5	75.00	37.50
Air Filter for Skid Steer	Item	1004	1	20.75	20.75
			Parts: 20.75	Labor: 37.50	Other: 0.00
Income - Shop Supplies					
Income - Shop Supplies	G/L Account	40150	1	20.00	20.00
			Parts: 0.00	Labor: 0.00	Other: 20.00
Test Battery					
Labor - Check Battery	Resource	LABOR	0.25	75.00	18.75
			Parts: 0.00	Labor: 18.75	Other: 0.00
			Parts: 89.00	Labor: 168.75	Other: 20.00
					Total SU00002: 277.75
SU00003-Skid Steer Loader S450					
Check fluid levels					
Labor - Check Fluid Levels	Resource	LABOR	0.25	75.00	18.75
			Parts: 0.00	Labor: 18.75	Other: 0.00
					Total Parts: 89.00
					Total Labor: 187.50
					Total Other: 20.00
					Total Service Ticket #ST00001 - Internal Servicing Customer 296.50

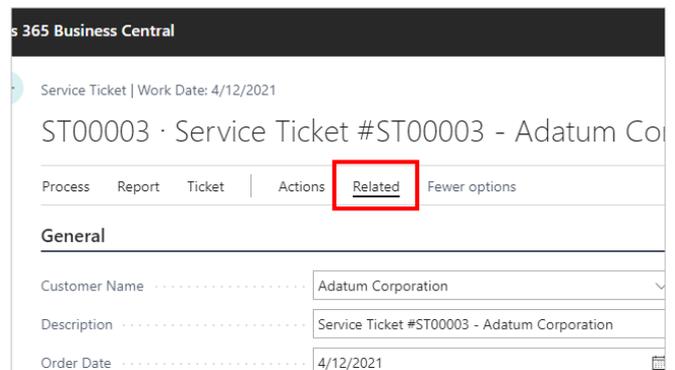
3.4.3.6. Service Template Checklists

Should the Service Template(s) added to a Service Ticket contain a Checklist(s), then the checklist(s) can be printed for or by the technician for reference and the recording of their findings.

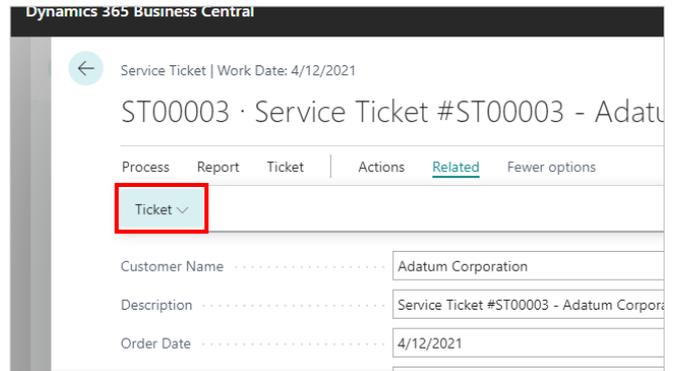
Additionally the technicians' findings can be entered onto the Service Ticket Checklist.

The following demonstrates the printing of a Service Template Checklist.

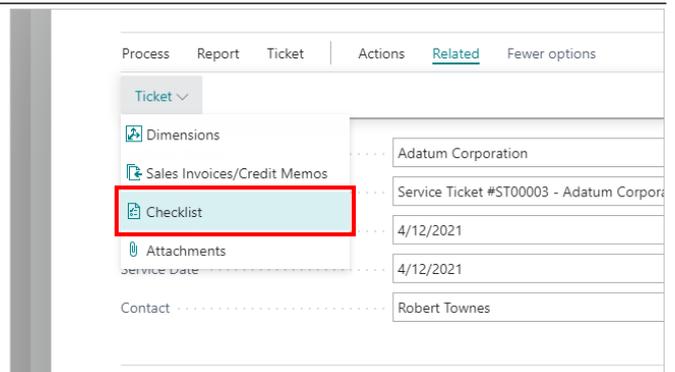
Click on the navigation menu item popup **Related**



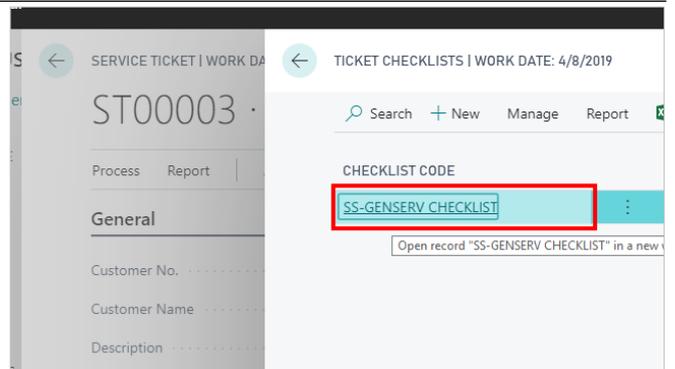
Click on the navigation menu item popup **Ticket**



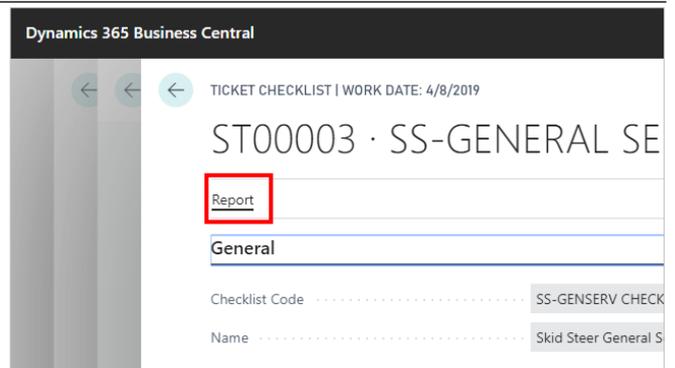
Click on the navigation menu item **Checklist**



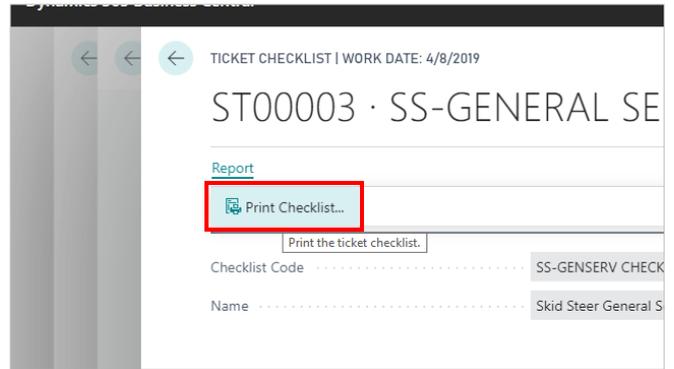
Click on the link in cell **Checklist Code** with the value **SS-GENSERV CHECKLIST**



Click on the navigation menu item popup **Report**

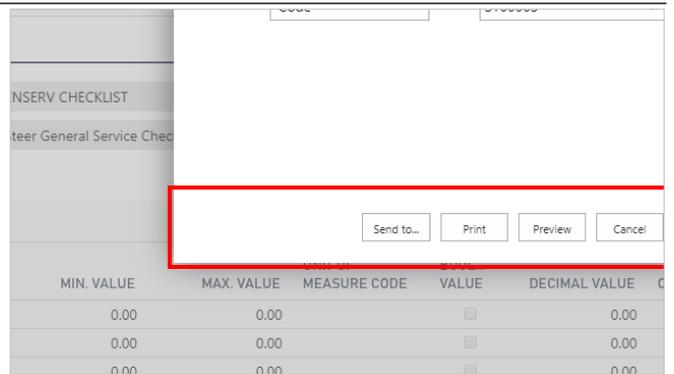


Click on the navigation menu item **Print Checklist...**

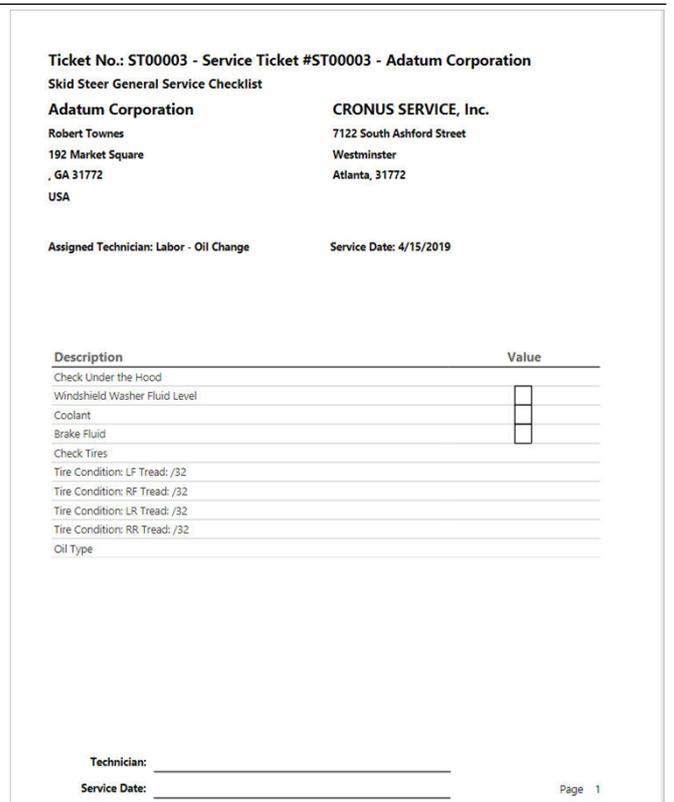


Click on **Send to... Print Preview Cancel**

The standard Microsoft Dynamics 365 Business Central, printing options are available to select from.



The following picture displays the Checklist document which is for the template, SS-General Service.

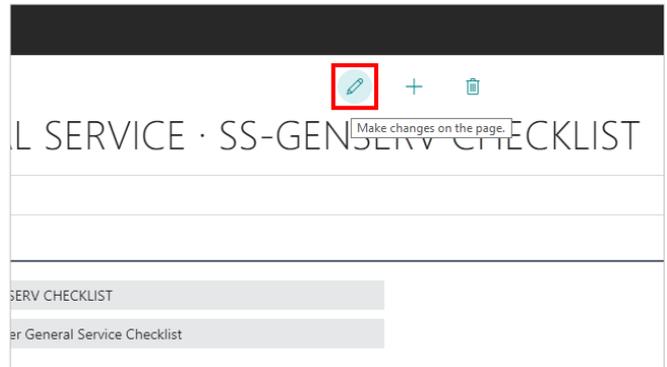


The following demonstrates the entering of the technicians' results from completing the checklist tasks.

The entry is optional.

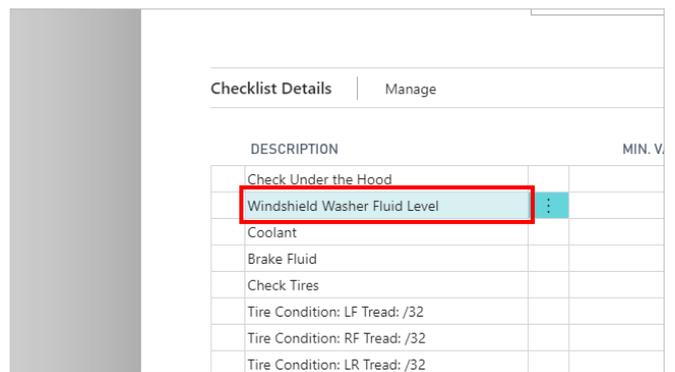
Click on the action toggle **edit/view**

The Checklist must be set to Edit mode to enter the technicians' findings.



For Boolean/Checkbox lines each line must be selected, before checking the boolean/checkbox

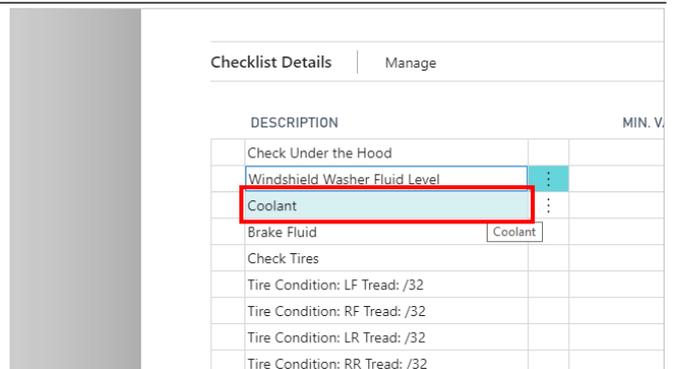
Click on the cell **Description** with the value **Windshield Washer Fluid Level**



Click on **Boolean Value**

MIN. VALUE	MAX. VALUE	UNIT OF MEASURE CODE	BOOL... VALUE	DECIMAL VALUE	OPTION VALUE
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	

Click on the cell **Description** with the value **Coolant**



Click on **Boolean Value**

LUE	MAX. VALUE	UNIT OF MEASURE CODE	BOOL... VALUE	DECIMAL VALUE	OPTION VALUE
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input checked="" type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	

Click on the cell **Description** with the value **Brake Fluid**

DESCRIPTION	MIN. V.
Check Under the Hood	
Windshield Washer Fluid Level	
Coolant	
Brake Fluid	
Check Tires	
Tire Condition: LF Tread: /32	
Tire Condition: RF Tread: /32	
Tire Condition: LR Tread: /32	
Tire Condition: RR Tread: /32	
Oil Type	

Click on **Boolean Value**

LUE	MAX. VALUE	UNIT OF MEASURE CODE	BOOL... VALUE	DECIMAL VALUE	OPTION VALUE
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input checked="" type="checkbox"/>	0.00	
0.00	0.00		<input checked="" type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	32.00		<input type="checkbox"/>	0.00	
0.00	0.00		<input type="checkbox"/>	0.00	

The following demonstrates entering decimal values for the tire tread readings.

Click on the cell **Decimal Value** with the value **0.00**

MAX. VALUE	UNIT OF MEASURE CODE	BOOL... VALUE	DECIMAL VALUE	OPTION VALUE
0.00		<input type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
		<input type="checkbox"/>		



ODT Service Help

Enter the text **22**.

MAX. VALUE	UNIT OF MEASURE CODE	BOOL... VALUE	DECIMAL VALUE	OPTION VALUE
0.00		<input type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	<input type="text" value="22"/>	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
		<input type="checkbox"/>		

Click on the cell **Decimal Value** with the value **0.00**

MAX. VALUE	MEASURE CODE	VALUE	DECIMAL VALUE	OPTION VALUE
0.00		<input type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	<input type="text" value="22"/>	
32.00		<input type="checkbox"/>	<input type="text" value="0.00"/>	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
		<input type="checkbox"/>		

Enter the text **22**.

MAX. VALUE	MEASURE CODE	VALUE	DECIMAL VALUE	OPTION VALUE
0.00		<input type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	22.00	
32.00		<input type="checkbox"/>	<input type="text" value="22"/>	
32.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
		<input type="checkbox"/>		

Click on the cell **Decimal Value** with the value **0.00**

0.00		<input type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input checked="" type="checkbox"/>	0.00	
0.00		<input type="checkbox"/>	0.00	
32.00		<input type="checkbox"/>	22.00	
32.00		<input type="checkbox"/>	<input type="text" value="22"/>	
32.00		<input type="checkbox"/>	<input type="text" value="0.00"/>	
32.00		<input type="checkbox"/>	<input type="text" value="0.00"/>	
0.00		<input type="checkbox"/>	0.00	
		<input type="checkbox"/>		

ODT Service Help

Enter the text **12**.

0.00	<input type="checkbox"/>	0.00
0.00	<input checked="" type="checkbox"/>	0.00
0.00	<input checked="" type="checkbox"/>	0.00
0.00	<input checked="" type="checkbox"/>	0.00
0.00	<input type="checkbox"/>	0.00
32.00	<input type="checkbox"/>	22.00
32.00	<input type="checkbox"/>	22.00
32.00	<input type="checkbox"/>	<input type="text" value="12"/>
32.00	<input type="checkbox"/>	0.00
0.00	<input type="checkbox"/>	0.00
	<input type="checkbox"/>	

Click on the cell **Decimal Value** with the value **0.00**

0.00	<input checked="" type="checkbox"/>	0.00
0.00	<input checked="" type="checkbox"/>	0.00
0.00	<input checked="" type="checkbox"/>	0.00
0.00	<input type="checkbox"/>	0.00
32.00	<input type="checkbox"/>	22.00
32.00	<input type="checkbox"/>	22.00
32.00	<input type="checkbox"/>	12
32.00	<input type="checkbox"/>	<input type="text" value="0.00"/>
0.00	<input type="checkbox"/>	0.00
	<input type="checkbox"/>	

Enter the text **11**.

0.00	<input checked="" type="checkbox"/>	0.00
0.00	<input checked="" type="checkbox"/>	0.00
0.00	<input checked="" type="checkbox"/>	0.00
0.00	<input type="checkbox"/>	0.00
32.00	<input type="checkbox"/>	22.00
32.00	<input type="checkbox"/>	22.00
32.00	<input type="checkbox"/>	12.00
32.00	<input type="checkbox"/>	<input type="text" value="11"/>
0.00	<input type="checkbox"/>	0.00
	<input type="checkbox"/>	

The following demonstrates the entry where there are multiple option values to choose from.

Click on the cell **Description** with the value **Oil Type**

Coolant		
Brake Fluid		
Check Tires		
Tire Condition: LF Tread: /32		
Tire Condition: RF Tread: /32		
Tire Condition: LR Tread: /32		
Tire Condition: RR Tread: /32		
<input type="text" value="Oil Type"/>		
	Oil Type	

Click on the cell **Option Value**

<input checked="" type="checkbox"/>	0.00		
<input checked="" type="checkbox"/>	0.00		
<input type="checkbox"/>	0.00		
<input type="checkbox"/>	22.00		
<input type="checkbox"/>	22.00		
<input type="checkbox"/>	12.00		
<input type="checkbox"/>	11.00		
<input type="checkbox"/>	0.00		
<input type="checkbox"/>			

Click on the link in cell **Value** with the value **Mobil**

22.00		
22.00		
12.00		
11.00		
0.00		

VALUE

Mobil

Select record "Mobil"

+ New Select from full list

Click on the back button

Dynamics 365 Business Central

TICKET CHECKLIST | WORK DATE: 4/15/2019

Back ST00003 · SS-GENERAL SE

Report

General

Checklist Code SS-GENSERV CHECK

Name Skid Steer General S

3.4.3.7. How to Process the Usage Actuals for the Ticket

The following demonstrates the confirmation of actual quantities for all the Service Ticket Detail lines.

The following example is for when the actuals are the same as the estimated quantities.

Should the actuals be different from the budgeted quantities, then on the Ticket Detail Lines, the quantity should be revised to reflect the actual quantities prior to running the Confirm Actuals.

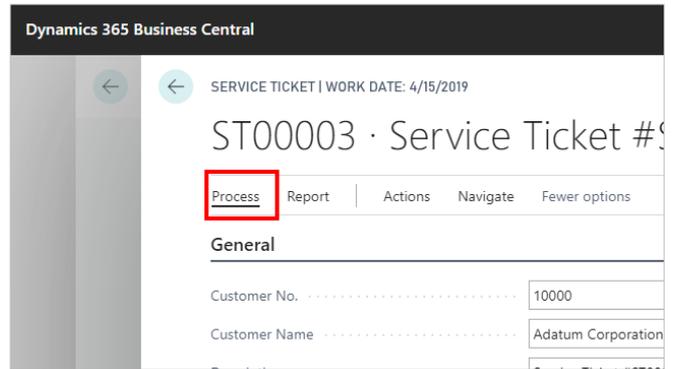
Alternatively, the quantity can be revised on the Job Journal records prior to posting the journal when only a portion of the usage is to be posted at the specified posting date.

This process automatically creates records in a Job Journal, which automatically opens and must be posted to record the usage on the ticket and job.

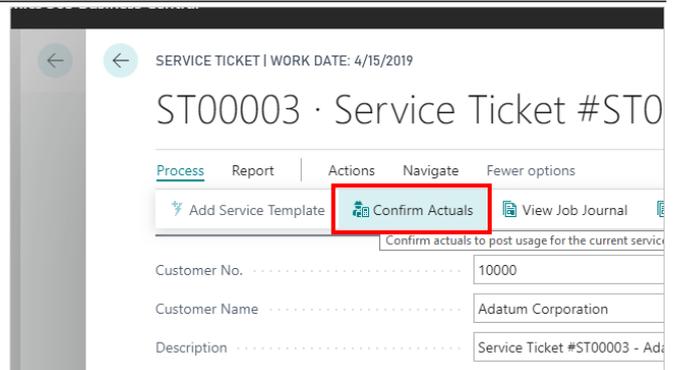
NOTE:

The first time a user completes the following steps a Job Journal Batch will automatically be created for the user.

Click on the navigation menu item **Process**

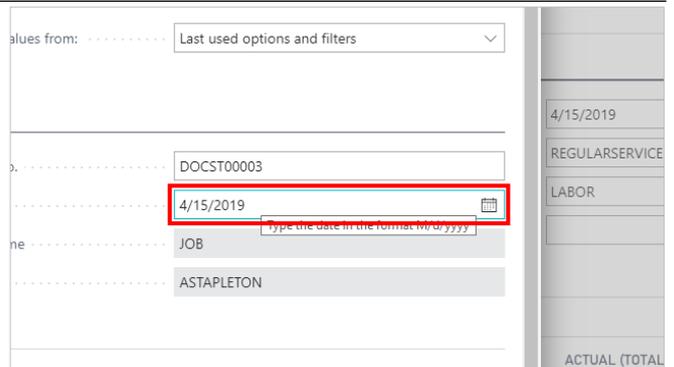


Click on the navigation menu item **Confirm Actuals**



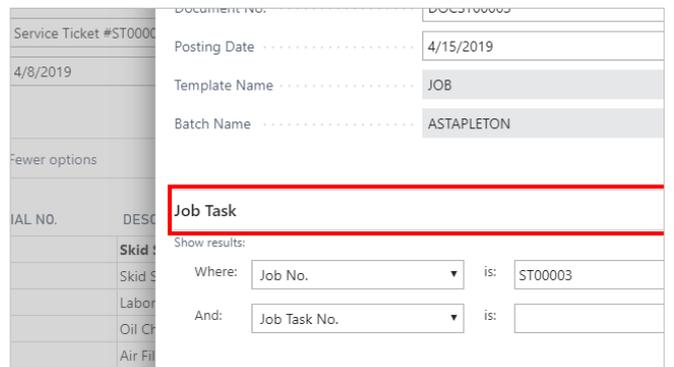
Click on the field **Posting Date**

Verify the Posting Date is the correct date and if not, then enter or select the applicable date.

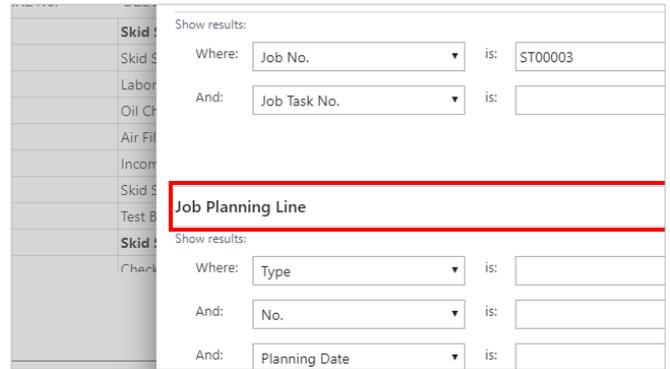


Should only some of the Ticket Detail records need to have the usage calculated, then filters can be set on the following tabs of Job Task and Job Planning Lines on the Confirm Actuals request page.

Click on **Job Task**



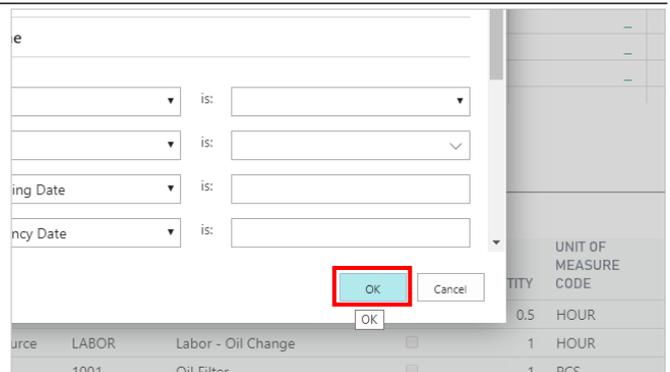
Click on **Job Planning Line**



Search dialog box with the following fields:

- Show results:
- Where: Job No. (dropdown) is: ST00003
- And: Job Task No. (dropdown) is:
- Job Planning Line** (highlighted in red)
- Show results:
- Where: Type (dropdown) is:
- And: No. (dropdown) is:
- And: Planning Date (dropdown) is:

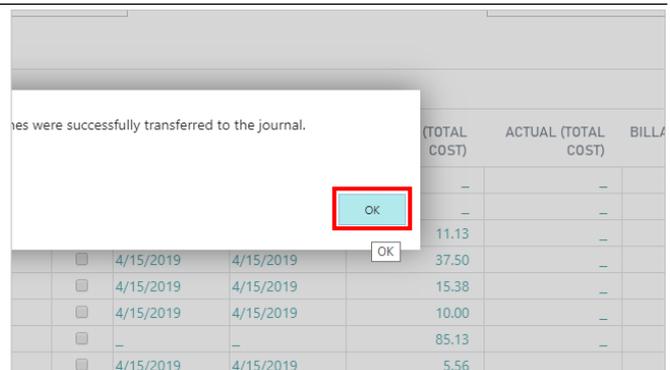
Click on the button **OK**



Dialog box with the following fields:

- is: (dropdown)
- is: (dropdown)
- ing Date (dropdown) is:
- ncy Date (dropdown) is:
- OK (highlighted in red)
- Cancel

Click on the button **OK**



Message box: "Items were successfully transferred to the journal."

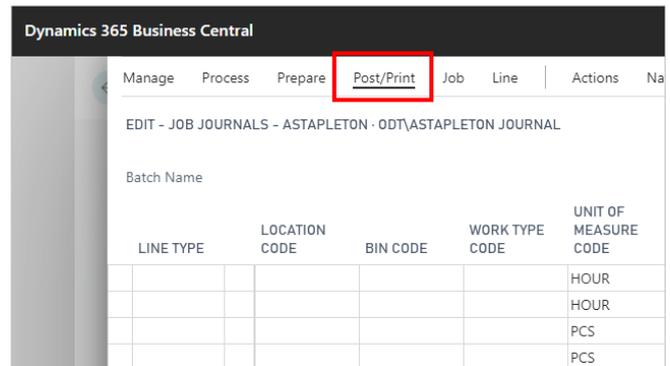
	(TOTAL COST)	ACTUAL (TOTAL COST)	BILLA
	11.13		
<input type="checkbox"/> 4/15/2019 4/15/2019	37.50		
<input type="checkbox"/> 4/15/2019 4/15/2019	15.38		
<input type="checkbox"/> 4/15/2019 4/15/2019	10.00		
<input type="checkbox"/> - -	85.13		
<input type="checkbox"/> 4/15/2019 4/15/2019	5.56		

OK (highlighted in red)

The Job Journal will automatically open for review and modification, if needed.

NOTE: Should you wish to change the Line Type field, you must first clear the Job Planning Line No. field.

Click on the navigation menu item popup **Post/Print**



Dynamics 365 Business Central interface showing the navigation menu with 'Post/Print' highlighted in red.

EDIT - JOB JOURNALS - ASTAPLETON · ODT\ASTAPLETON JOURNAL

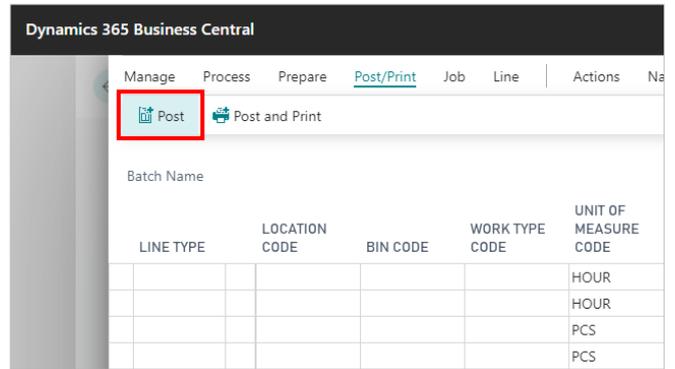
Batch Name

LINE TYPE	LOCATION CODE	BIN CODE	WORK TYPE CODE	UNIT OF MEASURE CODE
				hour
				hour
				PCS
				PCS

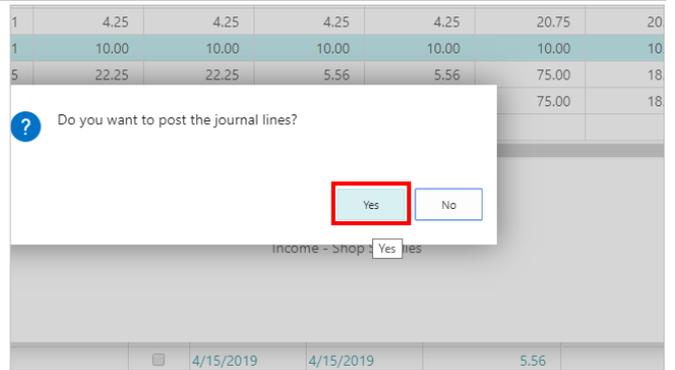
ODT Service Help

Click on the link **Post**

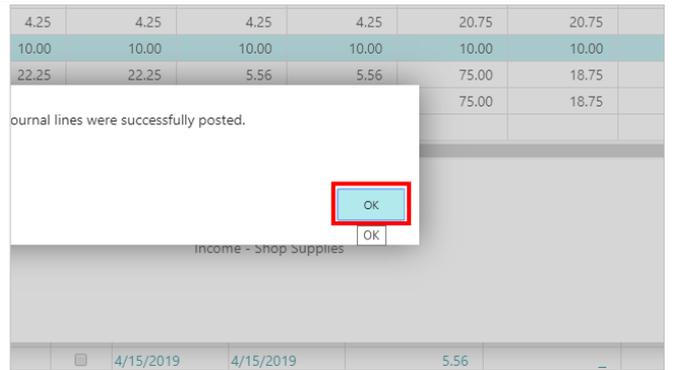
Alternatively Post and Print can be selected.



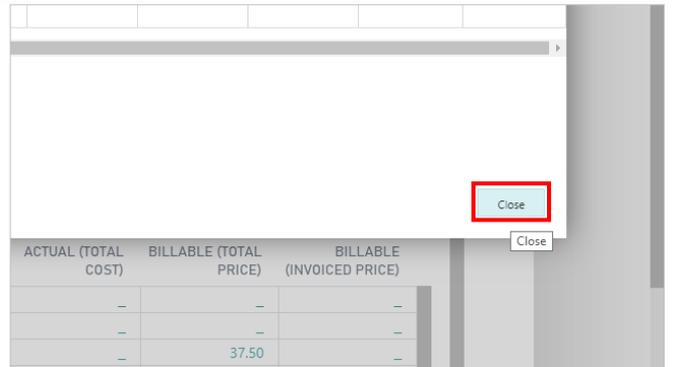
Click on the button **Yes**



Click on the button **OK**



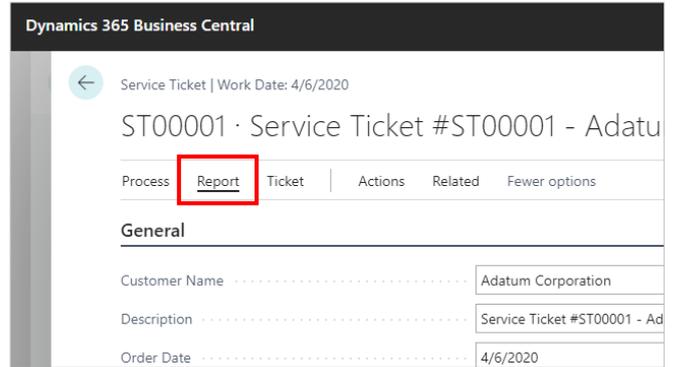
Click on the button **Close**



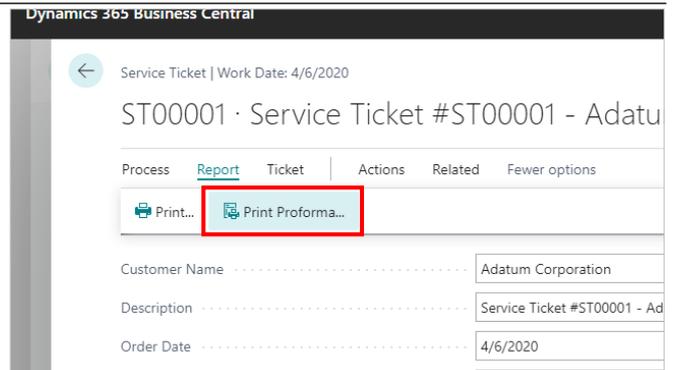
3.4.3.8. How to Print the Proforma Invoice

The following demonstrates printing the proforma invoice for a service ticket.

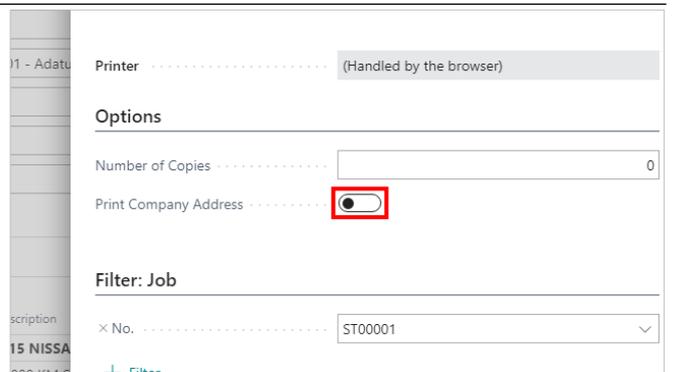
Click on the navigation menu item popup **Report**



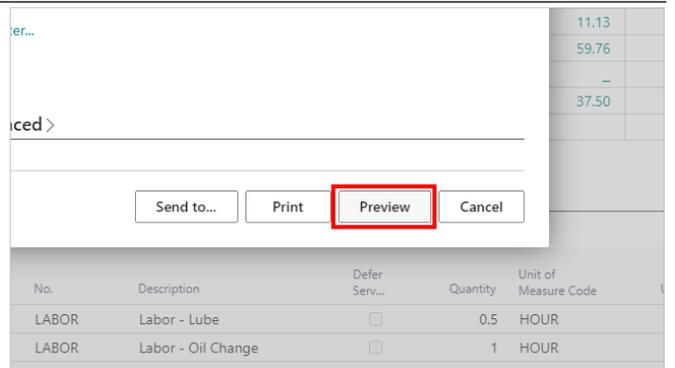
Click on the navigation menu item **Print Proforma...**



Click on the toggle field **Print Company Address**



Click on the button **Preview**





ODT Service Help

The following picture is an example of a proforma invoice.

Service Proforma

CRONUS SERVICE, Inc.
7122 South Ashford Street
Westminster
Atlanta, GA 31772

Page: 1
Service Ticket Number: ST00001
Service Ticket Date: 4/6/2020

Sold To: Adatum Corporation
Robert Townes
192 Market Square
Atlanta, GA 31772
USA

Ship To: Adatum Corporation
Robert Townes
192 Market Square
Atlanta, GA 31772
USA

Tax Ident. Type: Legal Entity
Customer ID: 10000
Ship Via: P.O. Number
Ship Date: 4/6/2020
Terms: 1 Month/2% 9 days
SalesPerson: Peter Saddow

Item No.	Description	Unit	Quantity	Unit Price	Total Price
SU00001-2015 NISSAN Titan					
20,000 KM Service					
Labor - Lube					
LABOR	Labor - Lube	Hour	0.50		
		Parts: 0.00	Labor: 0.00	Other: 0.00	
Oil Change					
LABOR	Labor - Oil Change	Hour	1.00	75.00	75.00
OILFILTER	Filter, Oil	Piece	1.00	11.75	11.75
OILGASKET	Gasket, Oil	Piece	1.00	2.75	2.75
MOBIL15W30	Mobil 1 5W30	Piece	5.00	10.75	53.75
		Parts: 68.25	Labor: 75.00	Other: 0.00	143.25
Rotate Tires					
LABOR	Labor - Rotate Tires	Hour	0.50	75.00	37.50
		Parts: 0.00	Labor: 37.50	Other: 0.00	37.50
		Parts: 68.25	Labor: 112.50	Other: 0.00	Total SU00001: 180.75
SU00004-2016 NISSAN Frontier					
20,000 KM Service					
Oil Change					
LABOR	Labor - Oil Change	Hour	1.00	75.00	75.00
OILFILTER	Filter, Oil	Piece	1.00	11.75	11.75
OILGASKET	Gasket, Oil	Piece	1.00	2.75	2.75
MOBIL15W30	Mobil 1 5W30	Piece	5.00	10.75	53.75
		Parts: 68.25	Labor: 75.00	Other: 0.00	143.25
		Parts: 68.25	Labor: 75.00	Other: 0.00	Total SU00004: 143.25

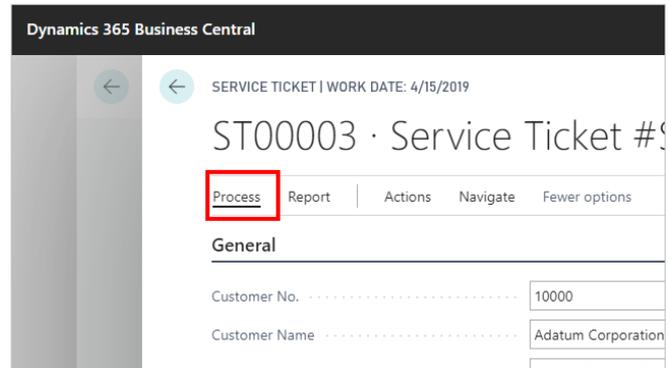
Amount Subject to Sales Tax: 324.00
Amount Exempt from Sales Tax: 0.00

Subtotal: 324.00
Invoice Discount: 0.00
Total Sales Tax: 12.45
Total: 336.45

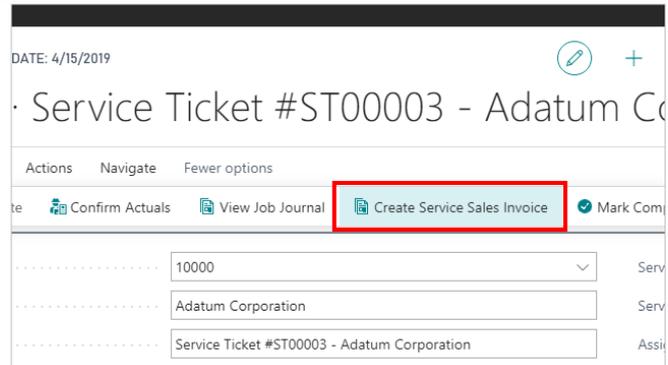
3.4.3.9. How to Invoice a Service Ticket

The following demonstrates the invoicing of a Service Ticket.

Click on the navigation menu item popup **Process**

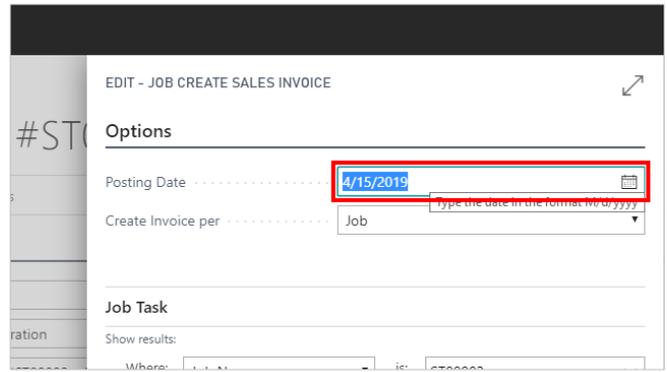


Click on the navigation menu item **Create Service Sales Invoice**

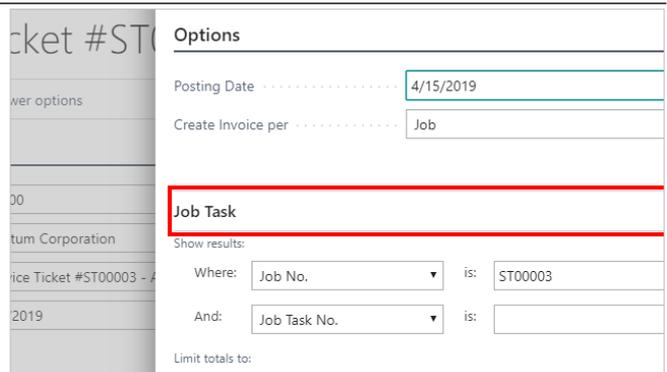


Click on the field **Posting Date**

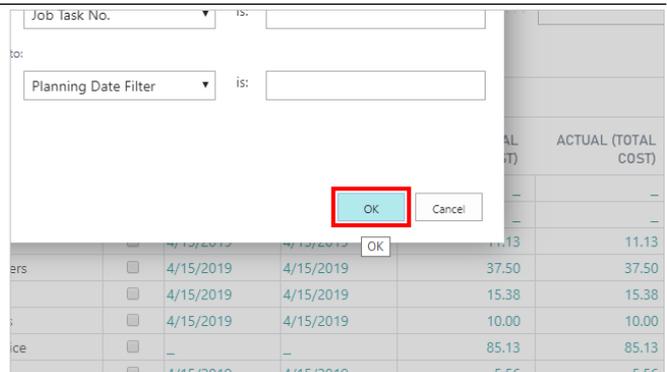
Verify that the Posting Date is the correct date. If not, then enter or select the applicable date.



Click on **Job Task**



Click on the button **OK**



A pop-up window will occur providing the choice to open the Sales Invoice or not.

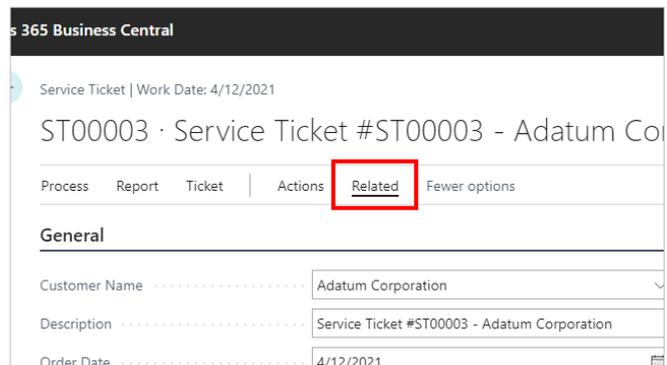
When No is selected, then the pop-up window will close.

When Yes is selected, then the open Sales Invoice will be displayed, where the invoice can be reviewed and posted, if desired.

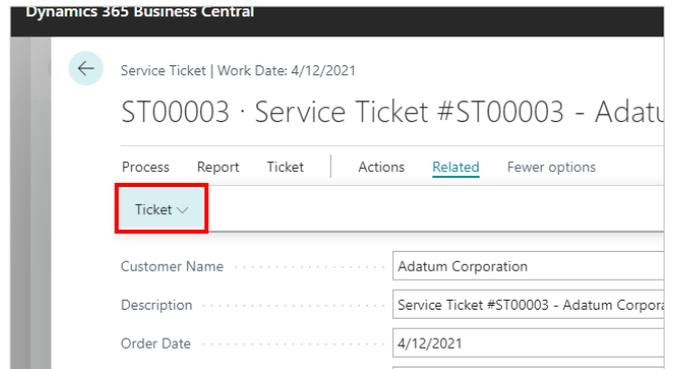
In this example No was selected.

The following demonstrates opening the outstanding Sales Invoice from the ticket and posting the invoice.

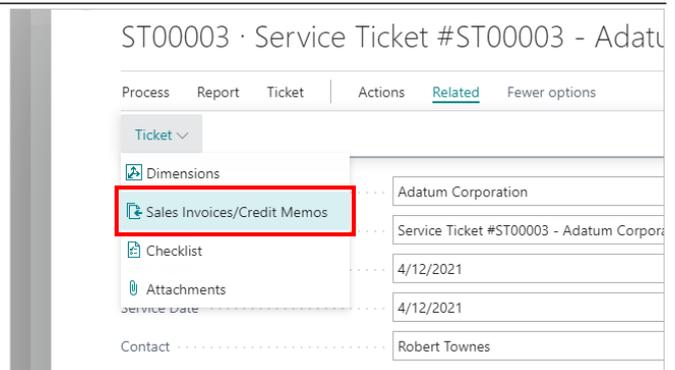
Click on the navigation menu item popup **Related**



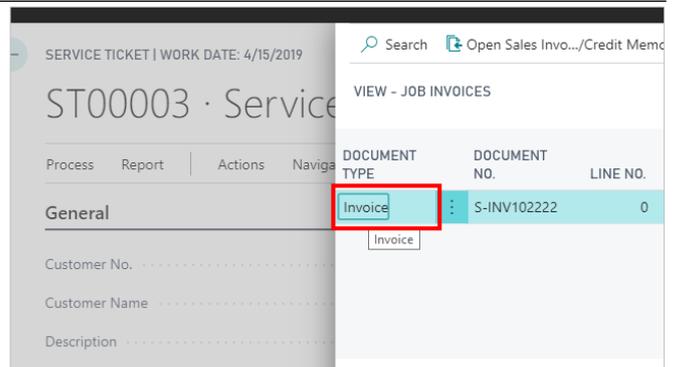
Click on the navigation menu item popup **Ticket**



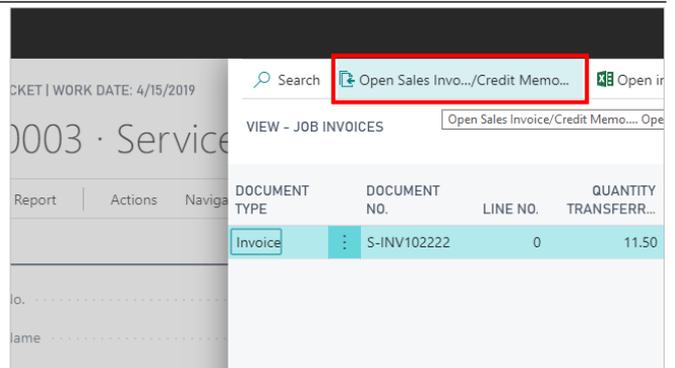
Click on the navigation menu item **Sales Invoices/Credit Memos**



Click on the cell **Document Type** with the value **Invoice**

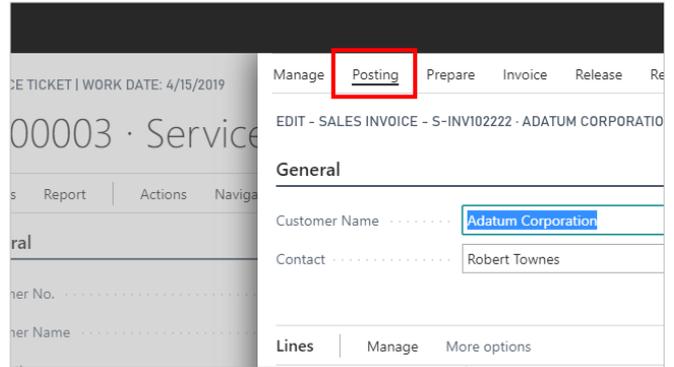


Click on the navigation menu item **Open Sales Invoice/Credit Memo...**



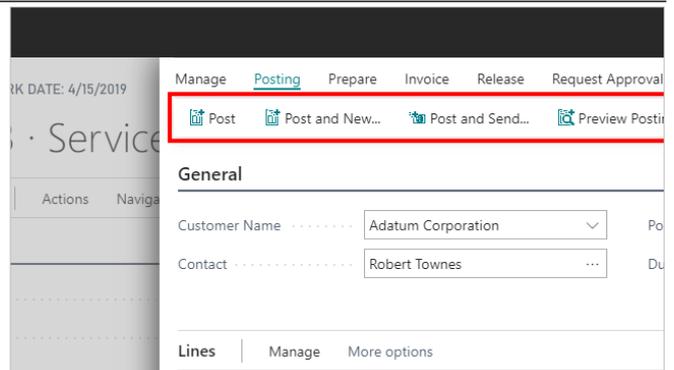
ODT Service Help

Click on the navigation menu item popup **Posting**

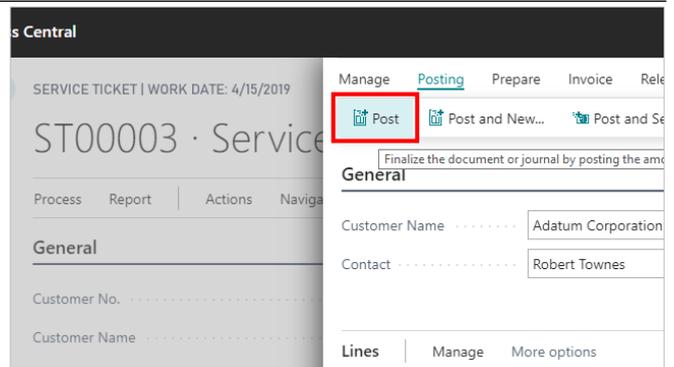


Click on **Post Post and New... Post and Send... Preview Posting**

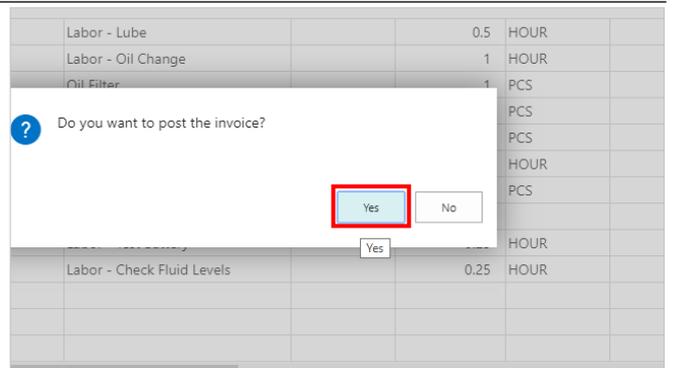
The standard Microsoft Dynamics 365 Business Central options are available for posting.



Click on the navigation menu item **Post**

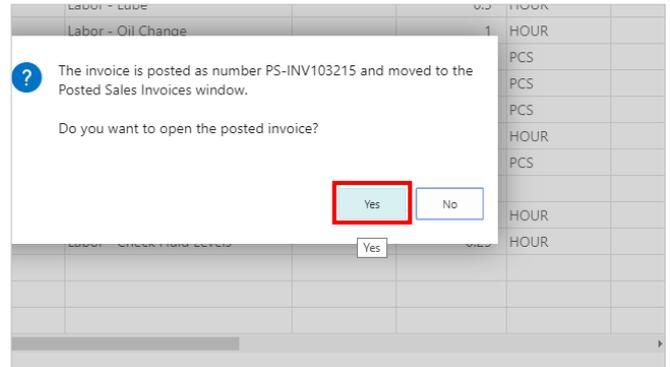


Click on the button **Yes**



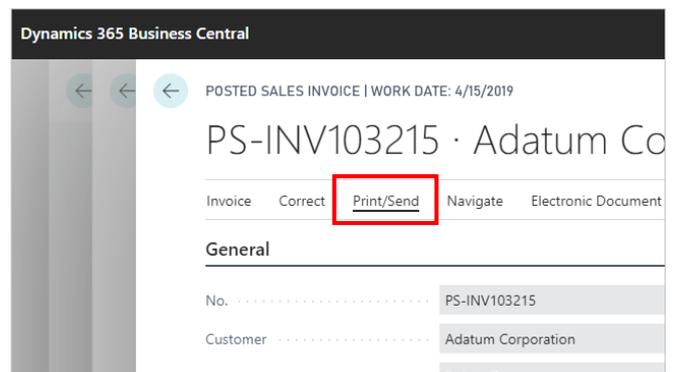
ODT Service Help

Click on the button **Yes**

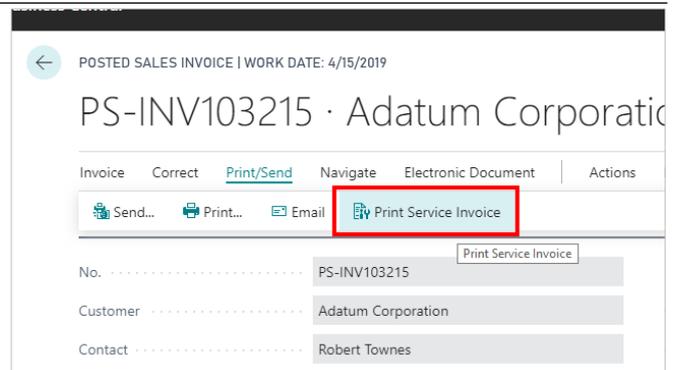


The following demonstrates printing the Service Invoice.

Click on the navigation menu item popup **Print/Send**

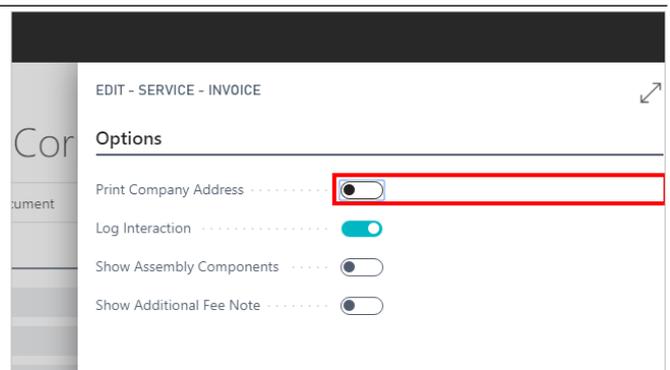


Click on the navigation menu item **Print Service Invoice**



Click on **Print Company Address, No**

By default the first time the Print - Service Invoice is ran the Print Company Information is by default disabled. Therefore, to print company information, this field must be enabled.





ODT Service Help

Click on **Send to... Print Preview Cancel**

The standard Microsoft Dynamics 365 Business Central, printing options are available to select from.

DESCRIPTION	And:	is:
Labor - Lube	Bill-to Customer No.	
Labor - Oil Change	Ship-to Code	
Oil Filter	No. Printed	
Oil Gasket		
Mobile Oil SW		
Labor - Replace		
Air Filter for Skid Steer		
Income - Shop Supplies		
Labor - Test Battery		
Labor - Check Fluid Levels		

Send to... Print Preview

The following pictures display a posted Service Invoice.

Item/Description	Unit	Quantity	Unit Price	Total Price
Service Ticket #ST00003 - Adatum Corporation				
SU00001-Skid Steer Loader S450				
Skid Steer General Service				
Air Filter for Skid Steers				
LABOR Labor - Replace Air Filter	Hour	0.5	75.00	38.63
1004 Air Filter for Skid Steer	Piece	1	20.75	21.70
	Parts	20.75	Labor: 37.50	Other: 0.00
				60.42
Income - Shop Supplies				
Income - Shop Supplies		1	20.00	21.00
	Parts	0.00	Labor: 0.00	Other: 20.00
				21.00
Labor - Lube				
LABOR Labor - Lube	Hour	0.5	75.00	38.63
	Parts	0.00	Labor: 37.50	Other: 0.00
				38.62
Oil Change for Skid Steers				
LABOR Labor - Oil Change	Hour	1	75.00	77.55
1001 Oil Filter	Piece	1	11.75	12.34
1002 Oil Gasket	Piece	1	2.75	2.88
1003 Mobile Oil SW30	Piece	5	10.75	55.44
	Parts	68.25	Labor: 75.00	Other: 0.00
				148.91



ODT Service Help

<p>CRONUS SERVICE, Inc. 7122 South Ashford Street Westminster Atlanta, 31772</p>	<p>INVOICE Page: 2</p>
	<p>Invoice Number: PS-INV103215 Invoice Date: 4/15/2019</p>
<p>Bill To: Adatum Corporation Robert Townes 192 Market Square , GA 31772 USA</p>	<p>Ship To: Adatum Corporation Robert Townes 192 Market Square , GA 31772 USA</p>
<p>Tax Ident. Type: Legal Entity</p>	<p>Customer ID: 10000</p>
<p>Ship Via</p>	<p>P.O. Number</p>
<p>Ship Date: 4/15/2019</p>	<p>P.O. Date: 4/15/2019</p>
<p>Due Date: 5/15/2019</p>	<p>Our Order No.</p>
<p>Terms: 1 Month/2% 8 days</p>	<p>SalesPerson: Peter Sadow</p>

Test Battery				
LABOR	Labor - Test Battery	Hour	0.25	75.00
				19.31
	Parts: 0.00	Labor: 18.75	Other: 0.00	19.31
	Parts: 89.00	Labor: 168.75	Other: 20.00	Total SU00001 288.26

SU00004-Skid Steer Loader S70

Skid Steer General Service

Check Fluid Levels				
LABOR	Labor - Check Fluid Levels	Hour	0.25	75.00
				19.32
	Parts: 0.00	Labor: 18.75	Other: 0.00	19.32
	Parts: 0.00	Labor: 18.75	Other: 0.00	Total SU00004 19.32

Amount Subject to Sales Tax USD	296.50	Subtotal:	296.50
Amount Exempt from Sales Tax USD	0.00	Invoice Discount:	0.00
		Total Sales Tax:	11.08
		Total USD:	307.58

NOTE:

When processing a ticket, the posting of the invoice and confirming of actuals are not limited to, confirming actuals, then invoicing. Invoicing can be done first, then confirmation of the actuals.

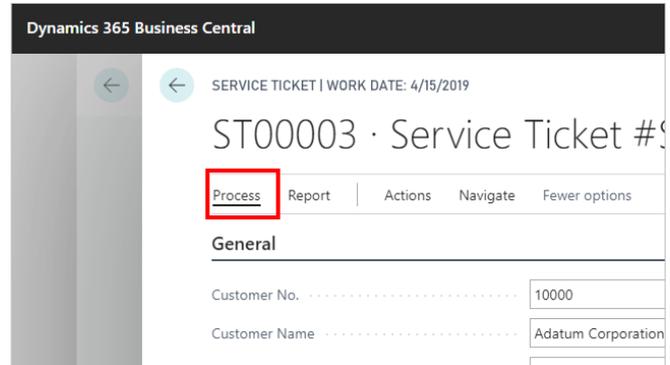
3.4.3.10. How to Close the Ticket

The final step is to mark the ticket as completed once all usage has been posted and the ticket has been fully invoiced.

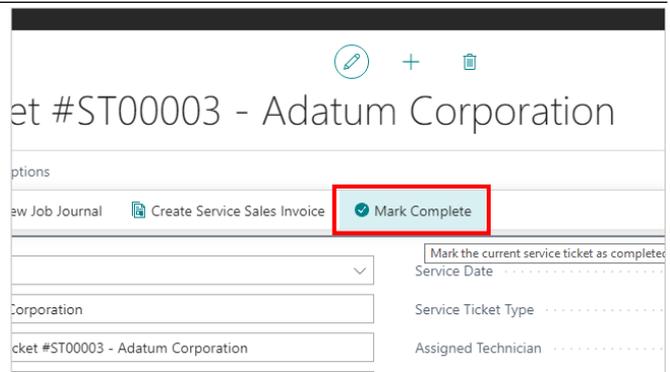
This will set the Status on the Job card to Completed.

The following demonstrates this process.

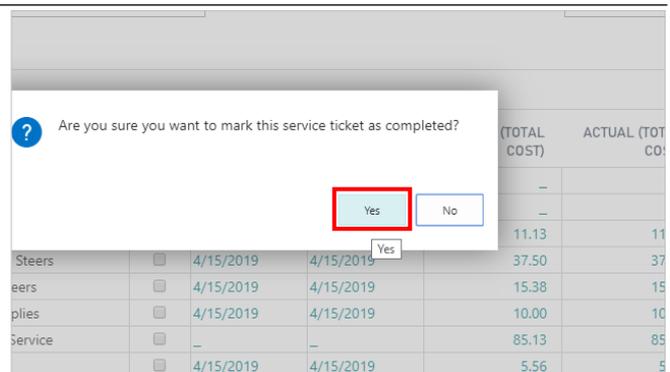
Click on the navigation menu item popup **Process**



Click on the navigation menu item **Mark Complete**



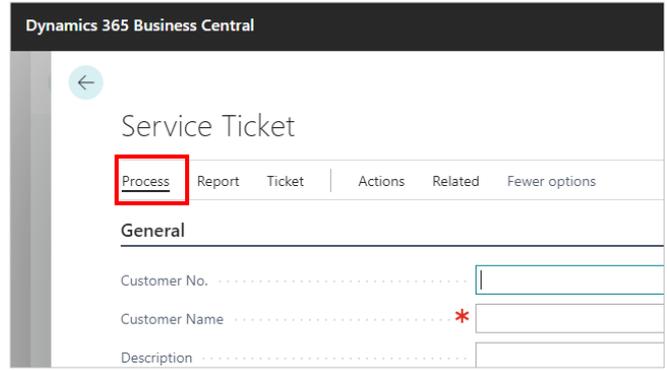
Click on the button **Yes**
Upon selecting Yes, the related Job Card, Status field will be set to Completed.



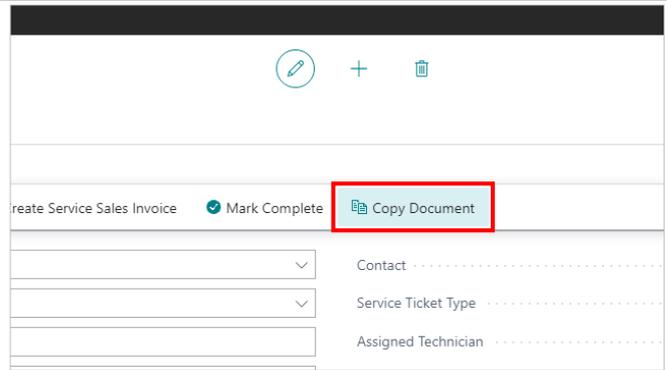
3.4.3.11. How to use the Copy Document Feature

The following demonstrates how to use the Copy Document Feature.
Please note that the Service Ticket that will be used for this example was created in advance.

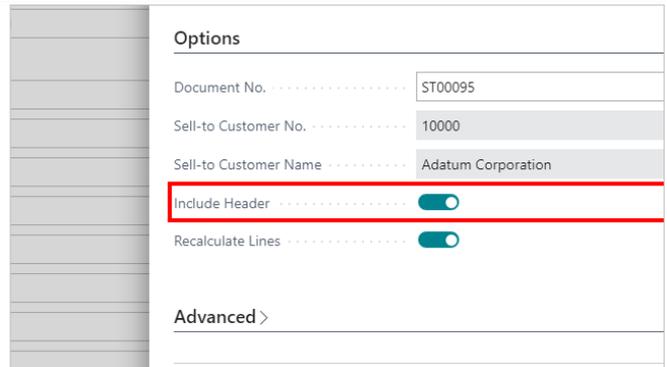
Click on the navigation menu item popup **Process**



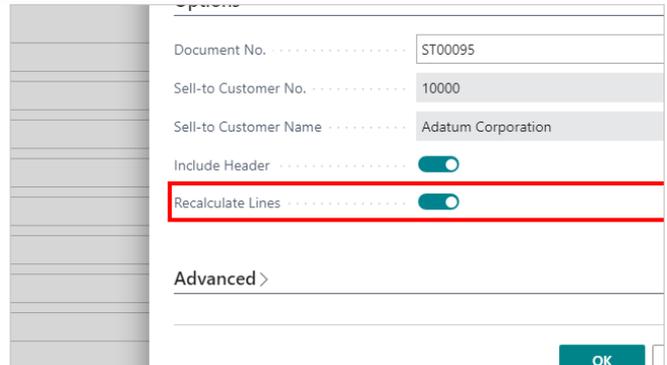
Click on the navigation menu item **Copy Document**



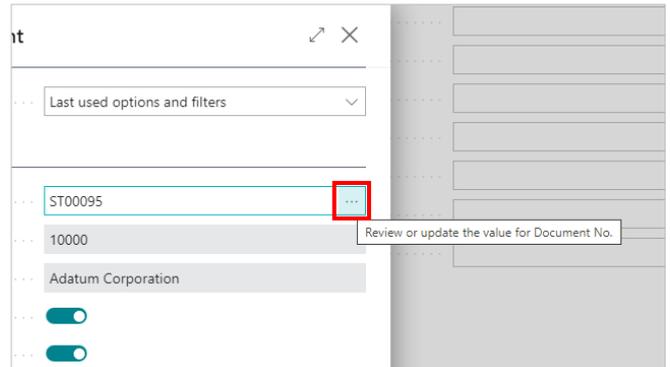
The Include Header toggle can be used to toggle if information from the header of the selected ticket is copied. It is enabled by default if a customer has not been selected before copying, and is disabled by default if a customer has been selected before copying.



The Recalculate Lines toggle can be used to toggle if service lines that get copied should have their prices recalculated after being copied.

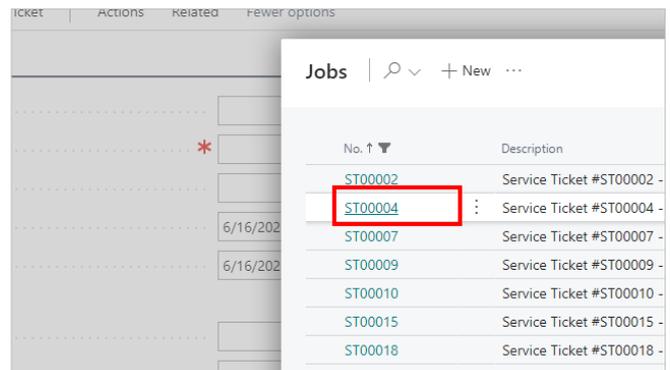


Click on the lookup button **Document No.**

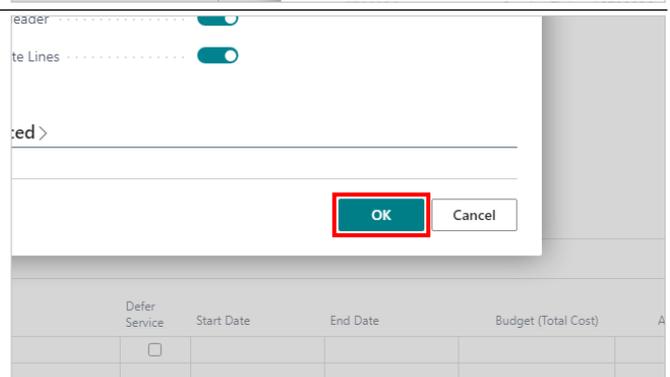


Select the service ticket that you want to copy.

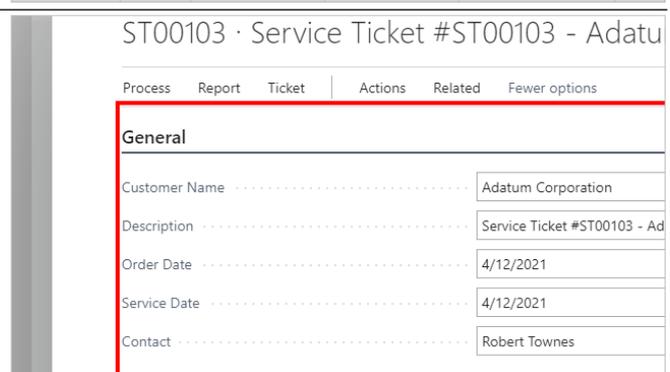
Click on the link in cell **No.** with the value **ST00004**



Click on the button **OK**



Notice that information from the selected ticket has now been copied to the current service ticket.



3.5. How to Create a Service Ticket from a Service Unit

3.5.1. Overview

ODT Service provides the ability to create a Service Ticket directly from the Service Unit card. There are two methods available to create the Service Ticket.

One is without a Service Template and the other is with a Service Template.

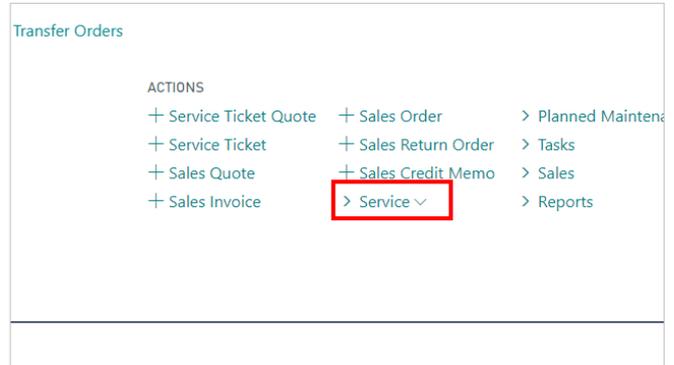
3.5.2. How to Create a Service Ticket

Sales Order Processor Profile

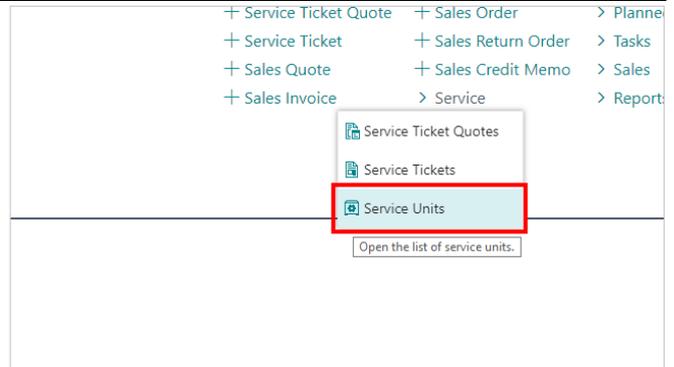
The same steps can be used when the user has the Business Manager Profile assigned to them.

The following demonstrates creating a Service Ticket without a Service Template being included.

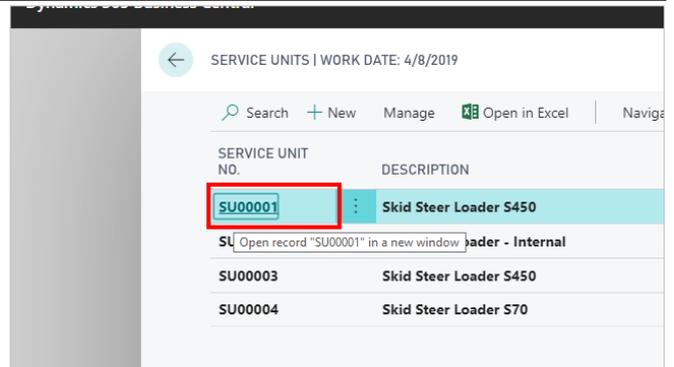
Click on the navigation menu item popup **Service**



Click on the navigation menu item **Service Units**

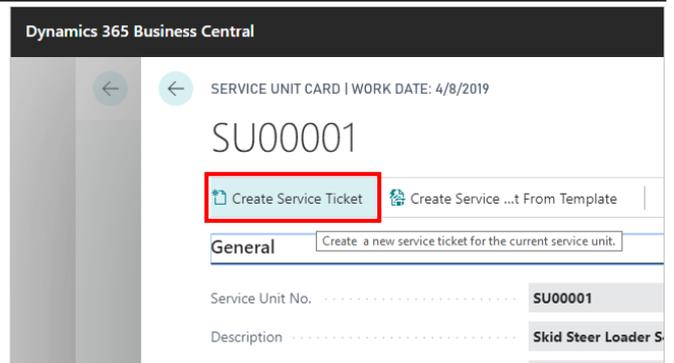


Click on the link in cell **Service Unit No.** with the value **SU00001**



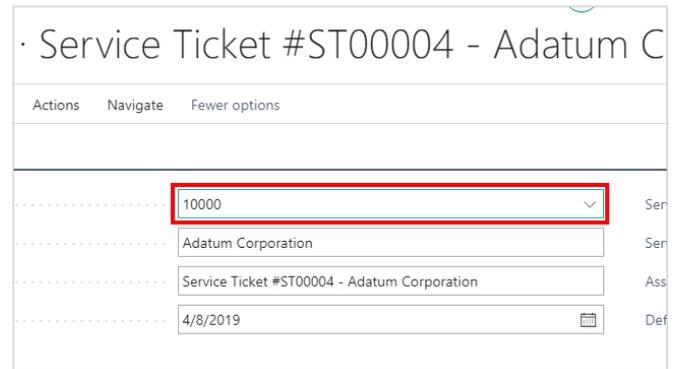
Click on the navigation menu item **Create Service Ticket**

If the selected service unit is already on another open service ticket, a message will be displayed to indicate this and confirm if you want to proceed.



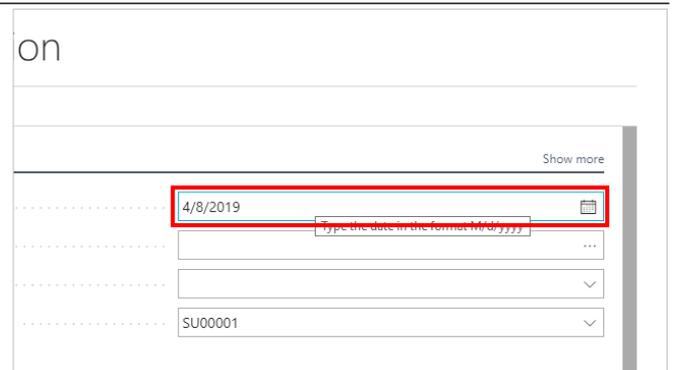
Click on the field **Customer No.**

The Customer No. is automatically populated based on the Customer setup on the Service Unit.



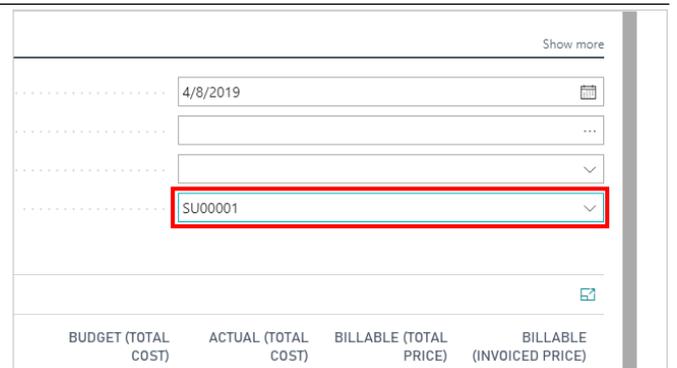
Click on the field **Service Date**

The Service Date defaults from the users' Work Date. Should the planned Service Date be different, then enter or lookup and select the date on which the servicing is to occur on.



Click on the field **Default Service Unit No.**

The Service Unit No. from which the Create Service Ticket was ran from will automatically populate the Default Service Unit field.



To learn how to add Ticket Units/Lines records and processing a Service Ticket, please see the user help in Processing Service of Service for Internal Equipment, or Service for External Customers.

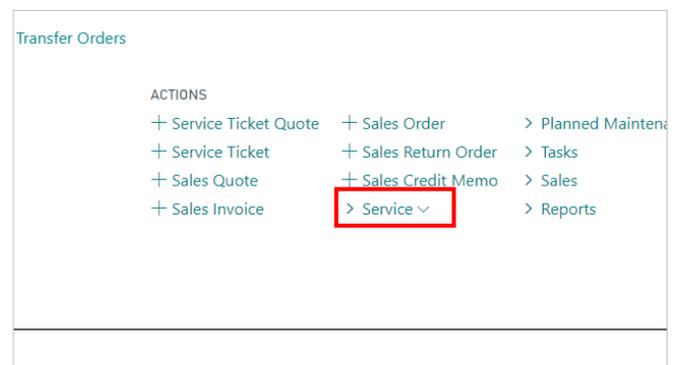
3.5.3. How to Create a Service Ticket with a Service Template

Sales Order Processor Profile

The same steps can be used when the user has the Business Manager Profile assigned to them.

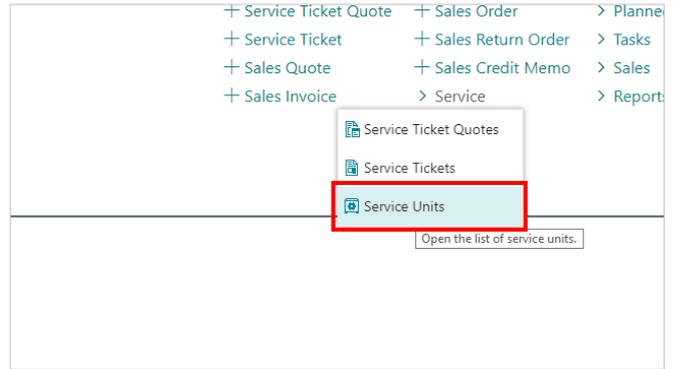
The following demonstrates creating a Service Ticket with a Service Template being included.

Click on the navigation menu item popup **Service**

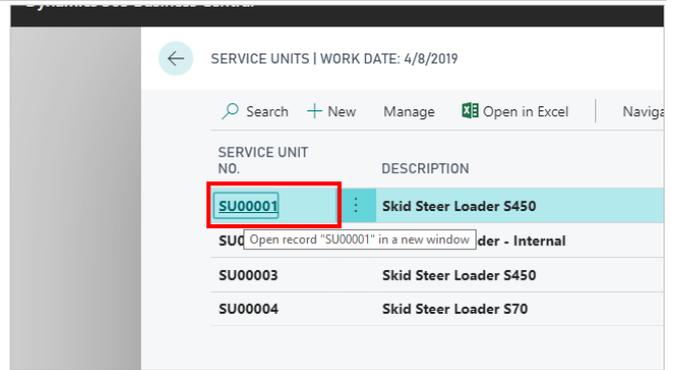


ODT Service Help

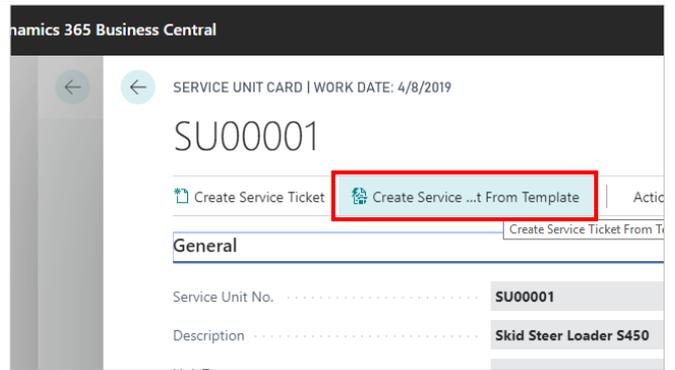
Click on the navigation menu item **Service Units**



Click on the link in cell **Service Unit No.** with the value **SU00001**



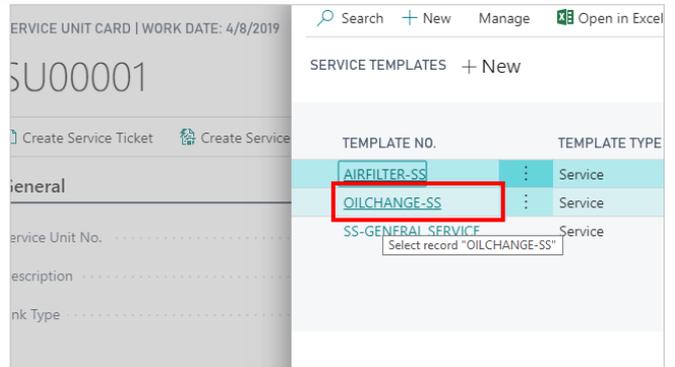
Click on the navigation menu item **Create Service Ticket From Template**



Click on the link in cell **Template No.** with the value **OILCHANGE-SS**

Select the Service Template to be included on the Service Ticket being created.

If the selected service unit is already on another open service ticket, a message will be displayed to indicate this and confirm if you want to proceed.





ODT Service Help

Click on the field **Customer No.**

The Customer No. is automatically populated based on the Customer setup on the Service Unit.

Click on the field **Service Date**

The Service Date defaults from the users' Work Date. Should the planned Service Date be different, then enter or lookup and select the date on which the servicing is to occur on.

The Ticket Units/Lines are automatically created based on the date from the users' Work Date. Should the Service date be changed to a later date, a pop-up will occur asking if the user would like to update the lines. The user should select Yes, to update the lines.

Click on the field **Default Service Unit No.**

The Service Unit No. from which the Create Service Ticket was ran from will automatically populate the Default Service Unit field.

Click on the cell **Description** with the value **Oil Change for Skid Steers**

The Service Template will automatically populate the Ticket Units/Lines, and the details of the template will populate the Service Ticket Details.

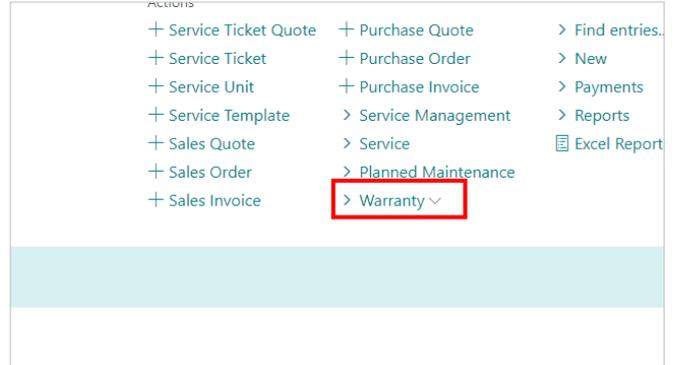
ODT SERVICE UNIT NO.	SERIAL NO.	DESCRIPTION	DEFER SERVI...
SU00001		Skid Steer Loader S450	
SU00001		Oil Change for Skid Steers	

To learn how to process a Service Ticket, please see the user help in Processing Service of Service for Internal Equipment, or Service for External Customers.

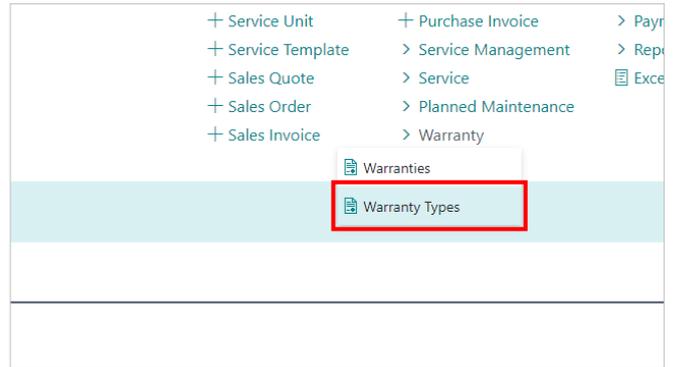
3.6. Service Warranties

3.6.1. How to set up Warranty Types

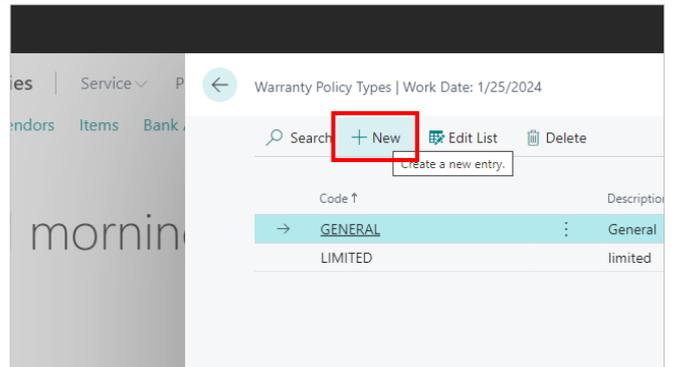
Click on the navigation menu item popup **Warranty**



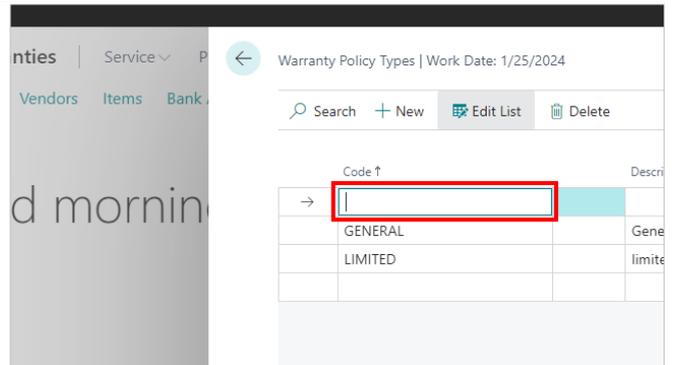
Click on the navigation menu item **Warranty Types**



Click on the navigation menu item **New**

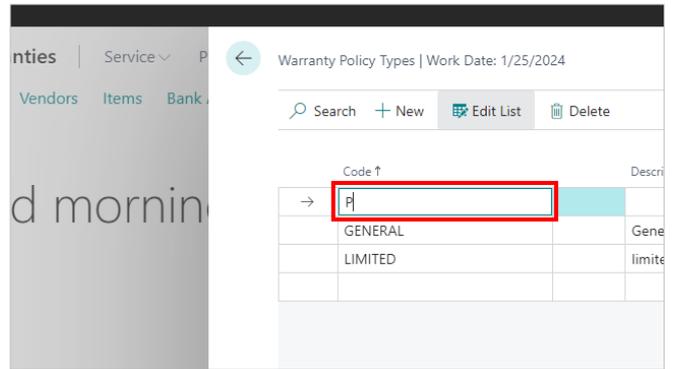


Click on the cell **Code**

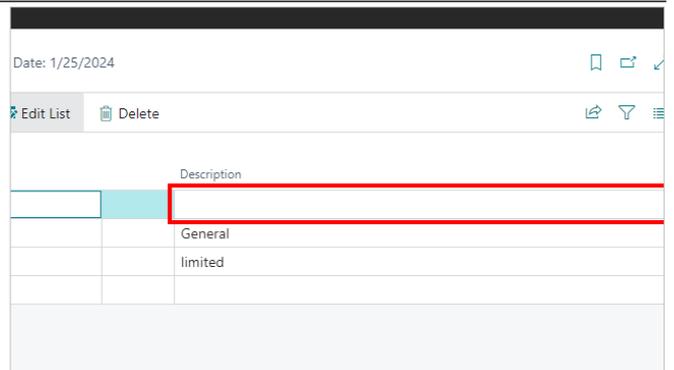


ODT Service Help

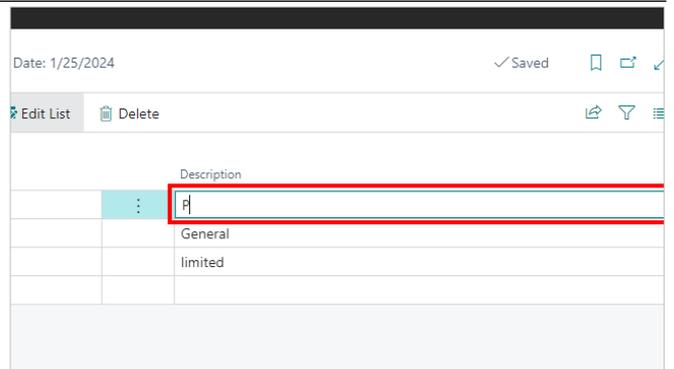
Enter the text **Power Train**.



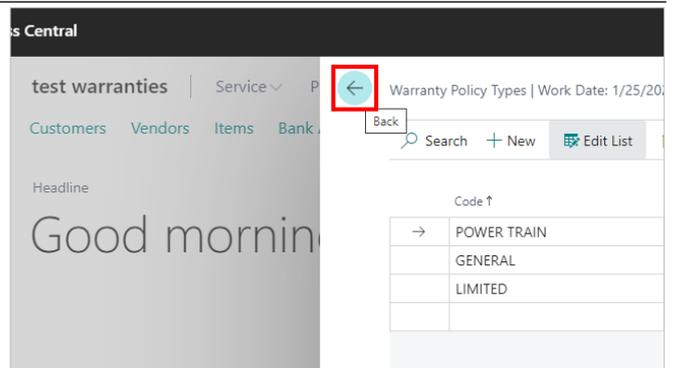
Click on the cell **Description**



Enter the text **Power Train**.

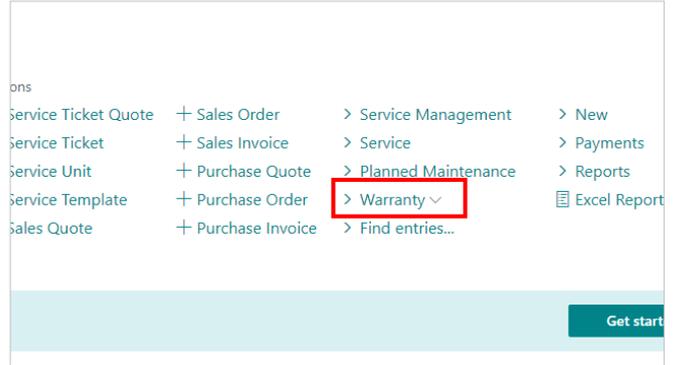


Click on the back button

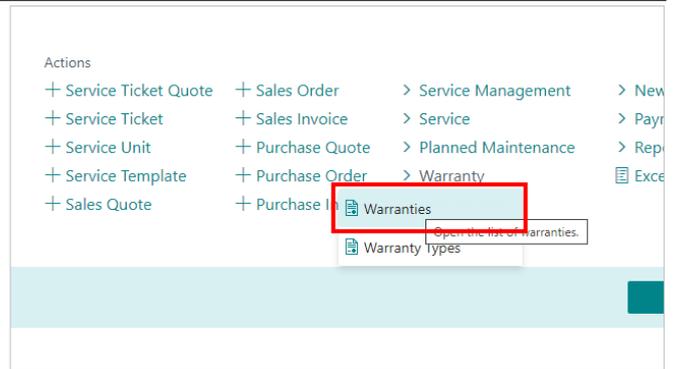


3.6.2. How to set up Warranties

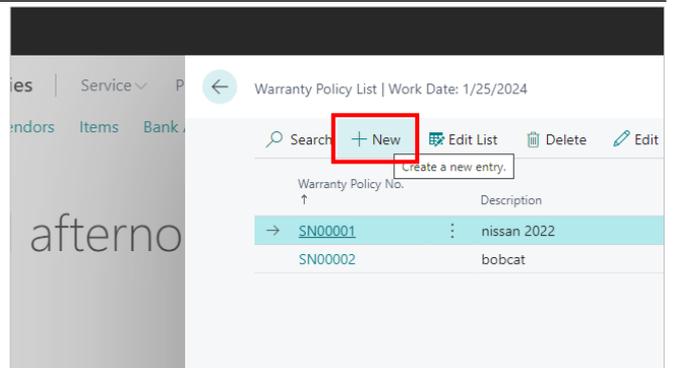
Click on the navigation menu item popup **Warranty**



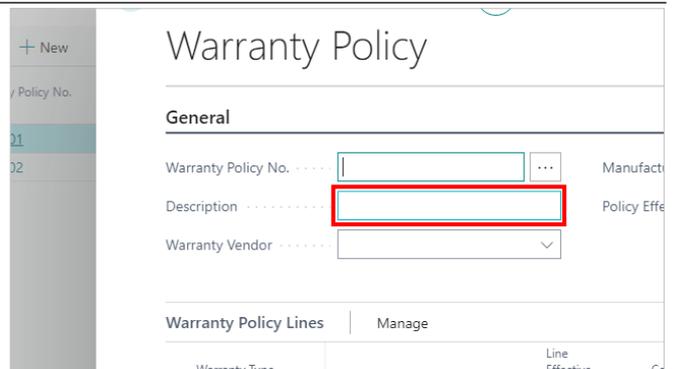
Click on the navigation menu item **warranties**.



Click on the navigation menu item **New**



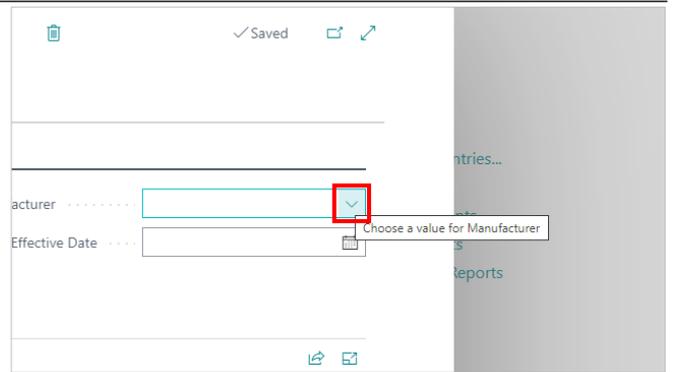
Click on the field **Description**



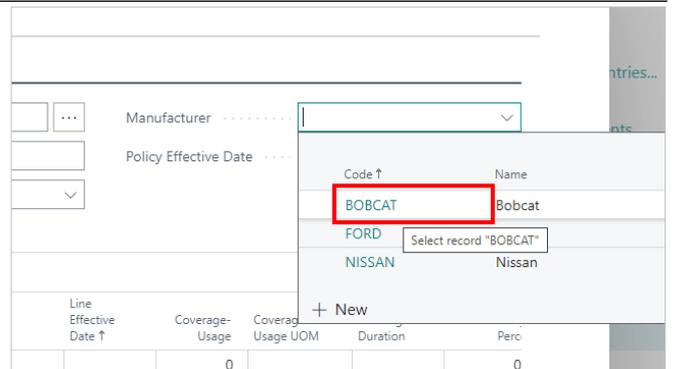
Enter the text **Warranty Policy 2022**.



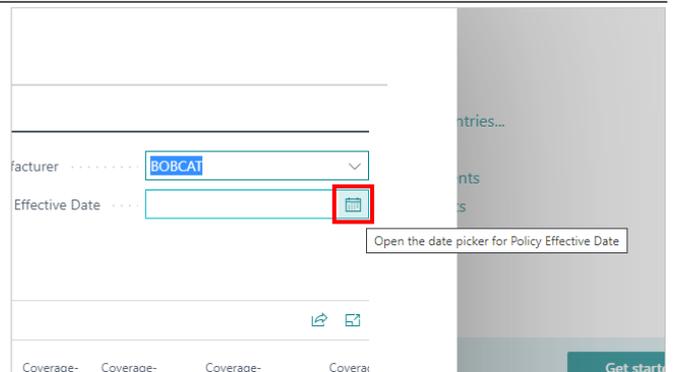
Click on the lookup button **Manufacturer**



Select the manufacturer this warranty will apply to.
Click on the link in cell **Code** with the value **BOBCAT**

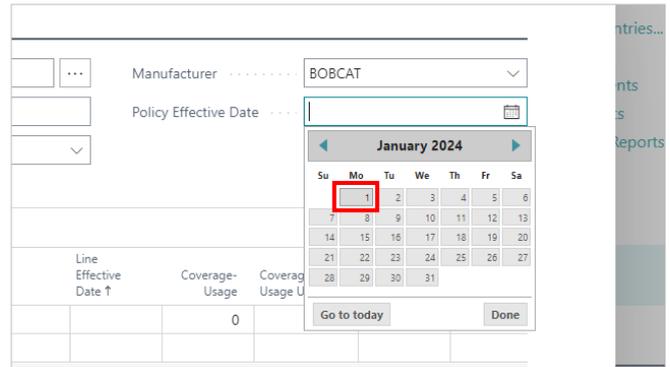


Select the date this policy will become effective.
Click on the link **Open the date picker**

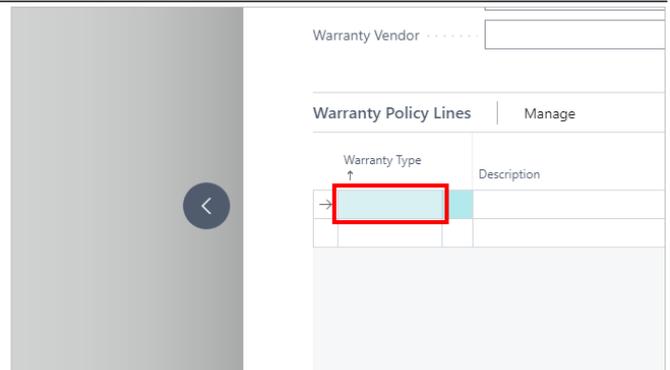


ODT Service Help

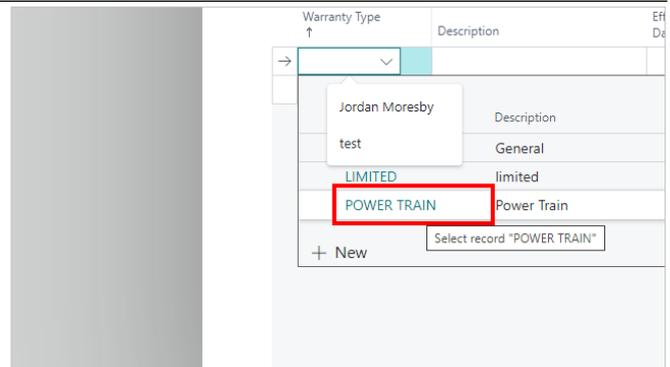
Click on a date in the calendar



Click on the cell **Warranty Type**

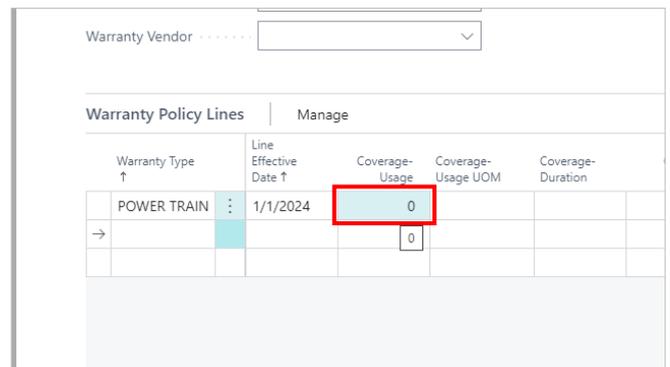


Select the Warranty that you wish to be part of this policy. The following example will only select one, but it is possible for multiple warranty types to be added. Click on the link in cell **Code** with the value **POWER TRAIN**



Coverage-Usage and Coverage-Usage UOM are used to determine if warranty coverage applies based on the Service Meter of a service unit.

Click on the cell **Coverage-Usage** with the value **0**





Enter the text **10000**.

Warranty Type ↑	Line Effective Date ↑	Coverage-Usage	Coverage-Usage UOM	Coverage-Duration
→ POWER TRAIN	1/1/2024			

Click on the cell **Coverage-Usage UOM**

Warranty Type ↑	Line Effective Date ↑	Coverage-Usage	Coverage-Usage UOM	Coverage-Duration	Coverage-Percent
→ POWER TRAIN	1/1/2024	10000			0.00

Click on the link in cell **Code** with the value **KM**

Date ↑	Usage	Usage UOM	Duration	Percent
→ POWER TRAIN	1/1/2024	10000		0.00

- Adatum Corporation
- 1
- 6/21/2022
- KM** (Kilometer)
- Select record "KM" (Liter)
- MILES (Miles)
- + New

Coverage Duration determines how long this policy will remain in effect.

Click on the cell **Coverage-Duration**

Line Effective Date ↑	Coverage-Usage	Coverage-Usage UOM	Coverage-Duration	Coverage-Percent
→ 1/1/2024	10000	KM		0.00

ODT Service Help

Enter the text **1y**.

Line	Effective Date ↑	Coverage-Usage	Coverage-Usage UOM	Coverage-Duration	Coverage-Percent
4	1/1/2024	10000	KM		0.00

Coverage Percent specifies what percentage of service will be covered under warranty.

Click on the cell **Coverage-Percent** with the value **0.00**

Coverage-Usage	Coverage-Usage UOM	Coverage-Duration	Coverage-Percent
10000	KM	1y	0.00

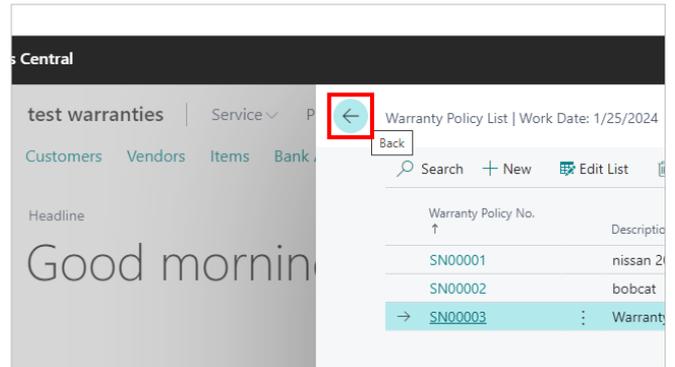
Enter the text **50**.

Coverage-Usage	Coverage-Usage UOM	Coverage-Duration	Coverage-Percent
10000	KM	1Y	50

Click on the back button

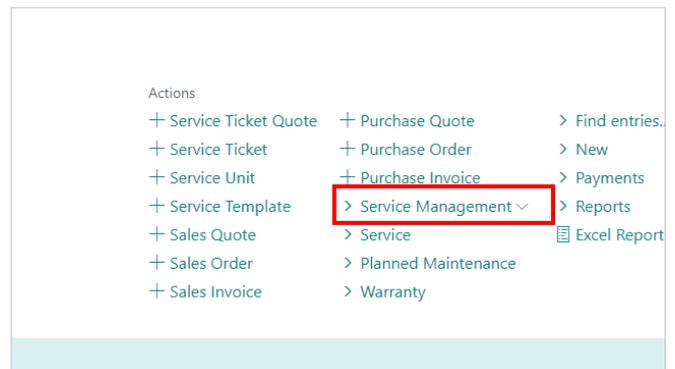
The screenshot shows a mobile application interface. At the top, there is a header 'Central' and a title 'Warranty Policy List | Work Date: 1/25/2024'. Below the title, there is a search bar and a '+ New' button. A list of warranty policies is displayed, with 'SN00003' selected. A red box highlights the back arrow button in the top left corner of the list view.

Click on the back button

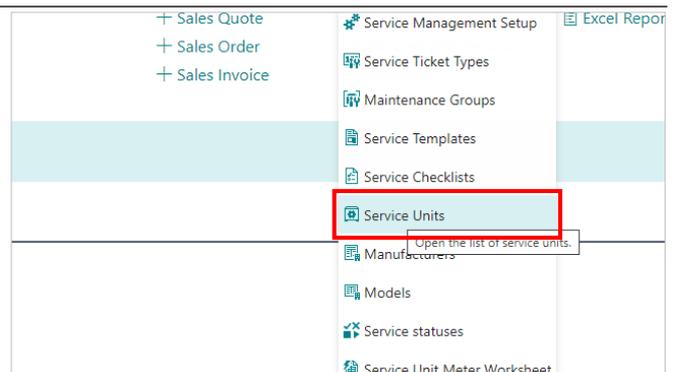


3.6.3. How to Assign Warranties to Service Units

Click on the navigation menu item popup **Service Management**

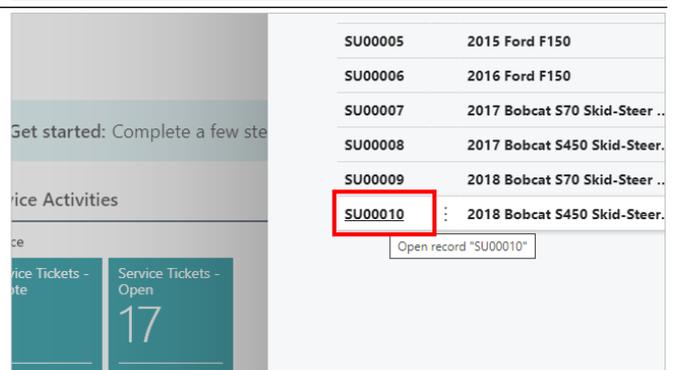


Click on the navigation menu item **Open the list of service units.**

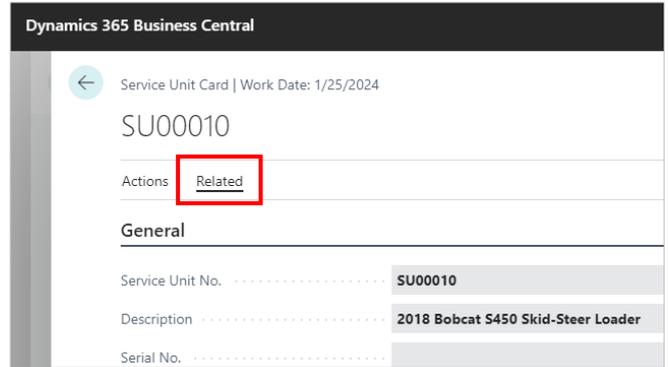


Select the Service Unit you wish to assign a warranty to.

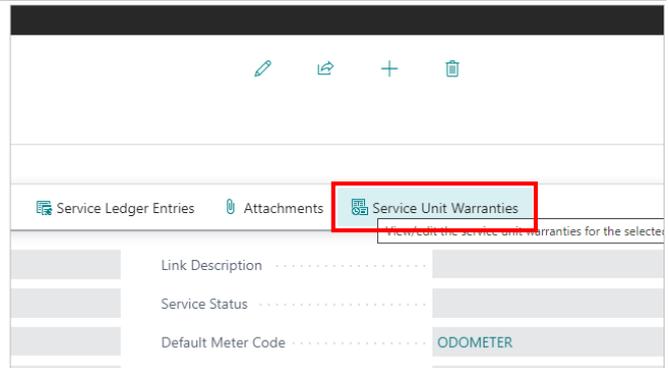
Click on the link in cell **Service Unit No.** with the value **SU00010**



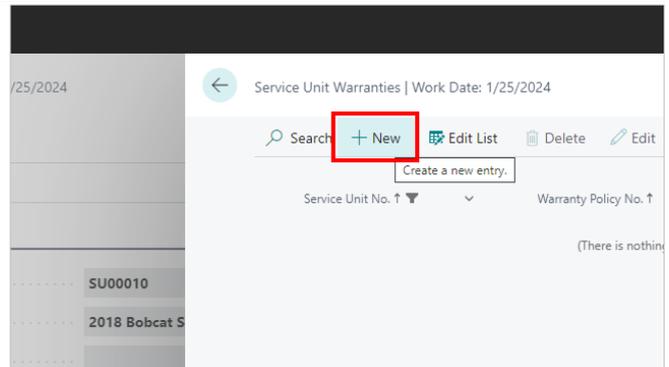
Click on the navigation menu item popup **Related**



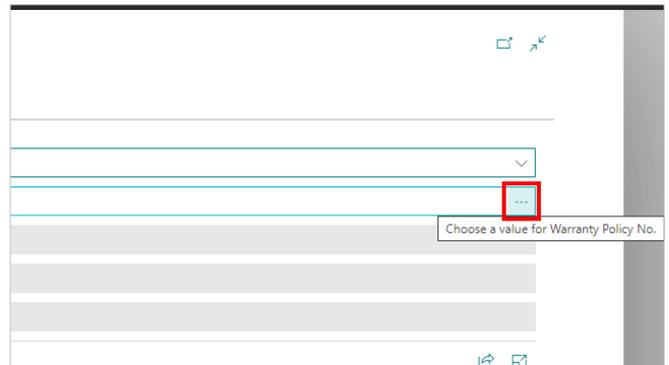
Click on the navigation menu item **Service Unit Warranties**



Click on the navigation menu item **New**

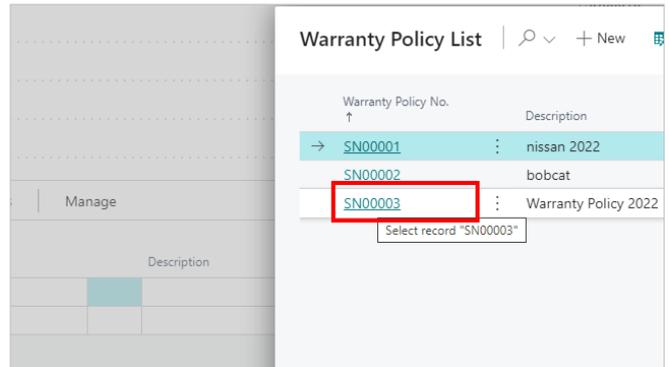


Click on the lookup button **Warranty Policy No.**

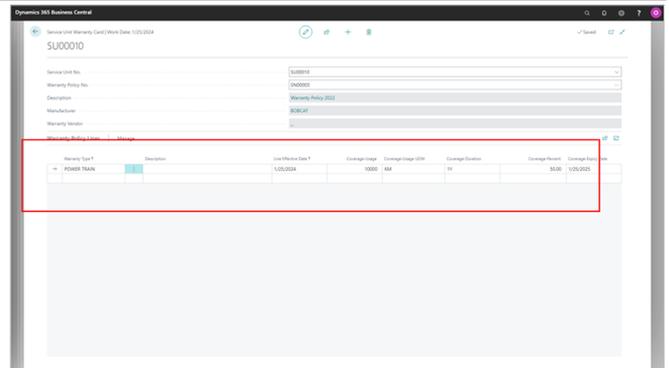


ODT Service Help

Select the Warranty Policy you wish to be assigned to this unit
 Click on the link in cell **Warranty Policy No.** with the value **SN00003**

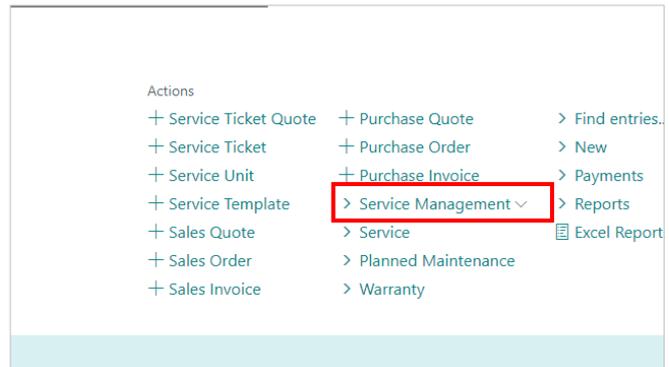


Notice that the Warranty Policy Lines have been automatically filled in based on the Warranties that were set up previously

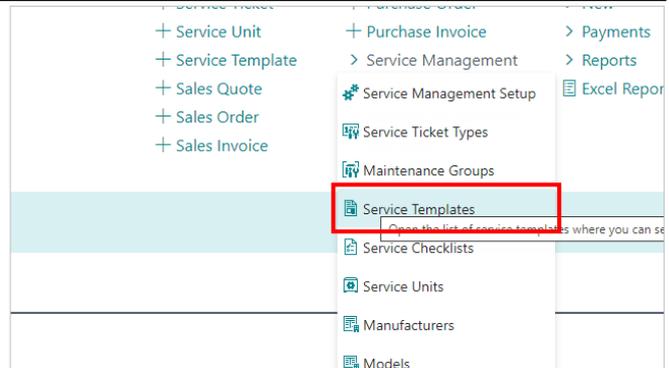


3.6.4. How to assign a Warranty to a Service Template

Click on the navigation menu item popup **Service Management**



Click on the navigation menu item Service Templates



ODT Service Help

Select the Service Template you wish to assign a warranty.
Click on the link in cell **Template No.** with the value **OILCHANGE-SS**

Template No.	Template Type	Description
20KSERVICE	All	20,000 KM S
40KSERVICE	All	40,000 KM S
50POINTINS...	All	50 point insp
OILCHANGE-LT	All	Oil Change
OILCHANGE-SS	All	Oil Change
REPLAC	Open record "OILCHANGE-SS"	Replace Air f
REPLACEAIRF...	All	Replace Air f
ROTATETIRES	All	Rotate Tires
SKIDSTEERGE...	All	Skid Steer G

Click on the action toggle **edit/view**

Click on the cell **Warranty Type**

Ticket Detail Line Type	Warranty Type	Quantity
Change	Both Budget an...	1.00
	Both Budget an...	1.00
	Both Budget an...	1.00
V30	Both Budget an...	6.00

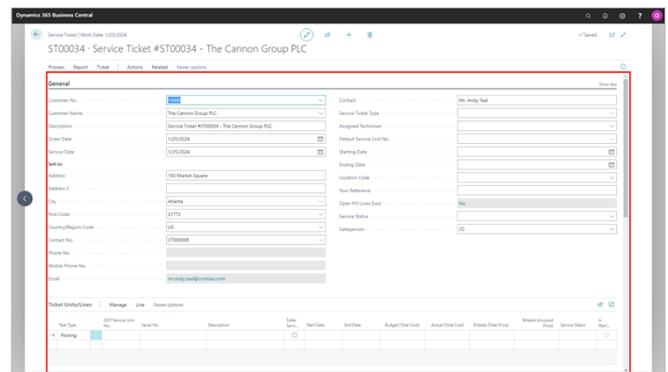
Select the warranty that this Service Template will apply to.
Click on the link in cell **Code** with the value **POWER TRAIN**

Repeat this process for all lines in the Service Template

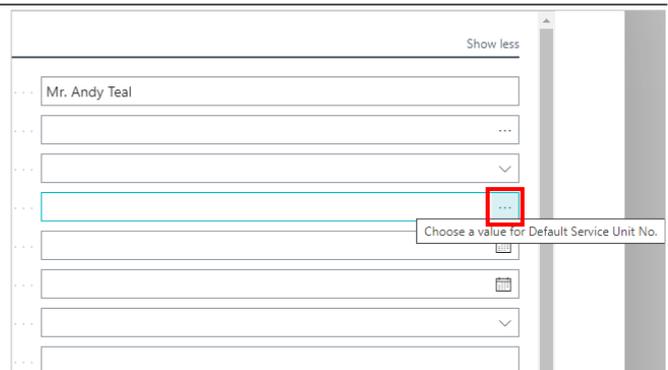
Ticket Detail Line Type	Warranty Type	Quantity	Unit Cost
Both Budget an...	POWER TRAIN	1.00	22.25
Both Budget an...	POWER TRAIN	1.00	3.50
Both Budget an...	POWER TRAIN	1.00	0.50
Both Budget an...	POWER TRAIN <input type="checkbox"/>	6.00	2.25

3.6.5. How to Process a Warranty on Service Tickets

The following example will start from a new service ticket.

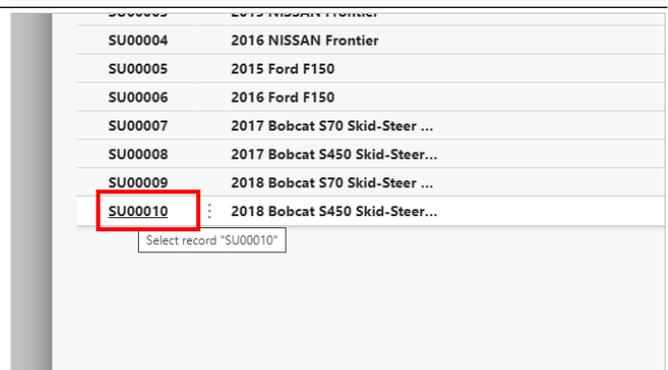


Click on the lookup button **Default Service Unit No.**



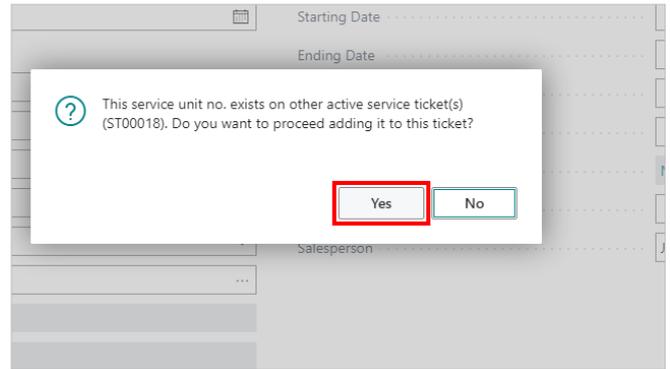
Select the Service Unit that has the warranty applied to it.

Click on the link in cell **Service Unit No.** with the value **SU00010**

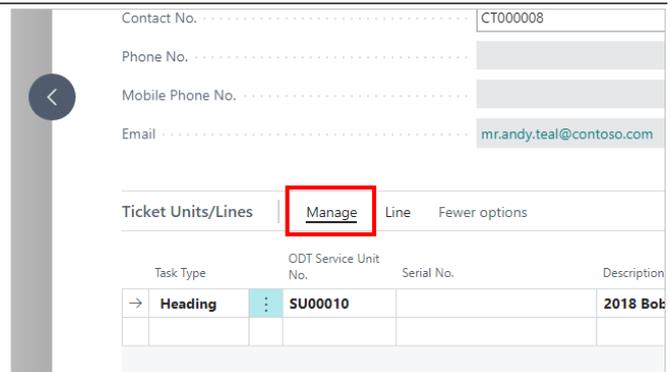


ODT Service Help

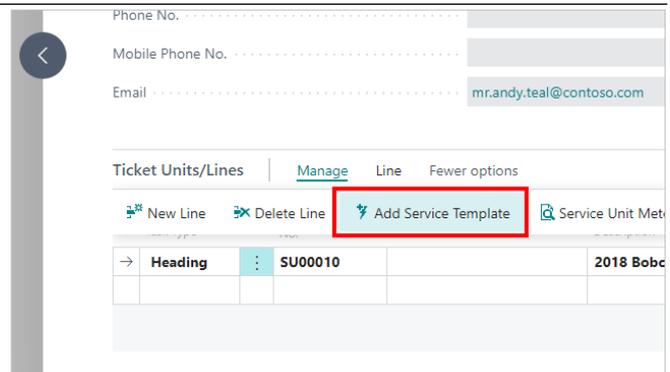
Click on the button **Yes**



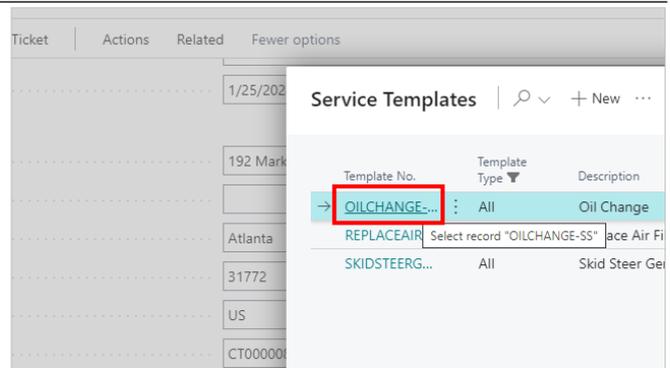
Click on the navigation menu item popup **Manage**



Click on the navigation menu item **Add Service Template**

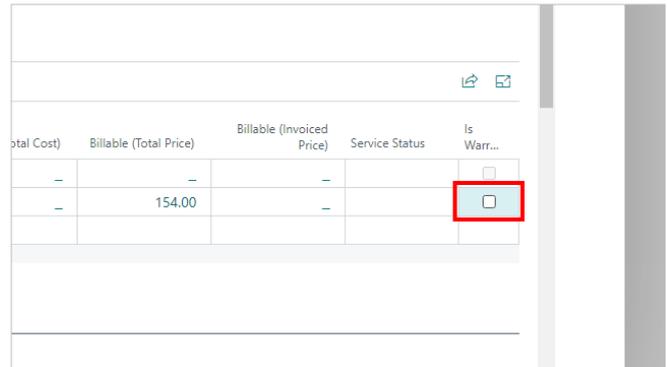


Select the service that will be performed under warranty
Click on the link in cell **Template No.** with the value **OILCHANGE-SS**



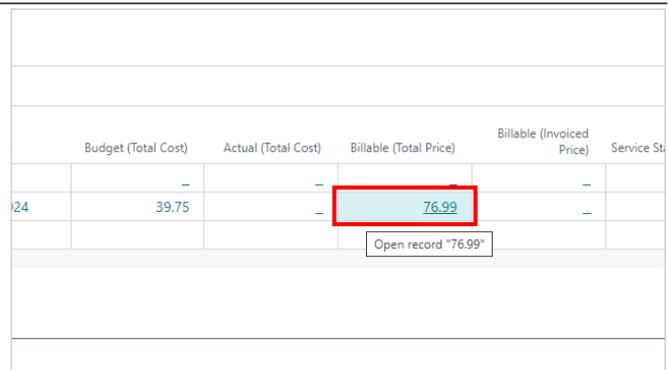
ODT Service Help

The Is Warrantable field can be used to toggle if the service is being performed under warranty. Click on **Is Warrantable**



Total Cost	Billable (Total Price)	Billable (Invoiced Price)	Service Status	Is Warrantable
-	-	-		<input type="checkbox"/>
-	154.00	-		<input type="checkbox"/>

Notice that the Total Price has been reduced, based on what was specified during the warranty setup.



Budget (Total Cost)	Actual (Total Cost)	Billable (Total Price)	Billable (Invoiced Price)	Service Status
-	-	-	-	
24	39.75	76.99	-	

3.7. Apply Maintenance Expense

The Apply Maintenance Expense feature allows you to post service costs back to a fixed asset or item that has been linked to a service unit. Apply Maintenance Expense can be used from both Service Tickets and Planned Maintenance Tickets.

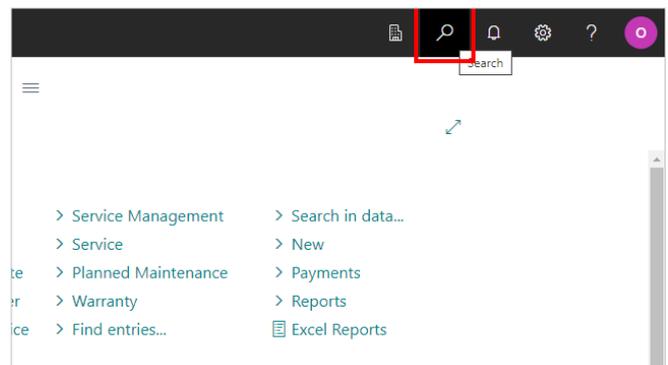
The following demonstrates how to apply a maintenance expense from a Service Ticket. A similar process can be used to apply a maintenance expense from a Planned Maintenance Ticket.

3.7.1. How to setup Apply Maintenance Expense

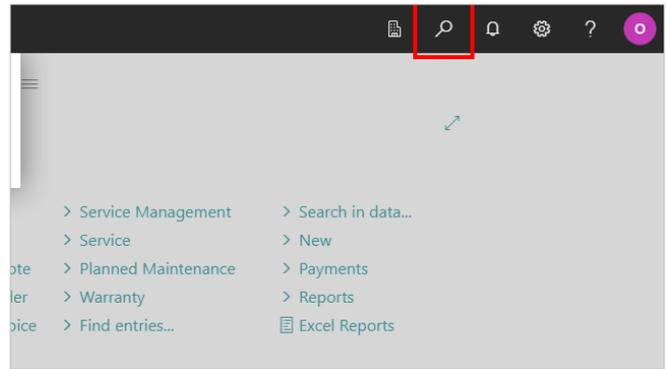
The Apply Maintenance Expense feature allows you to post service costs back to a fixed asset or item that has been linked to a service unit. Apply Maintenance Expense can be used from both Service Tickets and Planned Maintenance Tickets.

The following demonstrates how to apply a maintenance expense from a Service Ticket. A similar process can be used to apply a maintenance expense from a Planned Maintenance Ticket.

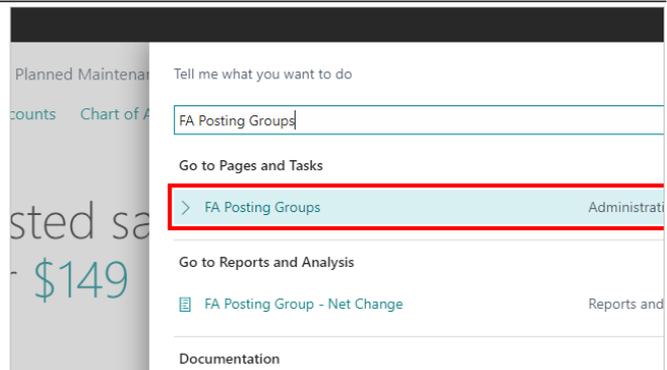
Click on the button **Search**



Enter the text **FA Posting Groups**.



Click on **FA Posting Groups Administration** □



Ensure that the Applied Maintenance Expense Account field is populated in the FA Posting Groups page.

10800	10800	10800		
10800	10800	10800		
10800	10800	10800		
10800	10800	10800		
10800	10800	10800		
10800	10800	10800		
10800	10800	10800	61200	
			61200	

Apply Maintenance Expense can be used with either Fixed Assets or Items .
If using items, they must have Serial Numbers set up.

Planning >

Item Tracking

Item Tracking Code: SNALL

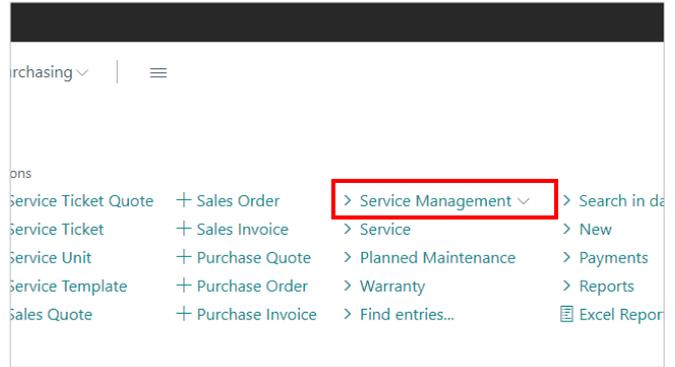
Serial Nos. SN1

Warehouse >

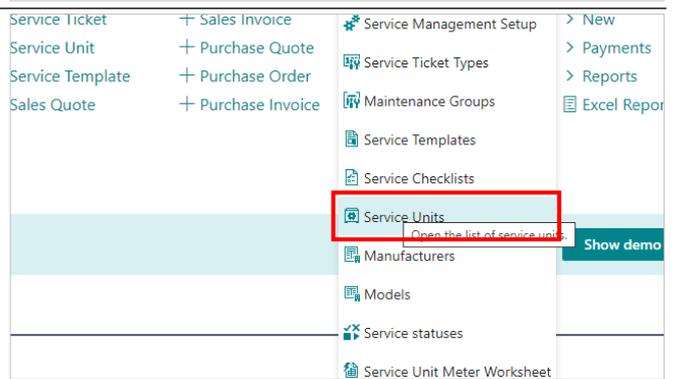
Service >

ODT Service Help

Click on the navigation menu item popup **Service Management**



Click on the navigation menu item **Open the list of service units.**



Click on the link in cell **Service Unit No.** with the value **SU00015**

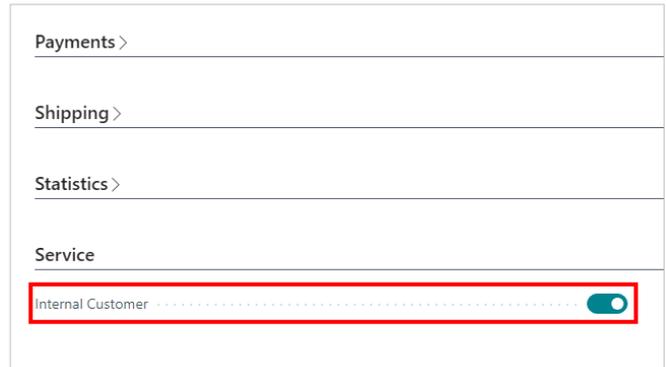
SU00007	2017 Bobcat S70 Skid-Steer ...		
SU00008	2017 Bobcat S450 Skid-Steer...		
SU00009	2018 Bobcat S70 Skid-Steer ...		
SU00010	2018 Bobcat S450 Skid-Steer...		
SU00011	Bobcat	Fixed Asset	FA000100
SU00015	Flatbed Truck	Fixed Asset	FA000110
SUT00002	Delivery truck		

Ensure that the Fixed Asset or Item is linked to a Service Unit

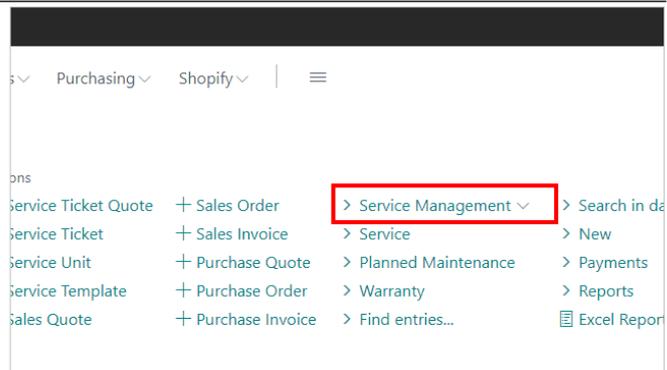
A screenshot of the 'General' tab in a service unit record. The 'Link Type' field is highlighted with a red rectangular box and is set to 'Fixed Asset'. Other fields include 'Service Unit No.' (SU00015), 'Description' (Flatbed Truck), 'Serial No.', and 'No.' (FA000110). The 'Customer' section is partially visible at the bottom.

ODT Service Help

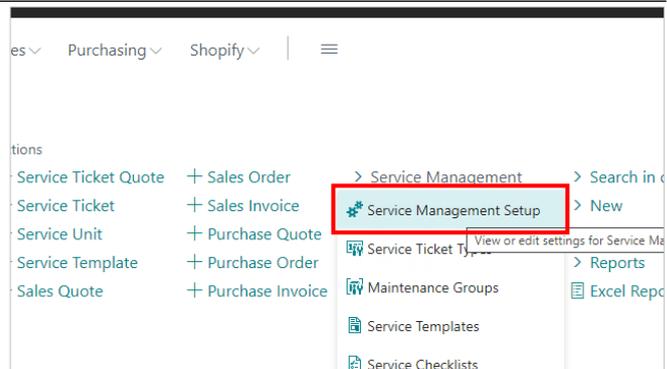
Apply Maintenance Expense will only work for Internal Customers



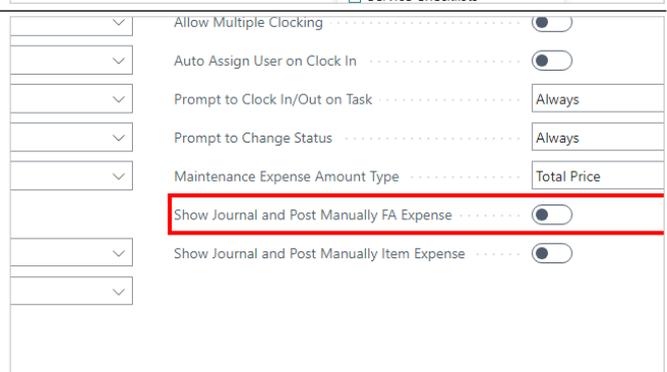
Click on the navigation menu item popup **Service Management**



Click on the navigation menu item **Service Management Setup**



Service Management Setup contains to toggle between manually or automatically posting maintenance expense for fixed assets and items.





ODT Service Help

The automatic or manual posting of Items and Fixed Assets can be toggled separately.

▼	Auto Assign User on Clock In	<input checked="" type="checkbox"/>
▼	Prompt to Clock In/Out on Task	Always
▼	Prompt to Change Status	Always
▼	Maintenance Expense Amount Type	Total Price
	Show Journal and Post Manually FA Expense	<input type="checkbox"/>
▼	Show Journal and Post Manually Item Expense	<input checked="" type="checkbox"/>
▼		
▼	Calendar to Use	STANDARD

Click on **Maintenance Expense Amount Type Total Cost Total Price**

▼	Show Completed Task Queue	<input type="checkbox"/>
▼	Allow Multiple Clocking	<input checked="" type="checkbox"/>
▼	Auto Assign User on Clock In	<input checked="" type="checkbox"/>
▼	Prompt to Clock In/Out on Task	Always
▼	Prompt to Change Status	Always
▼	Maintenance Expense Amount Type	Total Price
▼	Show Journal and Post Manually FA Expense	<input type="checkbox"/>
▼	Show Journal and Post Manually Item Expense	<input checked="" type="checkbox"/>
▼		

Click on the field **Maintenance Expense Amount Type**

	<input type="checkbox"/>
	<input checked="" type="checkbox"/>
	<input type="checkbox"/>
	Always
	Always
Type	Total Price
ly FA Expense	<input type="checkbox"/>
ly Item Expense	<input checked="" type="checkbox"/>

Click on the item **Total Price** in the list

	<input type="checkbox"/>
	<input checked="" type="checkbox"/>
	Always
	Always
Type	Total Price
ly FA Expense	Total Cost
ly Item Expense	Total Price
	Total Price

3.7.2. How to process Apply Maintenance Expense

To apply a maintenance expense, first create a Service Ticket or Planned Maintenance Ticket using the Service Unit that has a Fixed Asset linked to it. You must also select a customer that has Internal Customer enabled in the customer card

Click on the lookup button **Default Service Unit No.**

Click on the link in cell **Service Unit No.** with the value **SU00015**

Service Unit No.	Description
SU00005	2015 Ford F150
SU00006	2016 Ford F150
SU00007	2017 Bobcat S70 Skid-Steer ..
SU00008	2017 Bobcat S450 Skid-Steer..
SU00009	2018 Bobcat S70 Skid-Steer ..
SU00010	2018 Bobcat S450 Skid-Steer..
SU00011	Bobcat
SU00015	Flatbed Truck
SUT00002	Delivery truck

After creating the ticket, the Apply Maintenance Expense toggle must be enabled
Click on the toggle field **Apply Maintenance Expense**

ODT Service Help

Click on the navigation menu item popup **Manage**

Service Date 4/11/2022
 Contact Robert Townes
 Service Ticket Type
 Default Service Unit No. SU00015

Ticket Units/Lines | **Manage** | Line | Fewer options

New Line Delete Line Add Service Template Service Unit Me

Heading	SU00015	Flatbed Truck

Click on the navigation menu item **Add Service Template**

Contact Robert Townes
 Service Ticket Type
 Default Service Unit No. SU00015

Ticket Units/Lines | Manage | Line | Fewer options

New Line Delete Line **Add Service Template** Service Unit Me

Heading	SU00015	Flatbed Truck

Click on the link in cell **Template No.** with the value **OILCHANGE-LT**

Service Templates | New ...

Template No.	Template Type	Description
→ 20KSERVICE	All	20,000 KM Se
40KSERVICE	All	40,000 KM Se
50POINTINS...	All	50 point insp
OILCHANGE...	All	Oil Change
REPLACEAIR...	All	Replace Air Fi
ROTATETIRES	All	Rotate Tires

The Apply Maintenance Expense checkbox is used to specify which service templates will be applied as a maintenance expense

Total Price	Billable (Invoiced Price)	Service Status	Is War...	Apply Mai... Exp...
-	-		<input type="checkbox"/>	<input type="checkbox"/>
13.25	-	PENDING	<input type="checkbox"/>	<input type="checkbox"/>

Click on **Apply Maintenance Expense**

Total Price)	Billable (Invoiced Price)	Service Status	Is War...	Apply Mai... Exp...
-	-		<input type="checkbox"/>	<input type="checkbox"/>
13.25	-	PENDING	<input type="checkbox"/>	<input type="checkbox"/>

Click on the navigation menu item **Home**

Dynamics 365 Business Central

Service Ticket

ST00015 · Service Ticket #ST00015 - Adatum Corporation

Home Report Ticket Actions Automate Fewer options

Dimensions Statistics Ledger Entries Sales Invoices/Credit Memos

General

Customer Name Adatum Corporation

Description Service Ticket #ST00015 - Adatum Corporation

Before applying the maintenance expense, Confirm Actuals must be ran.

Click on the navigation menu item **Confirm Actuals**

Dynamics 365 Business Central

Service Ticket

ST00015 · Service Ticket #ST00015 - Adatum Corporation

Home Report Ticket Actions Automate Fewer options

Add Service Template **Confirm Actuals** View Job Journal Create

General

Customer Name Adatum Corporation

Description Service Ticket #ST00015 - Adatum Corporation

Click on the navigation menu item **Post**

Service Ticket #ST00015

Ticket Actions Automate

template Confirm Actuals View Job Journal

Adatum Corporation

Service Ticket #ST00015

4/11/2022

4/11/2022

Edit - Job Journals - KYLE · ODT\KYLE

Batch Name

Manage Home Prepare Line

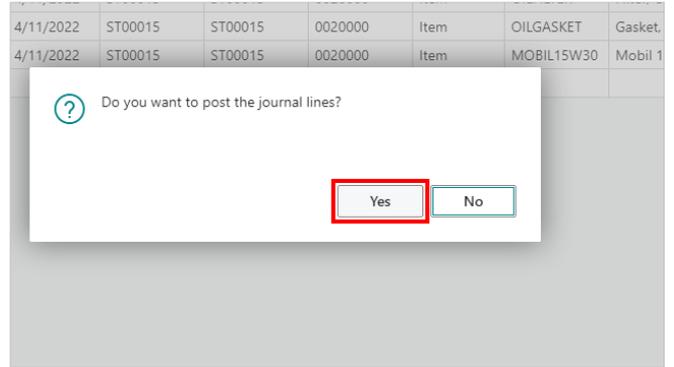
Post Reconcile

Finalize the document or journal by posting the a

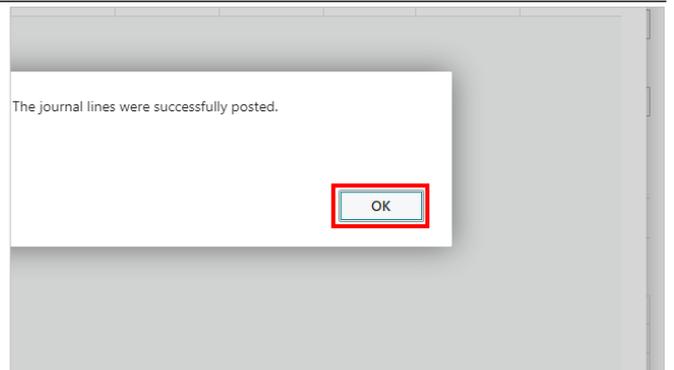
Line Type	Posting Date	Document No.
→ Both Bud	4/11/2022	ST00015
Both Budg...	4/11/2022	ST00015

ODT Service Help

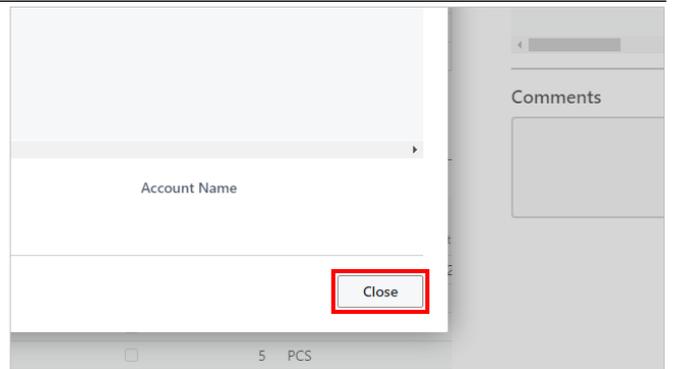
Click on the button **Yes**



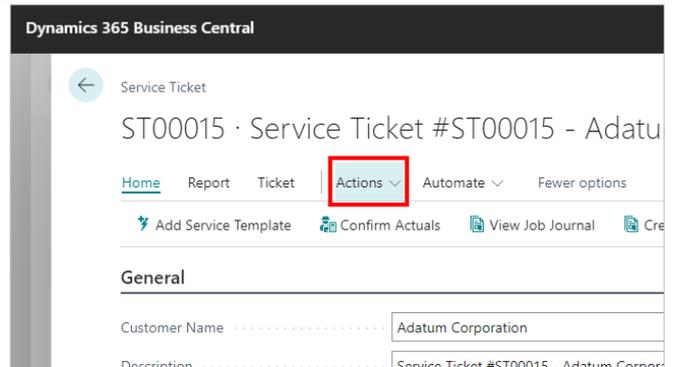
Click on the button **OK**



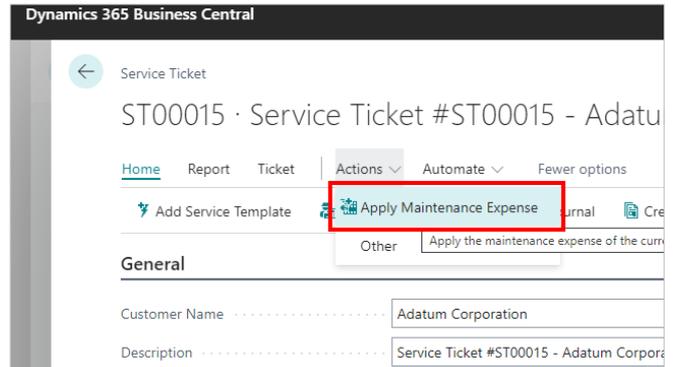
Click on the button **Close**



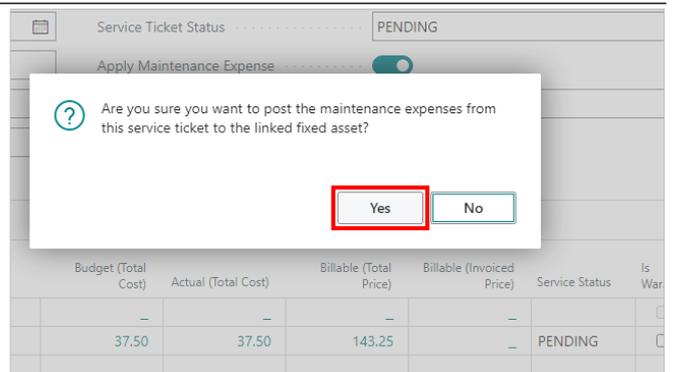
Now that Confirm Actuals has been ran, the Apply Maintenance Expense action can be ran
Click on the navigation menu item popup **Actions**



Click on the navigation menu item **Apply Maintenance Expense**

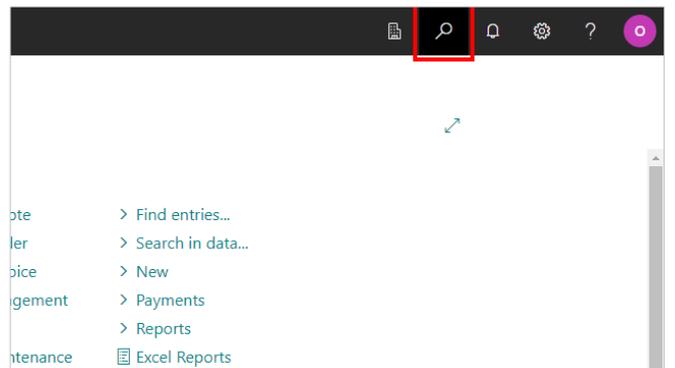


Click on the button **Yes**

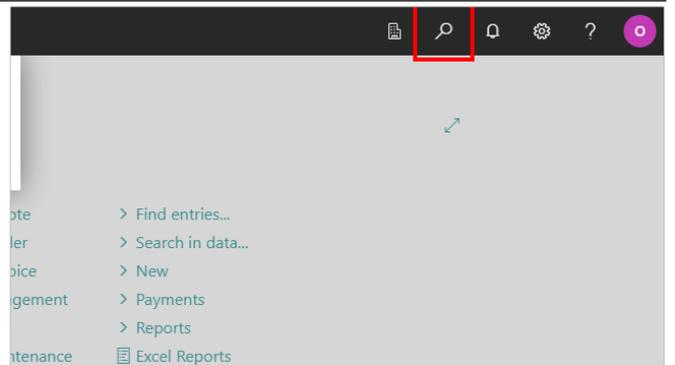


Now that the maintenance has been applied, we can view it from the Fixed Asset card.

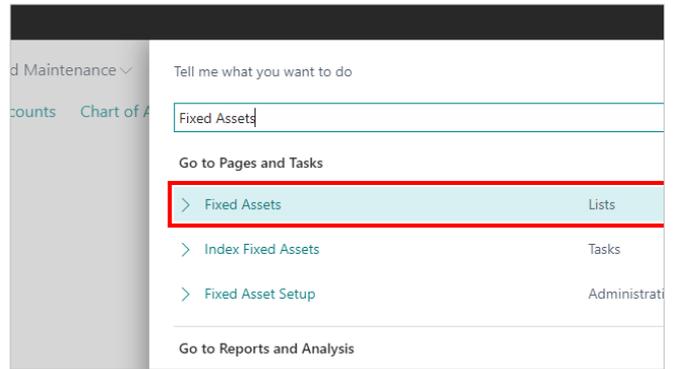
Click on the button **Search**



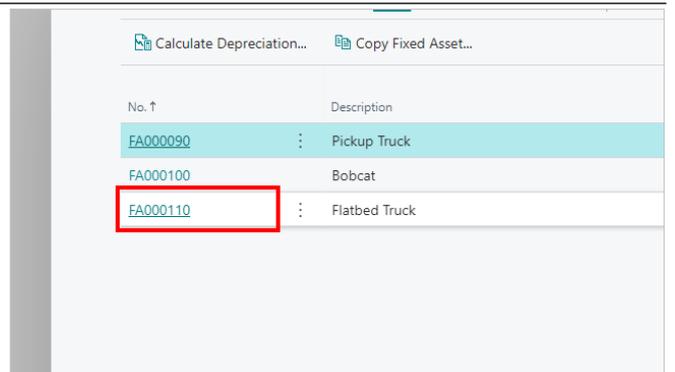
Enter the text **Fixed Assets**.



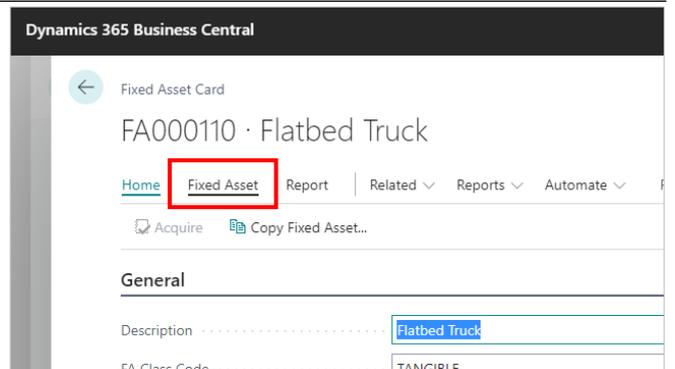
Click on **Fixed Assets Lists** □



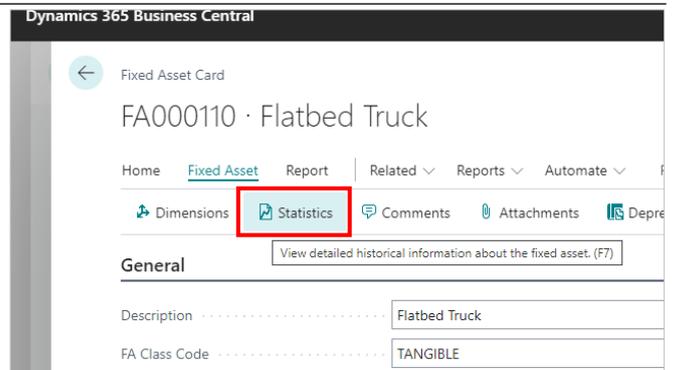
Click on the link in cell **No.** with the value **FA000110**



Click on the navigation menu item **Fixed Asset**



Click on the navigation menu item **Statistics**





ODT Service Help

Notice that some of the amounts have now been updated.

	0.00
	0.00
	0.00
Last FA Posting Date	Amount
4/11/2022	1,037.50
	0.00
	0.00
	0.00
	0.00

Click on **Amount**

	0.00
	0.00
	0.00
Last FA Posting Date	Amount
4/11/2022	1,037.50
	0.00
	0.00
	0.00
	0.00

Open details for

Notice that a new FA Ledger Entry has been added.

FA Posting Date	Document Type	Document No.	FA No.	Depreciation Book Code
4/11/2022	Invoice	G05003	FA000110	COMPANY
4/11/2022	Invoice	G05004	FA000110	COMPANY

Drilling own into the entry can provide more details about the entry.

Click on the navigation menu item **Find entries...**

Dynamics 365 Business Central

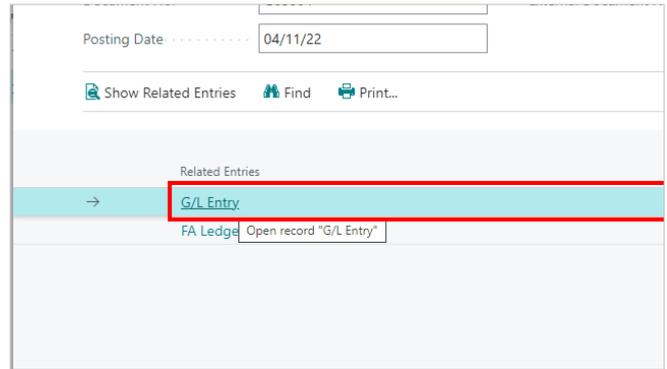
FA000110 - Flatbed Truck

FA Ledger Entries | Search | **Find entries...** | Cancel Entries... | Refresh

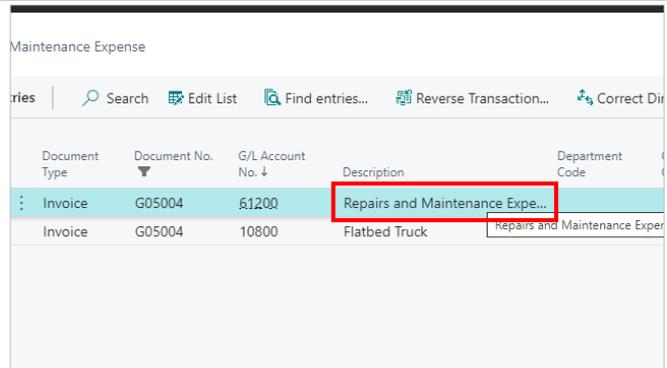
Find entries and documents that exist for this asset (Ctrl+Alt+Q)

FA Posting Date	Document Type	Document No.	FA No.	Book Code	Ca
4/11/2022	Invoice	G05003	FA000110	COMPANY	
4/11/2022	Invoice	G05004	FA000110	COMPANY	

Click on the link in cell **Related Entries** with the value **G/L Entry**



From here we can view details about where the entry came from.



If you applied a maintenance expense to an item, this can be viewed using the revaluation journal.

Item Code	Quantity	Amount	Unit Cost (Calculated)	Inventory Value (Calculated)	Unit (Reva)
	1	0.00	85.00	85.00	8
	1	0.00	10.00	10.00	1
	1	0.00	10.00	10.00	1
	1	0.00	10.00	10.00	1
	1	0.00	10.00	10.00	1

3.8. Visual Resource Scheduler

The Visual Resource Scheduler allows you to view a list of service tasks and tickets, and assign them to technicians using a drag and drop interface.

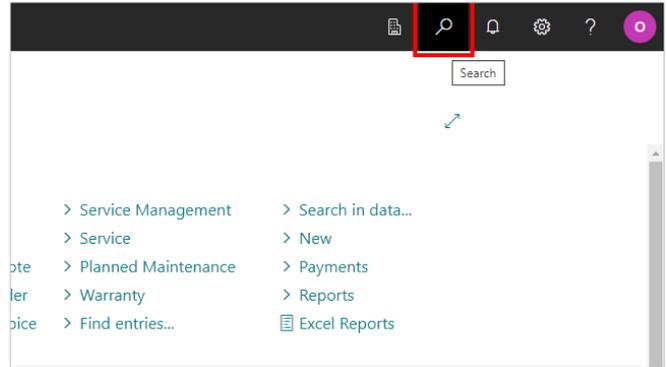
The following demonstrates how to set up and use the Visual Resource Scheduler.

3.8.1. How to set up the Visual Resource Scheduler

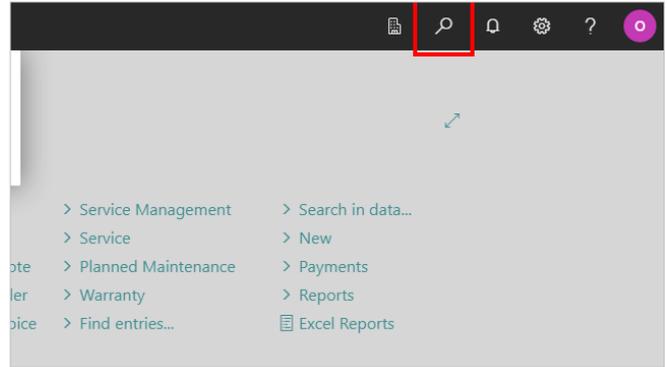
To use the Visual Resource Scheduler, you must have a Base Calendar set up

ODT Service Help

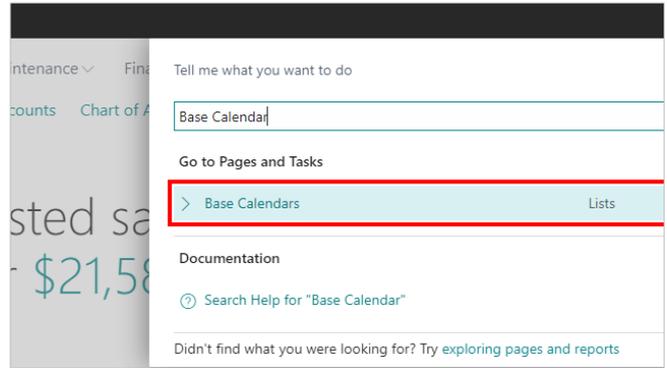
Click on the button **Search**



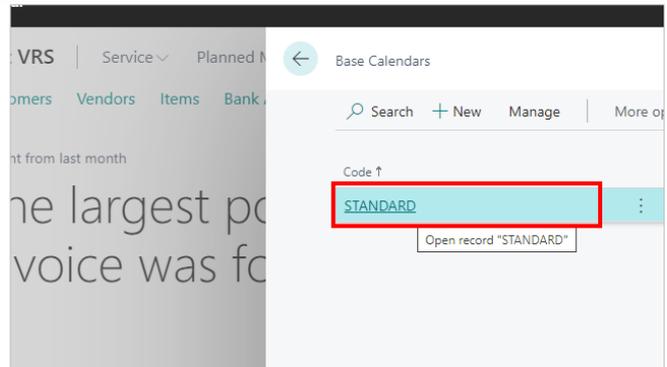
Enter the text **Base Calendar**.



Click on **Base Calendars Lists**



Click on **Code**

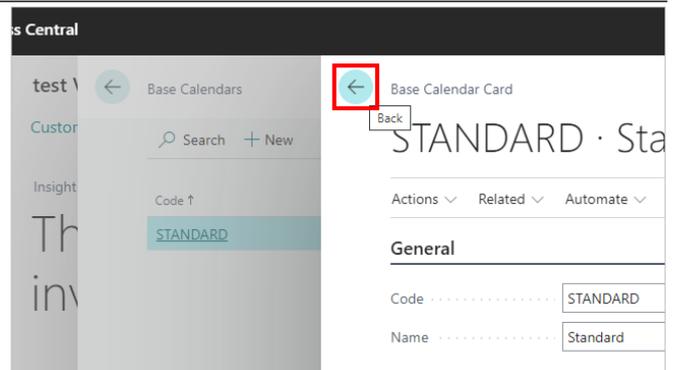


ODT Service Help

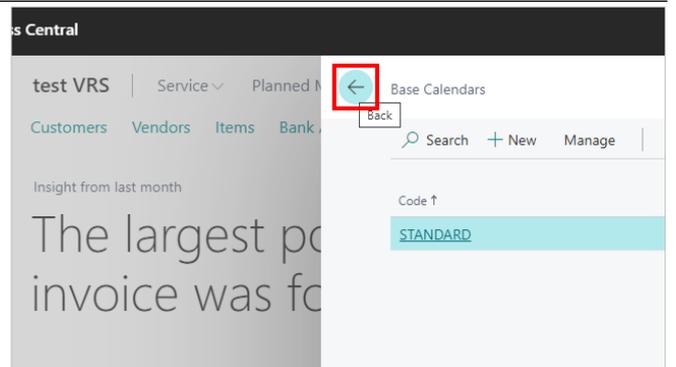
The dates in the Visual Resource Scheduler will display according to what is specified in the Base Calendar.

Date ↑	Day ↑	No
→ 4/10/2023	Monday	
4/11/2023	Tuesday	
4/12/2023	Wednesday	
4/13/2023	Thursday	
4/14/2023	Friday	
4/15/2023	Saturday	
4/16/2023	Sunday	
4/17/2023	Monday	
4/18/2023	Tuesday	
4/19/2023	Wednesday	

Click on the back button

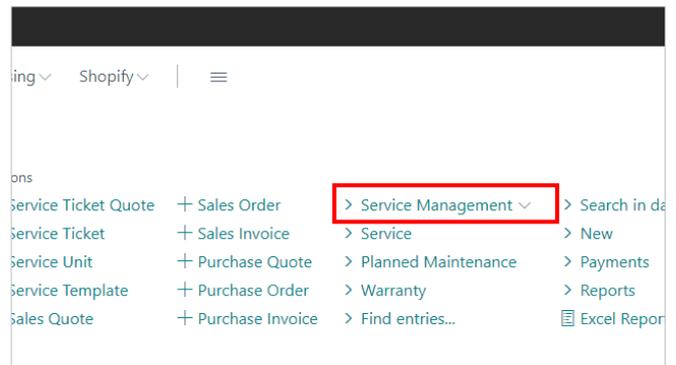


Click on the back button



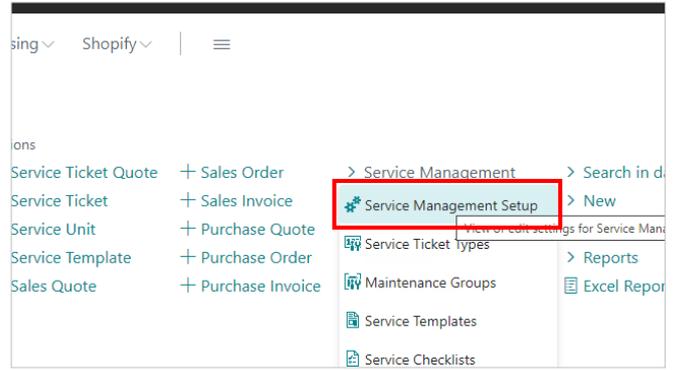
There are some additional settings that can be configured in Service Management Setup.

Click on the navigation menu item popup **Service Management**

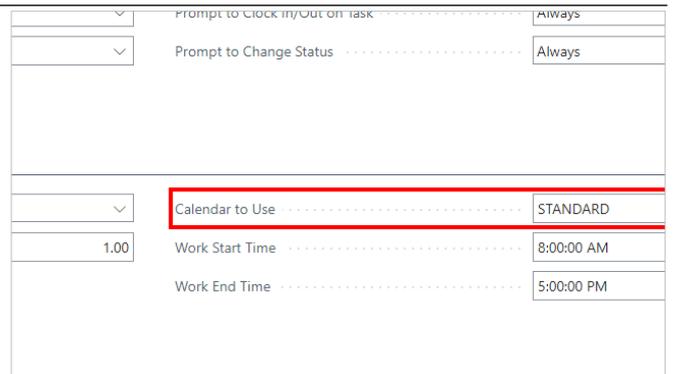


ODT Service Help

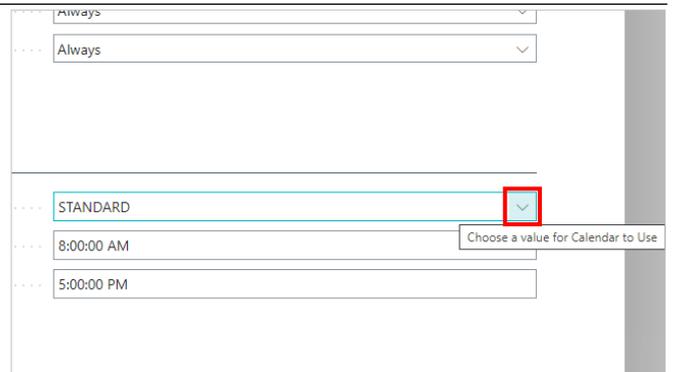
Click on the navigation menu item **Service Management Setup**



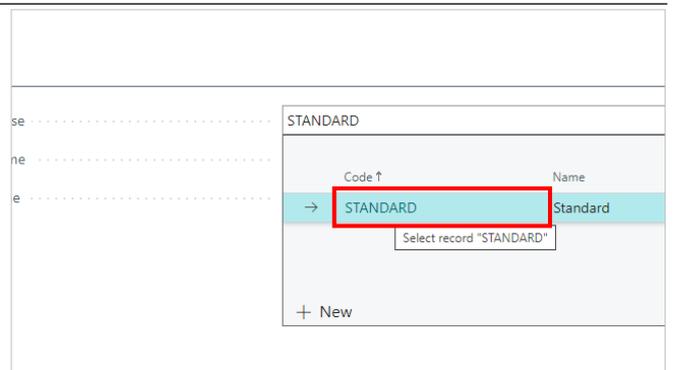
The Calendar To Use field specifies that Base Calendar that will be used when displaying the Visual Resource Scheduler.



Click on the lookup button **Calendar to Use**

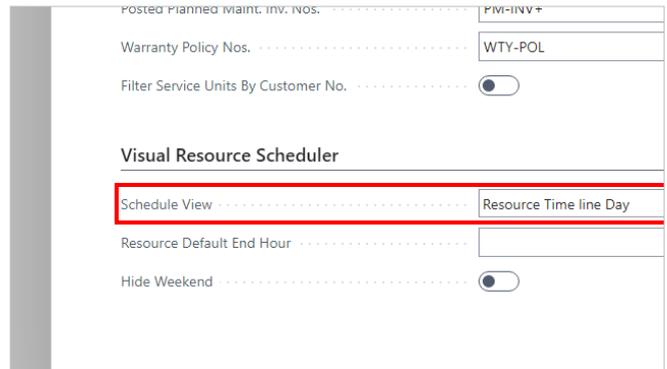


Click on STANDARD



ODT Service Help

The Schedule View field specifies how the Visual Resource Scheduler is displayed. By default it will be displayed in Day view, but you can also change it to display in Week or Month view.



Posted Planned Maint. Inv. Nos. PMI-INV #

Warranty Policy Nos. WTY-POL

Filter Service Units By Customer No.

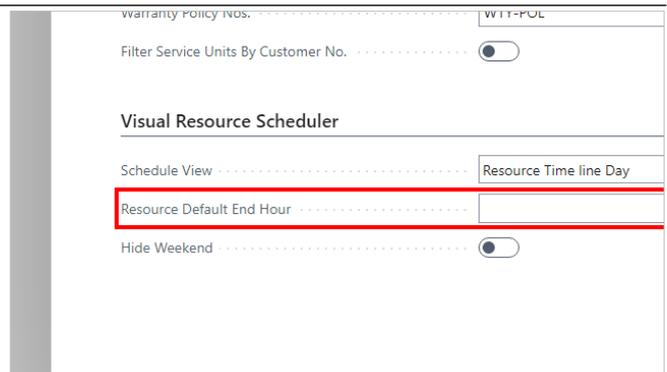
Visual Resource Scheduler

Schedule View Resource Time line Day

Resource Default End Hour

Hide Weekend

The Resource Default End Hour field specifies the default time that will be scheduled when a resource is added to the schedule. The default time is set to 1 hour, but you can change this if needed.



warranty Policy Nos. WTY-POL

Filter Service Units By Customer No.

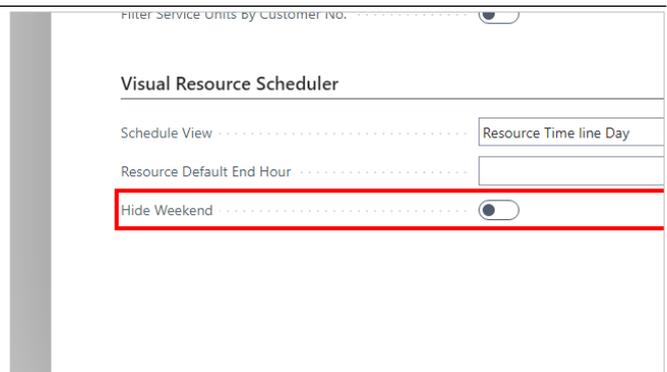
Visual Resource Scheduler

Schedule View Resource Time line Day

Resource Default End Hour

Hide Weekend

The Hide Weekend field will toggle if weekends are displayed on the Visual Resource Scheduler



Filter Service Units by Customer No.

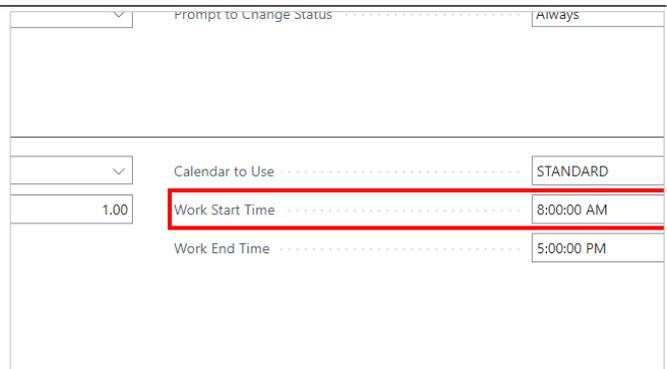
Visual Resource Scheduler

Schedule View Resource Time line Day

Resource Default End Hour

Hide Weekend

Work Start Time specifies what time the work day starts on the Visual Resource Scheduler.



▼ Prompt to Change Status Always

▼ Calendar to Use STANDARD

1.00 Work Start Time 8:00:00 AM

Work End Time 5:00:00 PM

ODT Service Help

Work End Time specifies what time the work ends starts on the Visual Resource Scheduler.

A screenshot of a web form. The 'Work End Time' field is highlighted with a red border. Other fields include 'Calendar to Use' (STANDARD), 'Work Start Time' (8:00:00 AM), and '1.00' in a dropdown menu.

Default List specifies how service tickets and tasks are displayed. The Tickets/Tasks option will display all service tickets and tasks, while the Ticket option will only display a list of service tickets

A screenshot of a web form. The 'Default List' dropdown menu is highlighted with a red border and shows 'Tickets/Tasks' selected. Other fields include 'Work Start Time' (8:00:00 AM), 'Work End Time' (5:00:00 PM), and a 'Create Labor Line' toggle switch.

Click on the back button

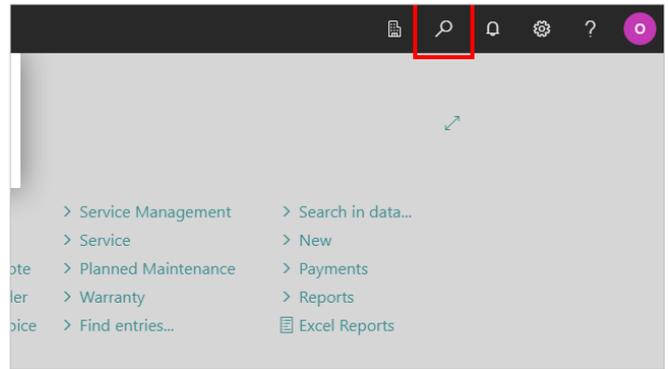
A screenshot of the Dynamics 365 Business Central 'Service Management Setup' page. A back button (left arrow) is highlighted with a red border. The page title is 'Service Management Setup' and it shows various configuration options under the 'General' section.

Next, you must configure the resources that will appear in the Visual Resource Scheduler.

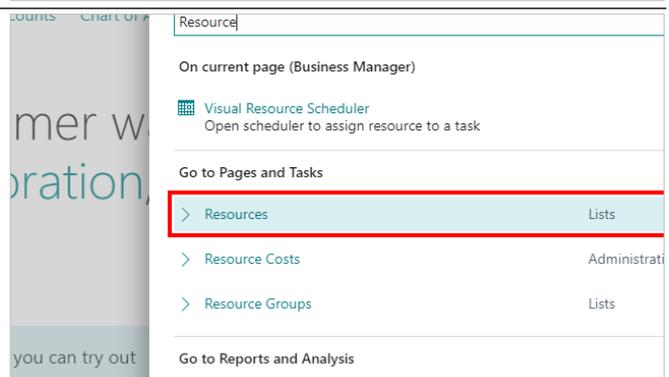
Click on the button **Search**

A screenshot of the Dynamics 365 Business Central search bar. The search icon (magnifying glass) is highlighted with a red border. Below the search bar, a list of search results is visible, including 'Service Management', 'Service', 'Planned Maintenance', 'Warranty', 'Find entries...', 'Search in data...', 'New', 'Payments', 'Reports', and 'Excel Reports'.

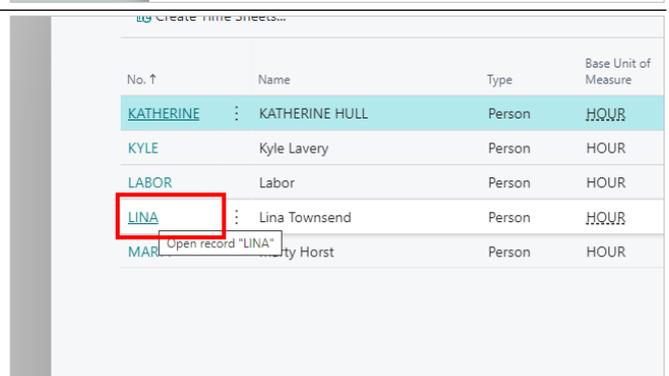
Enter the text **Resource**.



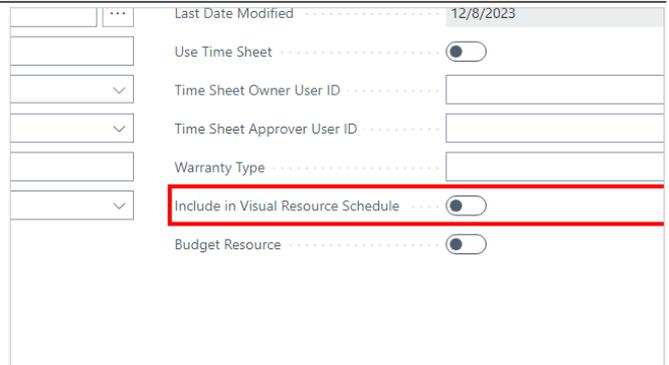
Click on **Resources Lists**



Click on **No.**



The Include In Visual Resource Scheduler option will toggle which resources will appear in the scheduler



Click on the toggle field **Include in Visual Resource Schedule**

Settings form with the following fields:

- Last Date Modified: 12/0/2023
- Use Time Sheet:
- Time Sheet Owner User ID:
- Time Sheet Approver User ID:
- Warranty Type:
- Include in Visual Resource Schedule: (highlighted in red)
- Budget Resource:

Resources displayed in the visual scheduler will be sorted based on there Resource Group.

Resource details form with the following fields:

- No.: LINA
- Name: Lina Townsend
- Type: Person
- Base Unit of Measure: HOUR
- Search Name: LINA TOWNSEND
- Resource Group No.: TEAM 2 (highlighted in red)
- Blocked:

3.8.2. How to use the Visual Resource Scheduler

Click on the button **Search**

Mobile app interface showing a search bar and a list of menu items:

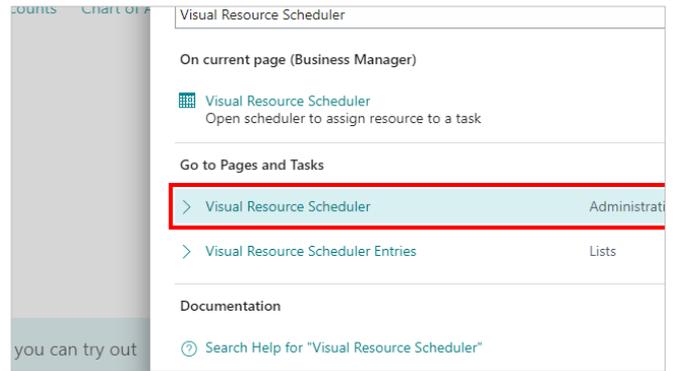
- Find entries...
- Search in data...
- New
- Payments
- Reports
- Excel Reports

Enter the text **Visual Resource Scheduler**.

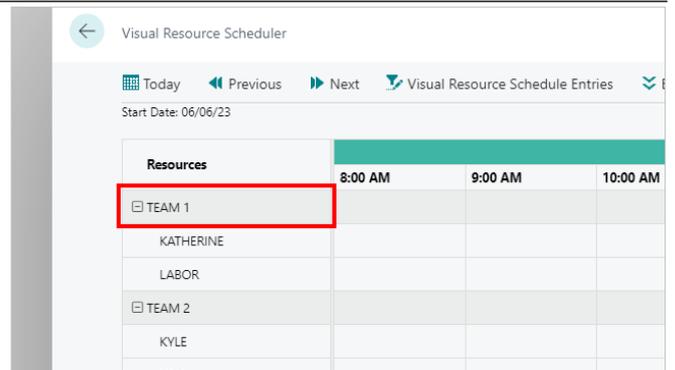
Mobile app interface showing the search bar with the text "Visual Resource Scheduler" entered. The search bar is highlighted in red.

ODT Service Help

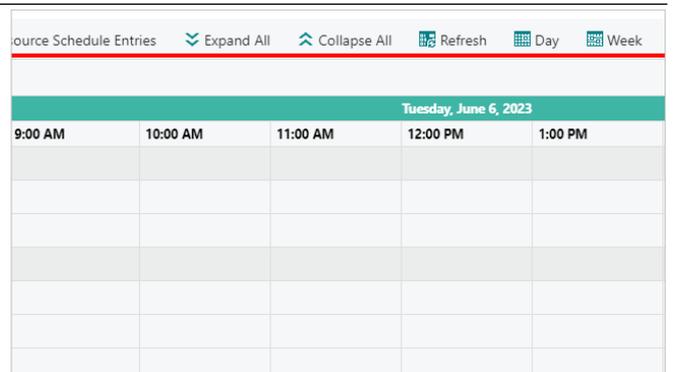
Click on **Visual Resource Scheduler Administration**



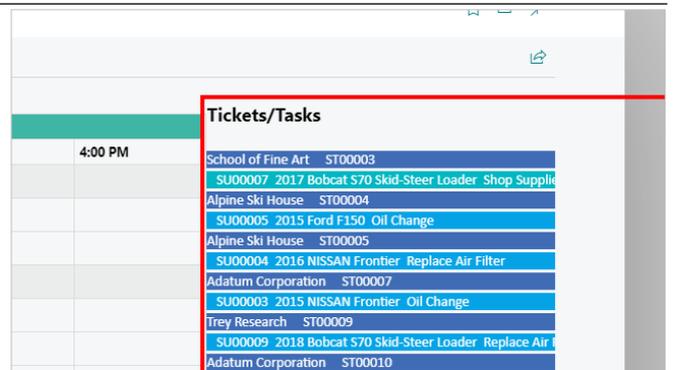
On the left side of the screen is a list of the resources that were configured to display on the visual scheduler, sorted by Resource Group



The center of the screen displays the days and times that can be scheduled.



The right side of screen shows a list of Service Tickets and Tasks. Dark blue represents a Service Ticket, light blue represents a Service Task, and green represents a task that has already been scheduled.



To assign a ticket or task, click and drag an item from the list on the right, to the schedule in the center.

ODT Service Help

Click and hold the left mouse button on **Adatum Corporation ST00017**

SU00009	2018 Bobcat S70 Skid-Steer Loader	Replace Air
Adatum Corporation	ST00010	
SU00006	2016 Ford F150	Oil Change
Trey Research	ST00011	
SU00008	2017 Bobcat S450 Skid-Steer Loader	Oil Change
Trey Research	ST00012	
SU00005	2015 Ford F150	Oil Change
Alpine Ski House	ST00014	
SU00005	2015 Ford F150	Rotate Tires
Adatum Corporation	ST00017	
SU00005	2015 Ford F150	Labor - Lube
SU00005	2015 Ford F150	Oil Change
SU00005	2015 Ford F150	Rotate Tires
SU00005	2015 Ford F150	50 point inspection

Release the left mouse button on the link **Adatum Corporation ST00017**

Day Week Month

June 7, 2023

1:00 PM	2:00 PM	3:00 PM	4:00 PM	Tickets
		Adatum Corporation	SI	School of F SU00007 Alpine Ski SU00005 Alpine Ski SU00004 Adatum Co SU00003 Trey Resea SU00009 Adatum Co

Notice that all tasks that were part of the ticket have now been assigned to the resource

June 7, 2023

1:00 PM	2:00 PM	3:00 PM	4:00 PM	Tickets
		SU00005 2015 Ford F150 SU00005 2015 Ford F150 SU00005 2015 Ford F150 SU00005 2015 Ford F150		School of F SU00007 Alpine Ski SU00005 Alpine Ski SU00004 Adatum Co SU00003 Trey Resea SU00009 Adatum Co SU00006 Trey Resea SU00008

You can also assign tasks individually

Click and hold the left mouse button on **SU00003 2015 NISSAN Frontier Oil Change**

Tickets/Tasks

4:00 PM	Tickets/Tasks
	School of Fine Art ST00003
	SU00007 2017 Bobcat S70 Skid-Steer Loader Shop Suppl
5 Ford F150	Alpine Ski House ST00004
5 Ford F150	SU00005 2015 Ford F150 Oil Change
5 Ford F150	Alpine Ski House ST00005
5 Ford F150	SU00004 2016 NISSAN Frontier Replace Air Filter
	Adatum Corporation ST00007
	SU00003 2015 NISSAN Frontier Oil Change
	Trey Research ST00009
	SU00009 2018 Bobcat S70 Skid-Steer Loader Replace Air
	Adatum Corporation ST00010
	SU00006 2016 Ford F150 Oil Change
	Trey Research ST00011
	SU00008 2017 Bobcat S450 Skid-Steer Loader Oil Change
	Trey Research ST00012
	SU00005 2015 Ford F150 Oil Change

Release the left mouse button on the link **SU00003 2015 NISSAN Frontier Oil Change**

June 8, 2023					Tickets
1:00 PM	2:00 PM	3:00 PM	4:00 PM		
					School of F
					SU00007
					Alpine Ski I
					SU00005
					Alpine Ski I
					SU00004
					Adatum Co
					SU00003
					Trey Resea
					SU00009
					Adatum Co
					SU00006
					Trey Resea
					SU00008
					Trey Resea
					SU00005

When a task is assigned, the amount of time it is scheduled for is based on what was specified in Service Management Setup. If you wish to change the amount of time scheduled, you can click and drag from the edge of the task.

Click and hold the left mouse button on the link **SU00003 2015 NISSAN Frontier Oil Change ST00007 Status: Released**

June 8, 2023					Tickets
1:00 PM	2:00 PM	3:00 PM	4:00 PM		
					School of F
					SU00007
					Alpine Ski I
					SU00005
					Alpine Ski I
					SU00004
					Adatum Co
					SU00003
					Trey Resea
					SU00009
					Adatum Co
					SU00006
					Trey Resea
					SU00008
					Trey Resea
					SU00005

Service Unit: SU00003
 2015 NISSAN Frontier Task:
 Oil Change Ticket: ST00007
 Status: Released Start
 Date:06/08/23 Start Time:
 3:00:00 PM,End
 Date:06/08/23,End Time:
 4:00:00 PM

Release the left mouse button on the link **SU00003 2015 NISSAN Frontier Oil Change ST00007 Status: Released**

June 8, 2023					Tickets
1:00 PM	2:00 PM	3:00 PM	4:00 PM		
					School of F
					SU00007
					Alpine Ski I
					SU00005
					Alpine Ski I
					SU00004
					Adatum Co
					SU00003
					Trey Resea
					SU00009
					Adatum Co
					SU00006
					Trey Resea
					SU00008
					Trey Resea
					SU00005

Service Unit: SU00003
 2015 NISSAN Frontier Task:
 Oil Change Ticket: ST00007
 Status: Released Start
 Date:06/08/23 Start Time:
 3:00:00 PM,End
 Date:06/08/23,End Time:
 5:00:00 PM

The same task can be assigned to multiple technicians.

Click and hold the left mouse button on **SU00003 2015 NISSAN Frontier Oil Change**

Tickets/Tasks	
4:00 PM	School of Fine Art ST00003
	SU00007 2017 Bobcat S70 Skid-Steer Loader Shop Supplie
	Alpine Ski House ST00004
	SU00005 2015 Ford F150 Oil Change
	Alpine Ski House ST00005
	SU00004 2016 NISSAN Frontier Replace Air Filter
	Adatum Corporation ST00007
	SU00003 2015 NISSAN Frontier Oil Change
	Trey Research ST00009
	SU00009 2018 Bobcat S70 Skid-Steer Loader Replace Air
	Adatum Corporation ST00010
	SU00006 2016 Ford F150 Oil Change
	Trey Research ST00011
	SU00008 2017 Bobcat S450 Skid-Steer Loader Oil Change
	Trey Research ST00012
	SU00005 2015 Ford F150 Oil Change

Release the left mouse button on the link **SU00003 2015 NISSAN Frontier Oil Change**

Tasks on the scheduler will change color based on the current status of the task. For example, a task will be colored orange when it has a status of On Hold.

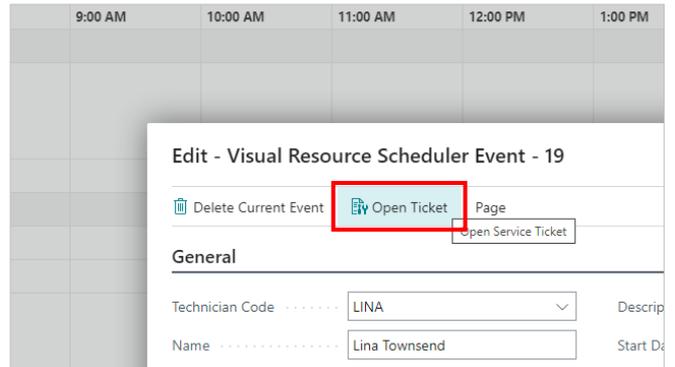
Double click on the link **SU00003 2015 NISSAN Frontier Oil Change ST00007 Status: Released**

Double clicking on a task will display more detailed information about the task.

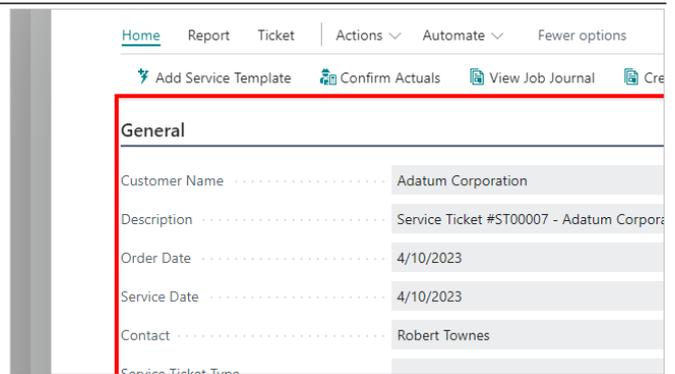


ODT Service Help

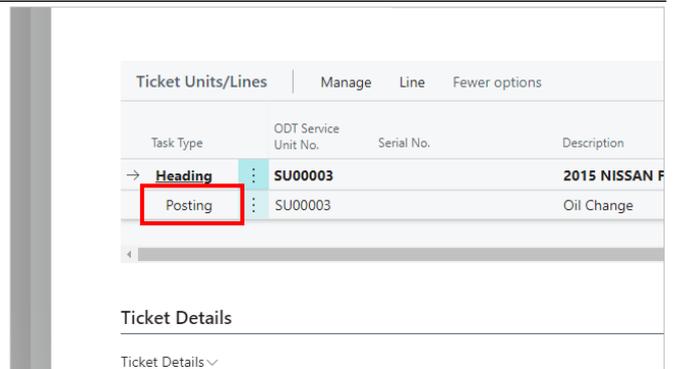
Click on the navigation menu item **Open Ticket**



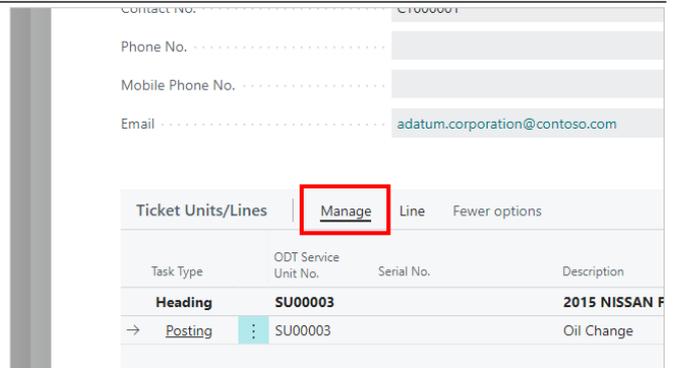
You can also open the ticket the task is part of to view information about it directly.



Click on **Task Type**

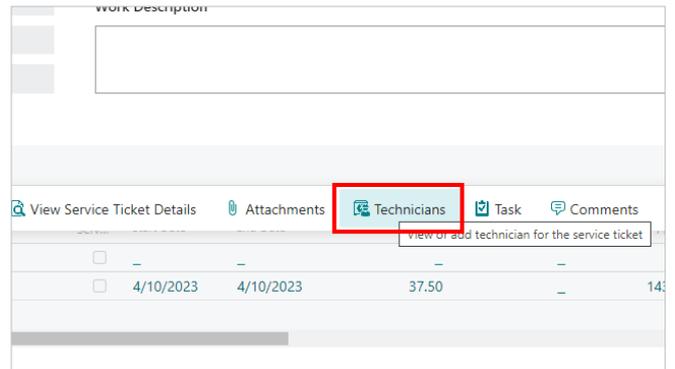


Click on the navigation menu item popup **Manage**

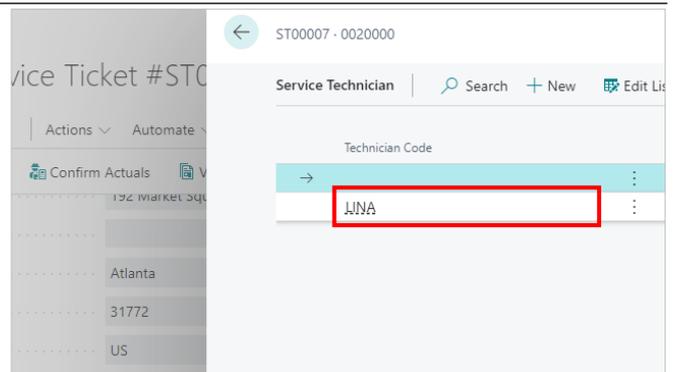


ODT Service Help

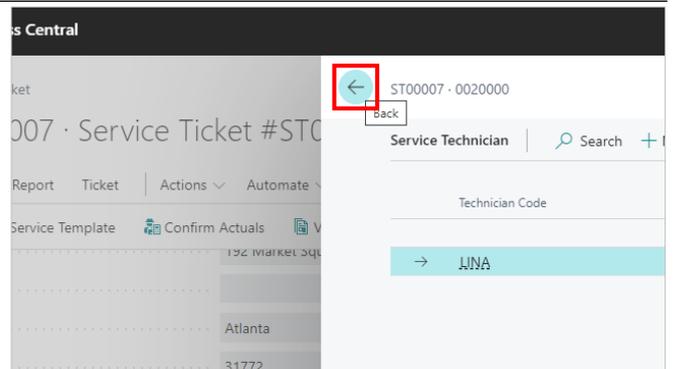
Click on the navigation menu item **Technicians**



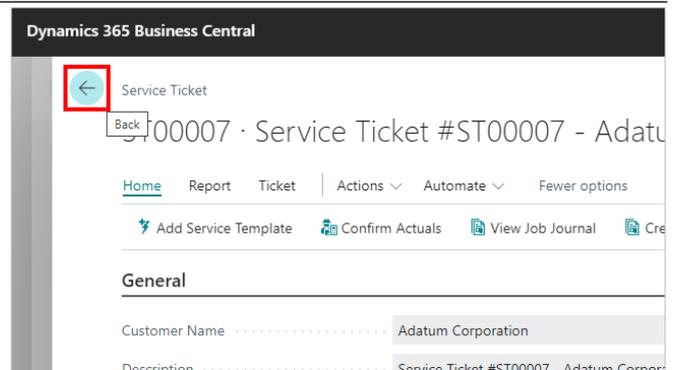
Notice that the Technician has automatically been assigned to the task.



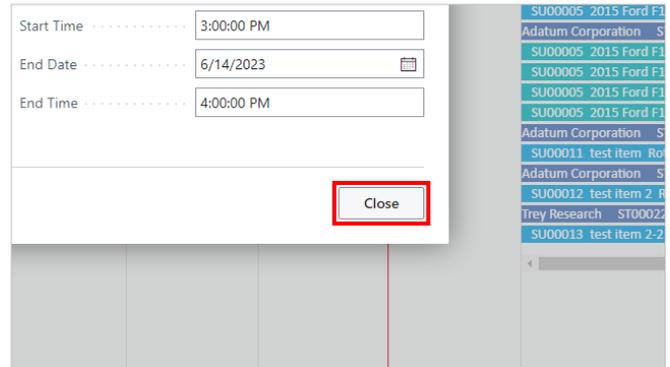
Click on the back button



Click on the back button



Click on the button **Close**

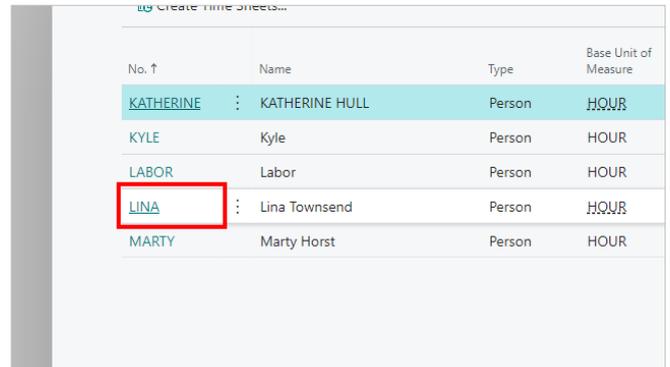


3.8.3. How to use Budget Resources

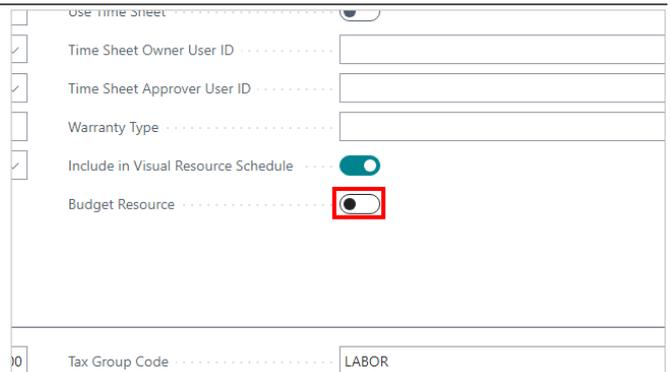
The Budget Resource toggle allows the Visual Scheduler to determine the time for a task based on the value that is specified on a Service Template that uses that resource.

Select the resource you would like to use as a Budget Resource

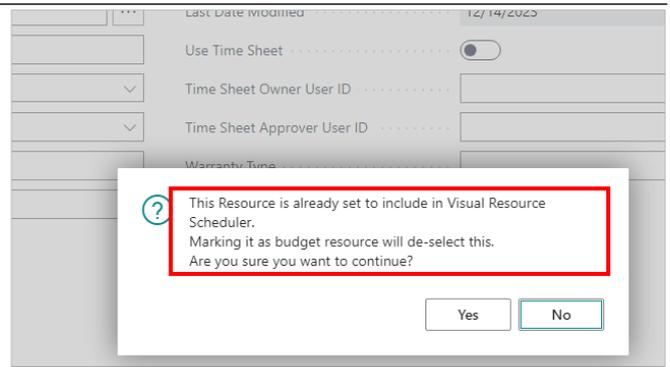
Click on the link in cell **No.** with the value **LINA**



Click on the toggle field **Budget Resource**

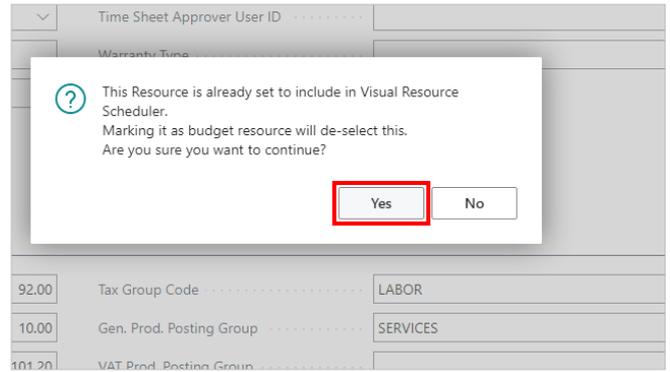


Note that the Budget Resource toggle cannot be enabled at the same time as the Include In Visual Resource Scheduler toggle.

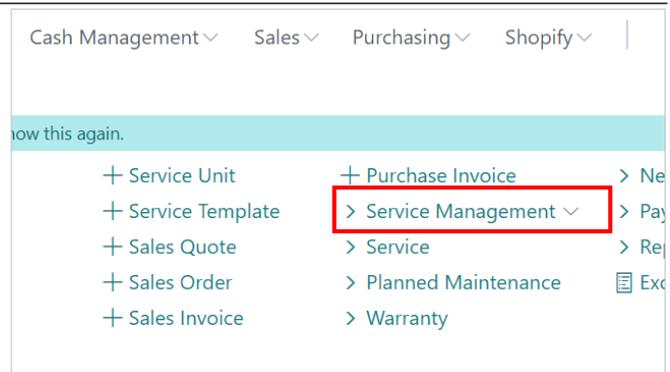


ODT Service Help

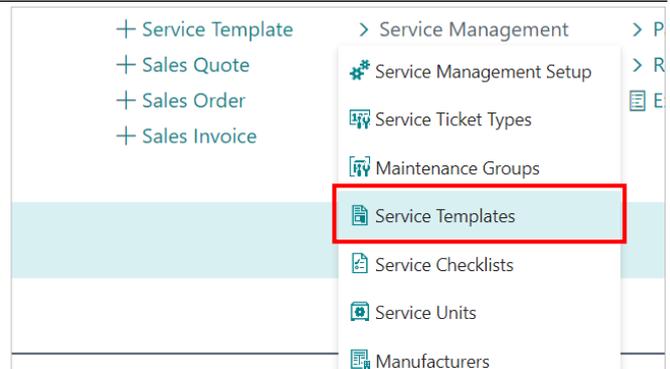
Click on the button **Yes**



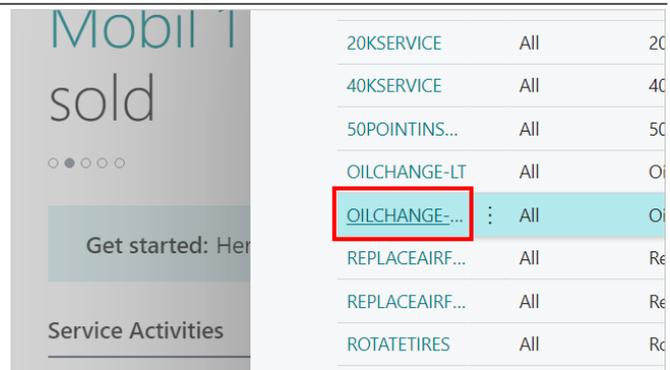
Click on the navigation menu item popup **Service Management**



Click on the navigation menu item **Service Templates**



Click on the link in cell **Template No.** with the value **OILCHANGE-SS**



ODT Service Help

Make sure that the Budget Resource has been added to the Service Template

Template Lines ➕ New Line ✖ Delete Line

Service Template No.	Type	No.	Description
→	Resource	LINA	Lina Townsend
	Item	OILFILTER	Filter, Oil
	Item	OILGASKET	Gasket, Oil
	Item	MOBIL15W30	Mobil 1 5W30

Enter the amount of time you would like to be displayed on the Visual Scheduler
Click on the cell **Quantity** with the value **1.00**

Ticket Detail Line Type	Warranty Type	Quantity	Unit Cost
Both Budg...	GENERAL	1.00	101.20
Both Budg...	GENERAL	1.00	3.50
Both Budg...	GENERAL	1.00	0.50
Both Budg...	GENERAL	6.00	2.25

Enter the text **3**.

Ticket Detail Line Type	Warranty Type	Quantity	Unit Cost
Both Budg...	GENERAL	1.00	101.20
Both Budg...	GENERAL	1.00	3.50
Both Budg...	GENERAL	1.00	0.50
Both Budg...	GENERAL	6.00	2.25

Click on the back button

Dynamics 365 Business Central

 Service Template

OILCHANGE-SS

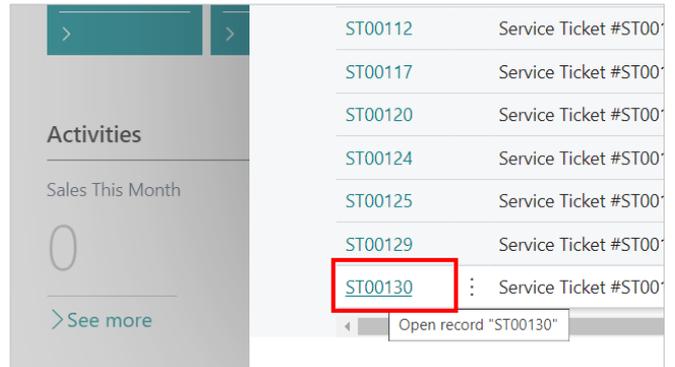
Related ▾ Automate ▾

General

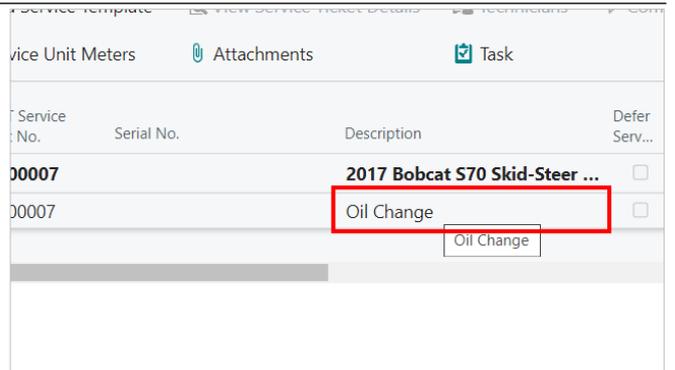
Template No. OILCHANGE-SS

ODT Service Help

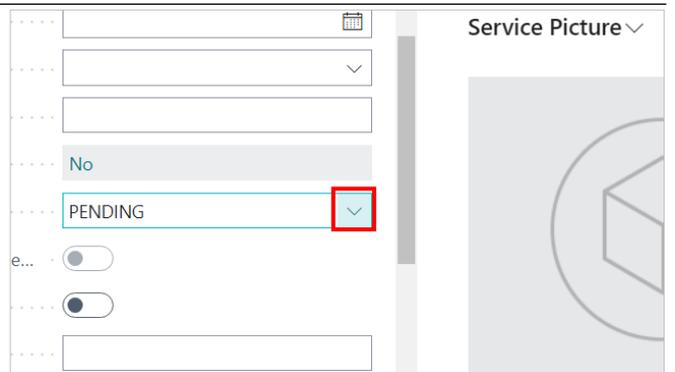
After the Service Template has been set up, create a new Service Ticket



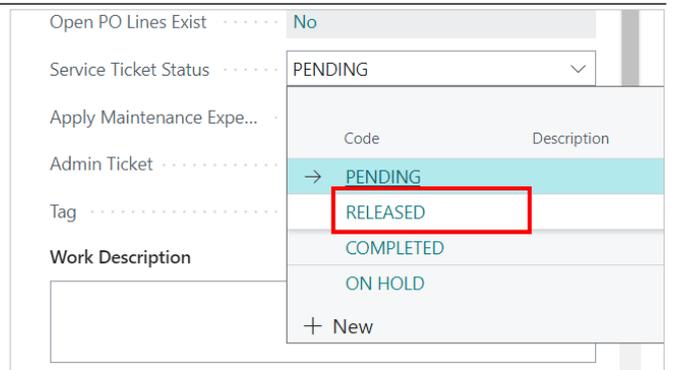
Add the Service Template to the ticket



Make sure that the ticket is set to a status of Released so it will display in the Visual Scheduler

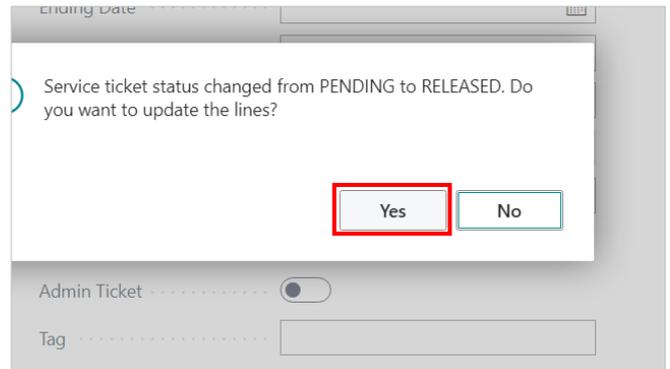


Click on the link in cell **Code** with the value **RELEASED**

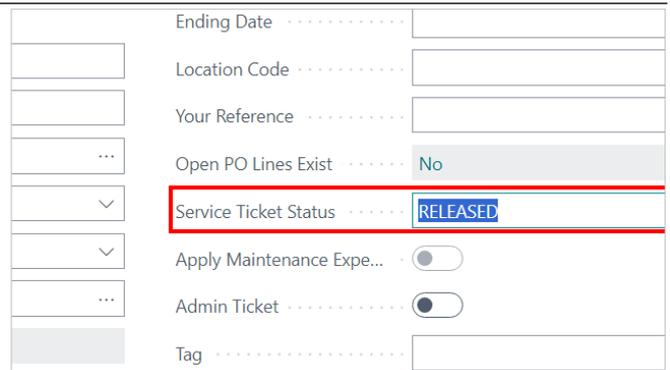


ODT Service Help

Click on the button **Yes**

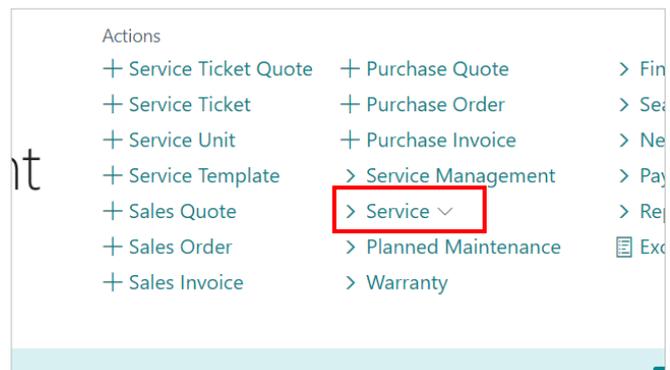


Click on **Service Ticket Status**

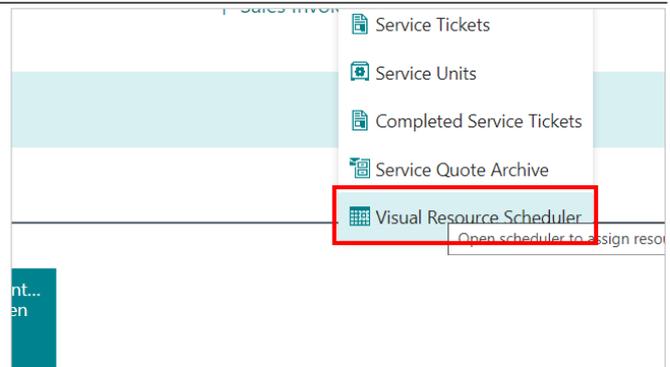


Once the ticket has finished being set up, open the Visual Resource Scheduler

Click on the navigation menu item popup **Service**

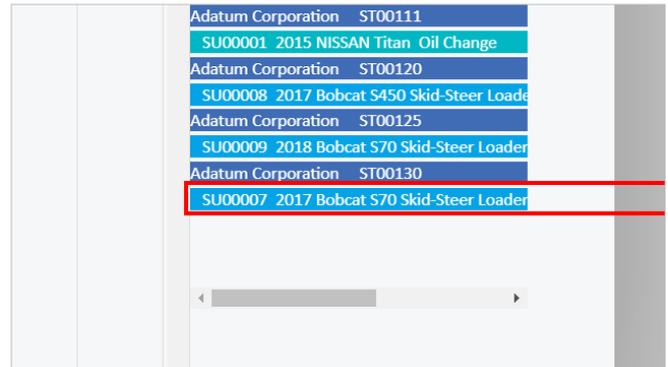


Click on the navigation menu item **Visual Resource Scheduler**

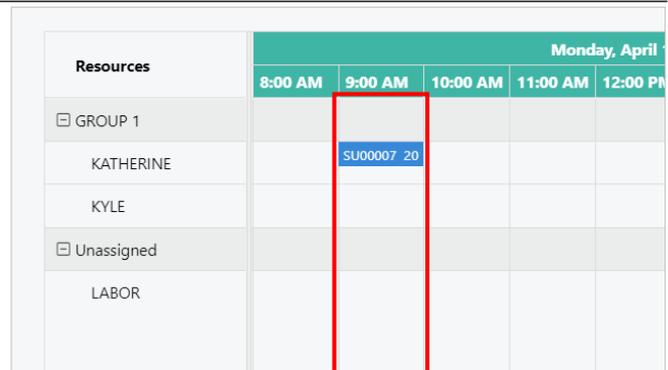


ODT Service Help

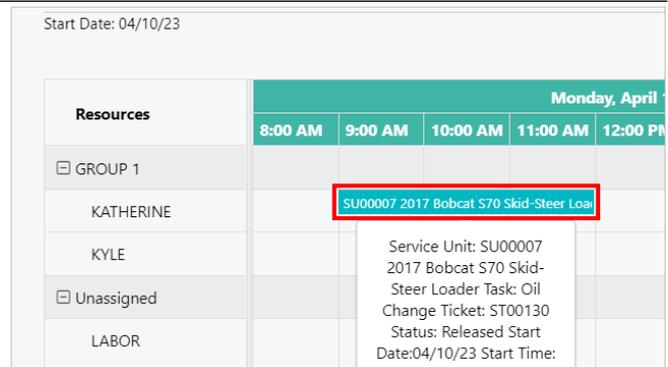
Click and Drag the task to assign it to a Resource



Release the left mouse button on



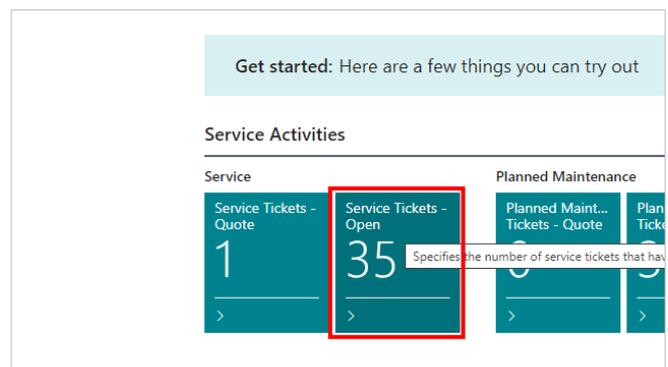
Notice that the task is automatically scheduled based on the amount of time that was specified on the Budget Resource used when creating the Service Template.



3.8.4. How to use Admin Tickets

Admin Tickets can be used to create events such as Sick or Vacation that can be assigned to resources on the Visual Resource Scheduler.

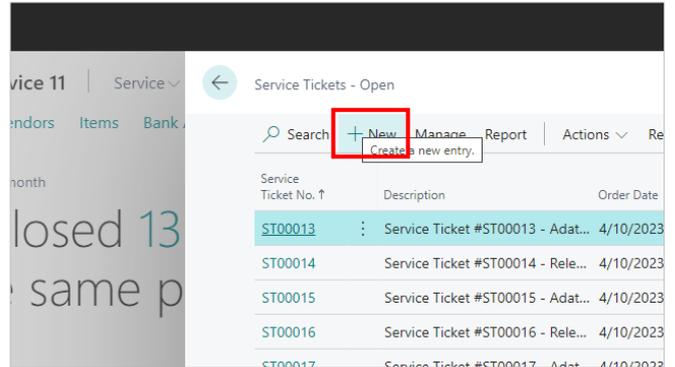
Click on the Service Tickets Cue



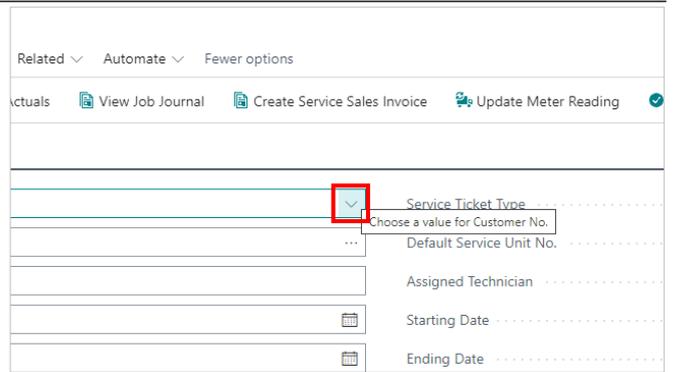
Start by creating a new service ticket

ODT Service Help

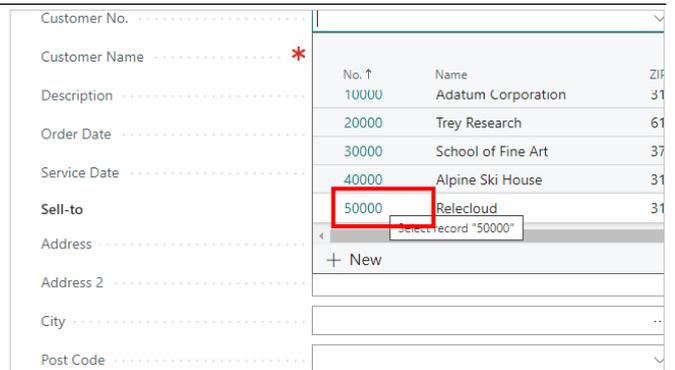
Click on the navigation menu item **New**



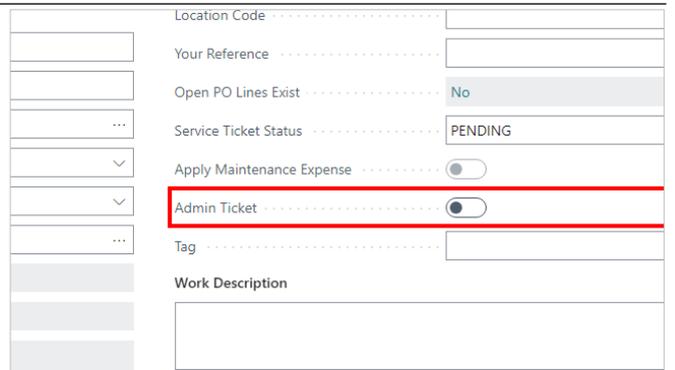
Click on the lookup button **Customer No.**



Click on the link in cell **No.** with the value **50000**



There is a new field labeled Admin Ticket. Toggling this will indicate that this is an admin ticket to be used for events.



ODT Service Help

Click on the toggle field **Admin Ticket**

The screenshot shows a form with several fields. The 'Admin Ticket' field is a toggle switch, currently turned on, and is highlighted with a red box. Other fields include 'Location Code', 'Your Reference', 'Open PO Lines Exist' (set to 'No'), 'Service Ticket Status' (set to 'PENDING'), 'Apply Maintenance Expense' (toggle off), 'Tag', and 'Work Description'.

Enter the events you would like to have in the Description field of the Task Lines

Click on the cell **Description**

The screenshot shows a table with columns: ODT Service Unit No., Serial No., Description, Defer Serv..., and Start Date. The 'Description' cell in the first row is highlighted with a red box.

Enter the text **Vacation**.

The screenshot shows the same table as above. The 'Description' cell is highlighted with a red box, and a dropdown menu is open, showing the text '192 Market Square' and 'com ren con'.

Click on the cell **Description**

The screenshot shows the same table as above. The 'Description' cell is highlighted with a red box and contains the text 'Vacation'.



ODT Service Help

Enter the text **Sick**.

nes | [Manage](#) | Line

[Delete Line](#) [Add Service Template](#) [Service Unit Meters](#) [View Service Ticket Details](#)

ODT Service Unit No.	Serial No.	Description	Defer Serv...	Start Date
		Vacation	<input type="checkbox"/>	-
		<input type="text" value=""/>	<input type="checkbox"/>	

Click on the cell **Description**

nes | [Manage](#) | Line

[Delete Line](#) [Add Service Template](#) [Service Unit Meters](#) [View Service Ticket Details](#)

ODT Service Unit No.	Serial No.	Description	Defer Serv...	Start Date
		Vacation	<input type="checkbox"/>	-
		Sick	<input type="checkbox"/>	
		<input type="text" value=""/>	<input type="checkbox"/>	

Enter the text **Emergency**.

nes | [Manage](#) | Line

[Delete Line](#) [Add Service Template](#) [Service Unit Meters](#) [View Service Ticket Details](#)

ODT Service Unit No.	Serial No.	Description	Defer Serv...	Start Date
		Vacation	<input type="checkbox"/>	-
		Sick	<input type="checkbox"/>	-
		<input type="text" value=""/>	<input type="checkbox"/>	

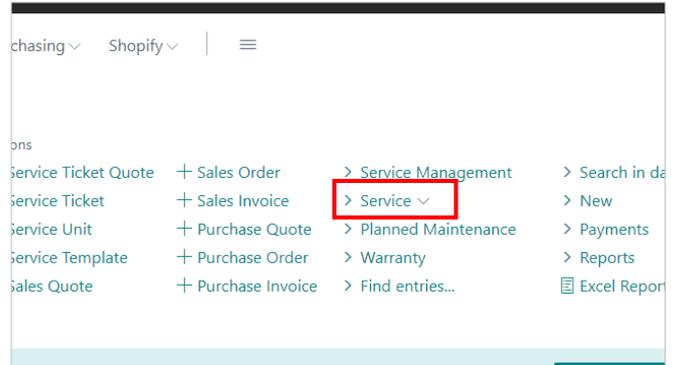
Click on the cell **Service Status** with the value **RELEASED**

[Service Unit Meters](#) [View Service Ticket Details](#) [Attachments](#) [Technicians](#)

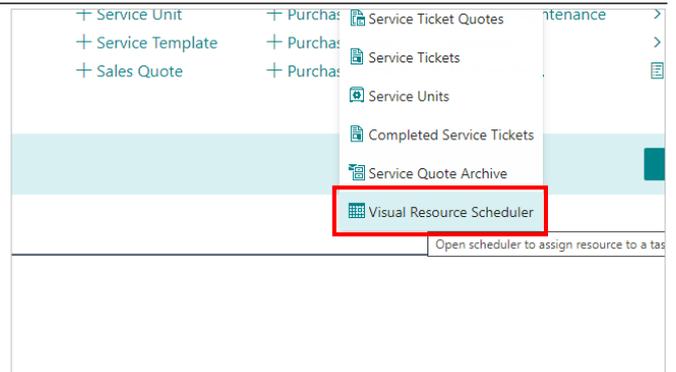
(Total Cost)	Billable (Total Price)	Billable (Invoiced Price)	Service Status	Is War...	Comments/Details
-	-	-	RELEASED	<input type="checkbox"/>	0/0
-	-	-	RELEASED	<input type="checkbox"/>	0/0
-	-	-	RELEASED	<input type="checkbox"/>	0/0

ODT Service Help

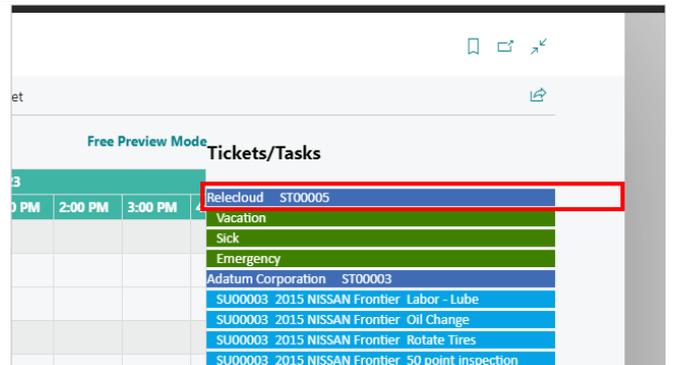
Click on the navigation menu item popup **Service**



Click on the navigation menu item **Visual Resource Scheduler**

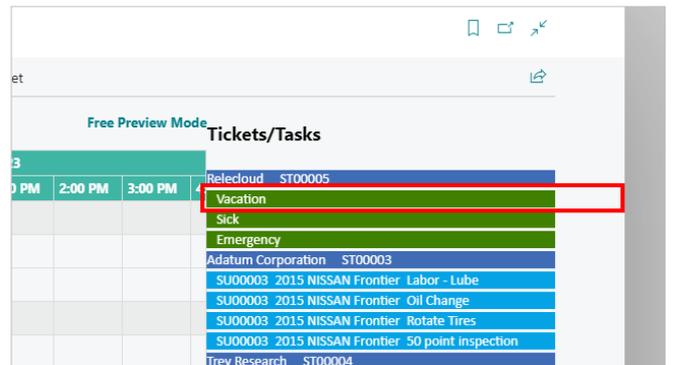


Admin Tickets and related events are always displayed at the top of the task list and highlighted in green.



Events can be assigned to technicians the same way you assign tasks

Click and hold the left mouse button on **Vacation**



Drag the event to the resource you want to assign it to.

Events are highlighted in green to be easy to identify

...

3.9. Warranty RMA

The Return Merchandise Authorization function is an extension of the warranty feature that will allow you to review and approve a warranty claim. Approved amounts can be sent to a vendor and any unapproved amounts can be billed back to the customer.

3.9.1. How to setup RMA functionality

Click on the navigation menu item popup **Service Management**

Click on the navigation menu item **Service Management Setup**



ODT Service Help

The Auto Create Warranty RMA option must be enabled to use the RMA feature.

<input type="checkbox"/>	Prompt to Clock In/Out on Task	Always
<input type="checkbox"/>	Prompt to Change Status	Always
<input type="checkbox"/>	Maintenance Expense Amount Type	Total Cost
<input type="checkbox"/>	Show Journal and Post Manually FA Expense	<input type="checkbox"/>
<input type="checkbox"/>	Show Journal and Post Manually Item Expense	<input type="checkbox"/>
<input type="checkbox"/>	Auto Create Warranty RMA	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Auto Create Disallowed Warranty Claim Sales Invoi...	<input type="checkbox"/>
<input type="checkbox"/>	Work Start Time	8:00:00 AM

Click on the toggle field **Auto Create Warranty RMA**

<input type="checkbox"/>	Prompt to Clock In/Out on Task	Always
<input type="checkbox"/>	Prompt to Change Status	Always
<input type="checkbox"/>	Maintenance Expense Amount Type	Total Cost
<input type="checkbox"/>	Show Journal and Post Manually FA Expense	<input type="checkbox"/>
<input type="checkbox"/>	Show Journal and Post Manually Item Expense	<input type="checkbox"/>
<input type="checkbox"/>	Auto Create Warranty RMA	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Auto Create Disallowed Warranty Claim Sales Invoi...	<input type="checkbox"/>
<input type="checkbox"/>	Work Start Time	8:00:00 AM

If Auto Create Disallowed Warranty Claim Sales Invoice is enabled, a sales invoice for the disallowed warranty amount will automatically be created when the RMA is posted. If this option is disabled, the invoice can still be created manually.

<input type="checkbox"/>	Prompt to Change Status	Always
<input type="checkbox"/>	Maintenance Expense Amount Type	Total Cost
<input type="checkbox"/>	Show Journal and Post Manually FA Expense	<input type="checkbox"/>
<input type="checkbox"/>	Show Journal and Post Manually Item Expense	<input type="checkbox"/>
<input type="checkbox"/>	Auto Create Warranty RMA	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Auto Create Disallowed Warranty Claim Sales Invoi...	<input type="checkbox"/>
<input type="checkbox"/>	Work Start Time	8:00:00 AM
<input type="checkbox"/>	Work End Time	5:00:00 PM

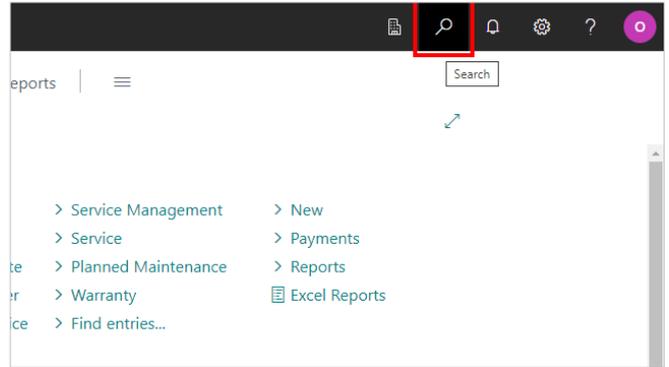
Click on the toggle field **Auto Create Disallowed Warranty Claim Sales Invoice**

<input type="checkbox"/>	Prompt to Change Status	Always
<input type="checkbox"/>	Maintenance Expense Amount Type	Total Cost
<input type="checkbox"/>	Show Journal and Post Manually FA Expense	<input type="checkbox"/>
<input type="checkbox"/>	Show Journal and Post Manually Item Expense	<input type="checkbox"/>
<input type="checkbox"/>	Auto Create Warranty RMA	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Auto Create Disallowed Warranty Claim Sales Invoi...	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Work Start Time	8:00:00 AM
<input type="checkbox"/>	Work End Time	5:00:00 PM

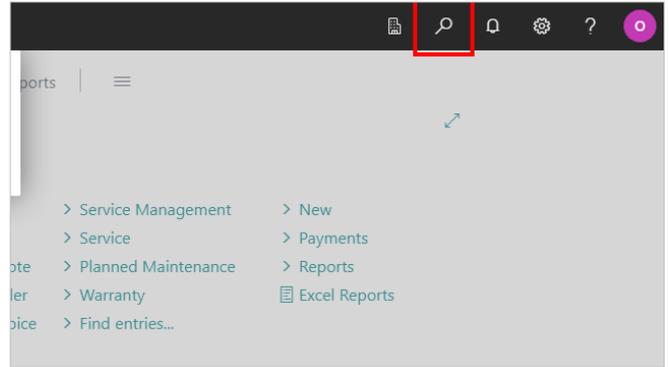
There are some additional fields that must be populated

ODT Service Help

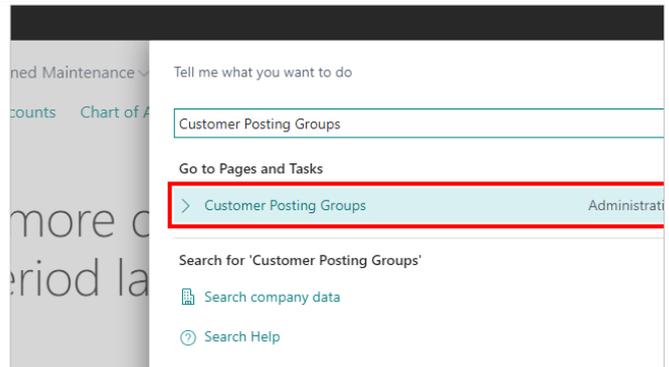
Click on the button **Search**



Enter the text **Customer Posting Groups**.



Click on **Customer Posting Groups Administration**



Click on the cell **Disallowed Warranty Claim Account**

Account	Credit Rounding Account	Payment Tolerance Debit Acc.	Payment Tolerance Credit Acc.	Disallowed Warranty Claim Account
	40920	40330	40330	

ODT Service Help

Enter the **Disallowed Warranty Claim Account** number.

Credit Rounding Account	Payment Tolerance Debit Acc.	Payment Tolerance Credit Acc.	Disallowed Warranty Claim Account
40920	40330	40330	<input type="text"/>

Name	Income/Ba...	Bloc...	Direct Post...
Repairs and Maintenance for R...	Income Sta...	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Insurances, Rental	Income Sta...	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Other Rental Expenses	Income Sta...	<input type="checkbox"/>	<input checked="" type="checkbox"/>

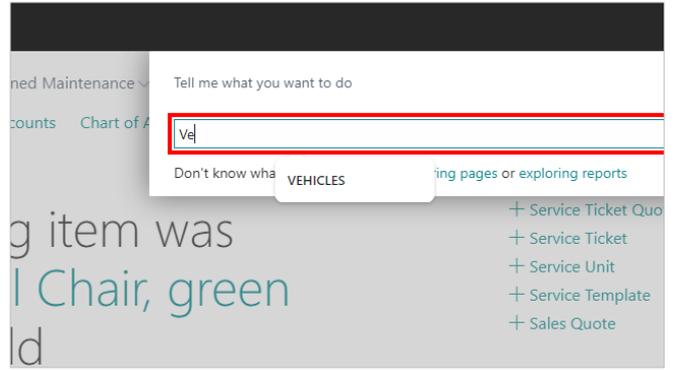
Click on the back button

Click on the button **Search**

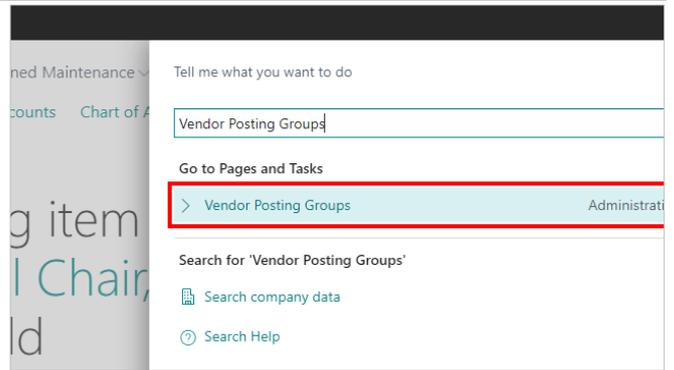
Click on the field **Tell me what you want to do**

ODT Service Help

Enter the text **Vendor Posting Groups**.



Click on **Vendor Posting Groups Administration** □



Click on the cell **Warranty Claim Account**

Debit Rounding Account	Credit Rounding Account	Payment Tolerance Debit Acc.	Payment Tolerance Credit Acc.	Warranty Claim Account
67300	67300	40330	40330	

Enter **Warranty Claim Account**.

Debit Rounding Account	Credit Rounding Account	Payment Tolerance Debit Acc.	Payment Tolerance Credit Acc.	Warranty Claim Account
67300	67300	40330	40330	

No.	Name	Income/Ba...	Bloc...
10000	Balance Sheet	Balance Sh...	<input type="checkbox"/>
10001	Assets	Balance Sh...	<input type="checkbox"/>
11000	Intangible Fixed Assets	Balance Sh...	<input type="checkbox"/>

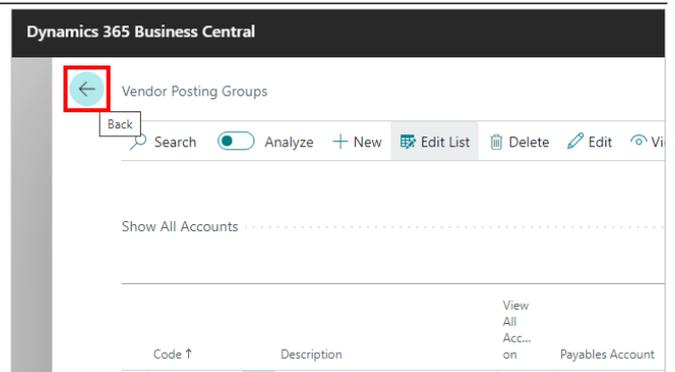
Click on the link in cell **No.** with the value **50230**

Debit Curr. Appln. Rndg. Acc.	Credit Curr. Appln. Rndg. Acc.	Debit Rounding Account	Credit Rounding Account	Payment Tolerance Debit Acc.	Pay Tol. Cre
67300	67300	67300	67300	40330	40

No.	Name	Inc
50230	Cost of Labor, Warranty/Contract	Tr

+ New Show

Click on the back button



3.9.2. How to Process a RMA

The following will demonstrate how to process an RMA. Note that these steps assume a warranty has already been created and assigned to a service unit.

Click on the cell **Is Warrantable** with the value **on**

Billable (Total Price)	Billable (Invoiced Price)	Service Status	Is War...	Comments/Details	Appl Mai.. Exp..
-	-		<input type="checkbox"/>	0/0	
143.25	-	PENDING	<input type="checkbox"/>	0/4	

Click on **Is Warrantable**

Billable (Total Price)	Billable (Invoiced Price)	Service Status	Is War...	Comments/Details	Appl Mai.. Exp..
-	-		<input type="checkbox"/>	0/0	
143.25	-	PENDING	<input type="checkbox"/>	0/4	

ODT Service Help

Click on the link in cell **Billable (Total Price)** with the value **71.61**

Date	Budget (Total Cost)	Actual (Total Cost)	Billable (Total Price)	Billable (Invoiced Price)	Service Status
3/2024	37.50	-	71.61	-	PENDING

Click on the button **Close**

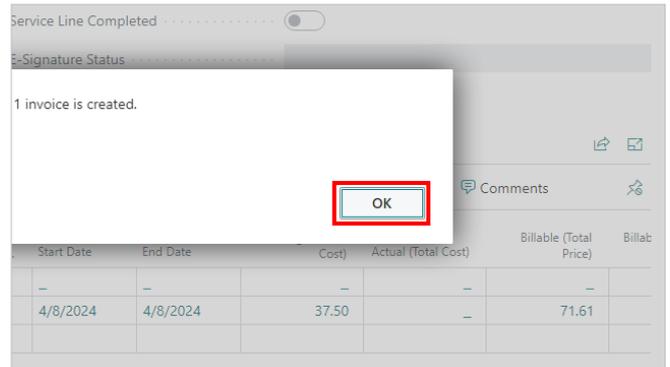
Click on the navigation menu item **Create Service Sales Invoice**

Click on the button **OK**

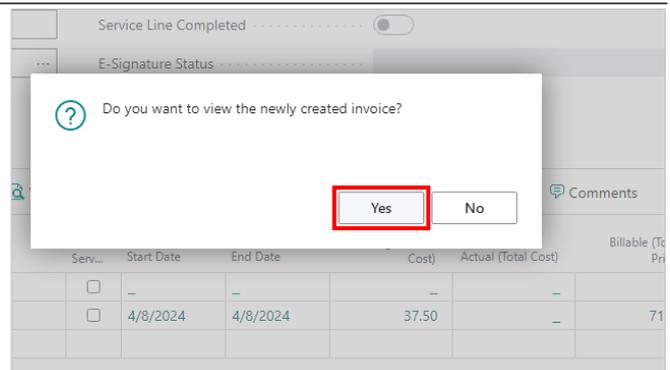
No.	Description	Serv...	Quantity	Unit of Measure Code
LABOR	Labor - Oil Change	<input type="checkbox"/>	1	HOURL
OILFILTER	Filter, Oil	<input type="checkbox"/>	1	PCS
OILGASKET	Gasket, Oil	<input type="checkbox"/>	1	PCS

ODT Service Help

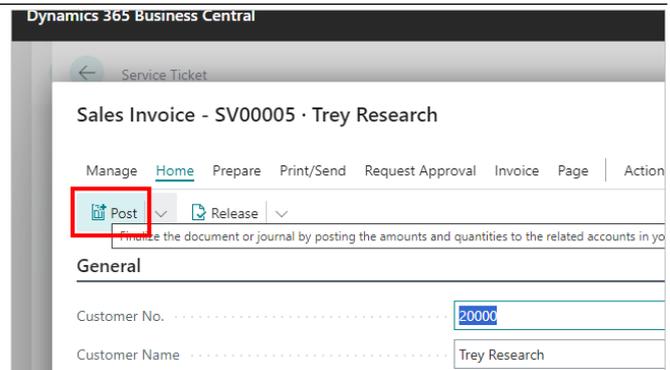
Click on the button **OK**



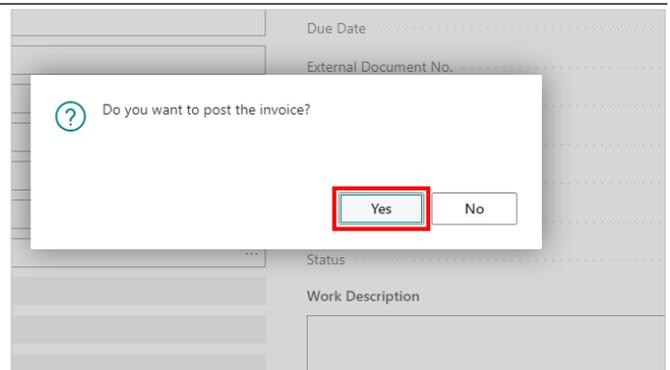
Click on the button **Yes**



Click on the button **Post**

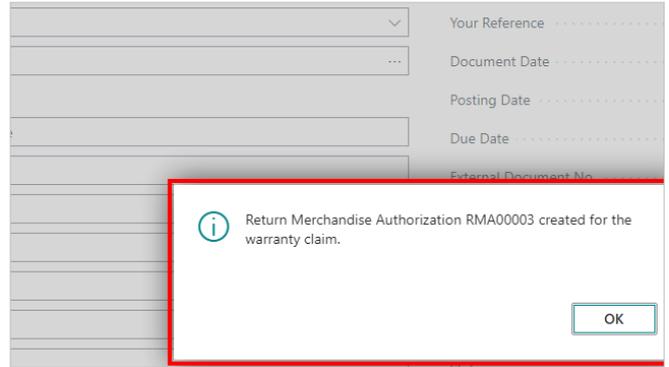


Click on the button **Yes**

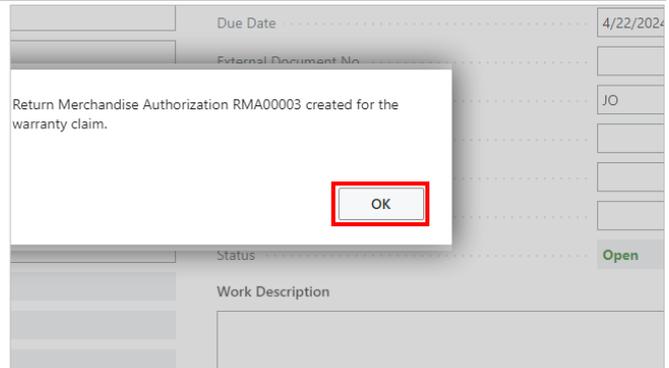


ODT Service Help

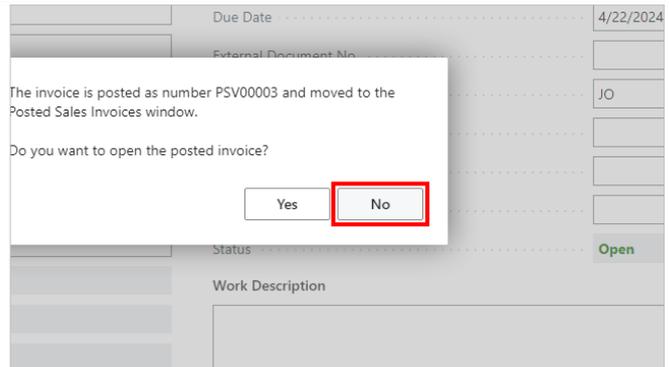
A message will appear after posting confirming that the RMA document has been created.



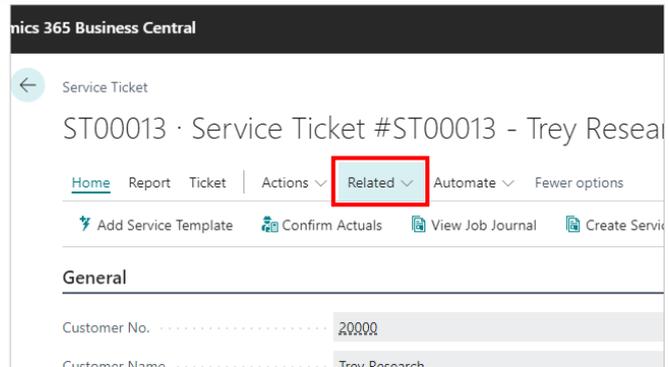
Click on the button **OK**



Click on the button **No**

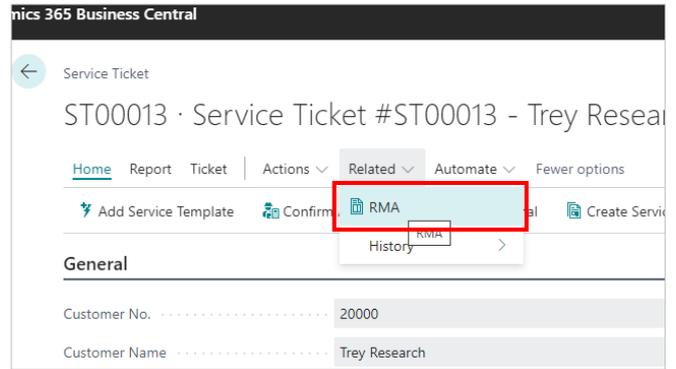


Click on the navigation menu item popup **Related**



ODT Service Help

the RMA action in the Related tab will link to the created RMA document
Click on the navigation menu item **RMA**



The **Warranty Original Claim** field displays the amount of the original warranty claim.

Tax Group Code	Line Discount %	Line Amount Excl. Tax	Warranty Original Claim	Disallowed Warranty Claim	Return Qty. to Ship
NONTAXABLE		71.63	71.63	0.00	1

The **Disallowed Warranty Claim** field displays the amount of the claim that was determined to not be valid and will not be paid

Line Discount %	Line Amount Excl. Tax	Warranty Original Claim	Disallowed Warranty Claim	Return Qty. to Ship
			0.00	1

You can change the claim amount by changing the Line Amount field

Click on the cell **Line Amount Excl. Tax** and enter the value **41**

Tax Area Code	Tax Group Code	Line Discount %	Line Amount Excl. Tax	Warranty Original Claim	Disallowed Warranty Claim
ATLANTA, GA	NONTAXABLE		41.00	71.63	0.00

41.00 Total Excl. Tax (USD)

ODT Service Help

Notice that Disallowed Warranty Claim field has been updated to reflect the amount that is not approved

Line Discount %	Line Amount Excl. Tax	Warranty Original Claim	Disallowed Warranty Claim	Return Qty. to Ship
	41.00	71.63	30.63	1

Tax (USD) 41.00

Click on the button **Post...**

Dynamics 365 Business Central

Purchase Return Order

RMA00003 · Fabrikam, Inc.

Home Prepare Print/Send Request Approval Return Order Actions

Post... Release Create Warehouse Shipment Apply E

Buy from State GA

ZIP Code 31772

City Atlanta

Country/Region US

Click on the button **OK**

Status Open

Ship Invoice Ship and Invoice

OK Cancel

Tax Group Code	Line Discount %	Line Amount Excl. Tax	Warranty Original Claim	Disallowed Warranty Claim	Return Qty.
A NONTAXABLE		41.00	71.63	30.63	

If the Auto Create Disallowed Warranty Claim Sales Invoice option was enabled, a notification will appear advising that an invoice was created for the disallowed amount

Campaign No.

Responsibility Center

Assigned User ID

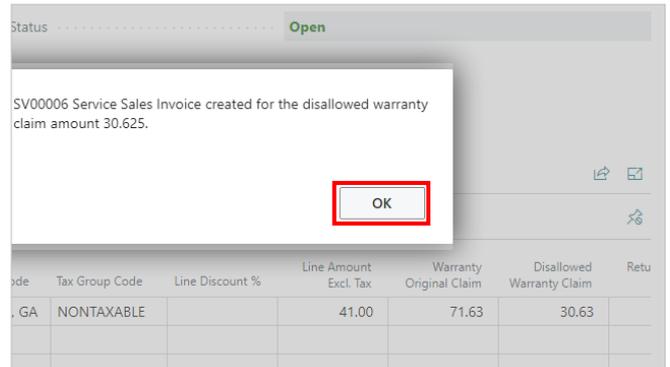
Status Open

SV00006 Service Sales Invoice created for the disallowed warranty claim amount 30.625.

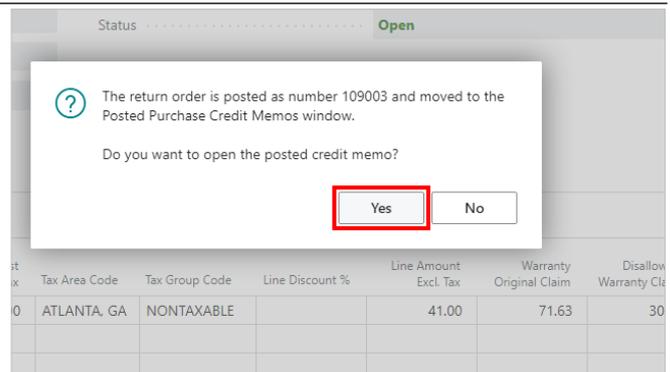
OK

ODT Service Help

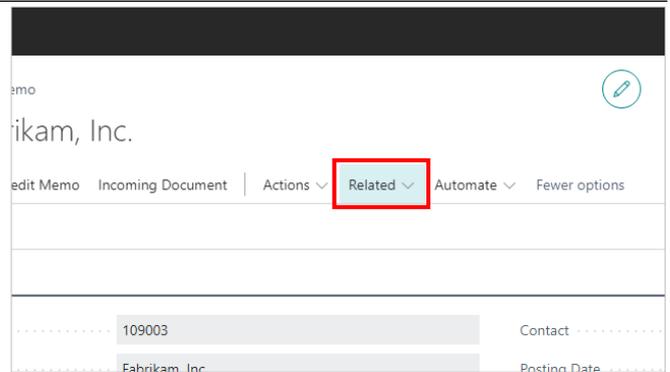
Click on the button **OK**



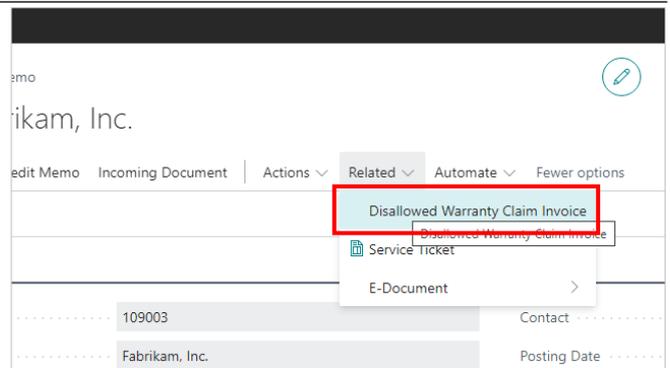
After posting, there will be a link to the disallowed warranty claim invoice on the posted document
Click on the button **Yes**



Click on the navigation menu item popup **Related**



Click on the navigation menu item **Disallowed Warranty Claim Invoice**



ODT Service Help

Notice that the Customer Name is for the original customer specified on the Service Ticket

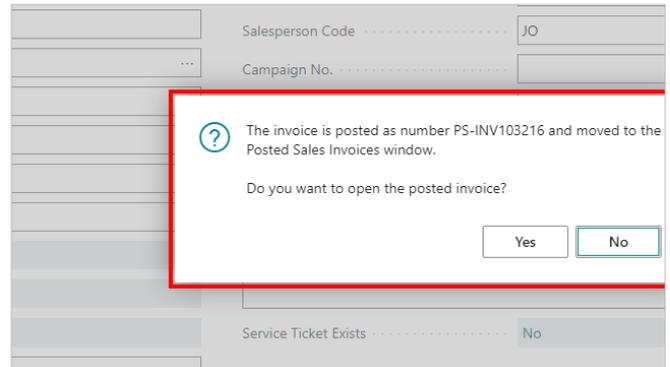
Notice that the Line Amount being charged is the same amount that was denied in the original RMA document

Tax Area Code	Tax Group Code	Line Discount %	Line Amount Excl. Tax	Amount Including Tax	Qty. to Assign
CHICAGO, IL	NONTAXABLE		30.63	30.63	0

When everything is ready, the remaining amount can be charged back to the original customer

Click on the button **Post**

Click on the button **Yes**

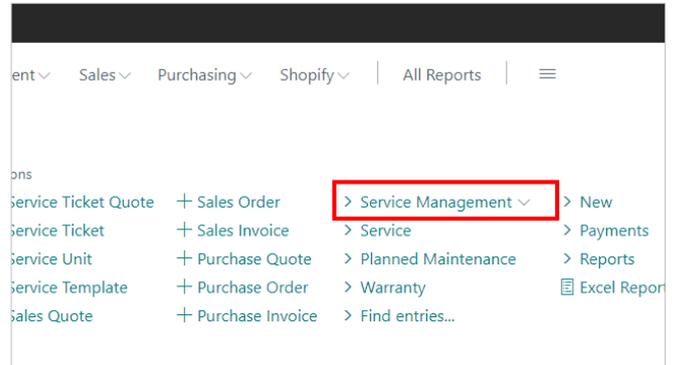


3.10. Service Notifications

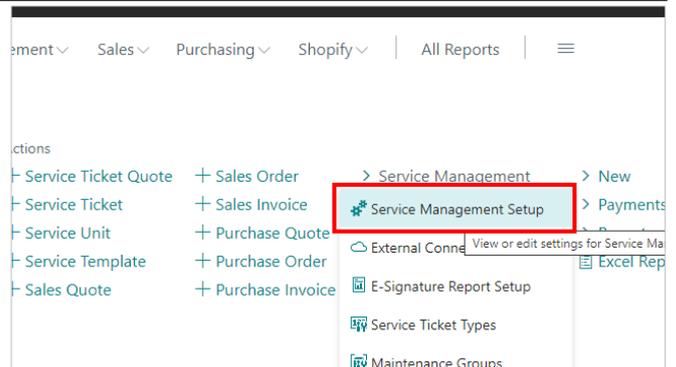
test

3.10.1. test

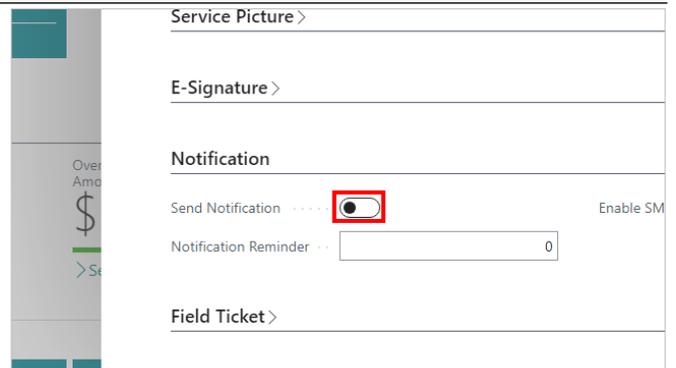
Click on the navigation menu item popup **Service Management**



Click on the navigation menu item **Service Management Setup**

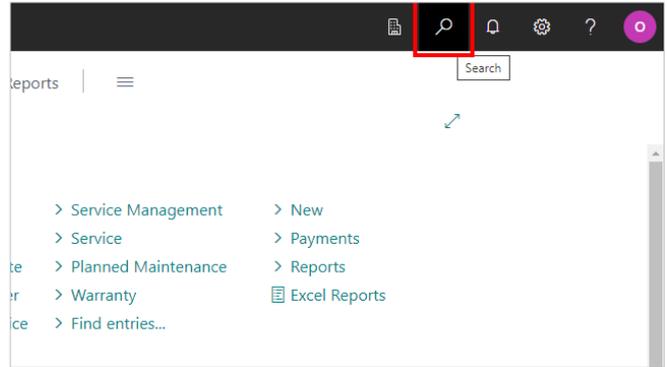


Click on the toggle field **Send Notification**

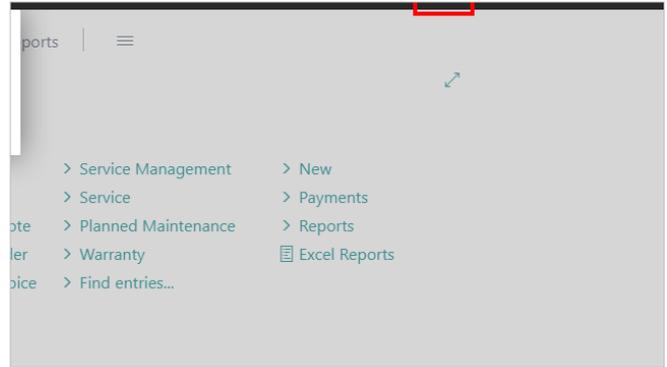


ODT Service Help

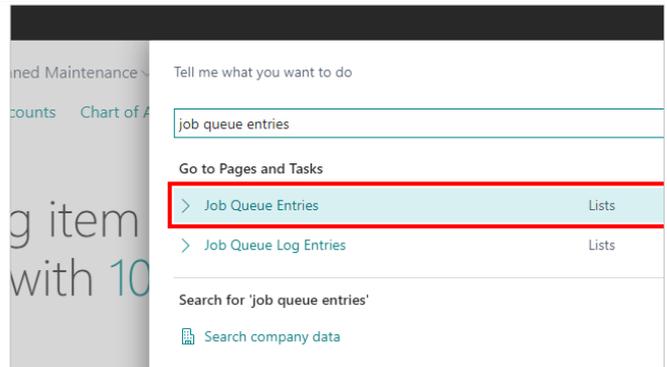
Click on the button **Search**



Enter the text **job queue entries**.



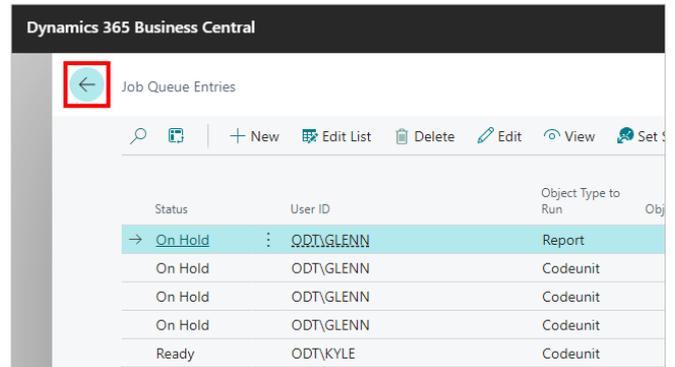
Click on **Job Queue Entries Lists**



Click on the cell **Object ID to Run** with the value **23072662**

Object ID	Object Type to Run	Object ID to Run	Object Caption to Run
IT\GLENN	Report	1511	Delegate Approval Requests
IT\GLENN	Codeunit	3997	Retention Policy JQ
IT\GLENN	Codeunit	842	Cash Flow Forecast Update
IT\GLENN	Codeunit	6700	O365 Sync. Management
IT\KYLE	Codeunit	1350	Telemetry Management
IT\KYLE	Codeunit	23072662	ODTSM Notification

Click on the back button

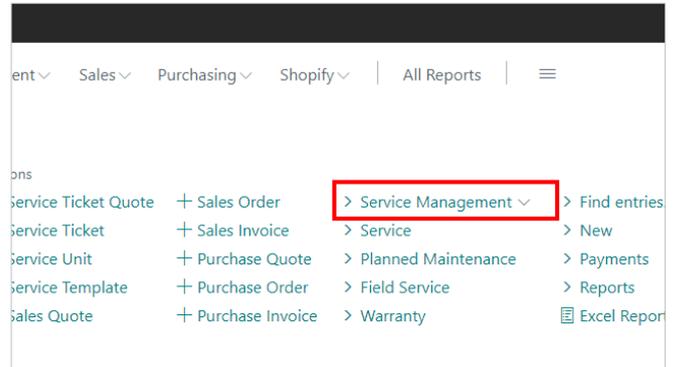


3.11. Field Service

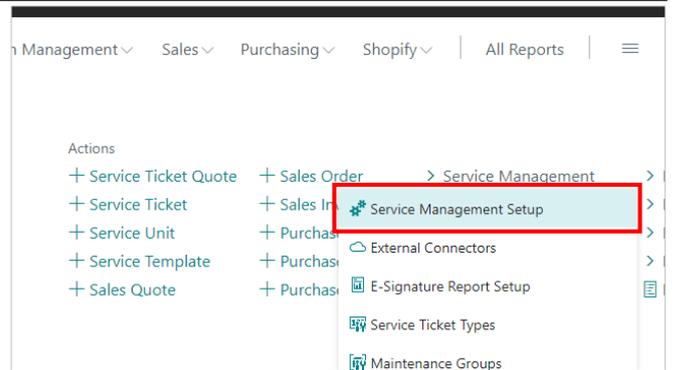
The following demonstrates how to setup and use Field Service Projects

3.11.1. Setup

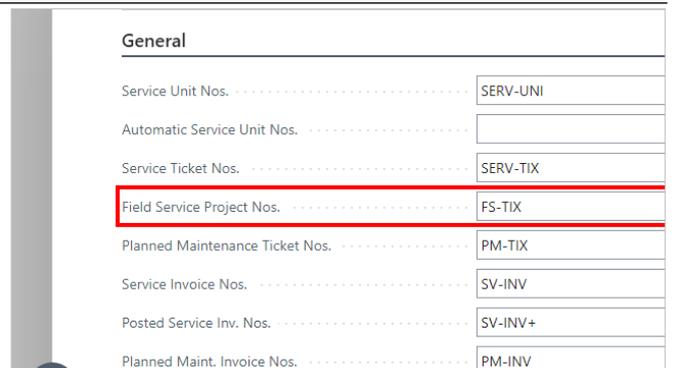
Click on the navigation menu item popup **Service Management**



Click on the navigation menu item **Service Management Setup**



Ensure that the Field Service Project Nos. field is populated



ODT Service Help

Ensure the Field Ticket Active toggle is enabled

Notification

Send Notification

Notification Reminder

Field Ticket

Field Ticket Active

Enable Field Ticket Approval

Click on the toggle field **Field Ticket Active**

Notification

Send Notification

Notification Reminder

Field Ticket

Field Ticket Active

Enable Field Ticket Approval

Ensure the the Field Ticket Nos. field is populated

Enable Customer Notification

Field Ticket Nos. FT-TIX

If you want to use approvals, then ensure that the Field Ticket Approval toggle is enabled

Notification

Send Notification

Notification Reminder

Field Ticket

Field Ticket Active

Enable Field Ticket Approval

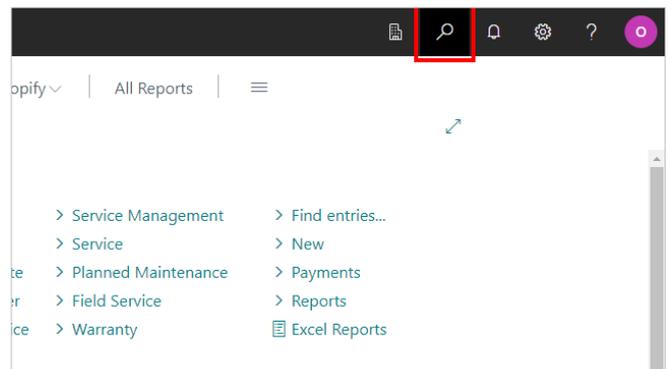
ODT Service Help

Click on the toggle field **Enable Field Ticket Approval**

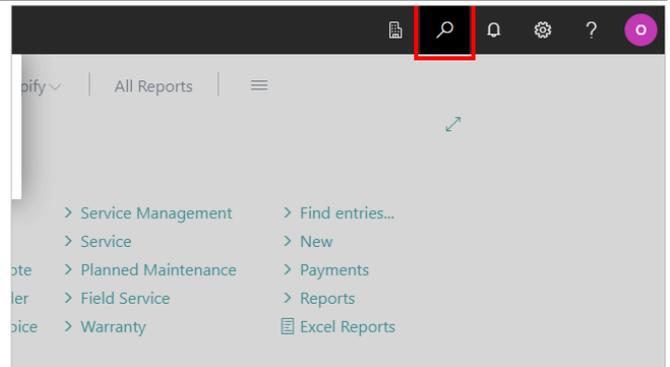


3.11.2. Setup Resources

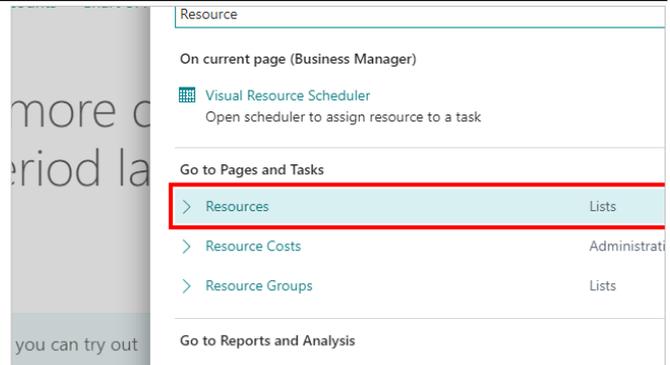
Click on the button **Search**



Enter the text **Resource**.



Click on **Resources Lists**



ODT Service Help

Click on the link in cell **No.** with the value **TERRY**

LABOR	Labor	Person	HOUR
LINA	Lina Townsend	Person	HOUR
MARTY	Marty Horst	Person	HOUR
RESOURCE2	RESOURCE2	Person	HOUR
RESOURCE3	RESOURCE3	Person	HOUR
TERRY	Terry Dodds	Person	HOUR

Open record "TERRY"

Click on **Field Technician User ID**

Price/Profit Calculation Profit=Price-Cost

Profit %

Unit Price

Personal Data >

Field Ticket

Field Technician User ID

Click on the lookup button **Field Technician User ID**

Unused Capacity

Invoiced

Invoiced %

Usage (Cost)

Profit

Profit %

Choose a value for Field Technician User ID

Click on the back button

Dynamics 365 Business Central

← Back Resource Card

TERRY · Terry Dodds

Home Resource Report | Related v Automate v Fewer options

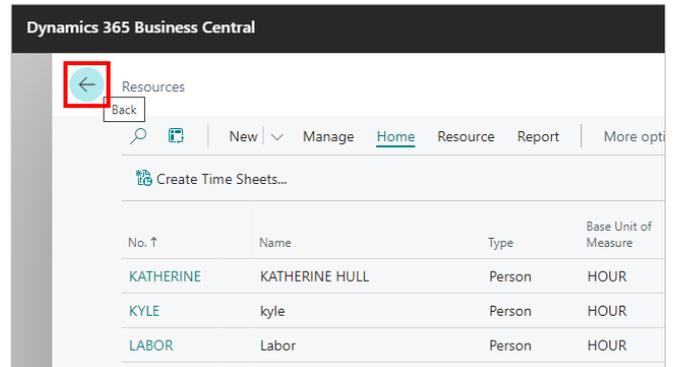
Create Time Sheets...

No. TERRY

Name Terry Dodds

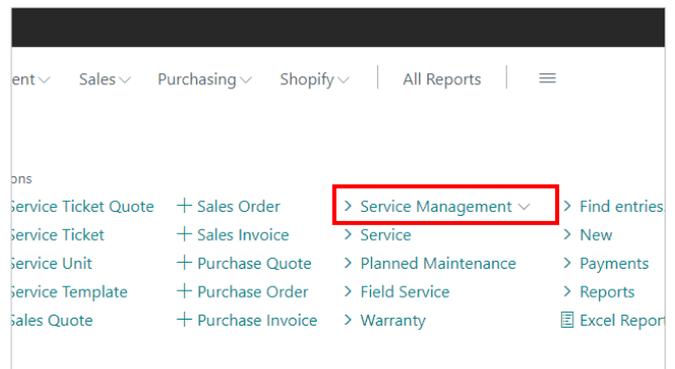
Type Person

Click on the back button

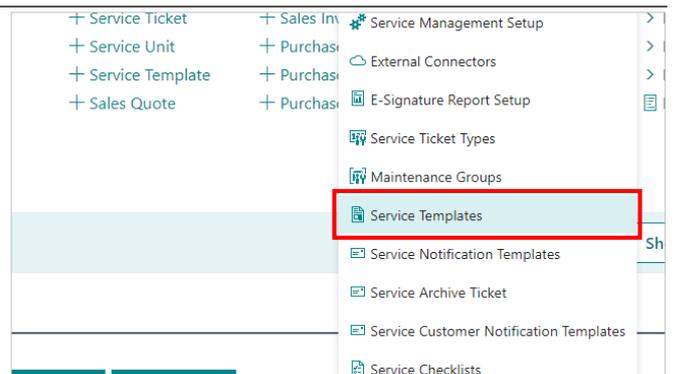


3.11.3. Setup Service Templates

Click on the navigation menu item popup **Service Management**



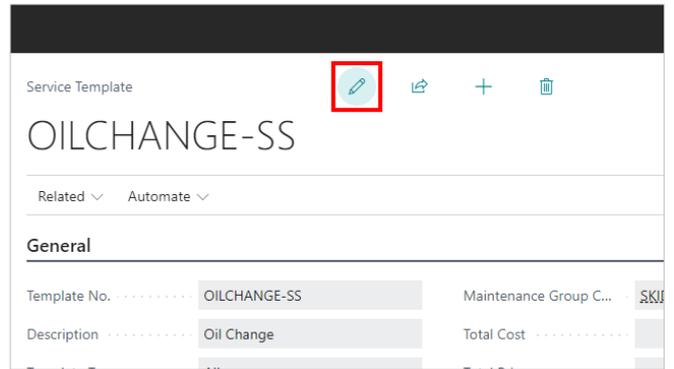
Click on the navigation menu item **Service Templates**



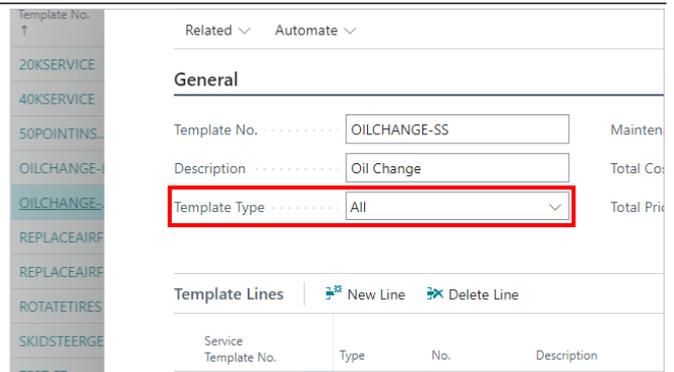
Click on the link in cell **Template No.** with the value **OILCHANGE-SS**

Template No.	Template Type	Description
20KSERVICE	All	20,000 KM S
40KSERVICE	All	40,000 KM S
50POINTINS...	All	50 point insp
OILCHANGE-LT	All	Oil Change
OILCHANGE-...	All	Oil Change
REPLACEAIRF...	All	Replace Air f
REPLACEAIRF...	All	Replace Air f
ROTATETIRES	All	Rotate Tires
SKIDSTEERGE...	All	Skid Steer G

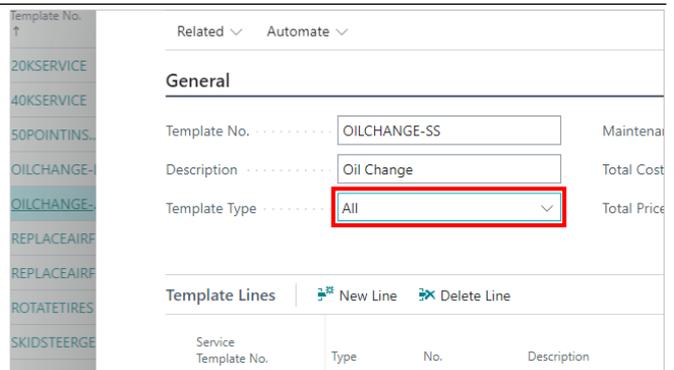
Click on the action toggle **edit/view**



The Template Type field can be used to determine if a template will only apply to field tickets or if it can be used on all tickets.



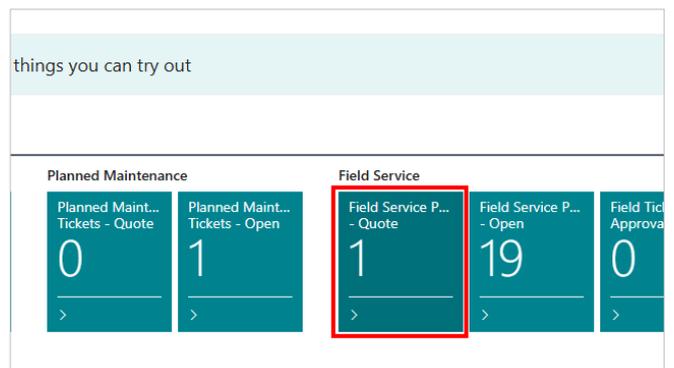
Click on the field **Template Type**



3.11.4. Create and Process Field Service Project

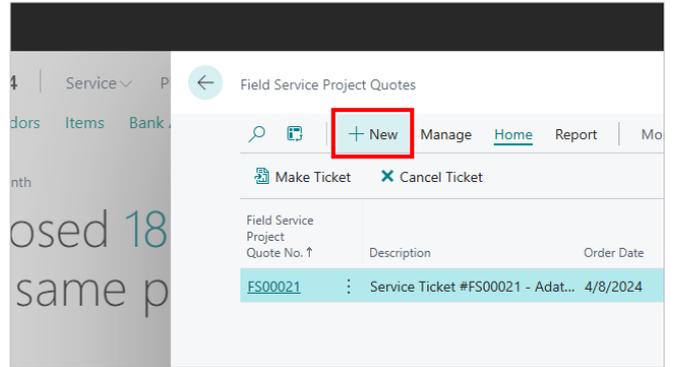
The following demonstrates how to setup and process a Field Service Project

Click on the link **Field Service Projects - Quote Cue**

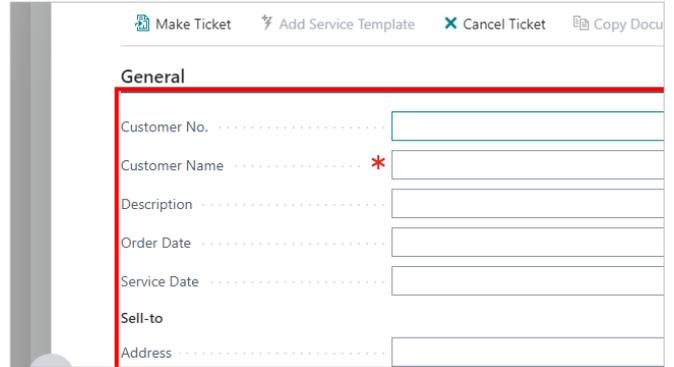


ODT Service Help

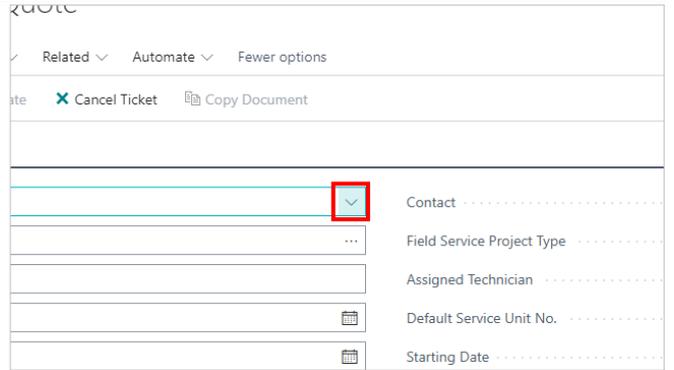
Click on the navigation menu item **New**



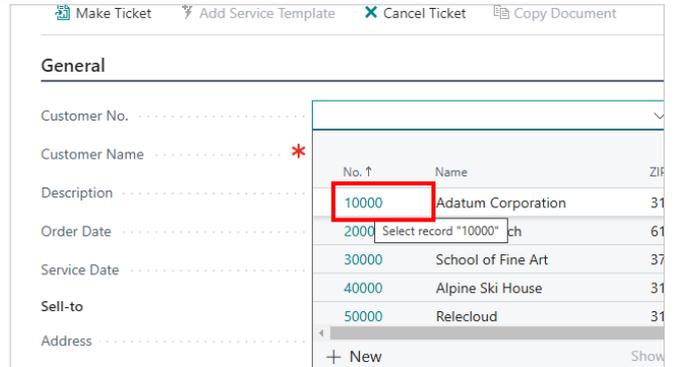
The setup of a Field Service Project Quote is similar to other ticket types



Click on the lookup button **Customer No.**



Click on the link in cell **No.** with the value **10000**



ODT Service Help

Click on the lookup button **Default Service Unit No.**

Click on the link in cell **Service Unit No.** with the value **SU00002**

Service Unit No.	Description
SU00002	2016 NISSAN Titan
SU00004	2016 NISSAN Frontier
SU00005	2015 Ford F150
SU00007	2017 Bobcat S70 Skid-Steer ...
SU00009	2018 Bobcat S70 Skid-Steer ...
SU00010	2018 Bobcat S450 Skid-Steer...

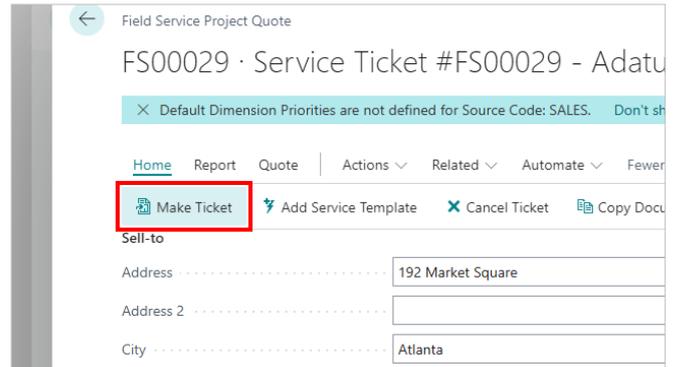
Click on the navigation menu item **Add Service Template**

Task Type	ODT Service Unit No.	Serial No.	Description
Heading	SU00002		2016 NISSAN T

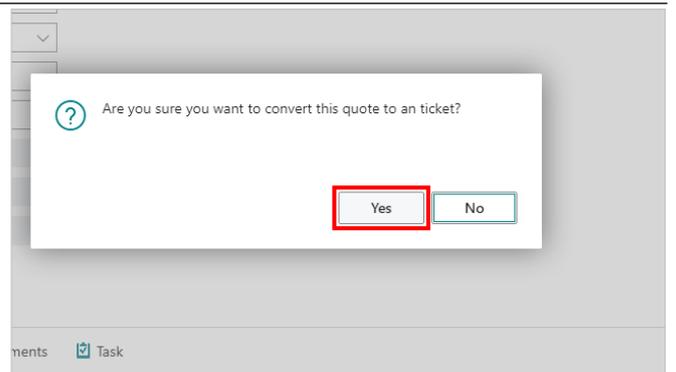
Click on the link in cell **Template No.** with the value **OILCHANGE-LT**

Template No.	Template Type	Description
20KSERVICE	All	20,000 KM Se
40KSERVICE	All	40,000 KM Se
50POINTINS...	All	50 point inspe
OILCHANGE...	All	Oil Change
REPLACEAIR...	All	Replace Air Fi
ROTATETIRES	All	Rotate Tires

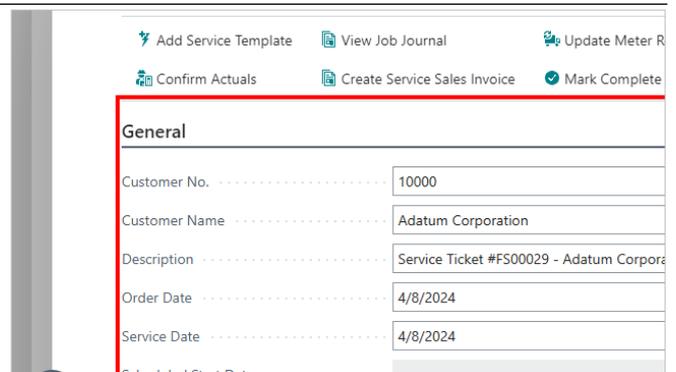
Click on the navigation menu item **Make Ticket**



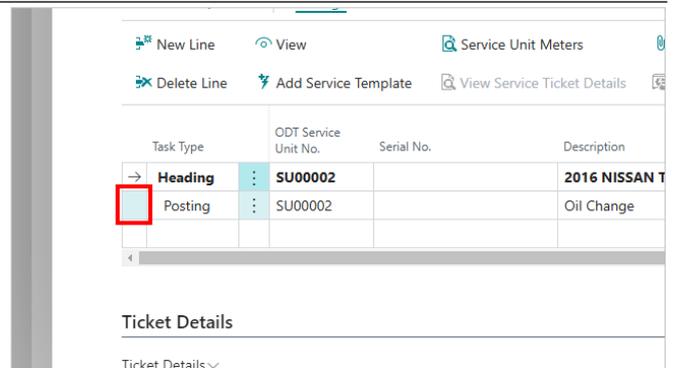
Click on the button **Yes**



The information from the Field Service Project Quote will default to the new Field Service Project

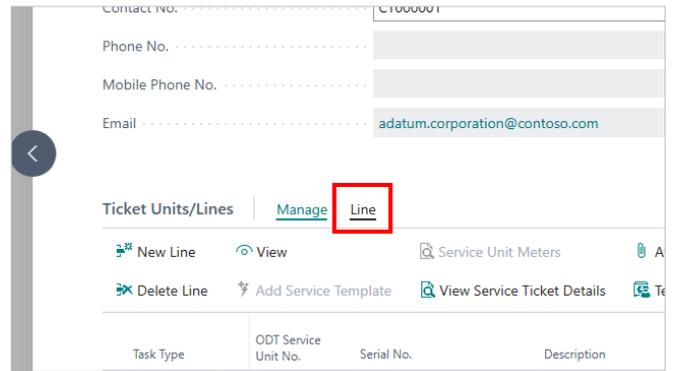


Select the line you want to create a Field Ticket for.

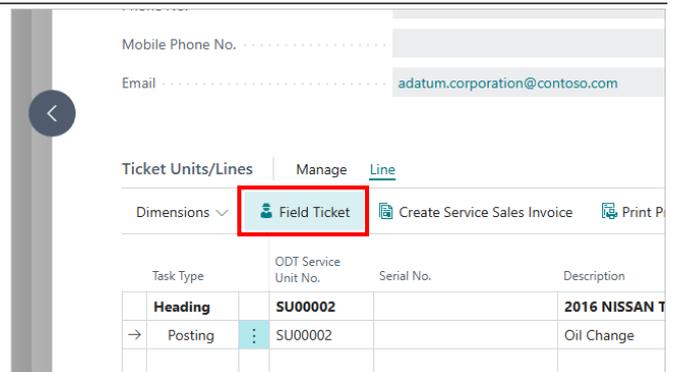


ODT Service Help

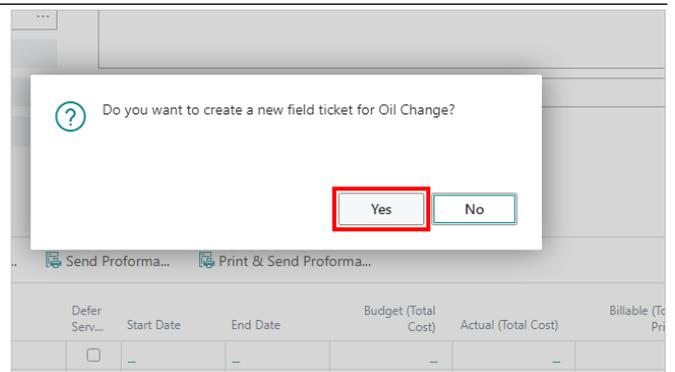
Click on the navigation menu item popup **Line**



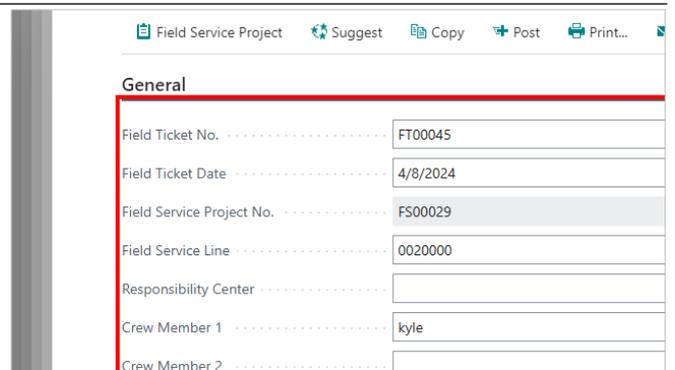
Click on the navigation menu item **Field Ticket**



Click on the button **Yes**



Notice that some of the Field Ticket information has already been filled in. You can adjust these fields as needed.



ODT Service Help

Click on **Field Ticket Line**

Type	No.	Project Task No.	Line Type	Employee No.
→ Resource	KYLE	0020000	Both Budg...	KYLE

The Field Ticket Lines contains information about the items and resources being used. You can add more lines as needed

Type	No.	Project Task No.	Line Type	Employee No.
→ Resource	KYLE	0020000	Both Budg...	KYLE

When using the Field Service approval process, notice that the status field says Open

Crew Member 3	
Site Contact	
On-Site Contact Email	
On-Site Phone No.	
Status	Open
Department Code	SALES
Customergroup Code	SMALL

To begin the approval process, first the approval must be sent

Click on the navigation menu item **Send**

Automate ▾ Fewer options

Suggest Copy Post Print... **Send** Cancel Approve Reject

FT00045	...	Crew Member 3
4/8/2024		Site Contact

ODT Service Help

Notice that the status has changed to Pending Approval

Crew Member 3	
Site Contact	
On-Site Contact Email	
On-Site Phone No.	
Status	Pending Approval
Department Code	SALES
Customergroup Code	SMALL

Click on the navigation menu item **Approve**

Post Print... Send Cancel **Approve** Reject

Notice that the status has changed to Approved

Crew Member 3	
Site Contact	
On-Site Contact Email	
On-Site Phone No.	
Status	Approved
Department Code	SALES
Customergroup Code	SMALL

Click on the navigation menu item popup **Home**

Field Ticket FT00045

Default Dimension Priorities are not defined for Source Code: PROJNL.

Home Field Ticket Automate Fewer options

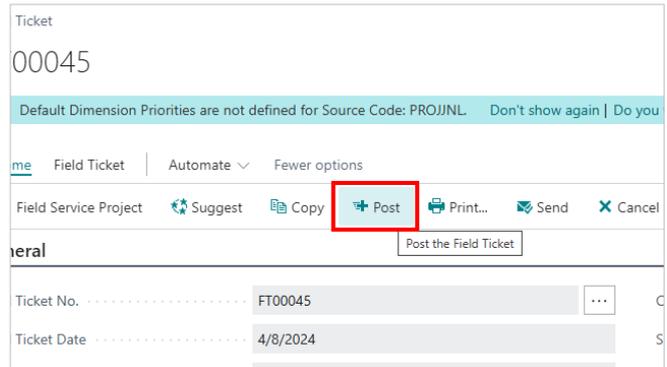
Dimensions

General

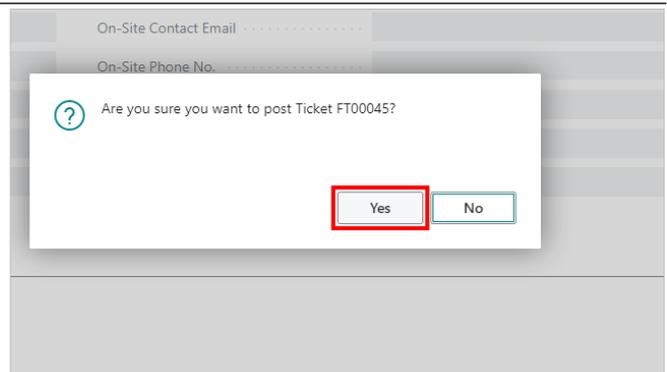
Field Ticket No. FT00045

When you are done, the Field Ticket can be posted

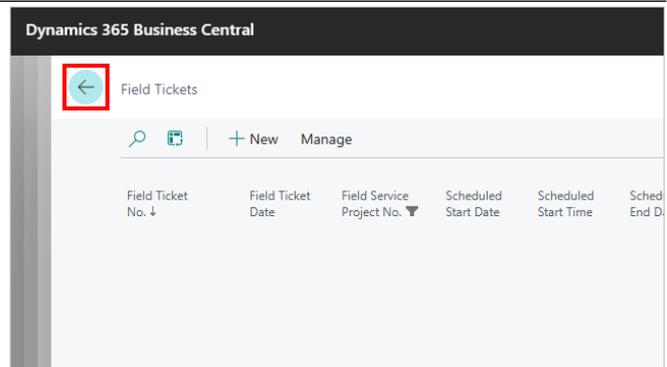
Click on the navigation menu item **Post**



Click on the button **Yes**



Click on the back button



When finished processing Field Tickets, you can process the rest of the Field Service Project the same as you would other ticket types

4. Planned Maintenance

4.1. Planned Maintenance Overview

4.1.1. Planned Maintenance Overview

ODT Service provides the ability to schedule and track maintenance that will be performed at a future date. This can be useful when it is known in advance that service will be required, such as service types that have recurring periods or that happen after a specific usage. It can also be useful if service needs to be delayed until a later date.

The Planned Maintenance Worksheet provides an easy way to manage planned maintenance entries. From the worksheet, a user can specify several criteria to filter the list of entries, such as Customer, Maintenance Group, and Service Unit. An entry can then be converted into a Planned Maintenance Ticket for easy processing, or deferred until a later date.

There are two things that must be set up to begin using Planned Maintenance features. Planned Maintenance Schedules must be assigned to Service Groups, and Service Unit Meters must be assigned to Service Units. Planned Maintenance Schedules identify the types of service to be planned and when they are triggered, and

Service Unit Meters are used to track when specific Service Units are due for service.

4.2. How to Use the Planned Maintenance Worksheet

4.2.1. Overview

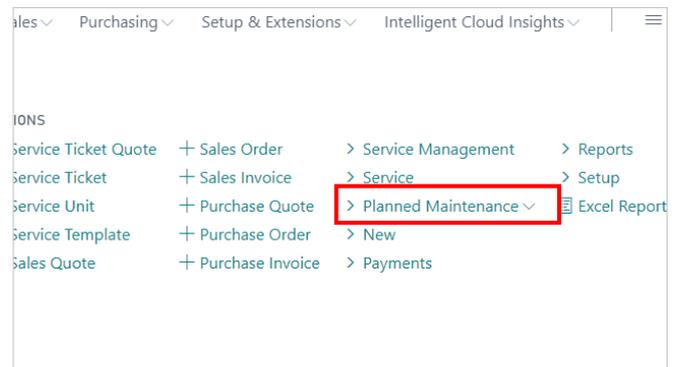
The Planned Maintenance Worksheet provides an easy way to manage Planned Maintenance related activities. Entries can be filtered using criteria such as Service Unit, Maintenance Group, and Customer. The worksheet will display all upcoming planned maintenance for entries fitting the specified criteria and can convert entries into Planned Maintenance Tickets when it is time for service.

4.2.2. How to use the Planned Maintenance Worksheet

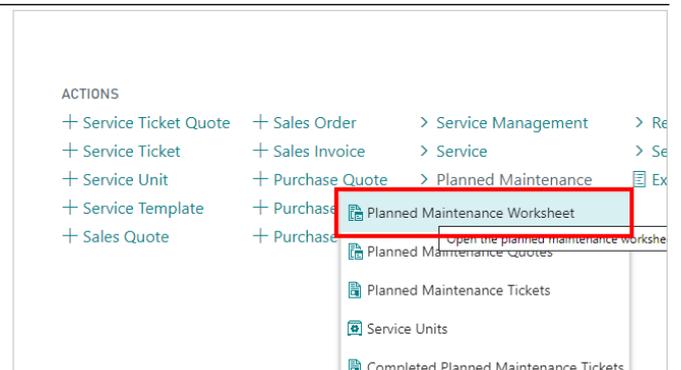
Business Manager Profile

Additional Planned Maintenance Schedules and Service Meters have been created prior to this example.

Click on the navigation menu item popup **Planned Maintenance**

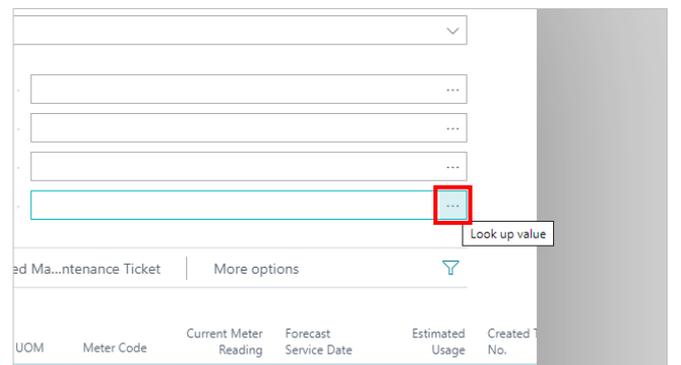


Click on the navigation menu item **Planned Maintenance Worksheet**



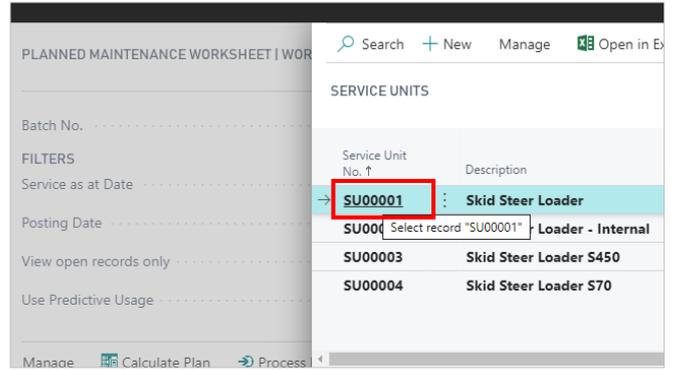
There are a variety of filters that can be used to identify planned maintenance tickets. The following example will use the Service Unit filter.

Click on the lookup button **Select Service Unit(s)**

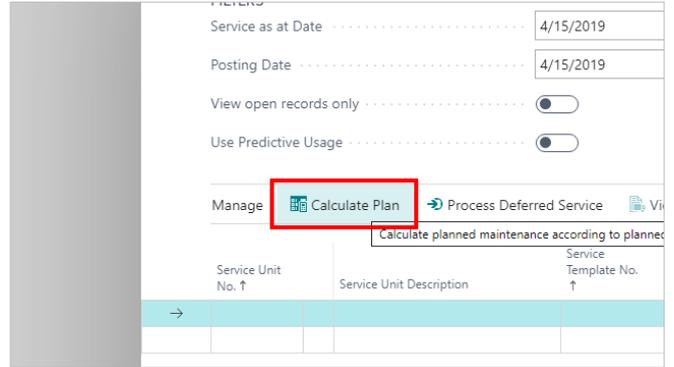


ODT Service Help

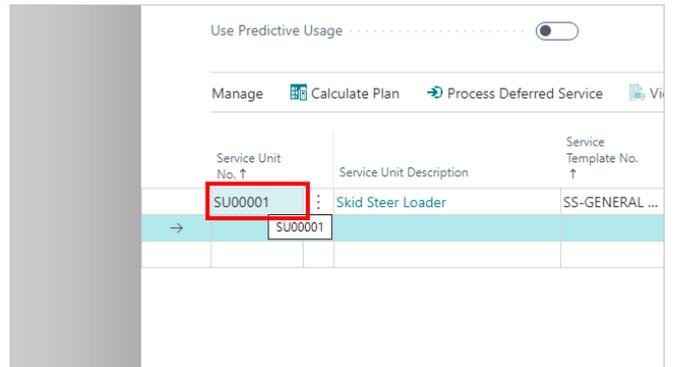
Click on the link in cell **Service Unit No.** with the value **SU00001**



Click on the navigation menu item **Calculate Plan**. Calculate Plan will display all service units that have triggered planned maintenance. Entries will be displayed based on the filters selected.

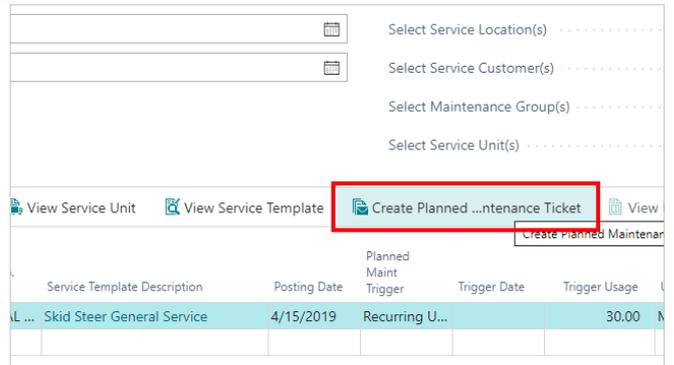


Click on the cell **Service Unit No.** with the value **SU00001**

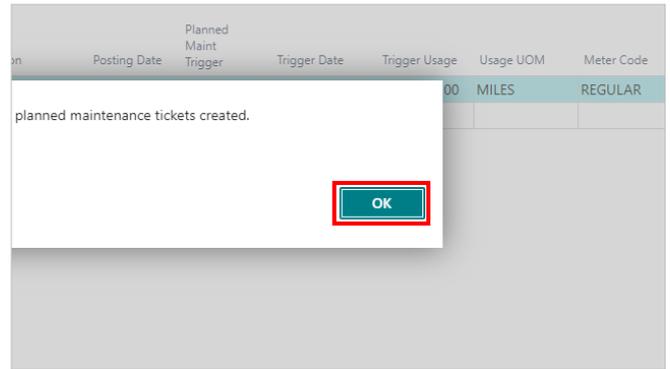


Click on the navigation menu item **Create Planned Maintenance Ticket**

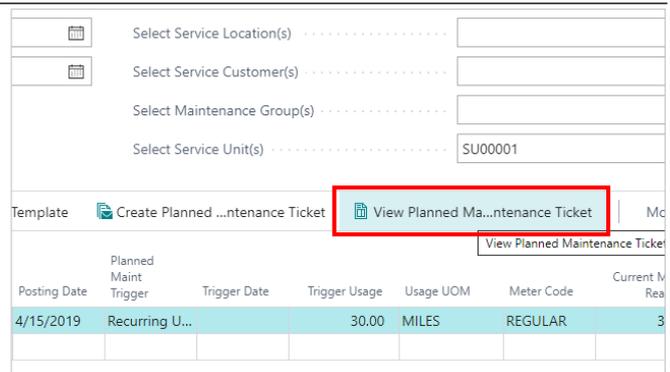
If the selected service unit is already on another open service ticket, a message will be displayed to indicate this and confirm if you want to proceed.



Click on the button **OK**



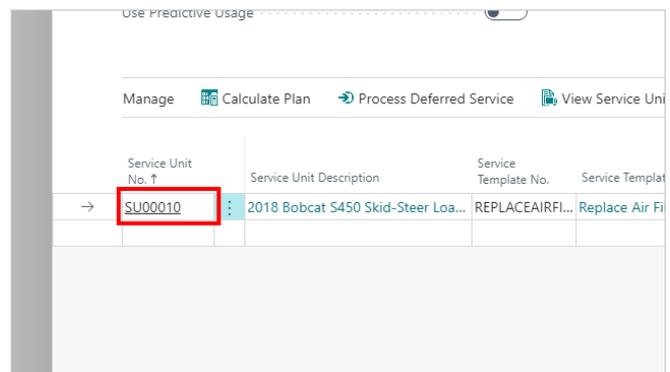
Click on the navigation menu item **View Planned Maintenance Ticket**



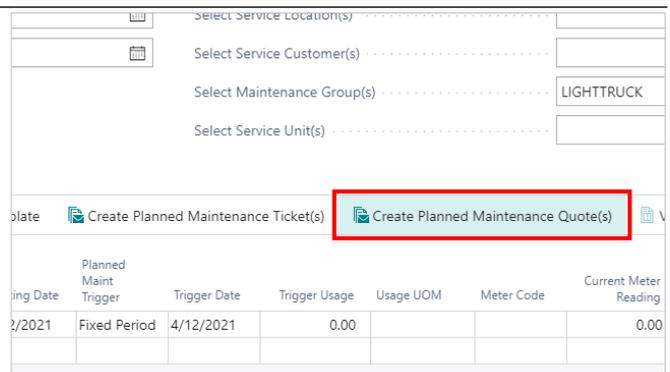
4.2.3. How to create a Planned Maintenance Quote

The following will demonstrate how to create a Planned Maintenance Quote using the Planned Maintenance Worksheet.

Click on the cell **Service Unit No.** with the value **SU00010**

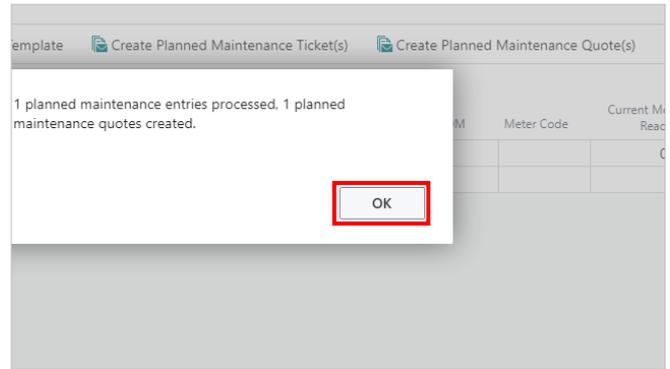


Click on the link **Create a planned maintenance quote for the selected line.**



ODT Service Help

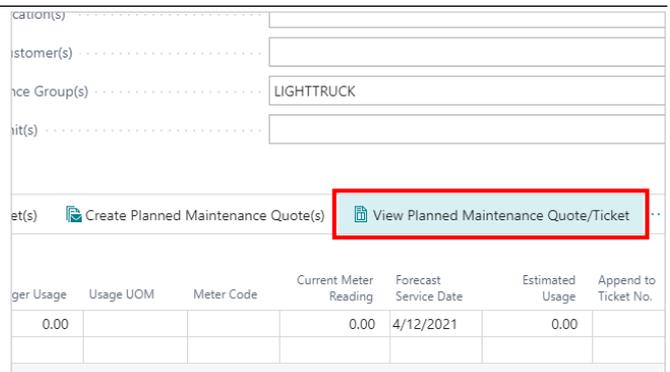
Click on the button **OK**



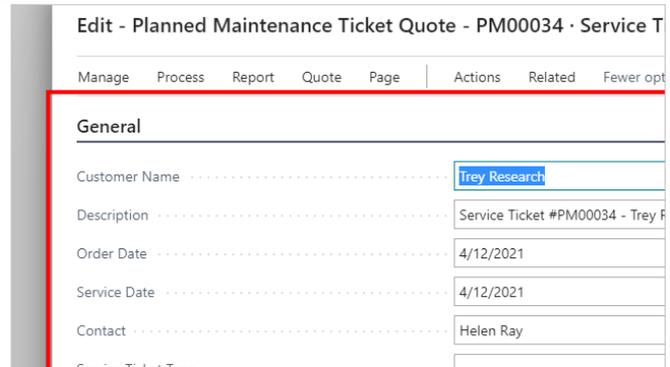
Click on the link in cell **Created Ticket Is Quote** with the value **Yes**
 The Created Ticket is Quote field will be changed to indicate that the selected unit is now part of a Planned Maintenance Quote.

Estimated Usage	Append to Ticket No.	Created Ticket No.	Created Ticket Is Quote	Defer Service	Defer Until Date	Service Unit Customer No
0.00		PM00034	Yes			20000

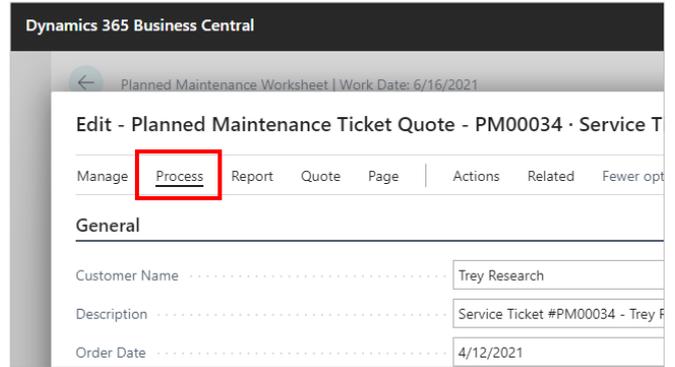
Click on the navigation menu item **View Planned Maintenance Quote/Ticket**



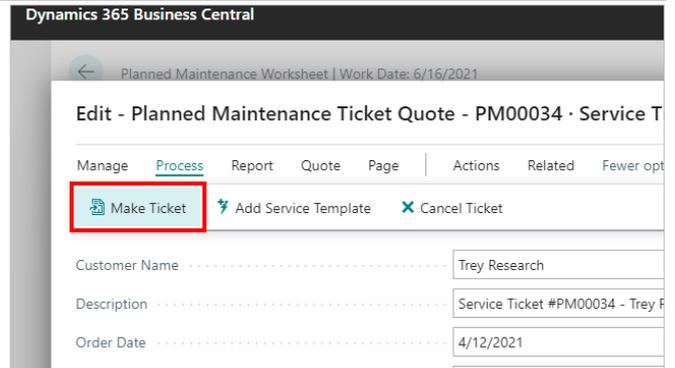
When you are finished reviewing the quote, it can be converted into a Planned Maintenance Ticket.



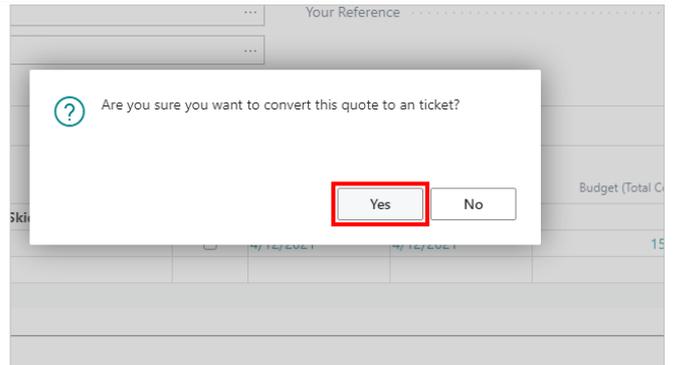
Click on the navigation menu item popup **Process**



Click on the navigation menu item **Make Ticket**



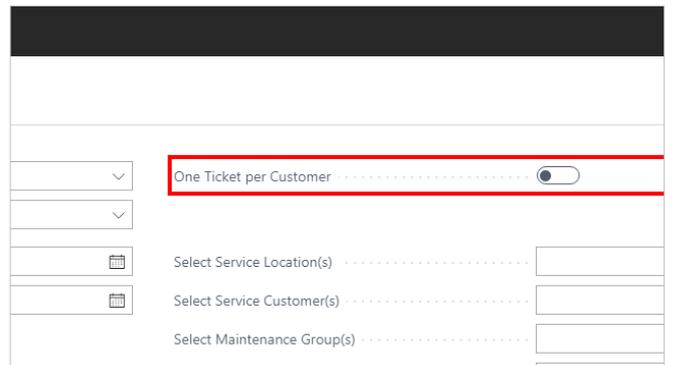
Click on the button **Yes**



4.2.4. How to use One Ticket Per Customer

One Ticket Per Customer allows you to add multiple Planned Maintenance lines to a single ticket. The units selected must belong to the same customer.

Click on **One Ticket per Customer**



ODT Service Help

Click on the link in cell **Service Unit No.** with the value **SU00008**

Date	Service Unit No.	Service Unit Description
4/...	SU00002	2016 NISSAN Titan
4/...	SU00003	2015 NISSAN Frontier
...	SU00004	2016 NISSAN Frontier
...	SU00005	2015 Ford F150
...	SU00006	2016 Ford F150
...	SU00007	2017 Bobcat S70 Skid-Steer ..
...	SU00008	2017 Bobcat S450 Skid-Steer..
...	SU00009	Select record "SU00008" Bobcat S70 Skid-Steer ..
...	SU00010	2018 Bobcat S450 Skid-Steer..

Click on the navigation menu item **Calculate Plan**

Service as at Date: 4/9/2020
 Posting Date: 4/6/2020
 View open records only:
 Use Predictive Usage:

Manage **Calculate Plan** Process Deferred Service View Service Uni

Calculate planned maintenance according to planned maintenance schedu

Service Unit No. ↑	Service Unit Description	Service Template No. ↑	Service Templat
→			

The selected units both belong to the same customer. Since they are both due for an oil change, we will select the two service lines for oil change.

Service Unit No. ↑	Service Unit Description	Service Template No. ↑	Service Templat
→ SU00007	2017 Bobcat S70 Skid-Steer Loader	OILCHANGE-SS	Oil Change
SU00007	2017 Bobcat S70 Skid-Steer Loader	REPLACEAIRFL...	Replace Air Fi
SU00008	2017 Bobcat S450 Skid-Steer Loa...	OILCHANGE-SS	Oil Change
SU00008	2017 Bobcat S450 Skid-Steer Loa...	REPLACEAIRFL...	Replace Air Fi

Click on the cell **Service Unit No.** with the value **SU00007**

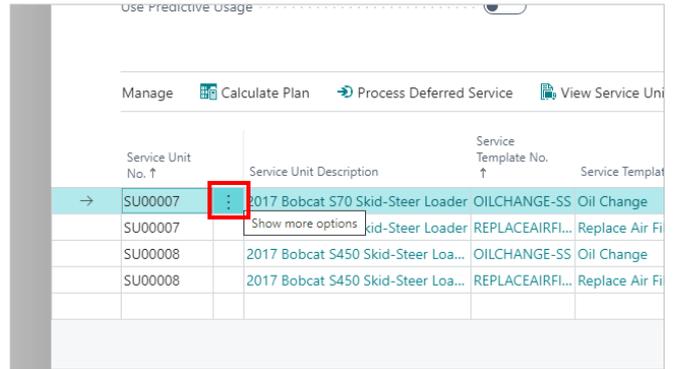
Use Predictive Usage:

Manage **Calculate Plan** Process Deferred Service View Service Uni

Service Unit No. ↑	Service Unit Description	Service Template No. ↑	Service Templat
→ SU00007	2017 Bobcat S70 Skid-Steer Loader	OILCHANGE-SS	Oil Change
SU00007	2017 Bobcat S70 Skid-Steer Loader	REPLACEAIRFL...	Replace Air Fi
SU00008	2017 Bobcat S450 Skid-Steer Loa...	OILCHANGE-SS	Oil Change
SU00008	2017 Bobcat S450 Skid-Steer Loa...	REPLACEAIRFL...	Replace Air Fi

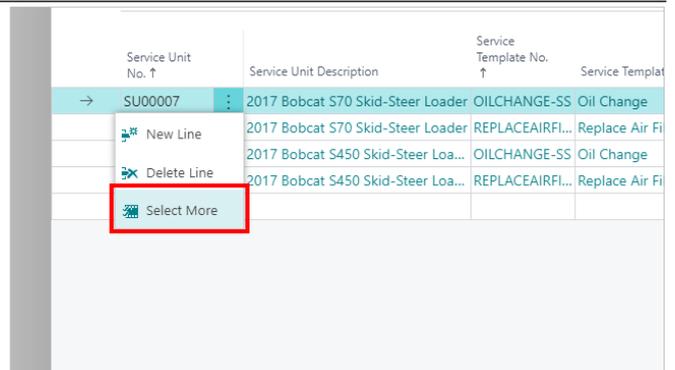
ODT Service Help

Click on the row menu button



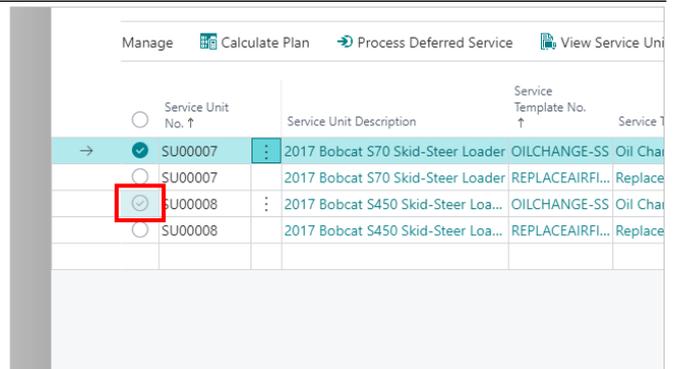
Service Unit No. ↑	Service Unit Description	Service Template No. ↑	Service Templat
→ SU00007	2017 Bobcat S70 Skid-Steer Loader	OILCHANGE-SS	Oil Change
SU00007	2017 Bobcat S70 Skid-Steer Loader	REPLACEAIRFI...	Replace Air Fi
SU00008	2017 Bobcat S450 Skid-Steer Loa...	OILCHANGE-SS	Oil Change
SU00008	2017 Bobcat S450 Skid-Steer Loa...	REPLACEAIRFI...	Replace Air Fi

Click on the menu item **Select More**



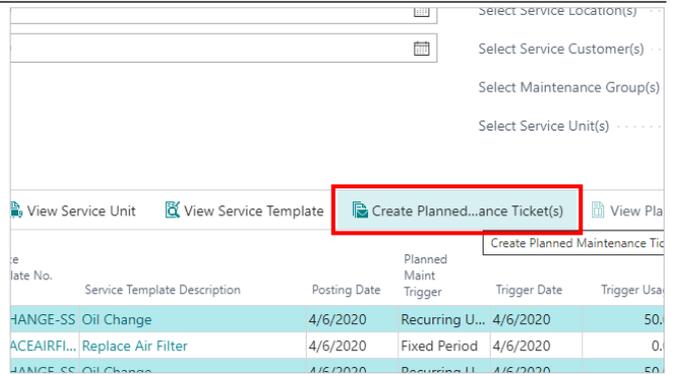
Service Unit No. ↑	Service Unit Description	Service Template No. ↑	Service Templat
→ SU00007	2017 Bobcat S70 Skid-Steer Loader	OILCHANGE-SS	Oil Change
	New Line	REPLACEAIRFI...	Replace Air Fi
	Delete Line	REPLACEAIRFI...	Replace Air Fi
	Select More		

Select the service line for Oil Change for both units.



Service Unit No. ↑	Service Unit Description	Service Template No. ↑	Service T
→ <input checked="" type="radio"/> SU00007	2017 Bobcat S70 Skid-Steer Loader	OILCHANGE-SS	Oil Cha
<input type="radio"/> SU00007	2017 Bobcat S70 Skid-Steer Loader	REPLACEAIRFI...	Replace
<input checked="" type="radio"/> SU00008	2017 Bobcat S450 Skid-Steer Loa...	OILCHANGE-SS	Oil Change
<input type="radio"/> SU00008	2017 Bobcat S450 Skid-Steer Loa...	REPLACEAIRFI...	Replace

Click on the navigation menu item **Create Planned Maintenance Ticket(s)**



Select Service Location(s) ...

Select Service Customer(s) ...

Select Maintenance Group(s)

Select Service Unit(s) ...

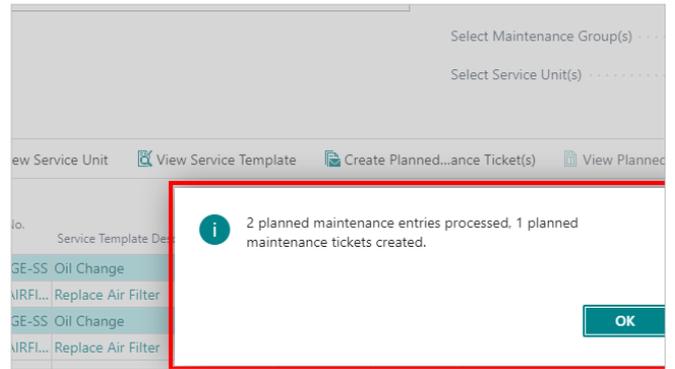
View Service Unit View Service Template **Create Planned...ance Ticket(s)** View Pla

Create Planned Maintenance Tic

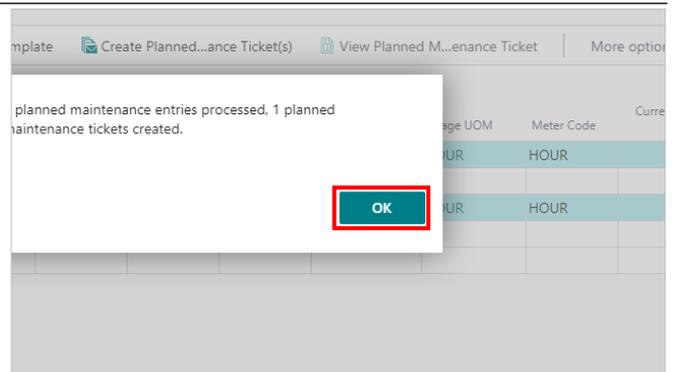
Service Template No.	Service Template Description	Posting Date	Planned Maint Trigger	Trigger Date	Trigger Usa
HANGE-SS	Oil Change	4/6/2020	Recurring U...	4/6/2020	50.
ACEAIRFI...	Replace Air Filter	4/6/2020	Fixed Period	4/6/2020	0.
HANGE-SS	Oil Change	4/6/2020	Recurring U...	4/6/2020	50.

ODT Service Help

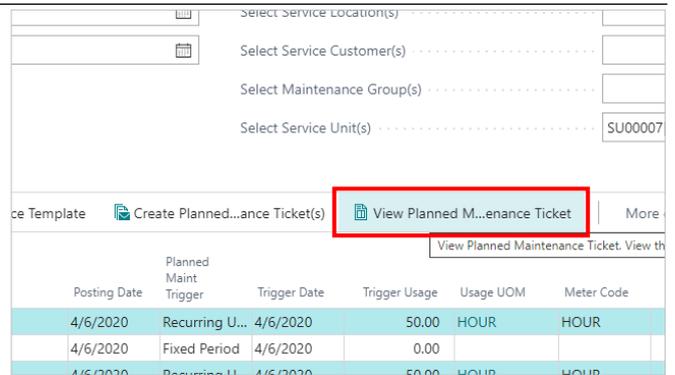
Notice that only 1 ticket has been created after selecting both lines.



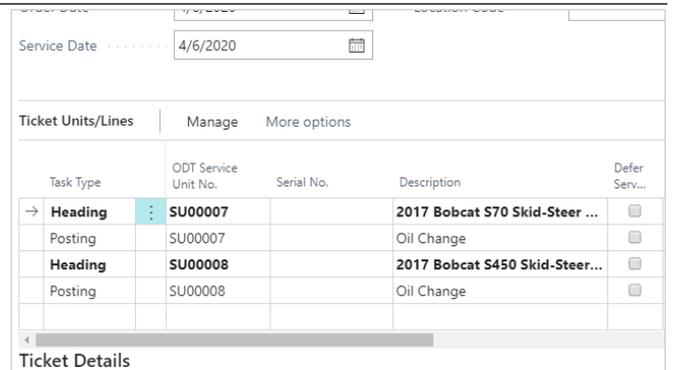
Click on the button **OK**



Click on the navigation menu item **View Planned Maintenance Ticket**



Notice that the ticket that was created now has lines for both of the selected Service Units.



4.2.5. How to use Predictive Usage

Predictive usage provides a way to plan service by predicting when a Service Meter on a Service Unit is expected to trigger. This allows a user to anticipate future service activities and plan accordingly.

The following demonstrates using Predictive Usage.

Business Manager Profile

Click on the link **Open the date picker**

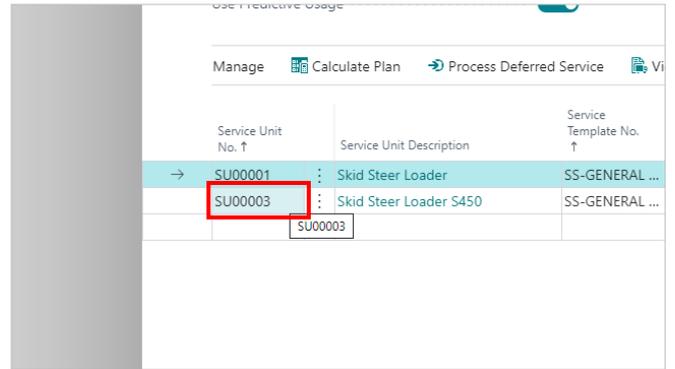
Change the date to April 16, 2019.

Click on the toggle field **Use Predictive Usage**

Click on the navigation menu item **Calculate Plan**

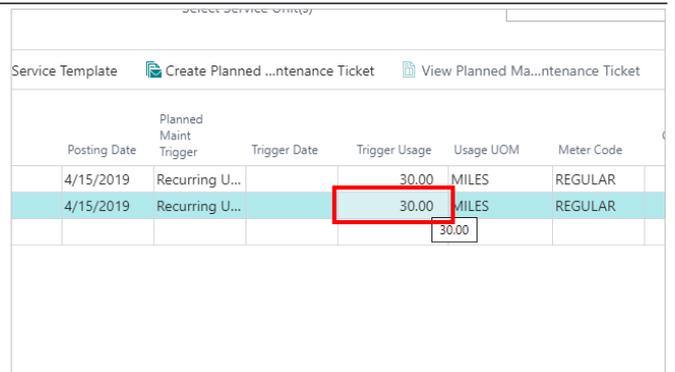
ODT Service Help

In addition to the entry from the previous example, a second entry now appears for Skid Steer General Service. Predictive Usage has determined that this will trigger during the specified time period.



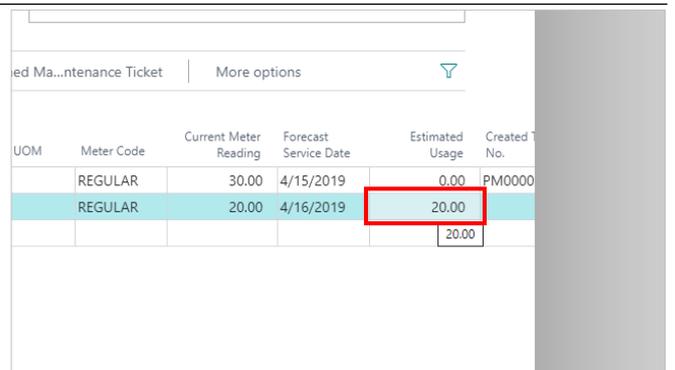
Service Unit No. ↑	Service Unit Description	Service Template No. ↑
SU00001	Skid Steer Loader	SS-GENERAL ...
SU00003	Skid Steer Loader S450	SS-GENERAL ...

Trigger usage displays the amount of usage required to trigger the Service Meter. In this example, the amount is 30 hours.



Posting Date	Planned Maint Trigger	Trigger Date	Trigger Usage	Usage UOM	Meter Code
4/15/2019	Recurring U...		30.00	MILES	REGULAR
4/15/2019	Recurring U...		30.00	MILES	REGULAR

Estimated Usage displays the amount of usage that is predicted to occur in the specified time period. In this example, the Service Unit will accrue 20 hours during the time period.



UOM	Meter Code	Current Meter Reading	Forecast Service Date	Estimated Usage	Created T No.
	REGULAR	30.00	4/15/2019	0.00	PM0000
	REGULAR	20.00	4/16/2019	20.00	

Since the predicted usage during the time period is estimated to be more than what is required to trigger the Service Meter, an entry for the required service is displayed.

At this point you may create a Planned Maintenance Ticket in the same way as you would for any entry on the Planned Maintenance Worksheet.

4.2.6. How to Defer Service

The following demonstrates how to defer service for a Planned Maintenance entry.

Business Manager Profile

ODT Service Help

Click on the cell **Service Unit No.** with the value **SU00003**

Service Unit No. ↑	Service Template No. ↑	Service Template Description
→ SU00001	SS-GENERAL ...	Skid Steer General Service
SU00003	SS-GENERAL ...	Skid Steer General Service
SU00003		

Click on the cell **Defer Service** with the value **Until Date Next Service**

Forecast Service Date	Estimated Usage	Created Ticket No.	Defer Service	Defer Until Date
4/15/2019	0.00	PM00001		
4/16/2019	20.00		Until Date Next Service	

Click on the item **Until Date** in the list

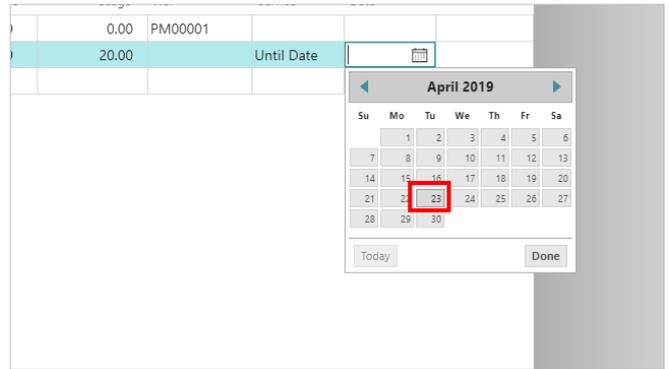
Forecast Service Date	Estimated Usage	Created Ticket No.	Defer Service	Defer Until Date
4/15/2019	0.00	PM00001		
4/16/2019	20.00		Until Date	

Click on the cell **Defer Until Date**

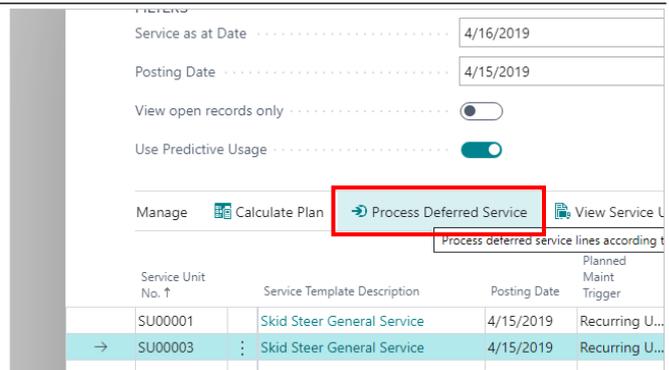
Forecast Service Date	Estimated Usage	Created Ticket No.	Defer Service	Defer Until Date
4/15/2019	0.00	PM00001		
4/16/2019	20.00		Until Date	

ODT Service Help

Select the date to April 23, 2019



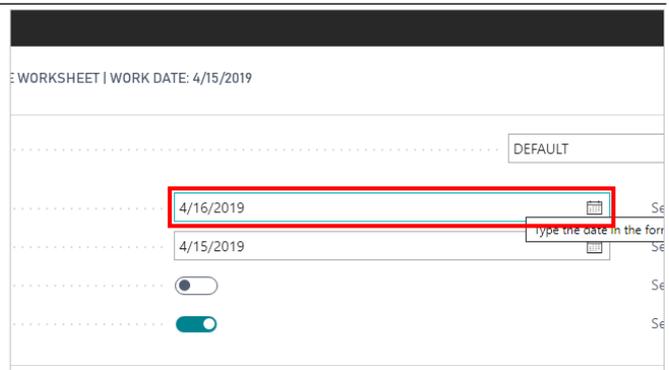
Click on the navigation menu item **Process Deferred Service**



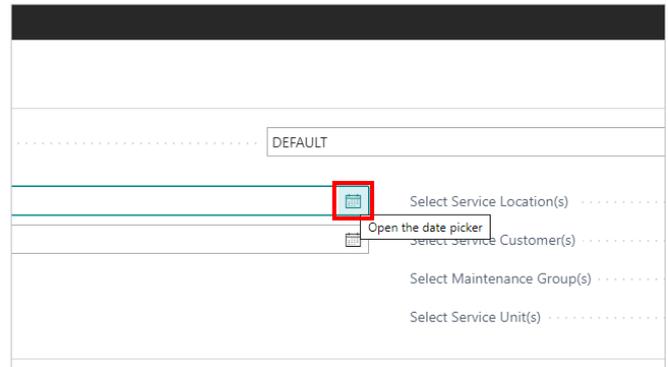
After clicking Process Deferred Service, the selected entry is removed from the current batch.



To view the deferred entry, simply change the Service Date to the date of deferral.
Click on the field **Service as at Date**



Click on the link **Open the date picker**



DEFAULT

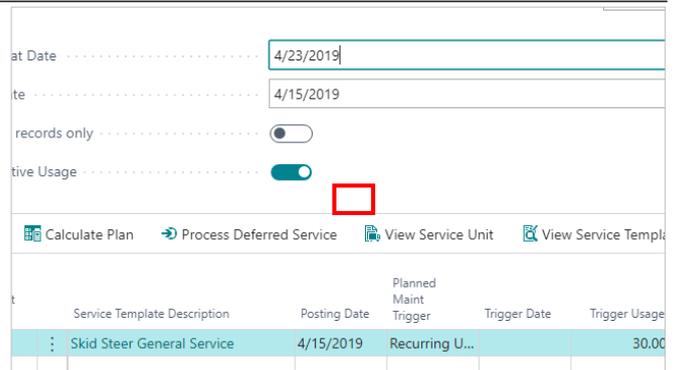
Select Service Location(s)

Open the date picker

Select Maintenance Group(s)

Select Service Unit(s)

Change the date to April 23, 2019



Service as at Date 4/23/2019

Posting Date 4/15/2019

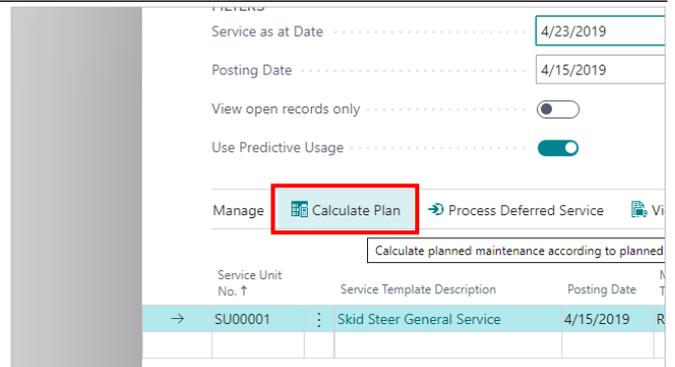
View open records only

Use Predictive Usage

Calculate Plan Process Deferred Service View Service Unit View Service Template

Service Unit No. ↑	Service Template Description	Posting Date	Planned Maint Trigger	Trigger Date	Trigger Usage
→ SU00001	Skid Steer General Service	4/15/2019	Recurring U...		30.00

Click on the link **Calculate planned maintenance according to planned maintenance schedules that have been set up.**



Service as at Date 4/23/2019

Posting Date 4/15/2019

View open records only

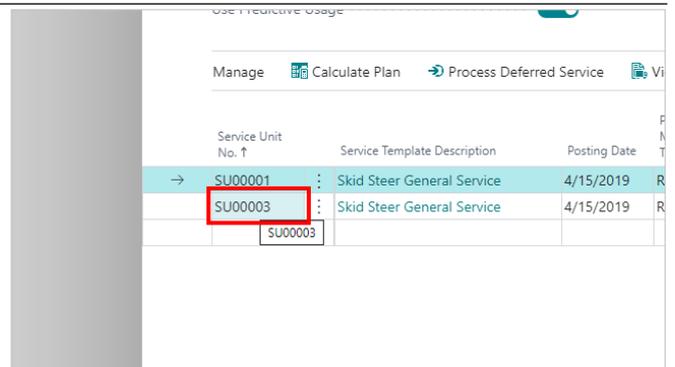
Use Predictive Usage

Calculate Plan Process Deferred Service View Service Unit View Service Template

Calculate planned maintenance according to planned

Service Unit No. ↑	Service Template Description	Posting Date	Planned Maint Trigger	Trigger Date	Trigger Usage
→ SU00001	Skid Steer General Service	4/15/2019			

Since the service date has been changed, Calculate Plan will now display the deferred entry.



Use Predictive Usage

Calculate Plan Process Deferred Service View Service Unit View Service Template

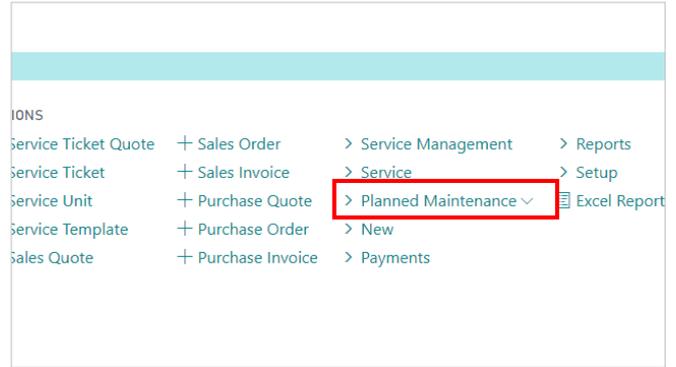
Service Unit No. ↑	Service Template Description	Posting Date	Planned Maint Trigger	Trigger Date	Trigger Usage
→ SU00001	Skid Steer General Service	4/15/2019			
SU00003	Skid Steer General Service	4/15/2019			

4.2.7. How to View the Planned Maintenance Entry Archive

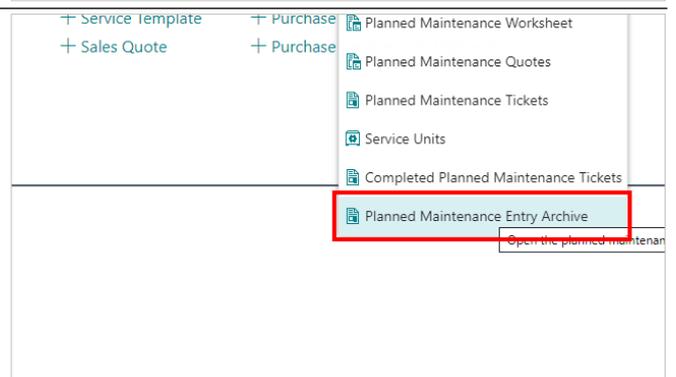
Business Manager Profile

ODT Service Help

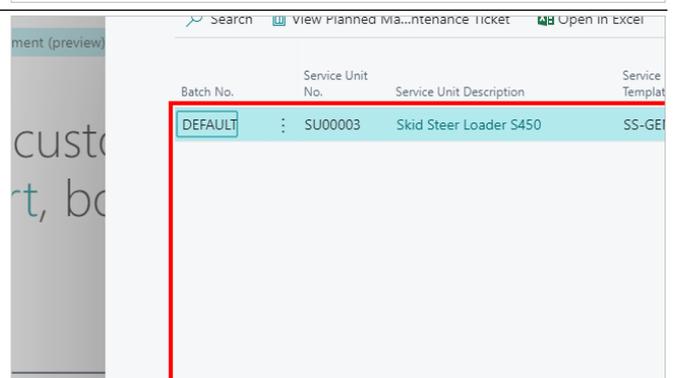
Click on the navigation menu item popup **Planned Maintenance**



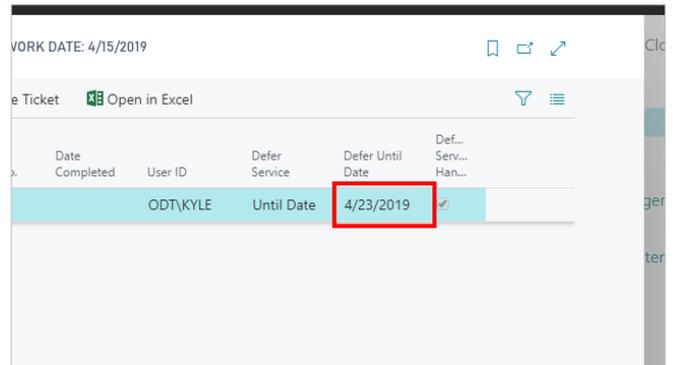
Click on the navigation menu item **Planned Maintenance Entry Archive**



The archive will display a list of all tickets that have been processed using the Planned Maintenance Worksheet.

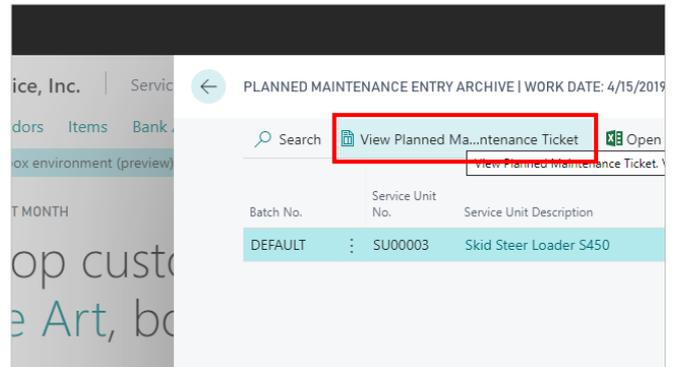


Click on the cell **Defer Until Date** with the value **4/23/2019**



Click on the navigation menu item **View Planned Maintenance Ticket**

If an entry has a Planned Maintenance Ticket assigned to it, you can view it by clicking the View Completed Planned Maintenance Ticket button.



4.3. How to Process Planned Maintenance Quotes

4.3.1. Overview

A Planned Maintenance Quote can be created:

- From the main menu option, Planned Maintenance, by selecting Planned Maintenance Quotes, which opens the Planned Maintenance Quote list where New can be selected.
- From the Actions section of the profile, select Planned Maintenance, then Planned Maintenance Quote.
- From the Activities Cue, Planned Maintenance Quote, then select New.

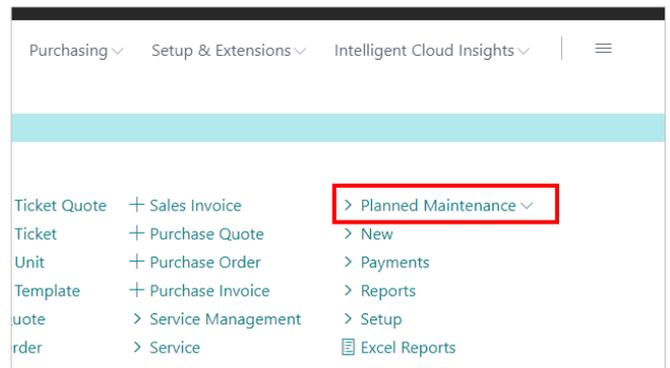
Upon approval from the customer, the Planned Maintenance Quote should be converted into a Planned Maintenance Ticket.

4.3.2. How to create a Planned Maintenance Quote

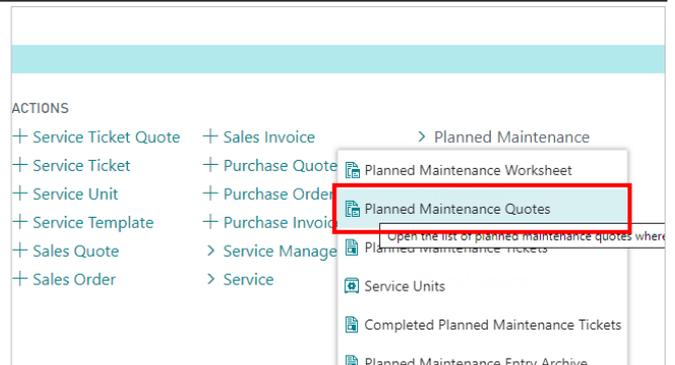
The following demonstrates the creation of a Planned Maintenance Quote.

Business Manager Profile

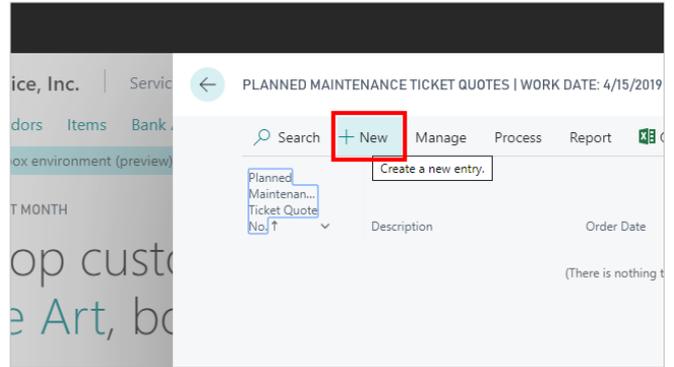
Click on the navigation menu item popup **Planned Maintenance**



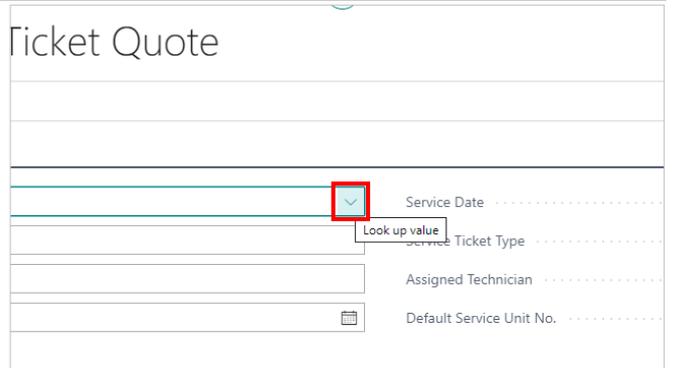
Click on the navigation menu item **Planned Maintenance Quotes**



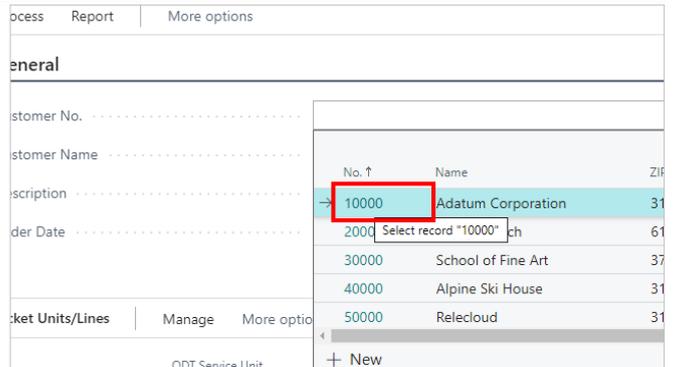
Click on the navigation menu item **New**



Click on the lookup button **Customer No.**



Click on the link in cell **No.** with the value **10000**
Select the applicable customer



Click on the field **Description**
You may specify a description for the ticket. If no description is given, a description using the ticket number will be automatically created.



Click on the field **Service Ticket Type**
This field is optional.

Click on the field **Assigned Technician**
This field is optional.

Click on the field **Default Service Unit No.**
If the selected service unit is already on another open service ticket, a message will be displayed to indicate this and confirm if you want to proceed.

Click on the link in cell **Service Unit No.** with the value **SU00001**
Select the applicable Service Unit. The selected Service Unit will be automatically added to the ticket lines.

Service Unit No. ↑	Description
SU00001	Skid Steer Loader
SU00002	Select record "SU00001" per Loader - Interna
SU00003	Skid Steer Loader S450
SU00004	Skid Steer Loader S70
+ New	

4.3.3. How to add a Service Template

A Service Template can be added using the Process option in the header, or the Manage option in the ticket lines. When a Service Template is selected, the template lines are automatically added to the ticket lines.



ODT Service Help

Enter the text **Additional Labor**.

When creating a new line, Task Type will automatically default to Posting, and Service Unit No. will automatically default to the current Service Unit.

	SU00001		Skid Steer Loader		
tal	SU00001		Skid Steer General Service		
	SU00001		Labor - Lube		4/1
	SU00001		Oil Change for Skid Steers		4/1
	SU00001		Air Filter for Skid Steers		4/1
	SU00001		Income - Shop Supplies		4/1
	SU00001		Skid Steer General Service		
			Al		

Click on the link in the cell Budget (Total Cost)

	4/15/2019	4/15/2019	11.13		
	4/15/2019	4/15/2019	37.50		
	4/15/2019	4/15/2019	15.38		
	4/15/2019	4/15/2019	10.00		
			74.01		

Note that the field Line Type defaults to Time and Materials, and Type defaults to Resource. These values may be changed if necessary. The following example uses the Resource Type.

Job Task No. ↑	Service Unit No.	Service Template No.	Line Type	Type	No.	Descri
0080000			Time and Mat	Resource		

Click on the cell **No.**

Service Template No.	Line Type	Type	No.	Description
	Time and	Resource		



ODT Service Help

Click on the link in cell **No.** with the value **LABOR**

No. ↑	Name
LABOR	Labor - Oil Change
LIND Select record "LABOR"	
MARK	Mark Hanson
MARY	Mary A. Dempsey
TIMOTHY	Timothy Sneath
+ New	

Click on the cell **Description** with the value **Labor - Oil Change**

Description will be automatically filled based on the Resource card selected. This value can be overridden to more accurately describe the task being performed.

Job No. ↑	Type	No.	Description	Defer Serv...
PM00002	Resource	LABOR	Labor - Oil Change	

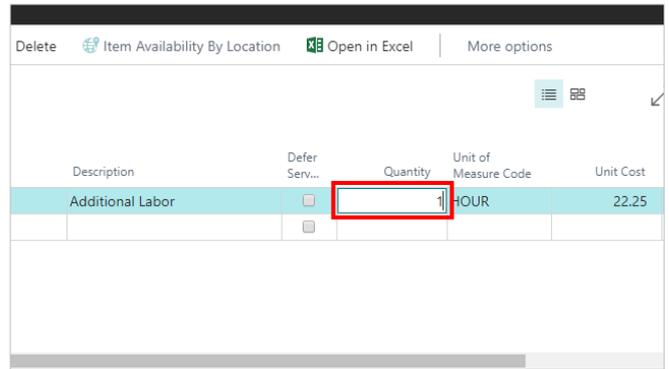
Enter the text **additional Labor.**

Job No. ↑	Type	No.	Description	Defer Serv...
PM00002	Resource	LABOR	Ad	

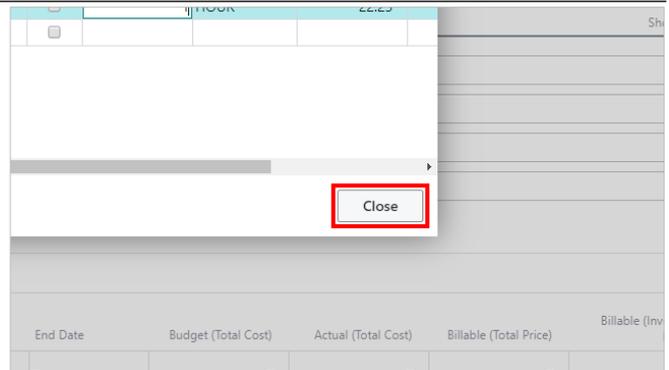
Click on the cell **Quantity**

Description	Defer Serv...	Quantity	Unit of Measure Code	Unit Cost
Additional Labor		1	HOURL	22.25

Enter the text 1.



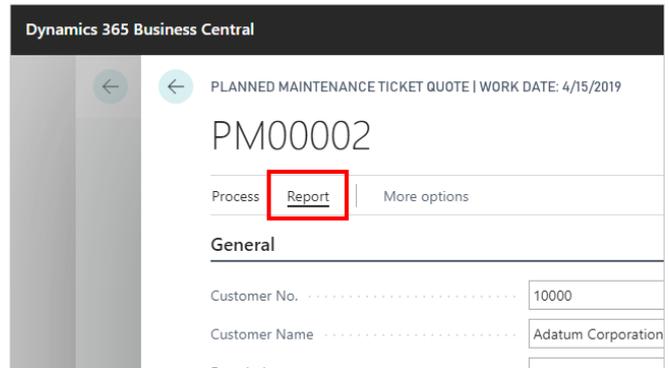
Click on the button **Close**



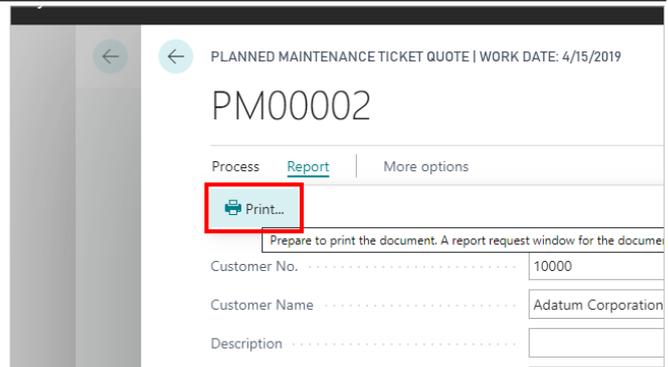
4.3.5. How to Print the Planned Maintenance Quote

The following demonstrates how to print a Planned Maintenance Quote.

Click on the navigation menu item popup **Report**

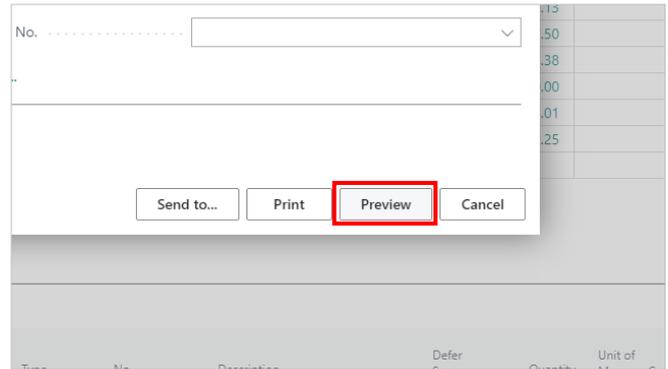


Click on the navigation menu item **Print...**



The standard Microsoft Dynamics 365 Business Central, printing options are available to select from.

In this example Preview will be used to view the ticket. Click on the button **Preview**



4.4. How to Process Planned Maintenance Tickets

4.4.1. Overview

A Planned Maintenance Ticket can be created:

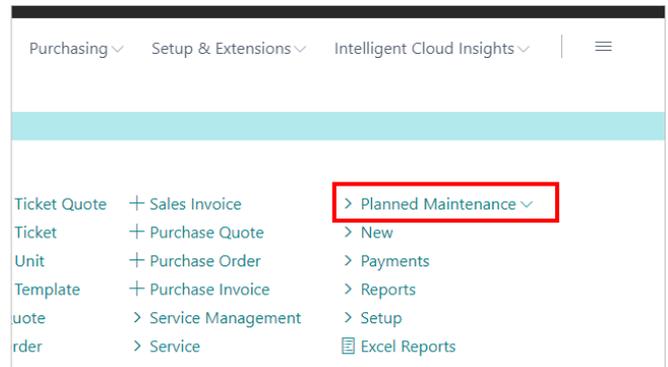
- From the main menu option, Planned Maintenance, by selecting Planned Maintenance Tickets, which opens the Planned Maintenance Ticket list where New can be selected.
- From the Actions part of the profile by selecting, Planned Maintenance, then Planned Maintenance Tickets.
- From the Activities Cue, Planned Maintenance Tickets Open and then selecting New.
- From the Planned Maintenance Worksheet. See ODT Service Help, Service Planned Maintenance Worksheet for more details.

4.4.2. How to Create a Planned Maintenance Ticket

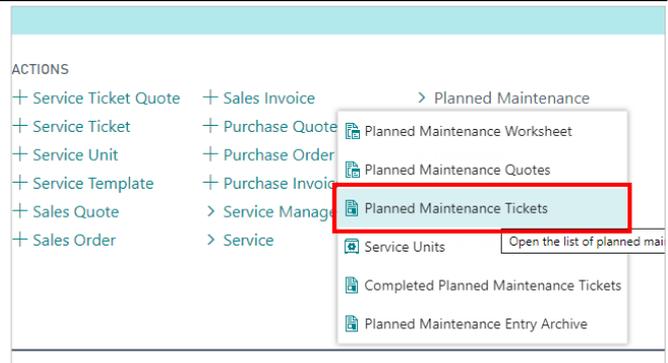
Planned Maintenance Tickets can be created manually, or they can be created using the Planned Maintenance Worksheet. Tickets created using the Planned Maintenance Worksheet will have all required fields filled in automatically.

The following demonstrates how to create a new Planned Maintenance Ticket.

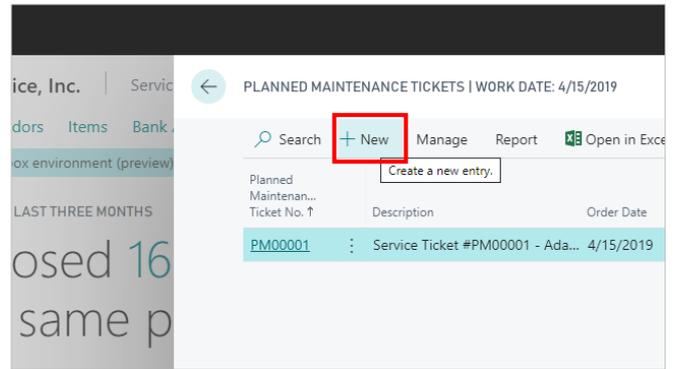
Click on the navigation menu item popup **Planned Maintenance**



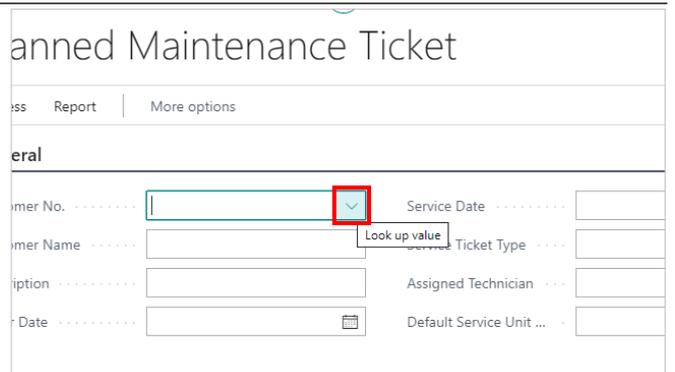
Click on the navigation menu item **Planned Maintenance Tickets**



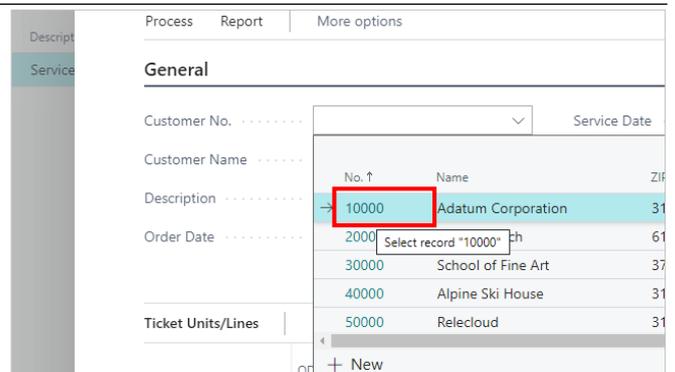
Click on the navigation menu item **New**



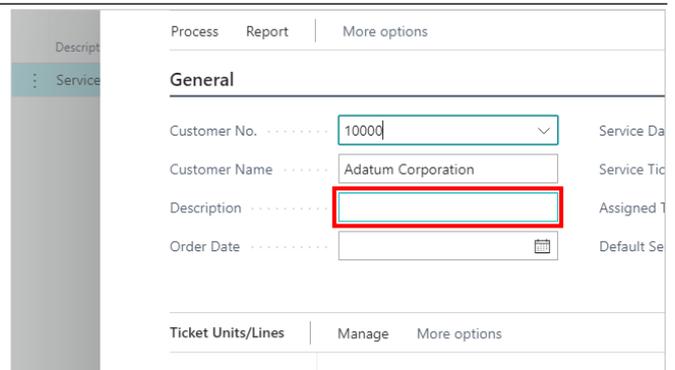
Click on the lookup button **Customer No.**



Click on the link in cell **No.** with the value **10000**
Select the applicable customer.



Click on the field **Description**
You may specify a description for the ticket. If no description is given, a description using the ticket number will be automatically created.



Click on the field **Service Ticket Type**
This field is optional.

The screenshot shows a form with several fields. The 'Service Ticket Type' field is highlighted with a red box. A 'Look up value' tooltip is visible over the field. Other fields include 'Service Date' (4/15/2019), 'Assigned Technician' (PM00003 - Adatu), and 'Default Service Unit'.

Click on the field **Assigned Technician**
This field is optional.

The screenshot shows the same form as above. The 'Assigned Technician' field is highlighted with a red box. A 'Look up value' tooltip is visible over the field. The 'Service Ticket Type' field is now empty.

Click on the field **Default Service Unit No.**
If the selected service unit is already on another open service ticket, a message will be displayed to indicate this and confirm if you want to proceed.

The screenshot shows the same form. The 'Default Service Unit No.' field is highlighted with a red box. A 'Look up value' tooltip is visible over the field. The 'Assigned Technician' field is now empty.

Click on the link in cell **Service Unit No.** with the value **SU0001**

The screenshot shows a dropdown menu for 'Service Unit No.' with the following items: SU0001 (Skid Steer Loader), SU0001 (Select record "SU00001" - Skid Steer Loader - Internal), SU00003 (Skid Steer Loader S450), and SU00004 (Skid Steer Loader S70). The 'SU0001' option is highlighted with a red box. A '+ New' option is at the bottom.

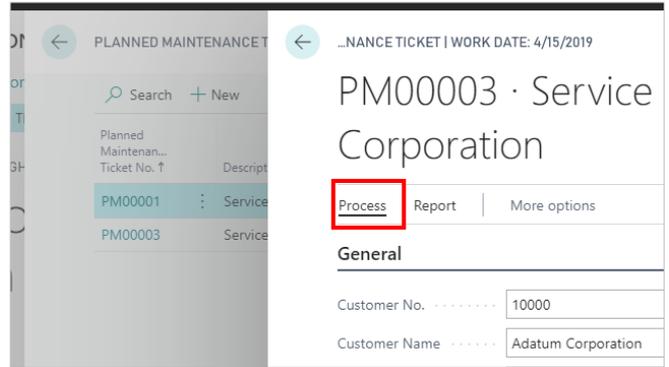
4.4.3. How to add a Service Template

A Service Template can be added using the Process option in the header, or the Manage option in the ticket lines. When a Service Template is selected, the template lines are automatically added to the ticket lines.

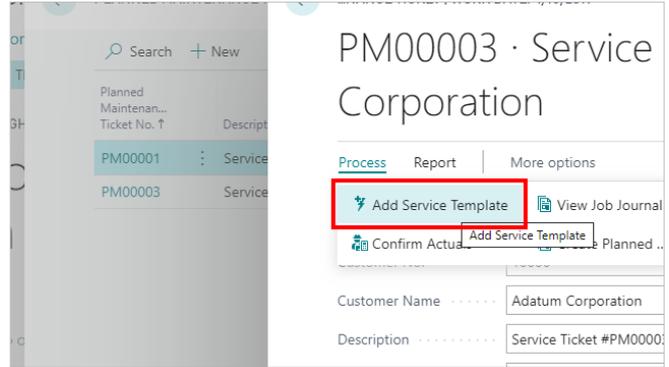
The following demonstrates how to add a Service Template to a Planned Maintenance Ticket.

Business Manager Profile

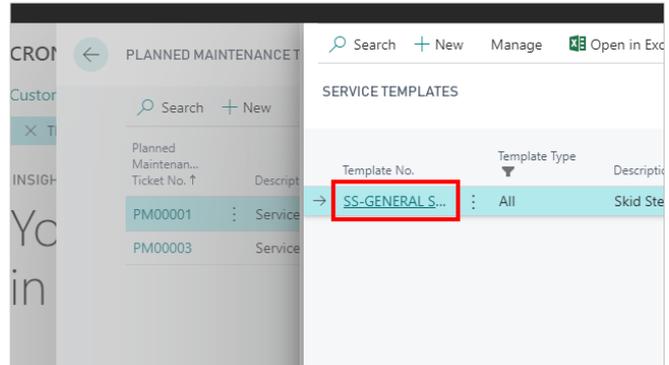
Click on the navigation menu item popup **Process**



Click on the navigation menu item **Add Service Template**

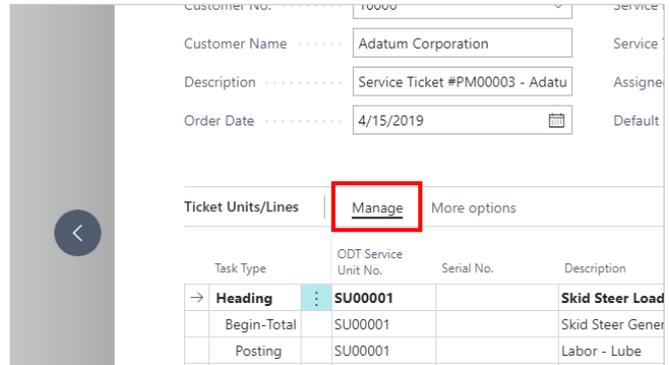


Click on the link in cell **Template No.** with the value **SS-GENERAL SERVICE**

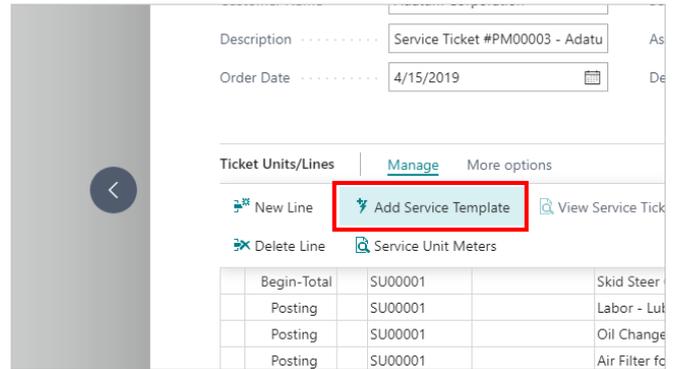


A Service Template can also be added from the ticket lines.

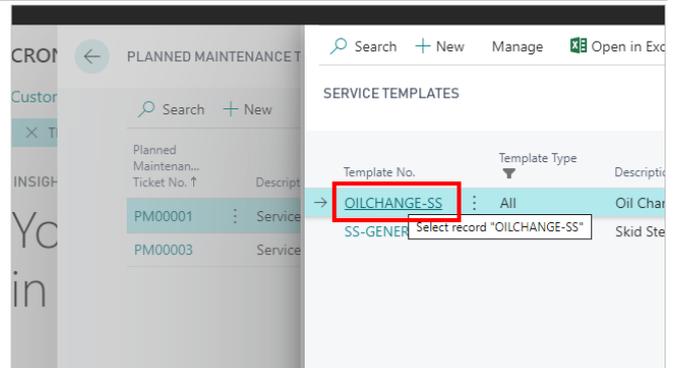
Click on the navigation menu item popup **Manage**



Click on the navigation menu item **Add Service Template**



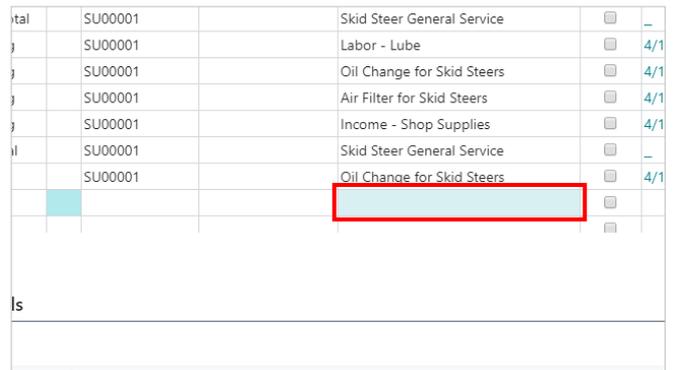
Click on the link in cell **Template No.** with the value **OILCHANGE-SS**



4.4.4. How to Manually add a Service Line

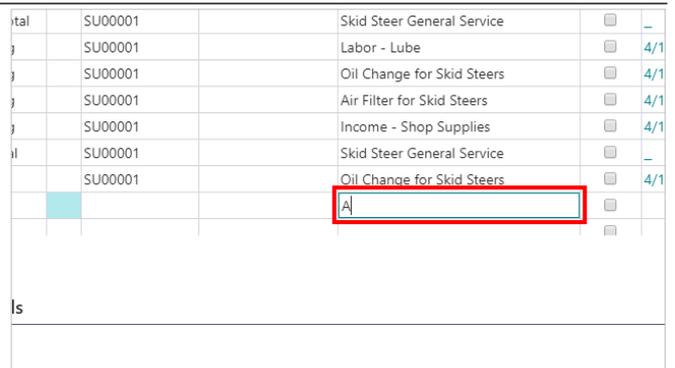
The following demonstrates manually entering a ticket line on a Planned Maintenance Ticket.

Click on the cell **Description**



Enter the text **Additional Labor**.

When creating a new line, Task Type will automatically default to Posting, and Service Unit No. will automatically default to the current Service Unit.





ODT Service Help

Click on the link in cell Budget (Total Cost).

<input type="checkbox"/>	-	-	-	-	-
<input type="checkbox"/>	4/15/2019	4/15/2019		11.13	-
<input type="checkbox"/>	4/15/2019	4/15/2019		37.50	-
<input type="checkbox"/>	4/15/2019	4/15/2019		15.38	-
<input type="checkbox"/>	4/15/2019	4/15/2019		10.00	-
<input type="checkbox"/>	-	-		74.01	-
<input type="checkbox"/>	4/15/2019	4/15/2019		37.50	-
<input type="checkbox"/>	4/15/2019	4/15/2019		-	-
<input type="checkbox"/>					

Note that the field Line Type defaults to Time and Materials, and Type defaults to Resource. These values may be changed if necessary. The following example uses the Resource Type.

EDIT LIST

BUDGET DETAILS

Job Task No. ↑	Service Unit No.	Service Template No.	Line Type	Type	No.	Description
0090000	SU00001		Time and Mat	Resource		

Click on the cell No.

EDIT - SERVICE TICKET DETAILS

Job No. ↑	Line Type	Type	No.	Description
PM00003	Time and	Resource		

Click on the link in cell No. with the value LABOR

SERVICE TICKET DETAILS

No. ↑	Line Type	Type	No.	Description	Deferral Serv...
PM00003	Time and Mat	Resource			

LABOR Labor - Oil Change

MARK Mark Hanson

MARY Mary A. Dempsey

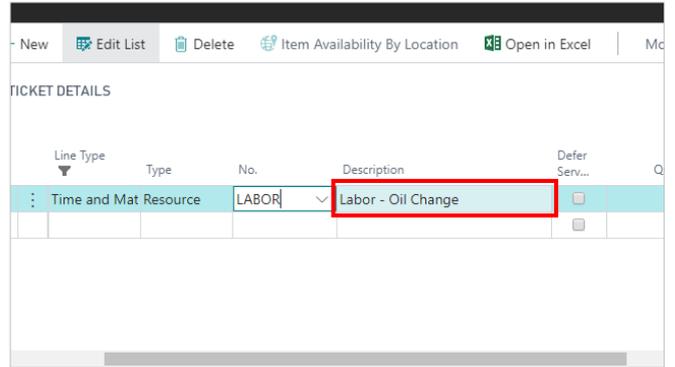
TIMOTHY Timothy Sneath

+ New

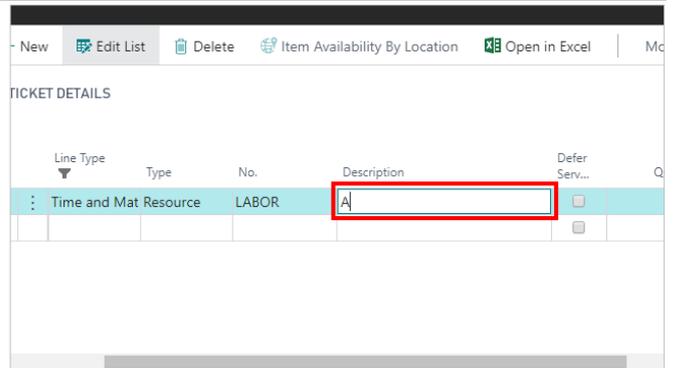
ODT Service Help

Click on the cell **Description** with the value **Labor - Oil Change**

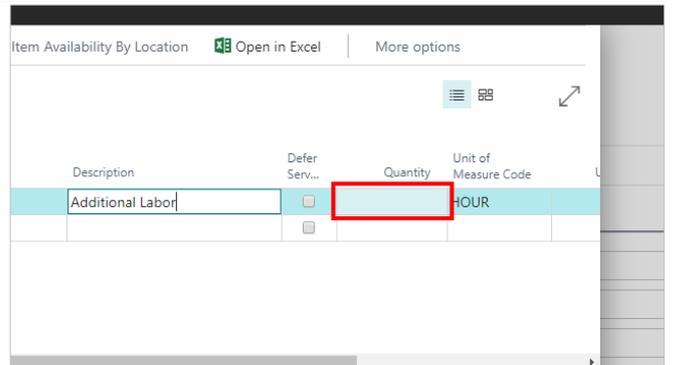
Description will be automatically filled based on the Resource card selected. This value can be overridden to more accurately describe the task being performed.



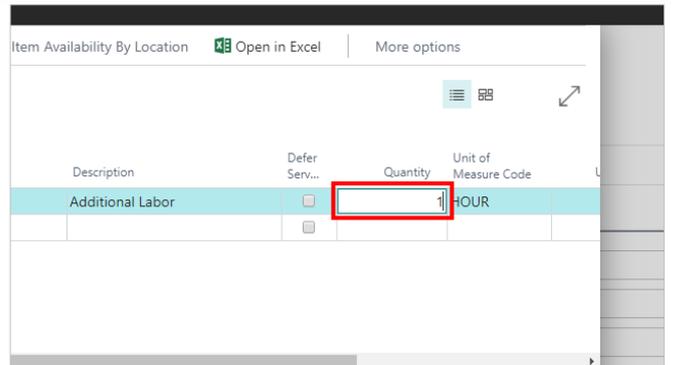
Enter the text **additional Labor**.



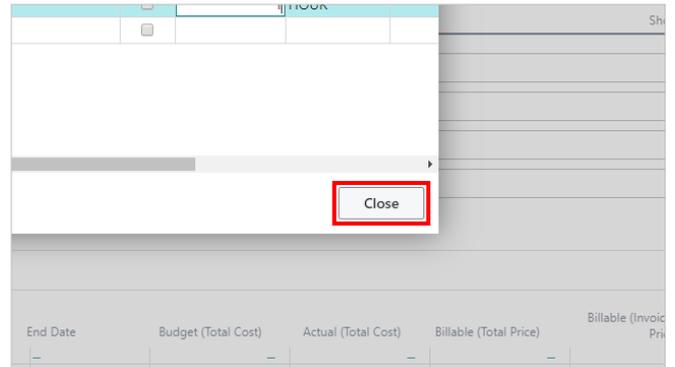
Click on the cell **Quantity**



Enter the text **1**.



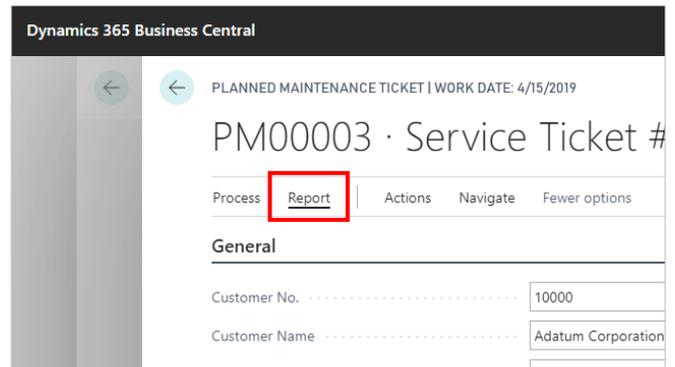
Click on the button **Close**



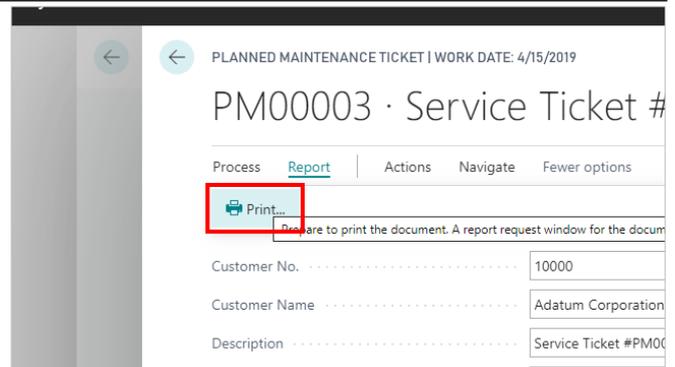
4.4.5. How to Print a Planned Maintenance Ticket

The following demonstrates how to print a Planned Maintenance Ticket.

Click on the navigation menu item popup **Report**

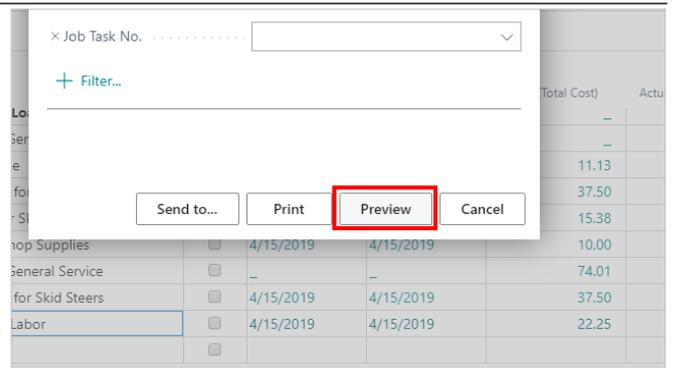


Click on the navigation menu item **Print...**



The standard Microsoft Dynamics 365 Business Central, printing options are available to select from.

In this example Preview will be used to view the ticket. Click on the button **Preview**



4.4.6. How to Confirm Usage Actuals

The following demonstrates the confirmation of usage actuals for Planned Maintenance Ticket Lines.

The following example is for when the actuals are the same as the estimated quantities.

ODT Service Help

Should the actuals be different from the budgeted quantities, then on the Ticket Detail Lines, the quantity should be revised to reflect the actual quantities prior to running the Confirm Actuals.

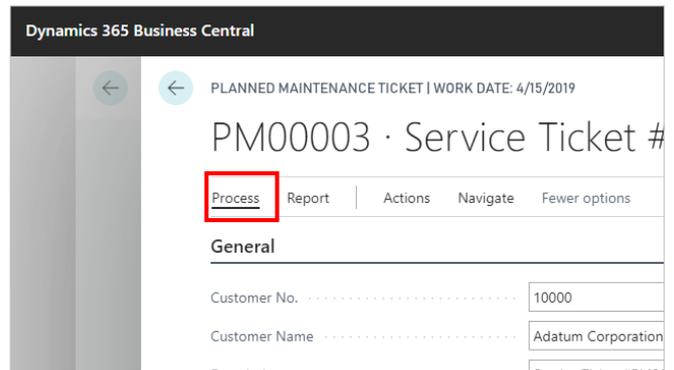
Alternatively, the quantity can be revised on the Job Journal records prior to posting the journal when only a portion of the usage is to be posted at the specified posting date.

This process automatically creates records in a Job Journal, which automatically opens and must be posted to record the usage on the ticket and job.

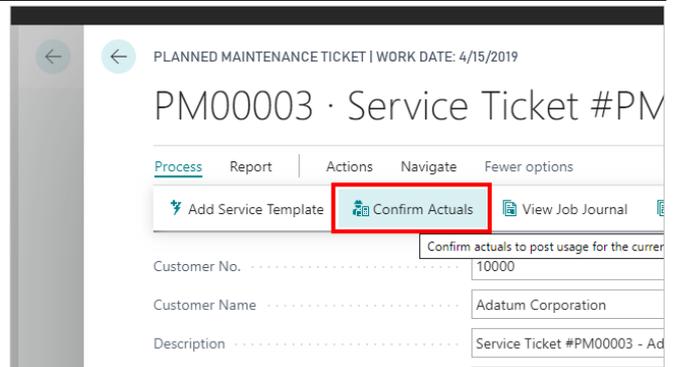
NOTE:

The first time a user completes the following steps a Job Journal Batch will automatically be created for the user.

Click on the navigation menu item popup **Process**



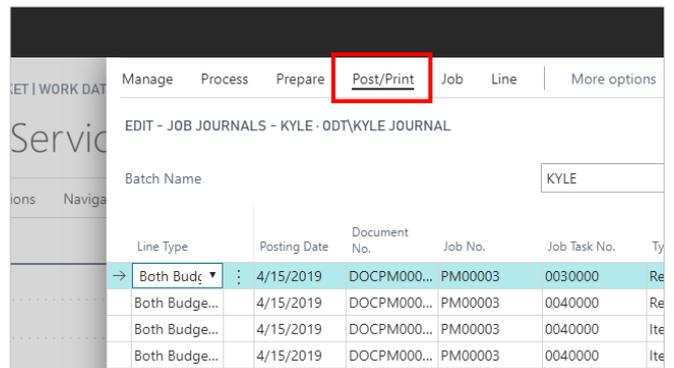
Click on the link **Confirm actuals to post usage for the current planned maintenance ticket.**



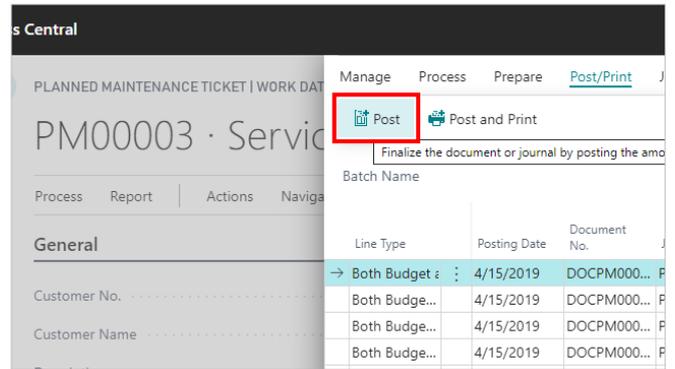
At this point the journal entries may be modified if necessary.

NOTE: If you wish to change the Line Type field, you must first clear the Job Planning Line No. field.

Click on the navigation menu item popup **Post/Print**



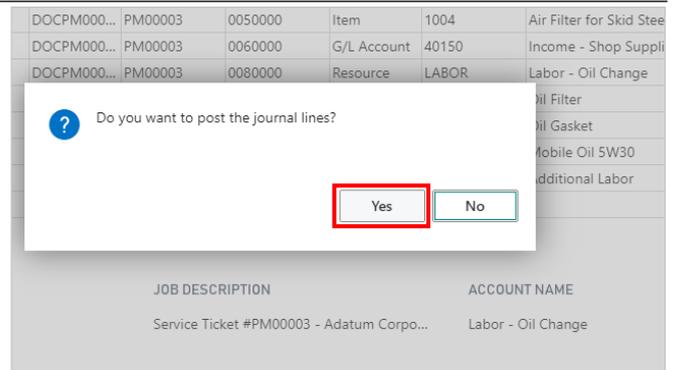
Click on the navigation menu item **Post**



The screenshot shows a software window titled 's Central' with a menu bar containing 'Manage', 'Process', 'Prepare', and 'Post/Print'. A dropdown menu is open under 'Post/Print', with the 'Post' option highlighted by a red box. Below the menu, there is a table with columns for 'Line Type', 'Posting Date', and 'Document No.'. The table contains several rows, with the first row highlighted in blue.

Line Type	Posting Date	Document No.
→ Both Budget	4/15/2019	DOCPM000...
Both Budge...	4/15/2019	DOCPM000...
Both Budge...	4/15/2019	DOCPM000...
Both Budge...	4/15/2019	DOCPM000...

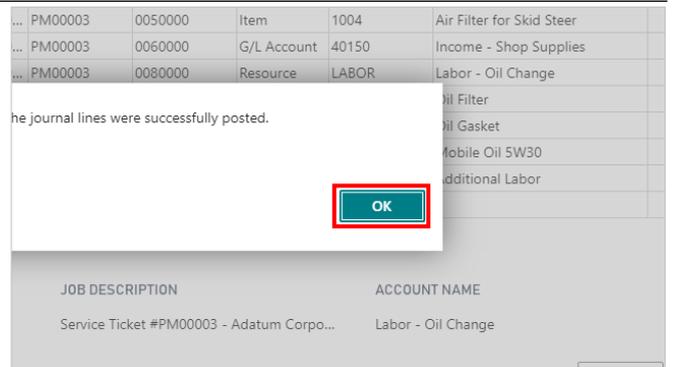
Click on the button **Yes**



The screenshot shows a confirmation dialog box with a question mark icon and the text 'Do you want to post the journal lines?'. The 'Yes' button is highlighted with a red box. The background shows a table with columns for 'JOB DESCRIPTION' and 'ACCOUNT NAME'.

JOB DESCRIPTION	ACCOUNT NAME
Service Ticket #PM00003 - Adatum Corpo...	Labor - Oil Change

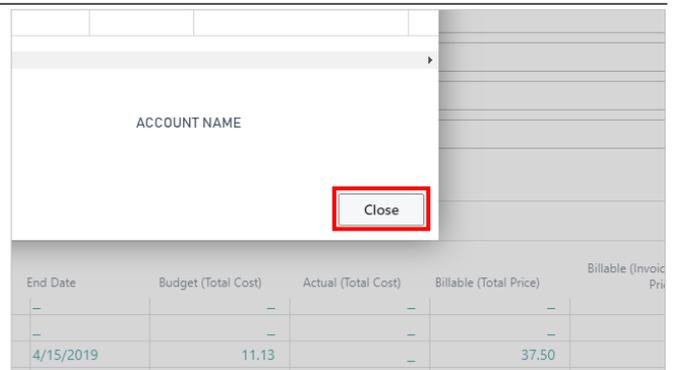
Click on the button **OK**



The screenshot shows a success message dialog box with the text 'The journal lines were successfully posted.' and an 'OK' button highlighted with a red box. The background shows a table with columns for 'JOB DESCRIPTION' and 'ACCOUNT NAME'.

JOB DESCRIPTION	ACCOUNT NAME
Service Ticket #PM00003 - Adatum Corpo...	Labor - Oil Change

Click on the button **Close**



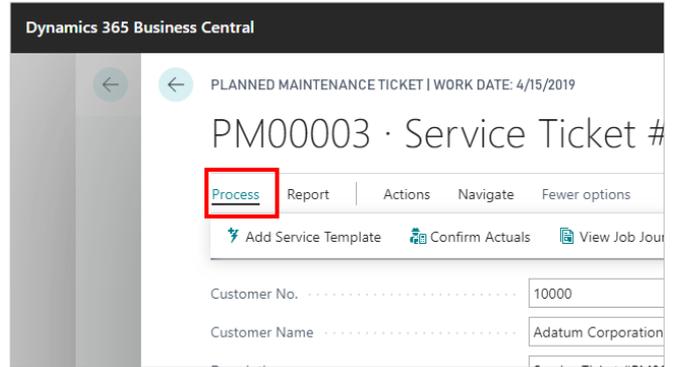
The screenshot shows a dialog box with the text 'ACCOUNT NAME' and a 'Close' button highlighted with a red box. Below the dialog box, there is a table with columns for 'End Date', 'Budget (Total Cost)', 'Actual (Total Cost)', 'Billable (Total Price)', and 'Billable (Invoice Price)'.

End Date	Budget (Total Cost)	Actual (Total Cost)	Billable (Total Price)	Billable (Invoice Price)
-	-	-	-	-
4/15/2019	11.13	-	37.50	-

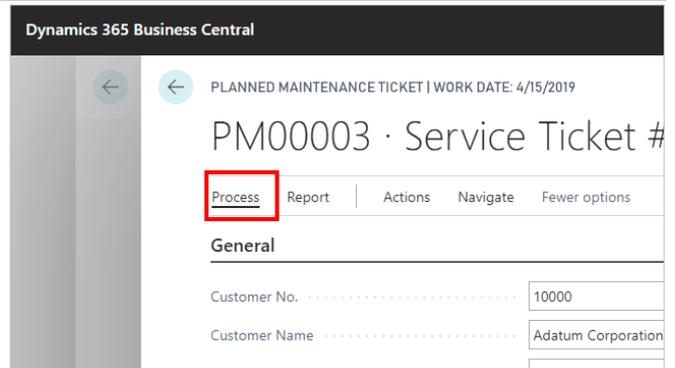
4.4.7. How to Invoice a Planned Maintenance Ticket

The following demonstrates how to invoice a Planned Maintenance Ticket.

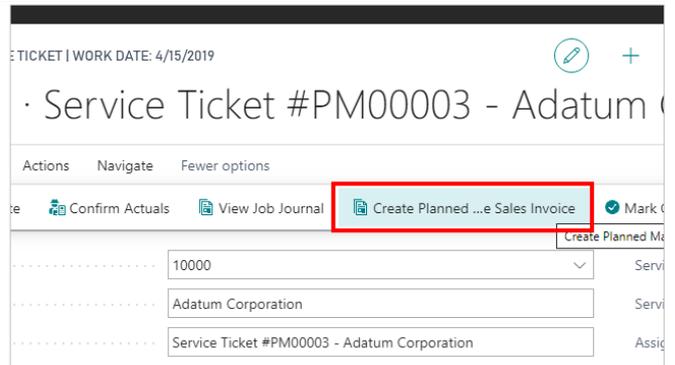
Click on the navigation menu item popup **Process**



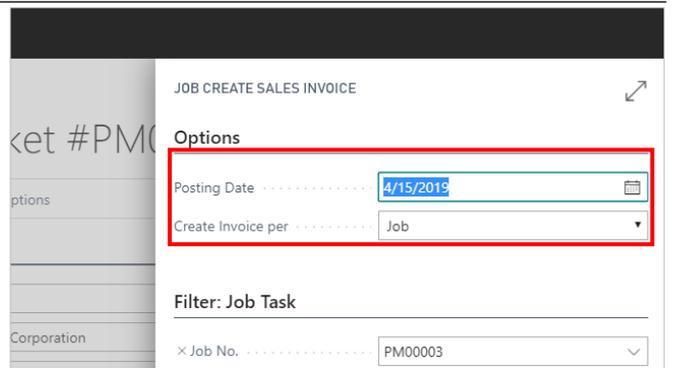
Click on the navigation menu item popup **Process**



Click on the navigation menu item **Create Planned Maintenance Sales Invoice**

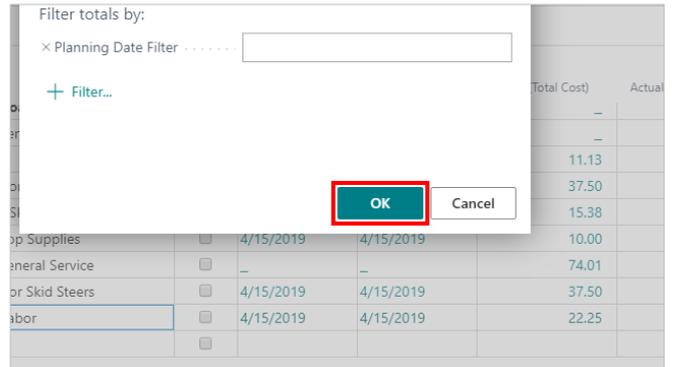


Verify that the Posting Date is correct.

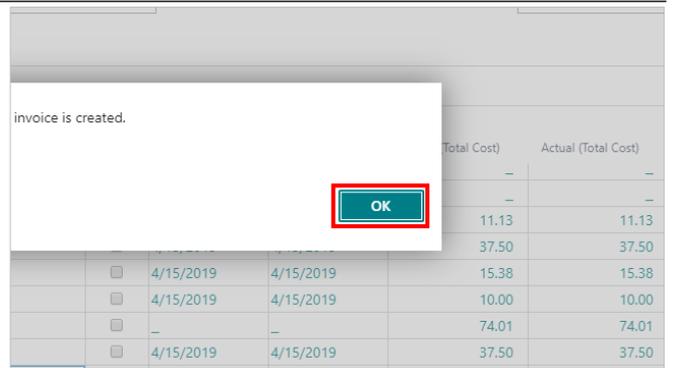


ODT Service Help

Click on the button **OK**

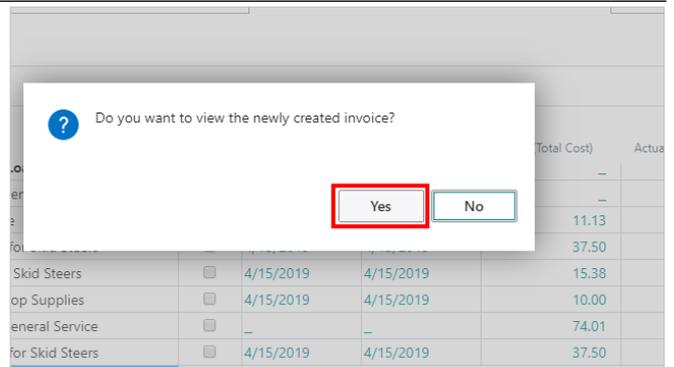


Click on the button **OK**



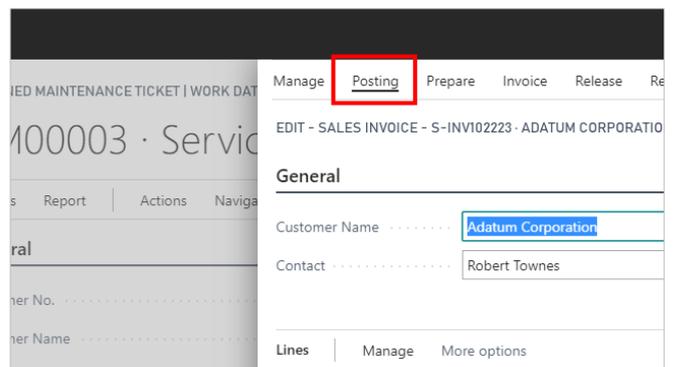
After creating the invoice, you will be given the option to view it. Selecting Yes will display the invoice, and selecting No will go back to viewing the Planned Maintenance Ticket.

The following example will select Yes. Click on the button **Yes**

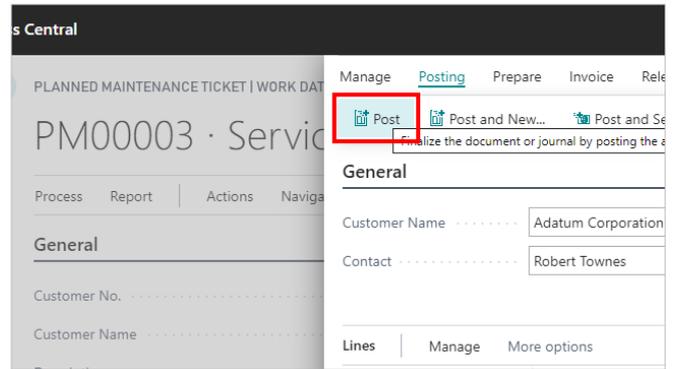


The following demonstrates how to post the invoice.

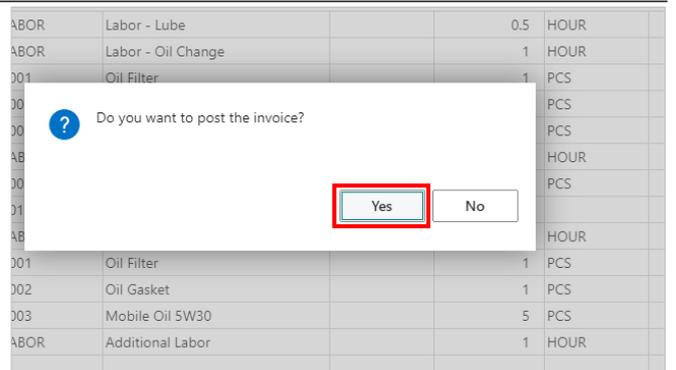
Click on the navigation menu item popup **Posting**



Click on the navigation menu item **Post**



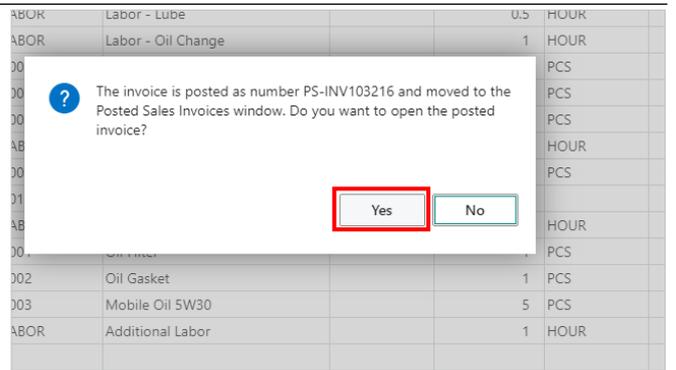
Click on the button **Yes**



After the posting is finished you will be given the option to view the posted invoice.

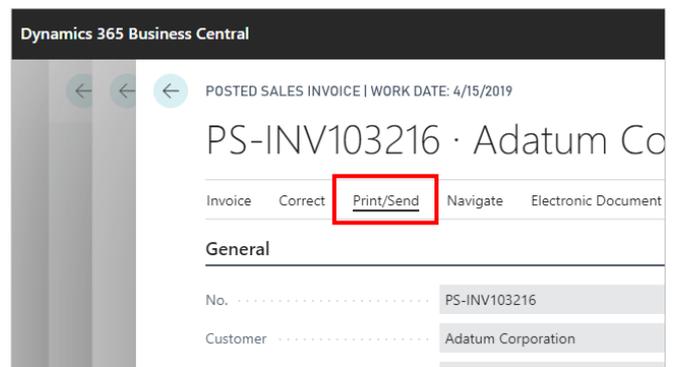
This example will select Yes and view the posted invoice.

Click on the button **Yes**

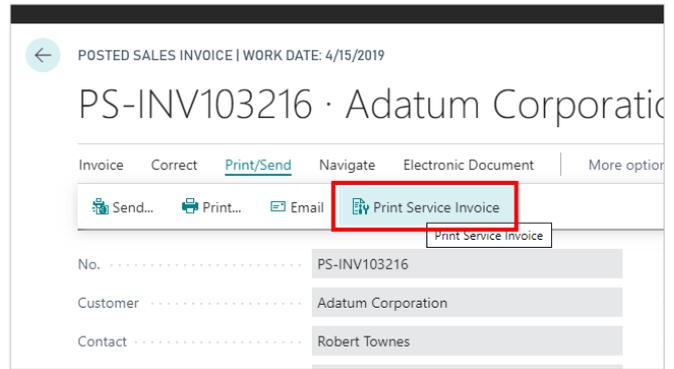


The following demonstrates how to print the posted invoice.

Click on the navigation menu item popup **Print/Send**

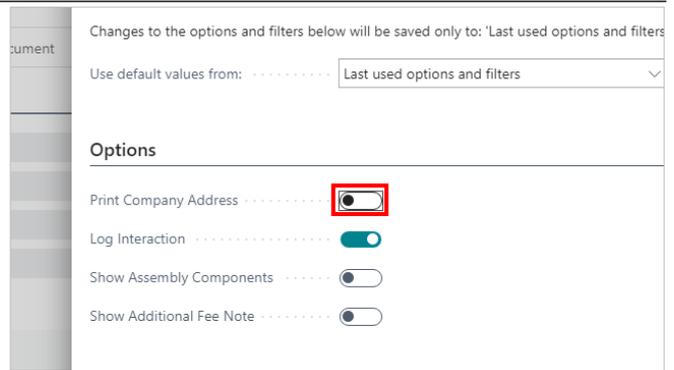


Click on the navigation menu item **Print Service Invoice**

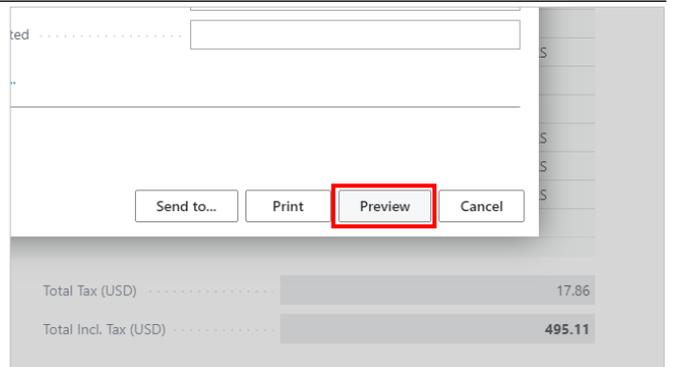


Click on the toggle field **Print Company Address**

By default the first time Print Service Invoice is ran the Print Company Information is by default disabled. Therefore, to print company information, this field must be enabled.



Click on the button **Preview**



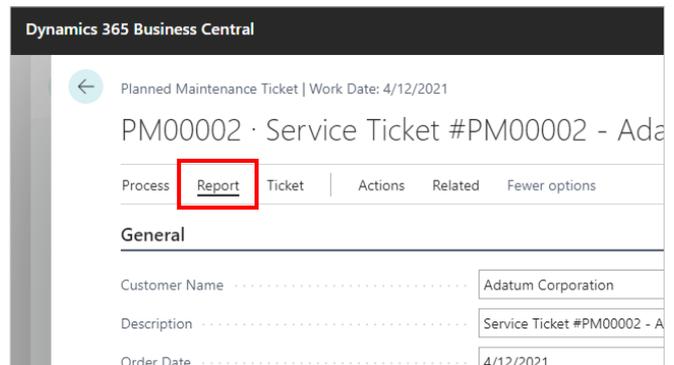
NOTE:

When processing a ticket, the posting of the invoice and confirming of actuals are not limited to, confirming actuals, then invoicing. Invoicing can be done first, then confirmation of the actuals.

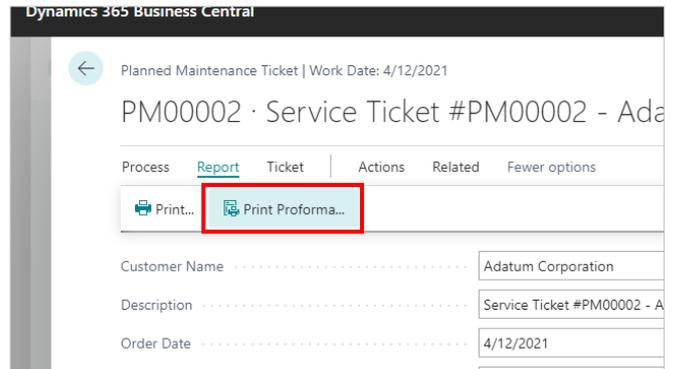
4.4.8. How to Print the Proforma Invoice

The following demonstrates printing the proforma invoice from a Planned Maintenance Ticket.

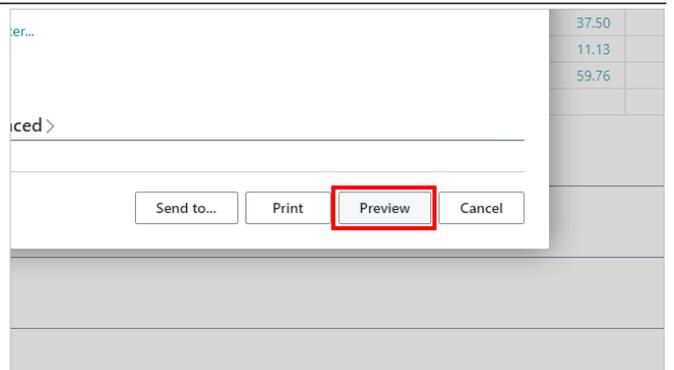
Click on the navigation menu item popup **Report**



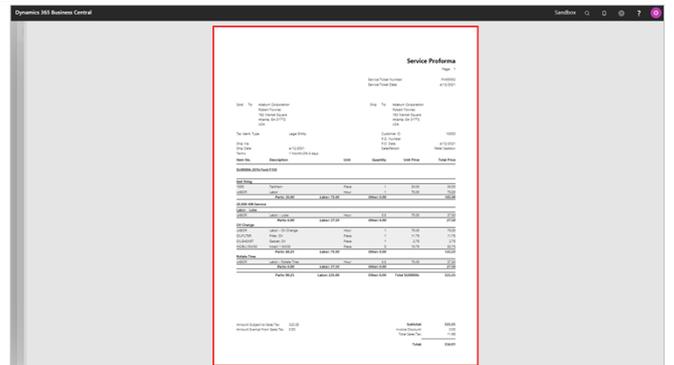
Click on the navigation menu item **Print Proforma...**



Click on the button **Preview**



The following shows an example of a printed proforma invoice.



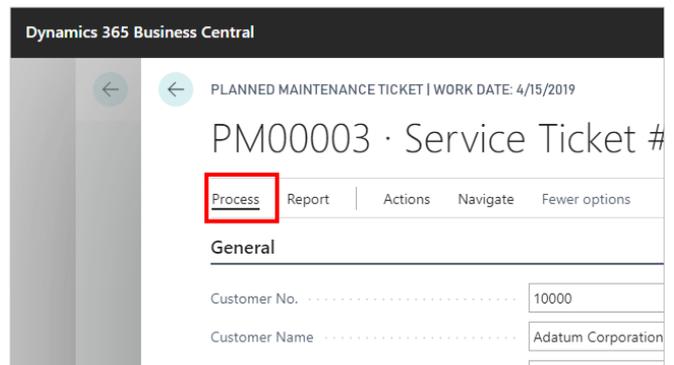
4.4.9. How to Close the Ticket

The final step is to mark the ticket as completed once all usage has been posted and the ticket has been fully invoiced.

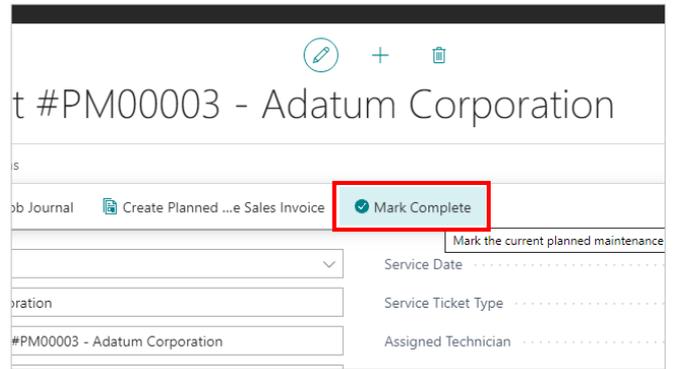
This will set the Status on the Job card to Completed.

The following demonstrates this process.

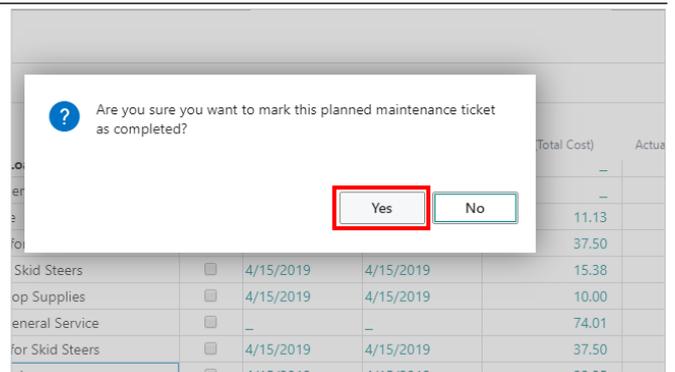
Click on the navigation menu item popup **Process**



Click on the navigation menu item **Mark Complete**



Click on the button **Yes**



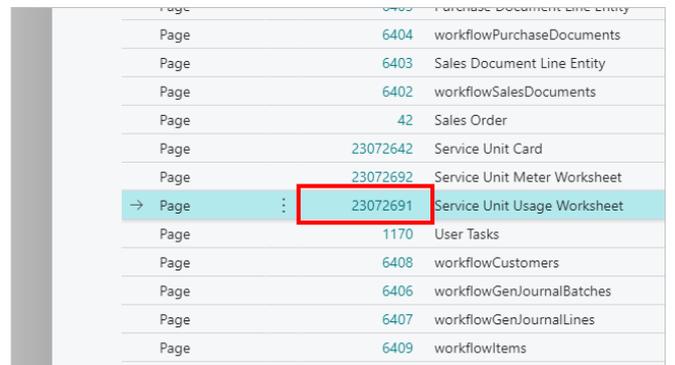
Upon selecting Yes, the related Job Card, Status field will be set to Completed.

4.5. How to use the Service Meter Web Service

4.5.1. How to use the Service Meter Web Service

ODT Service provides a web service that can be used to update service meters. You may update one at a time or many at once. This web service can be set up using the web services page in Business Central.

When setting up the web service, you must use the object ID for the Service Unit Usage Worksheet.



When using the web service, there are a few important points to know. When updating a meter this way, you must provide the ID of the service unit (ex: SU00001), the meter code (ex: ODOM), the new meter reading, and an optional Date-Time value.

Date-Time should be entered in the format yyyy-mm-ddT00:00:00Z. For example, a date of May 20th, 2025 at 7:30PM would be entered as 2025-05-20T19:30Z. All times entered are interpreted as UTC time by Business Central, and then changed into local time. So the previous example would be read as 19:30 UTC time.

If a date is not entered, then it will default to the current system date (not the work date). If a time is not entered, then it will default to 00:00:00 UTC time.

5. Reviewing Service

5.1. How to Review Service Ledger Entries

5.1.1. Overview

Service Ledger Entries are created and posted to the Service Unit when:

- The Confirm Actuals is ran and the Job Journal is posted.
- A Sales Invoice is created and posted.

The Service Ledger Entries can be viewed from the Service Unit.

From the Service Ledger Entries, when an invoice line is selected, the standard Navigate feature is available.

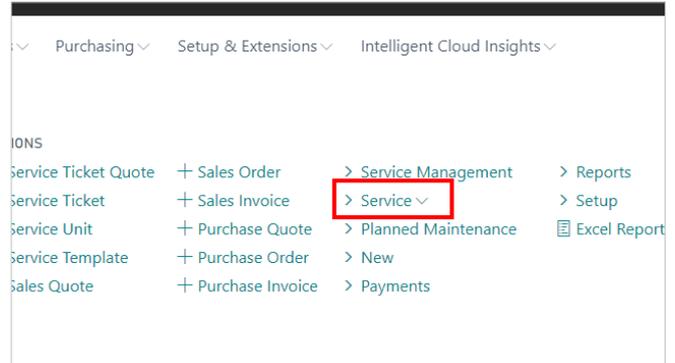
5.1.2. How to Review Service Ledger Entries

Business Manager Profile

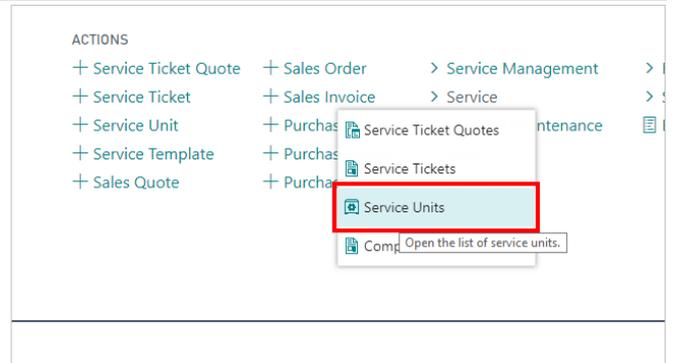
Users with the Sales Order Processor Profile can use the same steps to view Service Ledger Entries from the Service Unit.

The following demonstrates how to access the Service Ledger Entries from a Service Unit.

Click on the navigation menu item popup **Service**



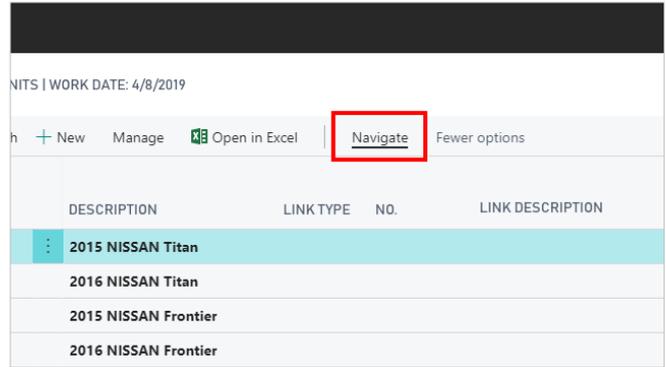
Click on the navigation menu item **Service Units**



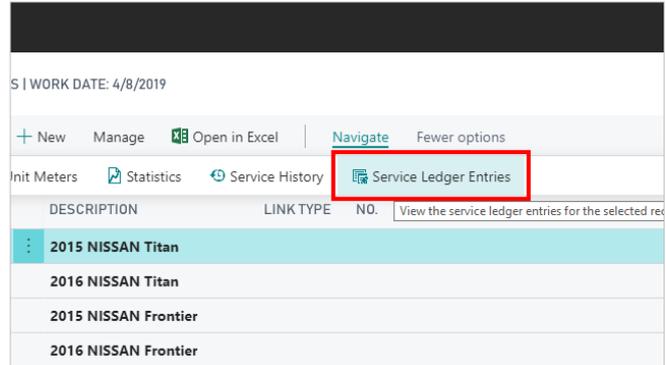
Select a Service Unit record in the list.

ODT Service Help

Click on the navigation menu item popup **Navigate**



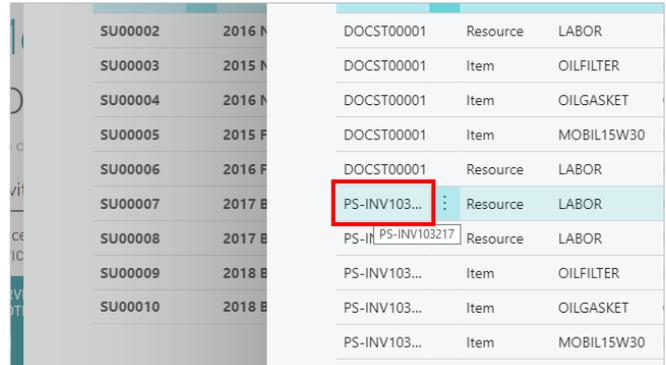
Click on the navigation menu item **Service Ledger Entries**



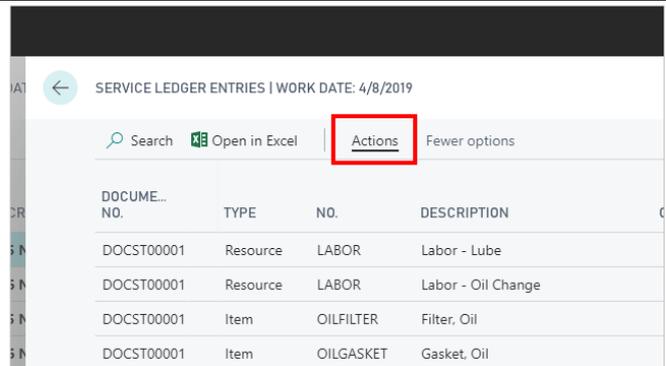
The Service Ledger Entries contain both the usage posted records and the Posted Sales Invoice records.

The following demonstrates how to navigate on a Posted Sales Invoice record.

Click on the cell **Document No.** with the value **PS-INV103217**

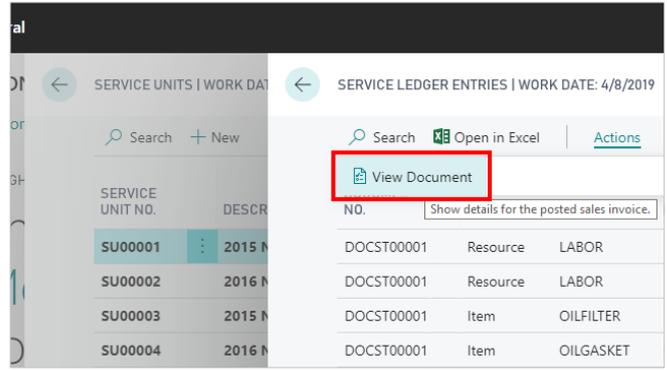


Click on the navigation menu item popup **Actions**

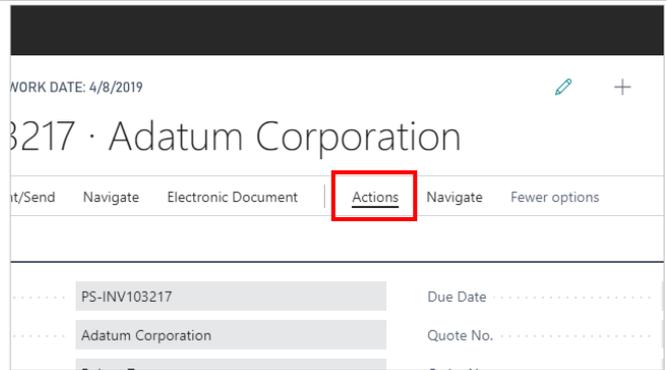


ODT Service Help

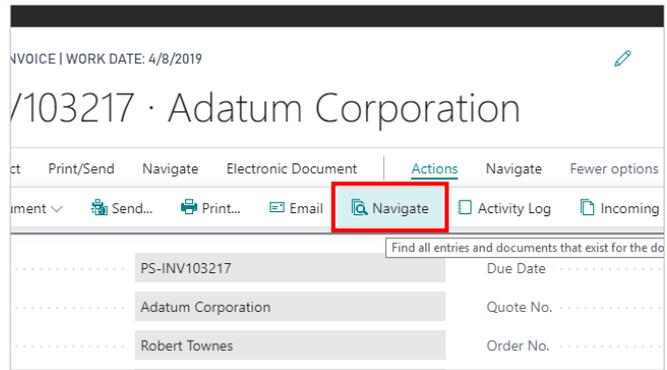
Click on the navigation menu item **View Document**



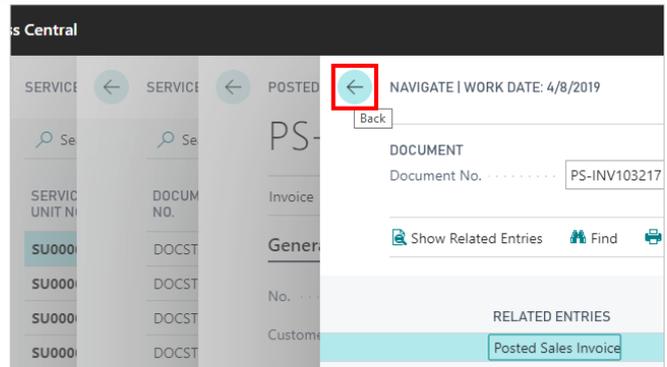
Click on the navigation menu item popup **Actions**



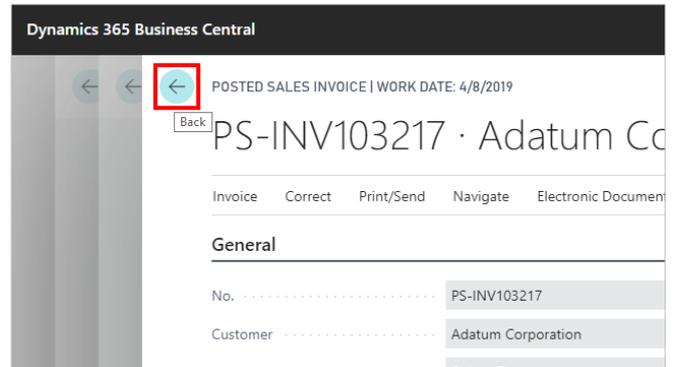
Click on the navigation menu item **Navigate**



Click on the back button



Click on the back button



5.2. How to Review Service History

5.2.1. Overview

The history of all servicing performed on a Service Unit is available from the Service Unit.

The Service History displays a listing of Service Tickets, which the unit was on. From the listing the Service Ticket can be opened and reviewed.

Additionally the Completed Service Ticket can be opened and reviewed from the Service History List or from an opened Service Ticket.

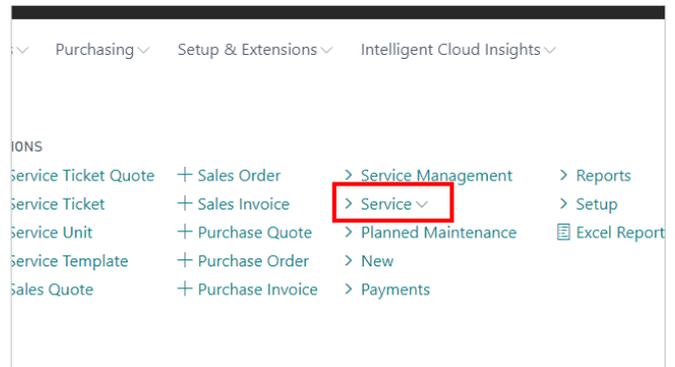
5.2.2. How to Review Service Unit Servicing History

Business Manager Profile

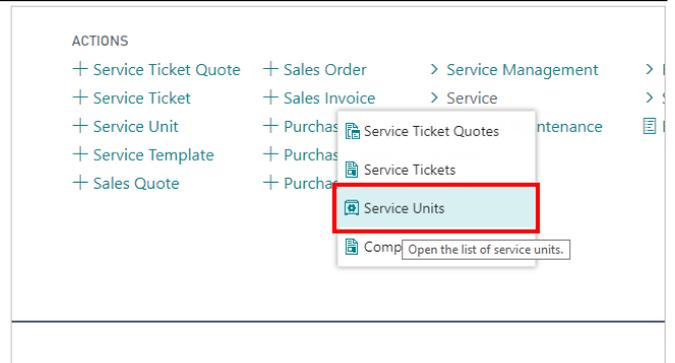
The same steps can be used by a user having the Sales Order Processor Profile.

The following demonstrates the viewing of the Service History List, opening the Service Ticket and opening the Completed Service Ticket.

Click on the link **Service**



Click on the navigation menu item **Service Units**



ODT Service Help

Click on the link in cell **Service Unit No.** with the value **SU00001**

SERVICE UNIT NO.	DESCRIPTION
SU00001	2015 NISSAN Titan
SU00002	2016 NISSAN Titan
SU00003	2015 NISSAN Frontier
SU00004	2016 NISSAN Frontier
SU00005	2015 Ford F150

Click on the navigation menu item popup **Navigate**

Service Unit No. SU00001
Description 2015 NISSAN Titan

Click on the navigation menu item **Service History**

Service Unit No. SU00001
Description 2015 NISSAN Titan

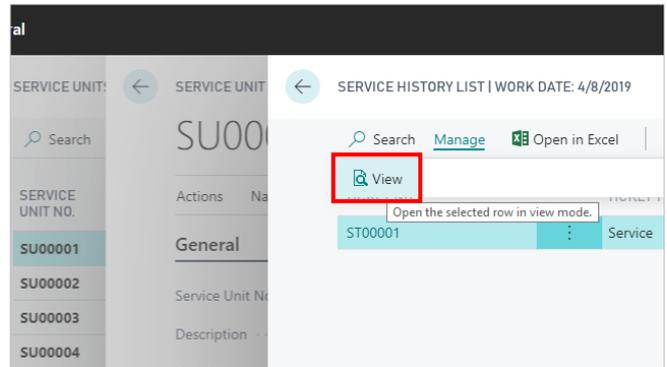
Select the ticket record to be viewed.

Click on the navigation menu item popup **Manage**

TICKET NO.	TICKET TYPE
ST00001	Service

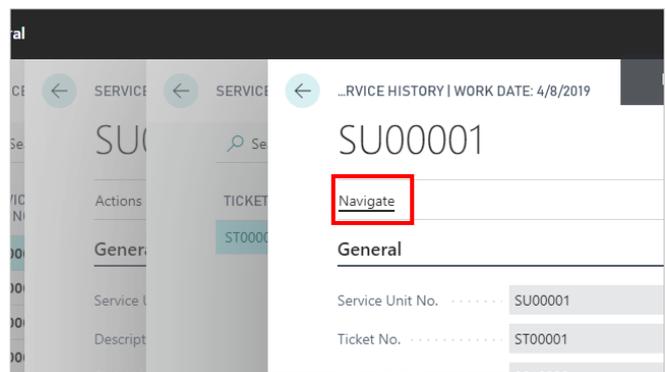
ODT Service Help

Click on the navigation menu item **View**

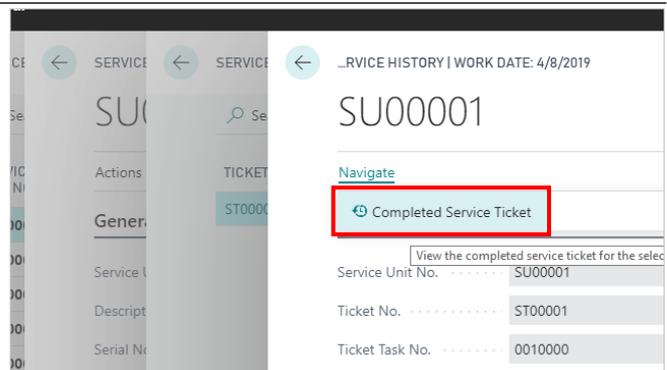


The following demonstrates the opening of the Completed Service Ticket from the Service Ticket.

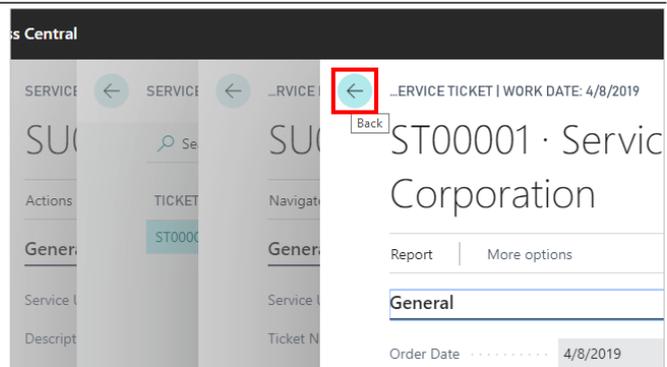
Click on the navigation menu item popup **Navigate**



Click on the navigation menu item **Completed Service Ticket**

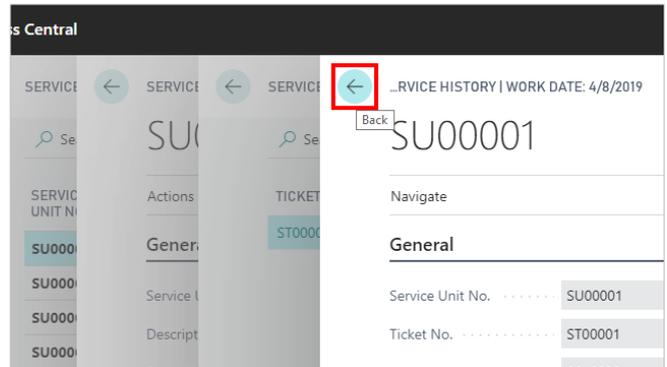


Click on the back button



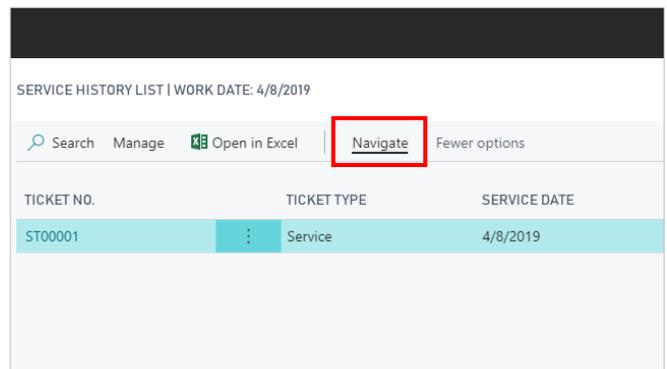
ODT Service Help

Click on the back button

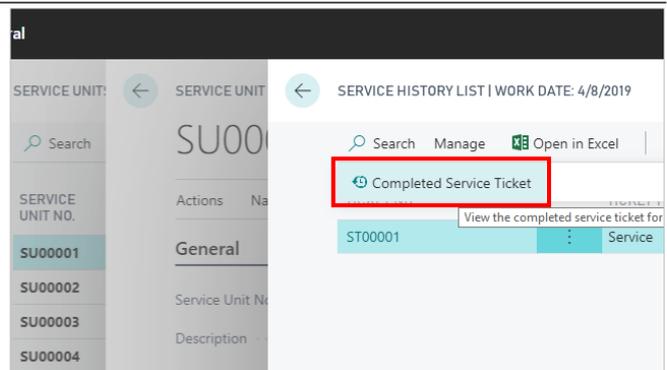


Alternatively the Completed Service Ticket can be opened from the Service History List using the following steps.

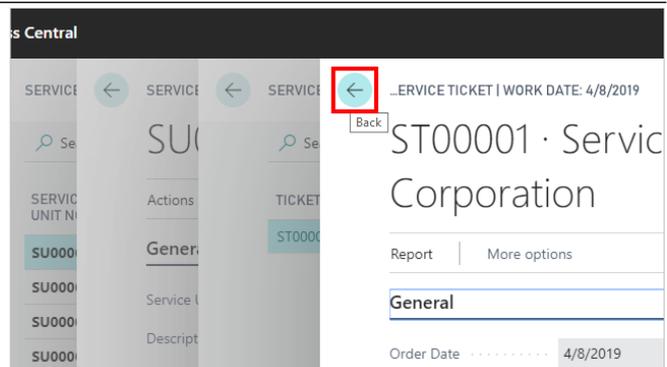
Click on the navigation menu item popup **Navigate**



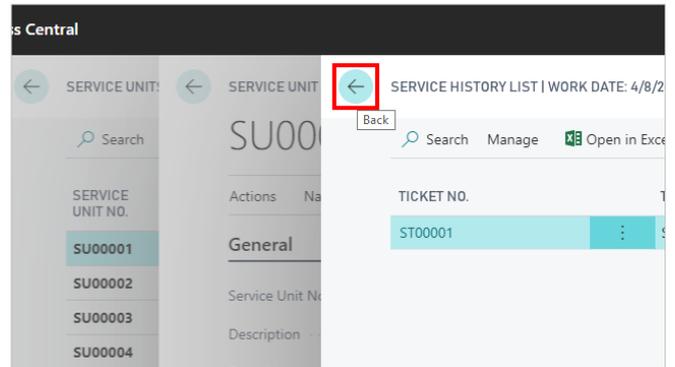
Click on the navigation menu item **Completed Service Ticket**



Click on the back button



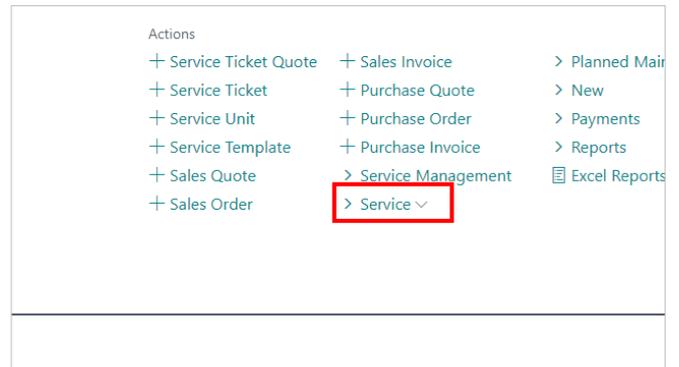
Click on the back button



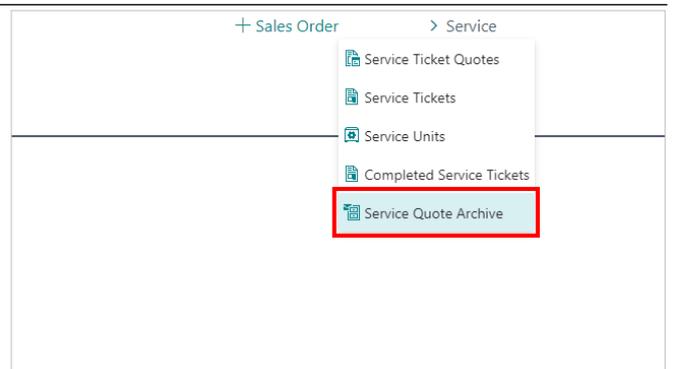
5.2.3. How to view the Service Quote Archive

The following demonstrates how to view a history of completed service checklists.

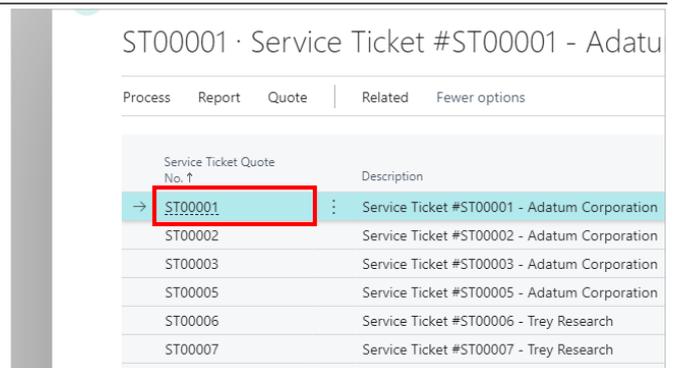
Click on the navigation menu item popup **Service**



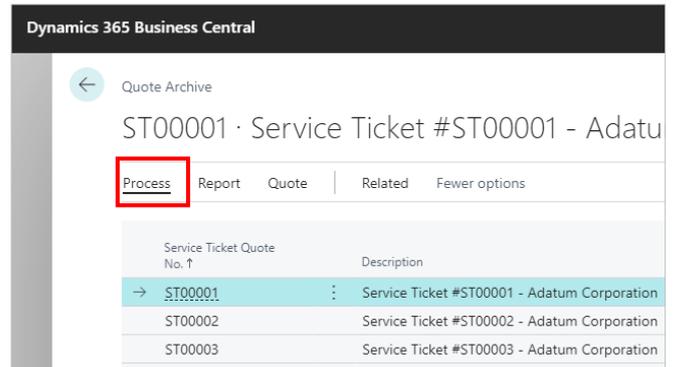
Click on the navigation menu item **Service Quote Archive**



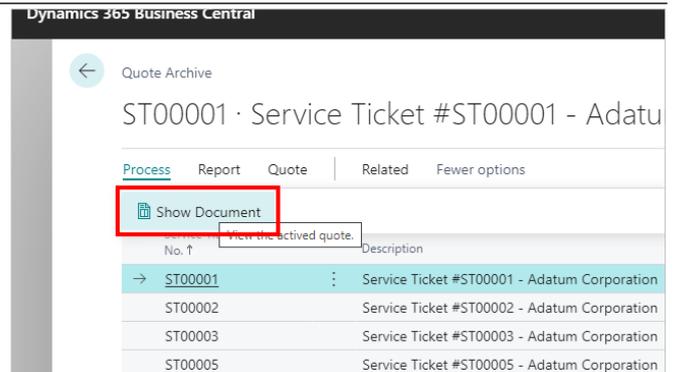
Select the quote that you wish to view
Click on the cell **Service Ticket Quote No.** with the value **ST00001**



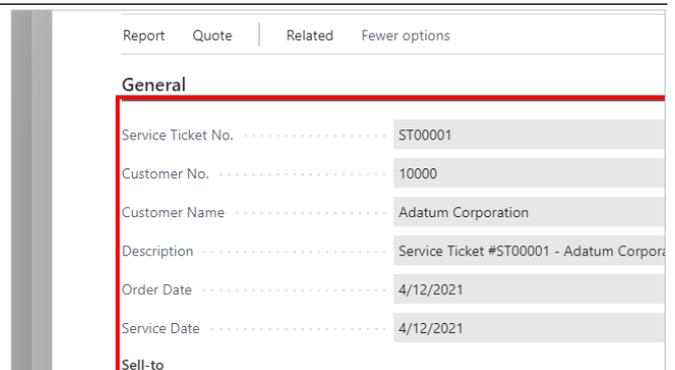
Click on the navigation menu item popup **Process**



Click on the navigation menu item **Show Document**



You can now view information about the completed Service Ticket Quote.

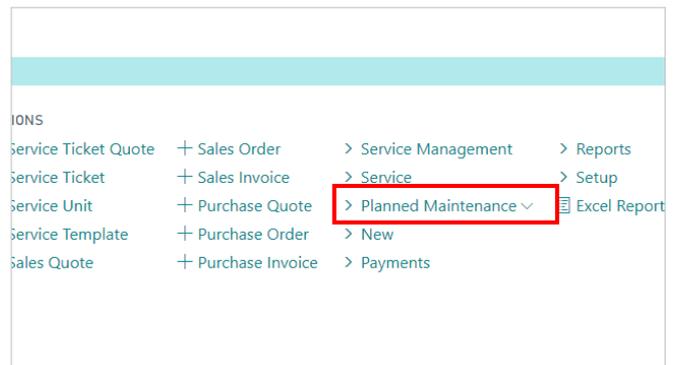


5.3. How to Review Planned Maintenance History

5.3.1. How to view the Planned Maintenance Entry Archive

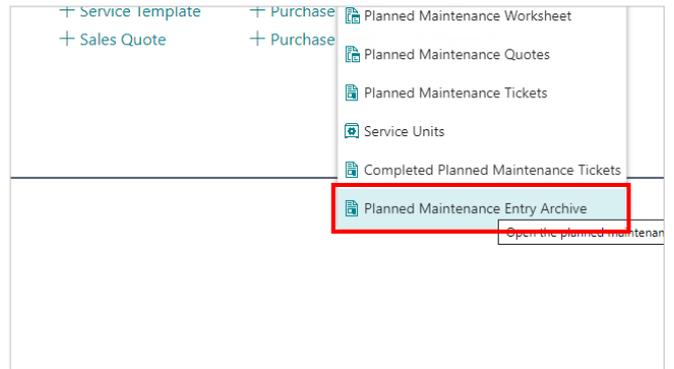
Business Manager Profile

Click on the navigation menu item popup **Planned Maintenance**

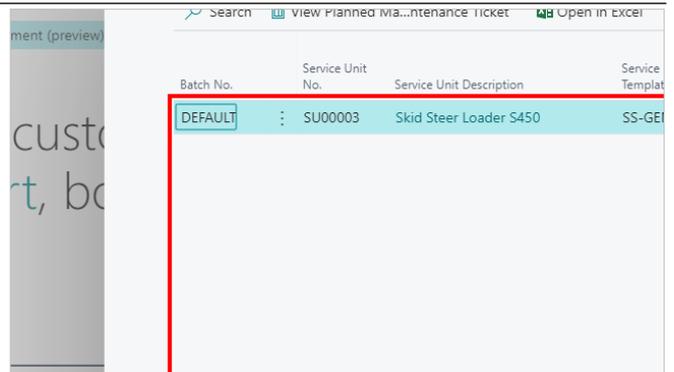


ODT Service Help

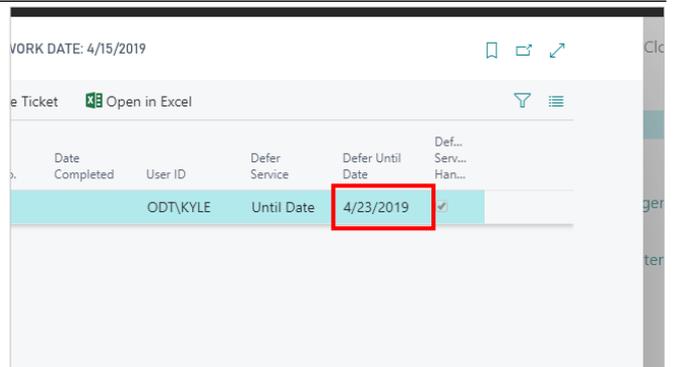
Click on the navigation menu item **Planned Maintenance Entry Archive**



The archive will display a list of all tickets that have been processed using the Planned Maintenance Worksheet.

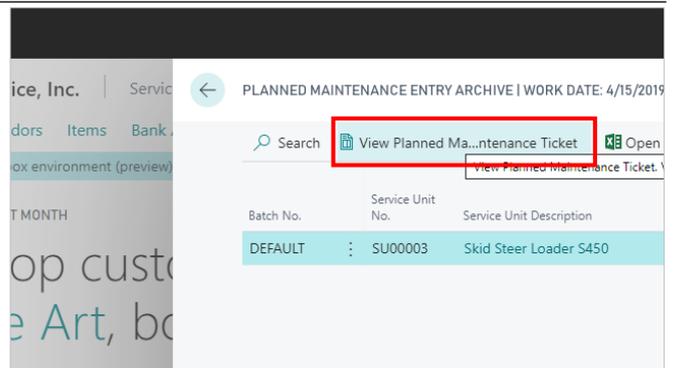


Click on the cell **Defer Until Date** with the value **4/23/2019**



Click on the navigation menu item **View Planned Maintenance Ticket**

If an entry has a Planned Maintenance Ticket assigned to it, you can view it by clicking the View Completed Planned Maintenance Ticket button.

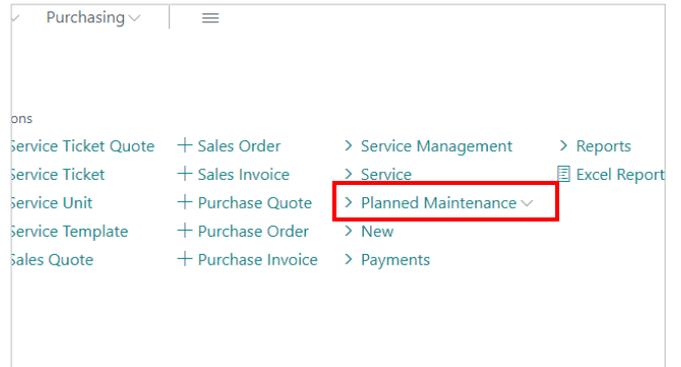


5.3.2. How to view Planned Maintenance Quote Archive

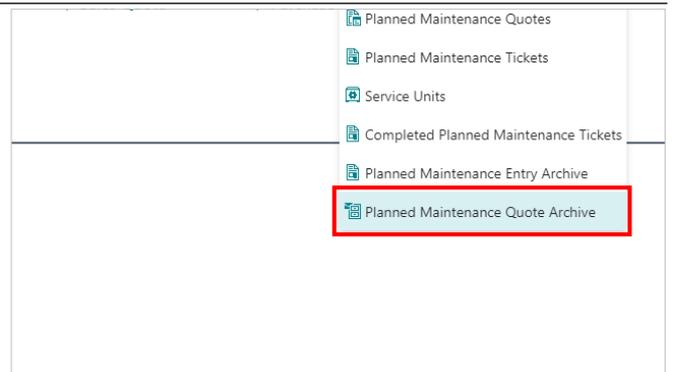
The following demonstrates how to view the Planned Maintenance Quote Archive.

ODT Service Help

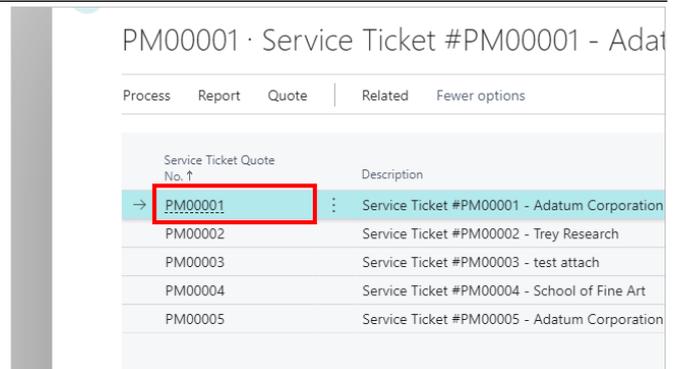
Click on the navigation menu item popup **Planned Maintenance**



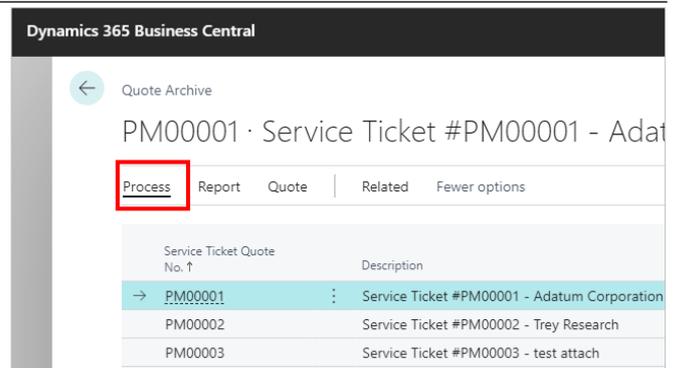
Click on the navigation menu item **Planned Maintenance Quote Archive**



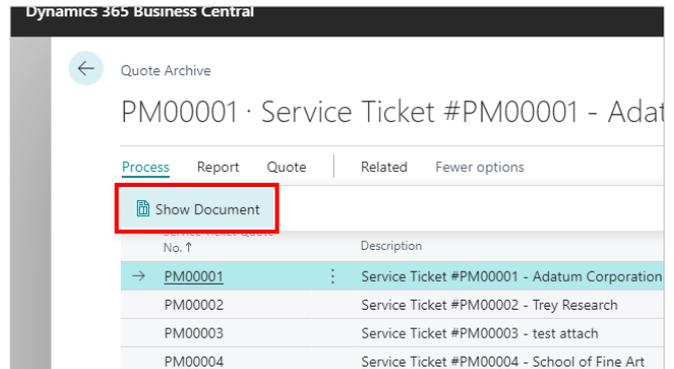
Select the quote you wish to view.
Click on the cell **Service Ticket Quote No.** with the value **PM00001**



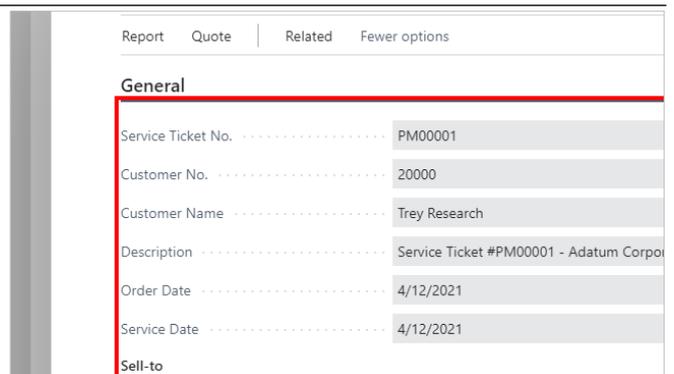
Click on the navigation menu item popup **Process**



Click on the navigation menu item **Show Document**



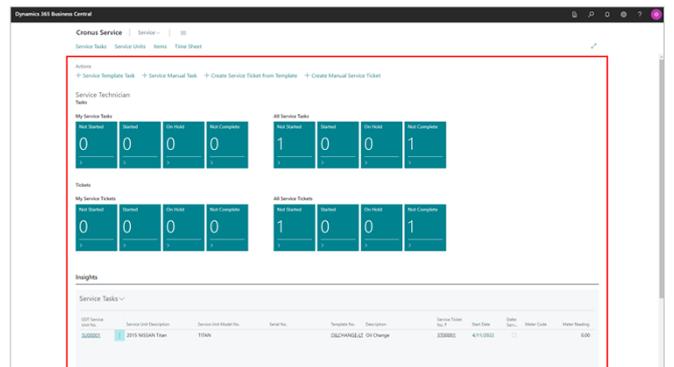
You can now view details of the complete Planned Maintenance Quote



6. Technician Role Center

6.1. Technician Role Center Overview

The Service Technician Role Center provides a more simplified and streamlined view of service information needed for technicians. Technicians can view a list of service tasks that have been assigned to them, and can easily view and update information related to the task, such as task status, parts and items used, and time spent. There are also options to quickly create additional tasks if needed.



6.2. Service Ticket Task

The following demonstrates how to release and process service tasks using the Technician role center.

Note that this demonstration assumes that relevant Service Statuses have already been created. Please refer to the documentation for Service Status for steps on how to do this.

6.2.1. How to Release a Ticket for Service

Service Tickets must first be released by a Technician Manager using the Business Manager role center.

General

Customer No. 10000

Customer Name Adatum Corporation

Description Service Ticket #ST00016 - Adatum Corpora

Order Date 4/11/2022

Service Date 4/11/2022

Sell-to

Address 192 Market Square

To release the ticket, the status must be changed to a status with the Released type

Starting Date 4/11/2022

Ending Date 4/11/2022

Location Code

Your Reference

Open PO Lines Exist No

Service Ticket Status PENDING

Apply Maintenance Expense

Salesperson

Click on the lookup button **Service Ticket Status**

4/11/2022

4/11/2022

No

PENDING

Warranty

Warranty Policy No. ↑ WRR00001

Warranty Type ↑ GENERAL

Choose a value for Service Ticket Status

Comments

Click on the link in cell **Code** with the value **RELEASED**

Apply Maintenance Expense

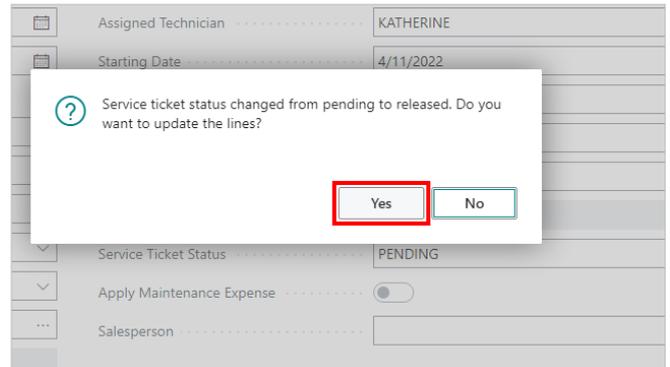
Salesperson

Code	Description
COMPLETE	Complete
IN PROCESS	In Process
ON HOLD	On Hold
→ PENDING	Pending
RELEASED	Release

+ New

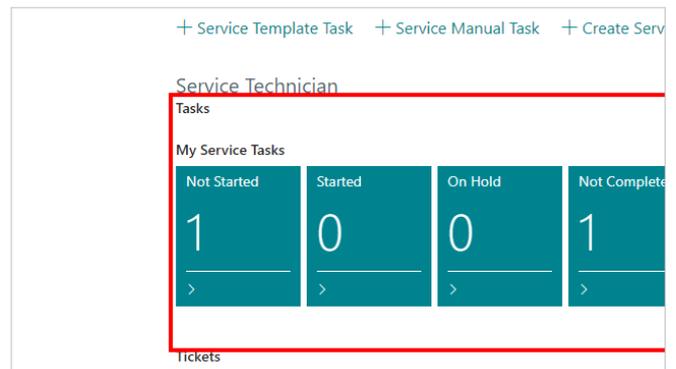
Defer serv...	Start Date	End Date	Budget (Total Cost)	Actual (Total Cost)	Billable (Total Price)	Bi
<input type="checkbox"/>	-	-	-	-	-	-

Click on the button **Yes**

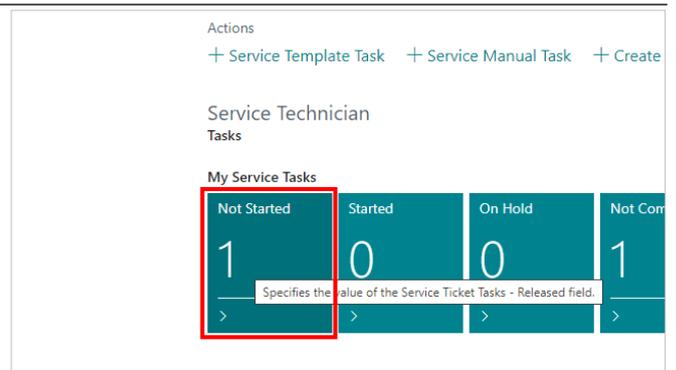


6.2.2. How to Process a Service Ticket Task

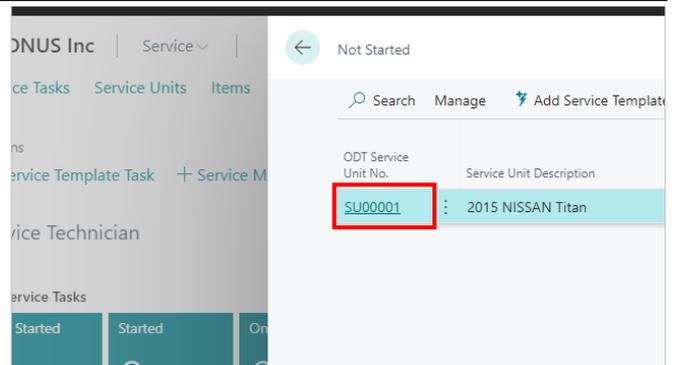
Service Tasks in the Technician role center are sorted based on their status.



Click on the link **Not Started**

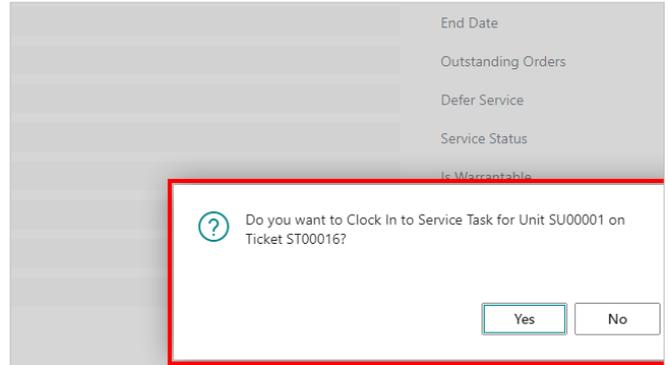


A list of Service Tasks will be displayed
Click on the link in cell **ODT Service Unit No.** with the value **SU00001**

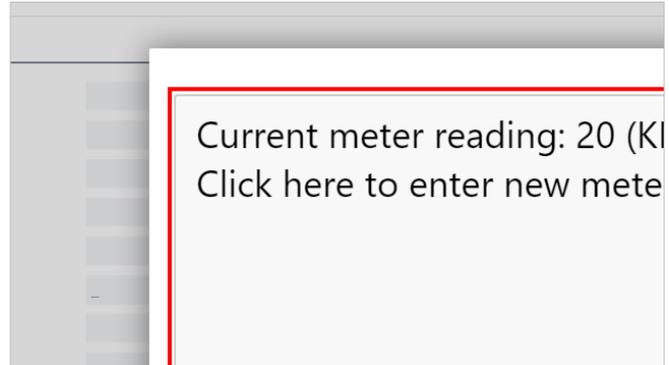


ODT Service Help

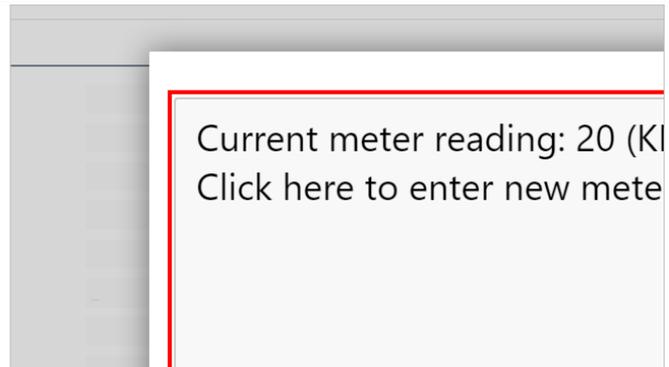
There will be an option to clock in if you wish to use time tracking. Please refer to the Time Tracking documentation for additional information on this feature.



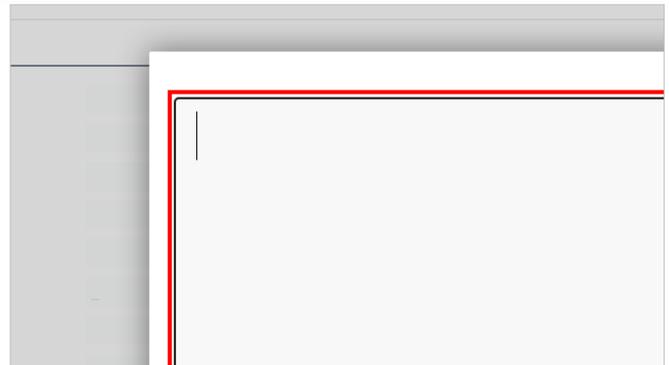
If the unit has a Service Meter, you will prompted to update the meter reading.



Click on the textarea

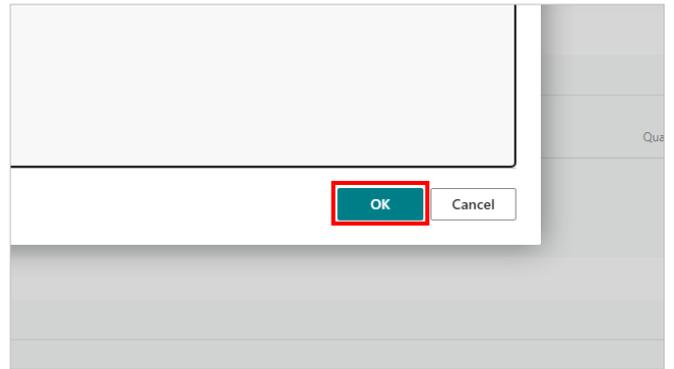


Enter the text **50**.

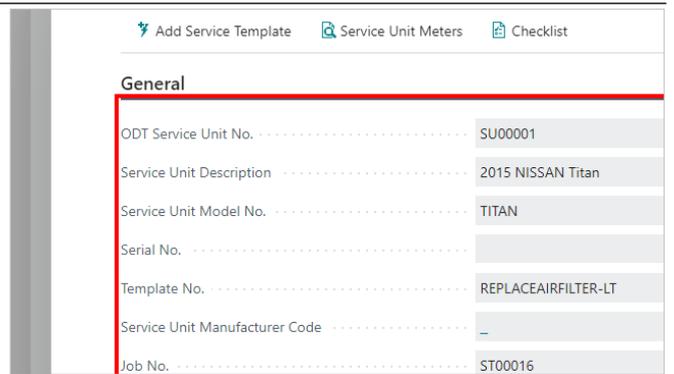


ODT Service Help

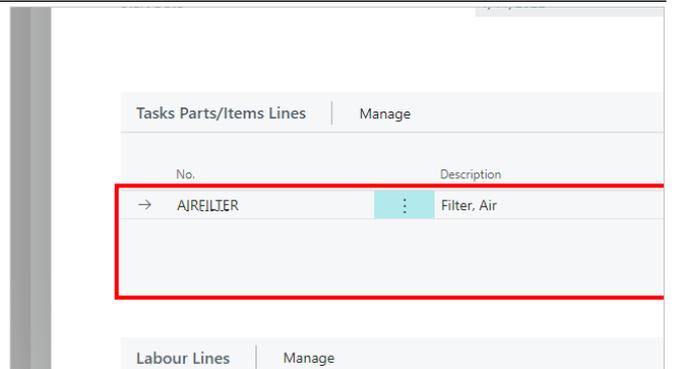
Click on the button **OK**



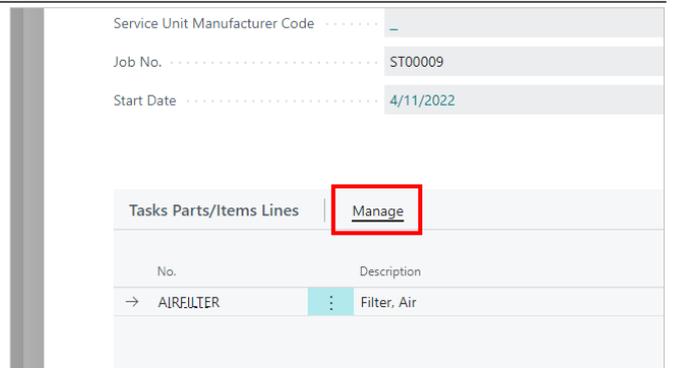
The General Tab displays details about the Service Unit and Service Ticket the task is related to.



The Task Parts/Items Lines display the list of Parts and Items being used for the service task. Additional Parts and Items can be added as needed.

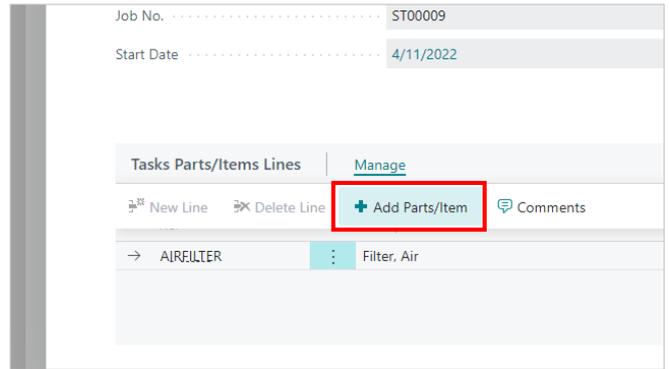


Click on the navigation menu item popup **Manage**

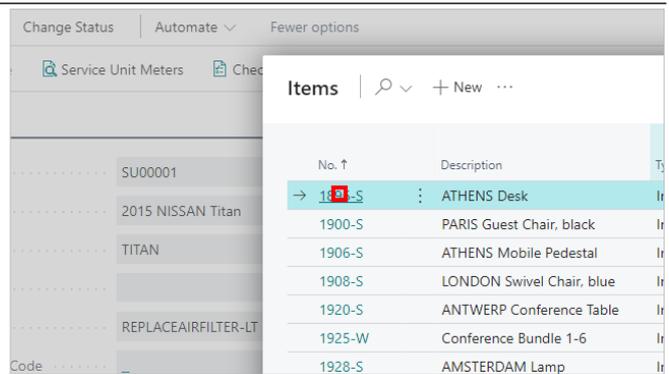


ODT Service Help

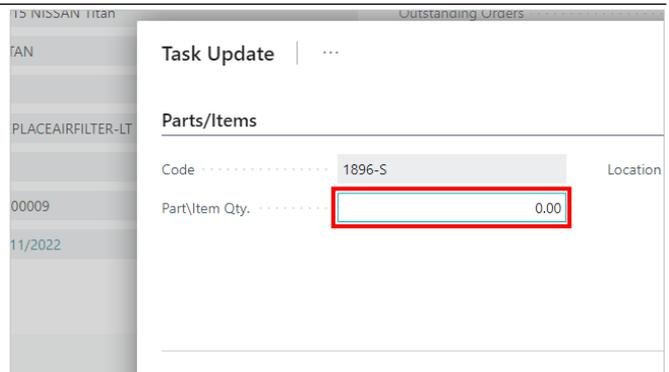
Click on the navigation menu item **Add Parts/Item**



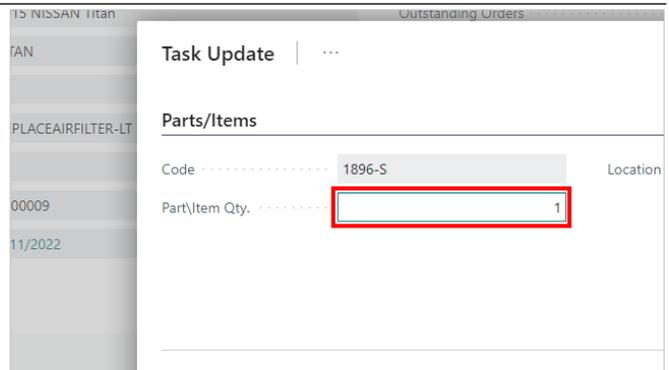
Select the Part or Item you want to add to the task



Click on the field **Part\Item Qty.**

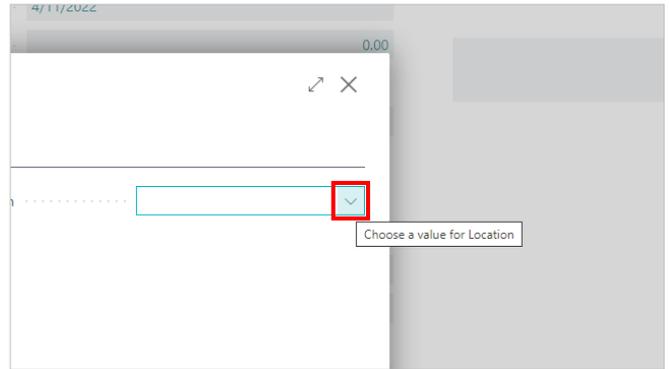


Enter the text **1**.

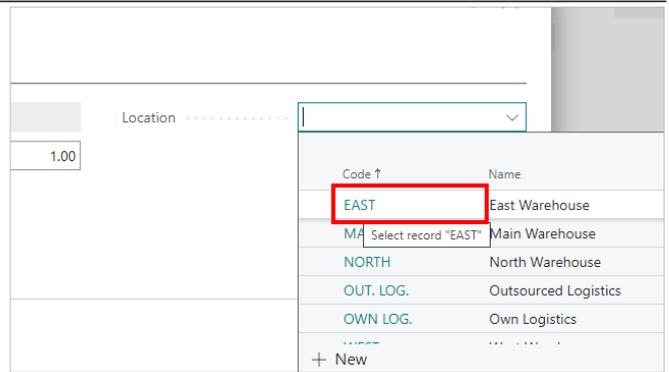


ODT Service Help

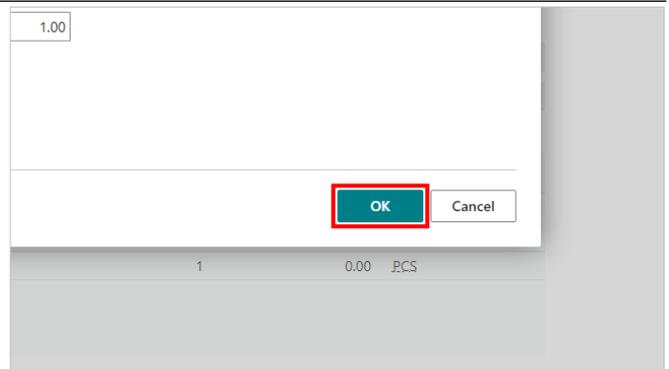
Click on the lookup button **Location**



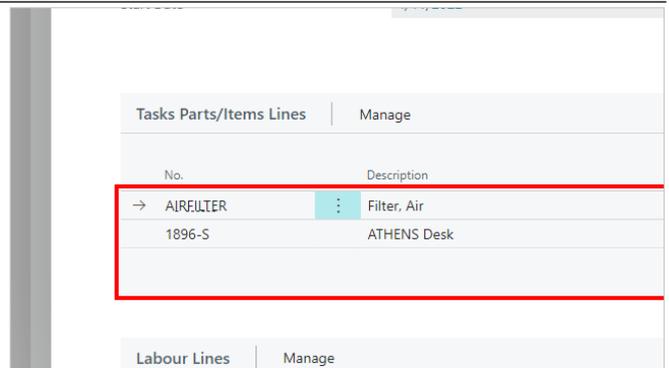
Click on the link in cell **Code** with the value **EAST**



Click on the button **OK**



Notice that the selected part or item has now been added to the task lines



ODT Service Help

You can also adjust the quantity of parts and items used for the task as needed.
Click on the cell **Quantity Used** with the value **1.00**

Meter Reading				50.00
↶ ↷				
Location Code	Estimated Quantity	Quantity Used	Unit of Measure Code	
	1	1.00	PCS	
EAST	1	1.00	PCS	
↶ ↷				

Enter the text **2**.

Meter Reading				50.00
↶ ↷				
Location Code	Estimated Quantity	Quantity Used	Unit of Measure Code	
	1	1.00	PCS	
EAST	1	1.00	PCS	
↶ ↷				

Click on the cell **Estimated Quantity** with the value **2**

Meter Reading				
↶ ↷				
Comments	Location Code	Estimated Quantity	Quantity Used	
No		2	2.00	
No	EAST	1	1.00	
↶ ↷				

When you are finished working on the task, you can close the task card.
Click on the back button

Dynamics 365 Business Central

Service Task Card

replace Air Filter

Home | Time Tracking | Change Status | Automate | Fewer options

Add Service Template | Service Unit Meters | Checklist

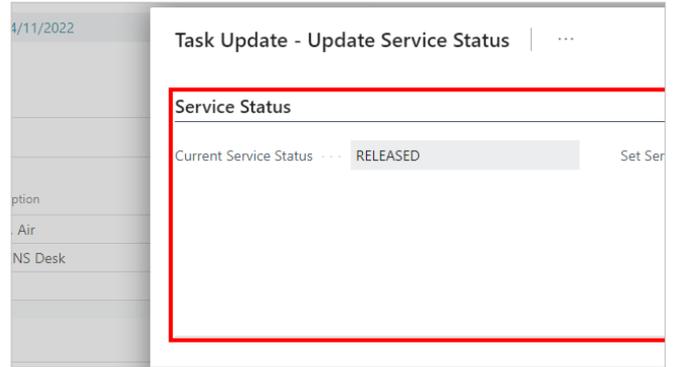
Template No. REPLACEAIRFILTER-LT

Service Unit Manufacturer Code

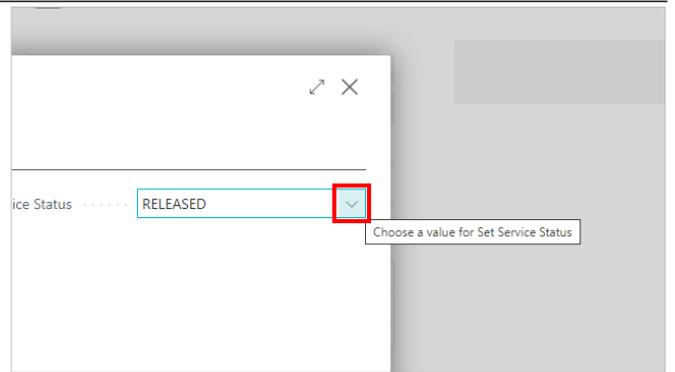
Job No. ST00009

ODT Service Help

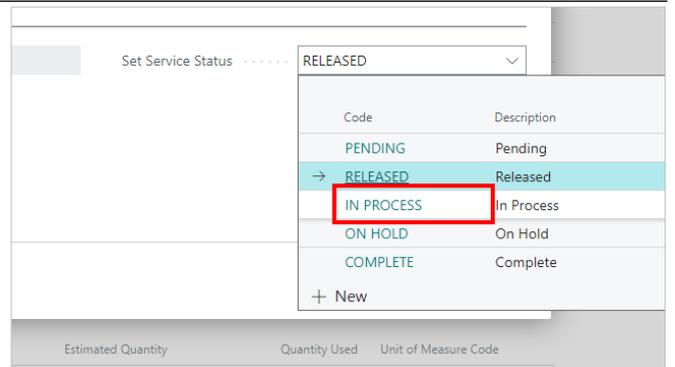
If the status of the task has changed, you can update it when closing the task card.



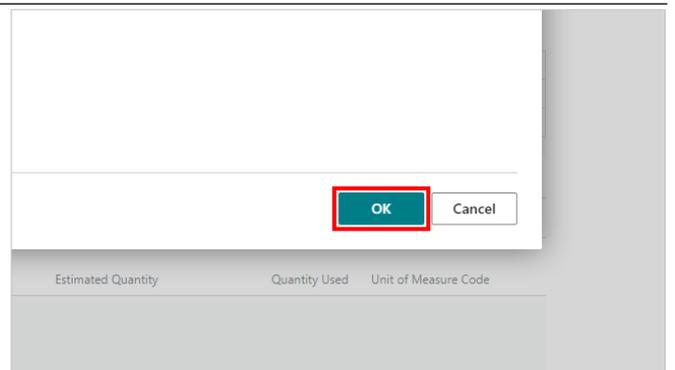
Click on the lookup button **Set Service Status**



Click on the link in cell **Code** with the value **IN PROCESS**



Click on the button **OK**



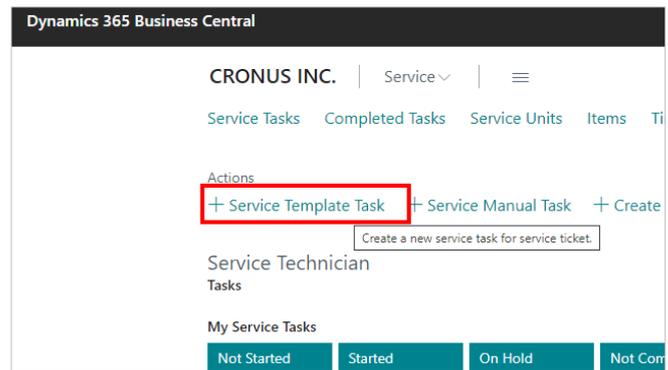
When viewing the service ticket from the Business Manager role center, notice that the status of the task has been updated to match what was specified when closing the task card

(Total Cost)	Billable (Total Price)	Billable (Invoiced Price)	Service Status	Is War...	Comments
-	-	-		<input type="checkbox"/>	0/0
-	1,079.80	-	IN PROCESS	<input type="checkbox"/>	0/3
			IN PROCESS		

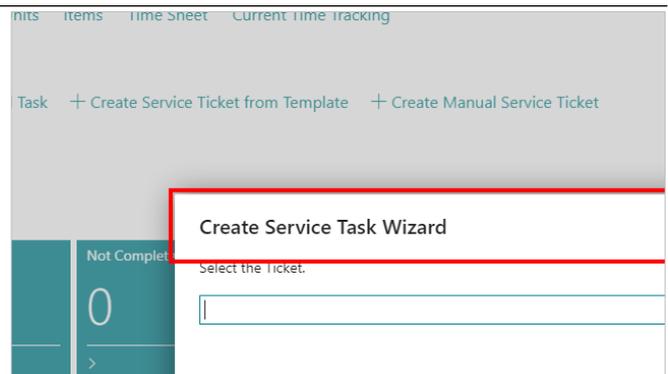
6.2.3. How to Create a New Task

New tasks can be created by manually entering a task description or by using an existing Service Template. The following demonstrates how to create a new Service Task using Service Template Task, however a similar process can be used for Service Manual Task.

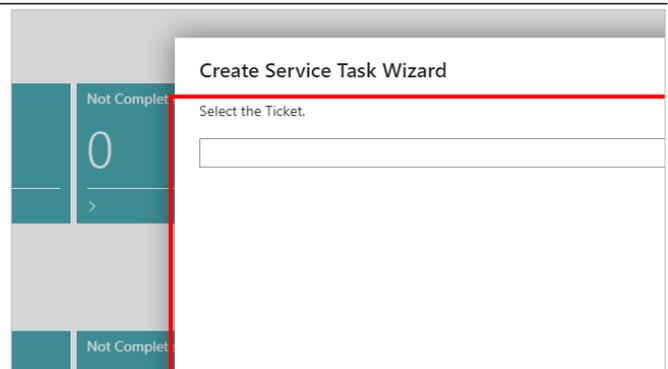
Click on the navigation menu item **Service Template Task**



The Task Creation Wizard will open and guide you through the steps to create a new task.

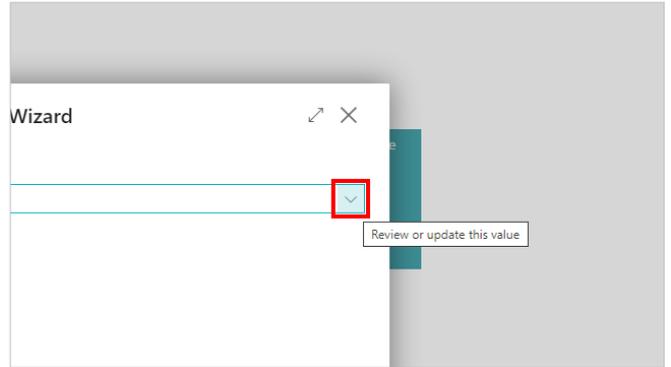


First, select the Service Ticket that will include this task.

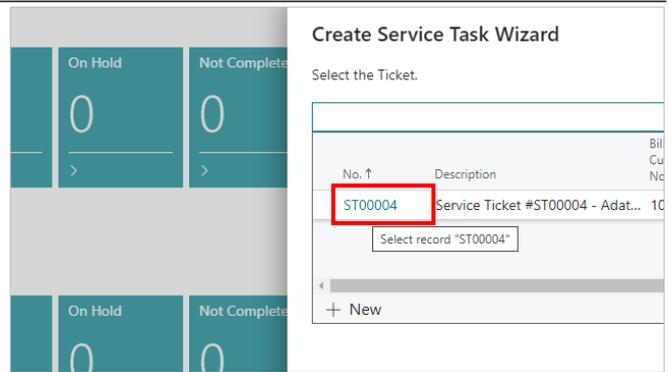


ODT Service Help

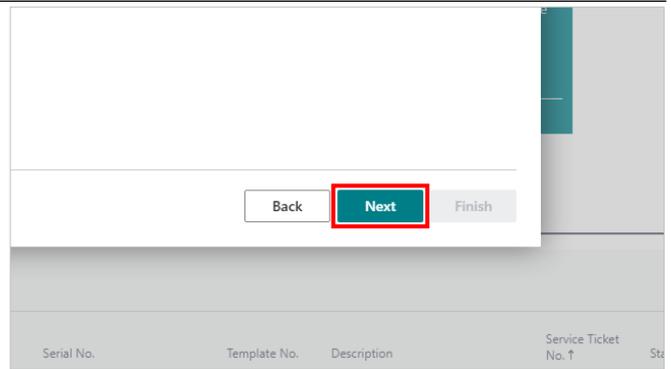
Click on the lookup button **Review or update this value**



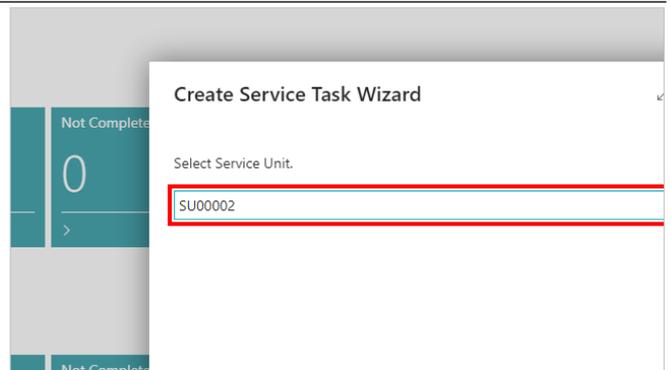
Click on **No.**



Click on the button **Next**

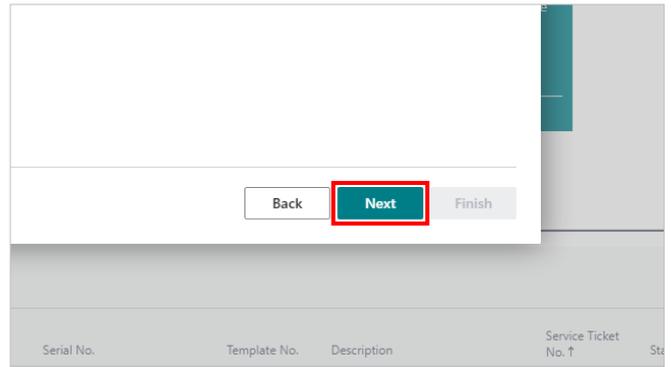


The wizard will default to the unit specified on the ticket. If there is more than one unit on the ticket you will be able to change the one that is selected.

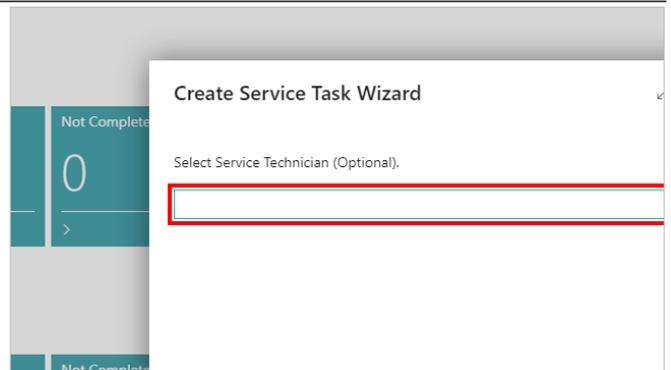


ODT Service Help

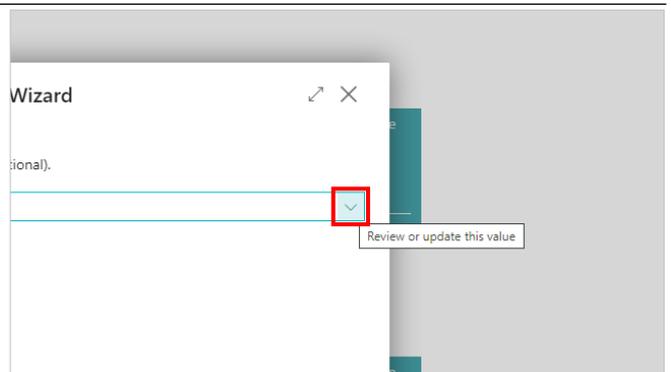
Click on the button **Next**



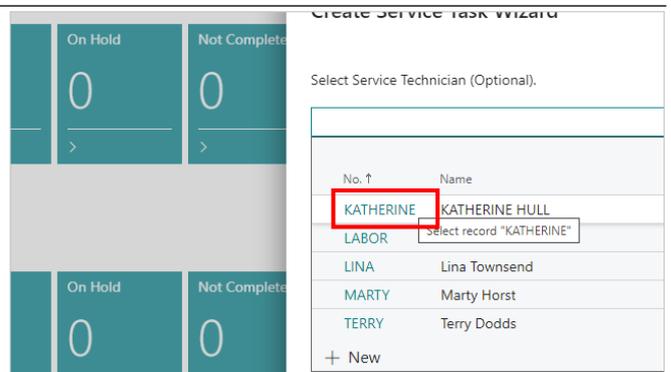
You may choose to select a Technician to be assigned to the task.



Click on the lookup button **Review or update this value**

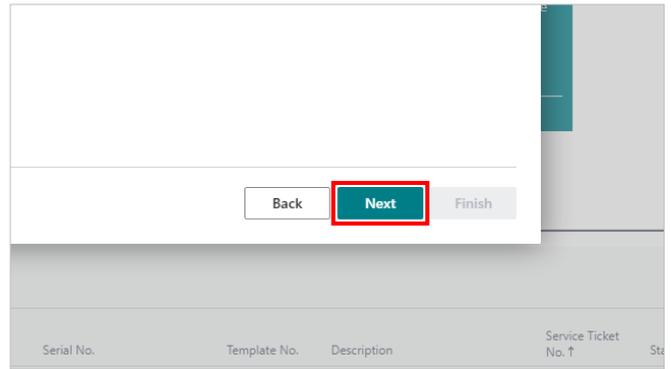


Click on **No.**

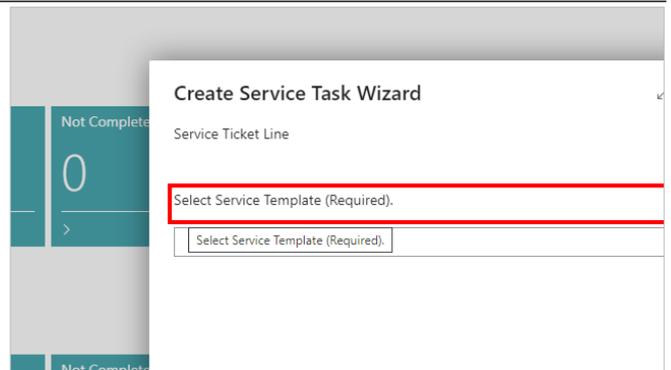


ODT Service Help

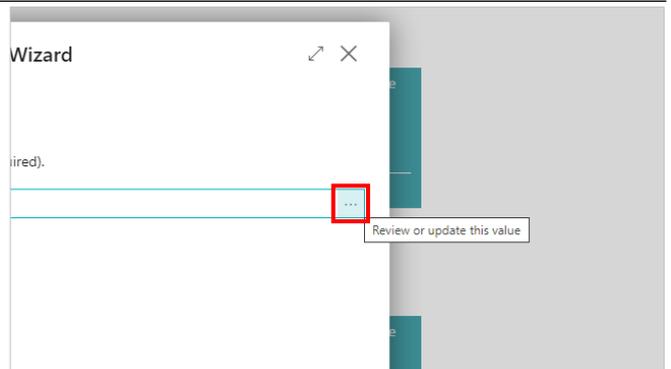
Click on the button **Next**



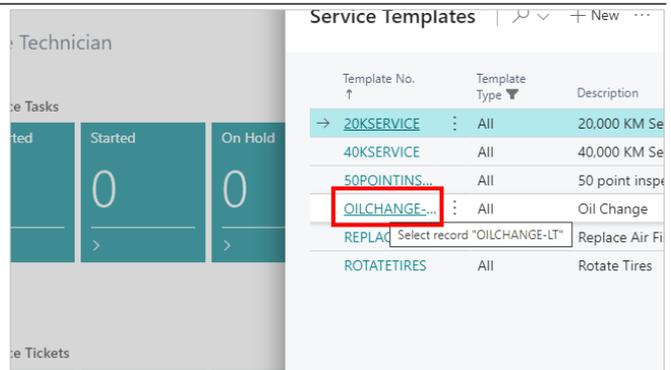
Select the Service Template you want to use to create the task.



Click on the lookup button **Review or update this value**

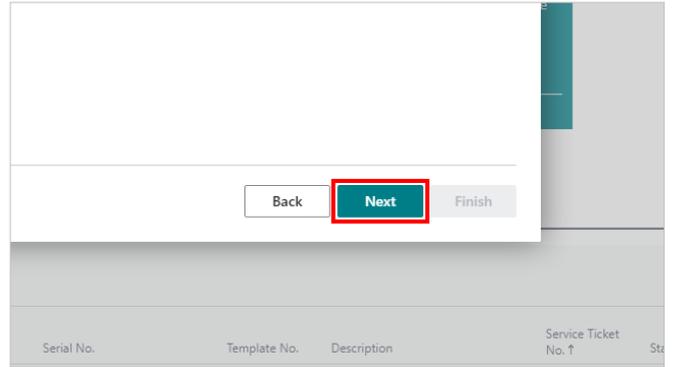


Click on **Template No.**

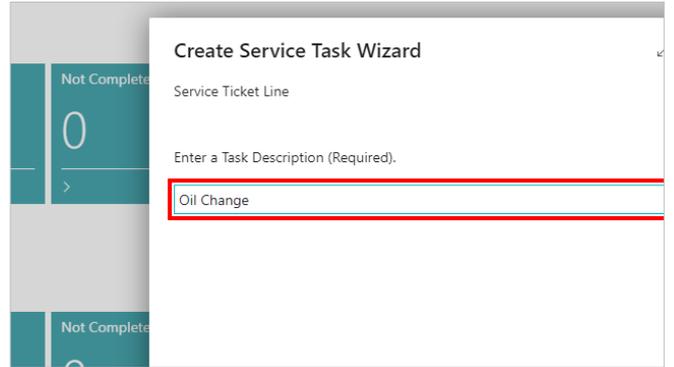


ODT Service Help

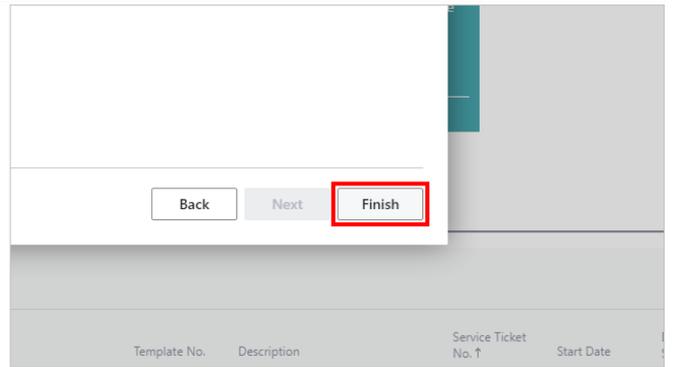
Click on the button **Next**



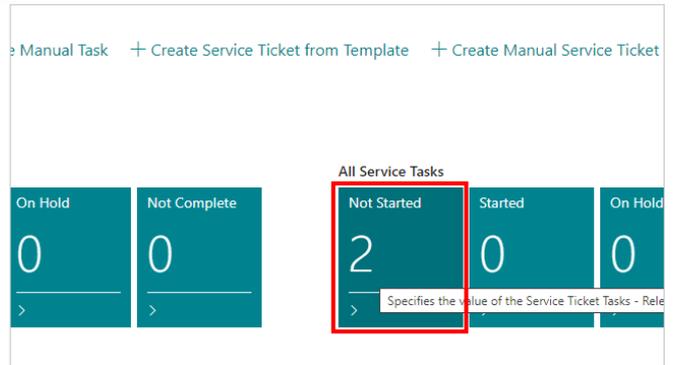
The Task Description will default from the selected Service Template. You will be given the option to change the description if you wish.



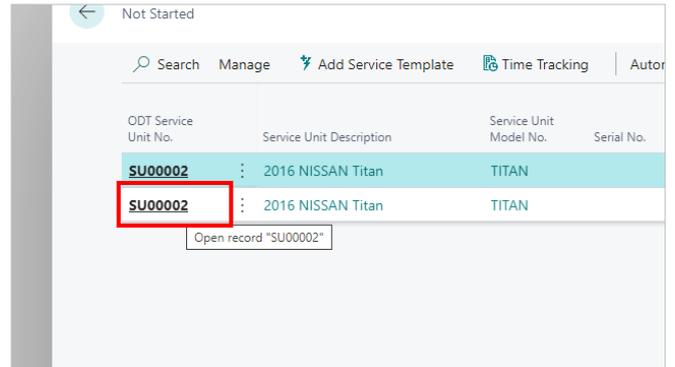
Click on the button **Finish**



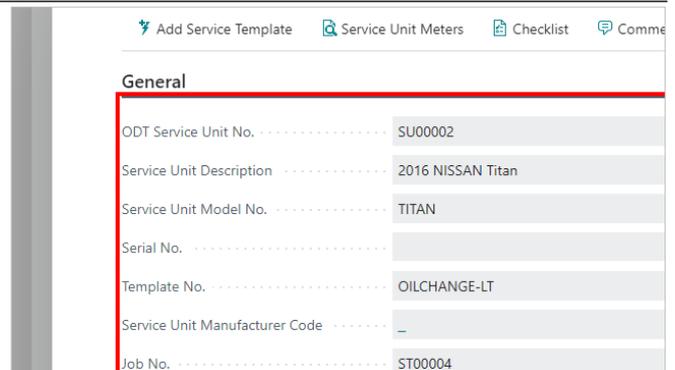
When the wizard is finished the new task will now be displayed in the Service Task Cue



Click on **ODT Service Unit No.**



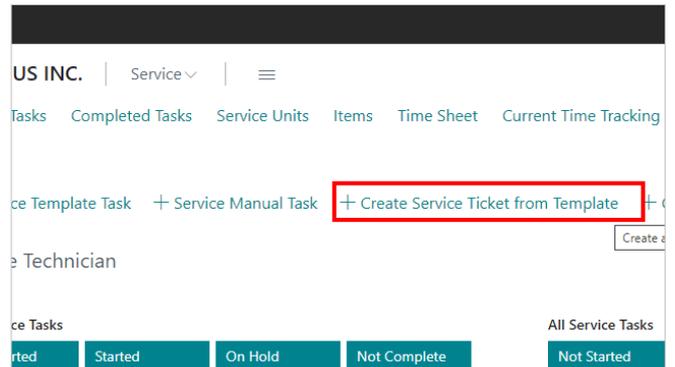
Notice that the new task has all the details that were specified in the creation wizard



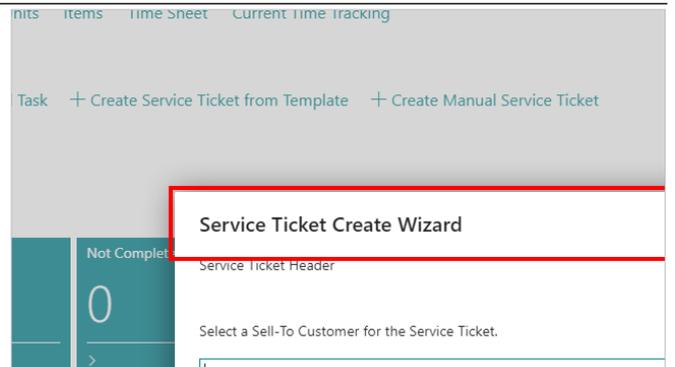
6.2.4. How to create a new Service Ticket

New tickets can be created by manually entering a ticket description or by using an existing Service Template. The following demonstrates how to create a new Service Ticket using Service Ticket from Template, however a similar process can be used for Manual Service Ticket.

Click on the navigation menu item **Create Service Ticket from Template**

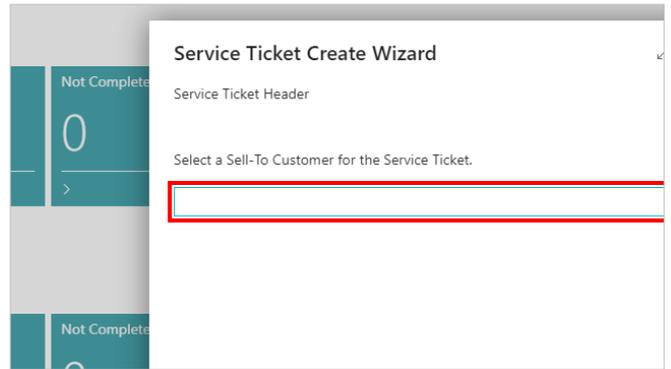


This will open the Service Ticket Create Wizard

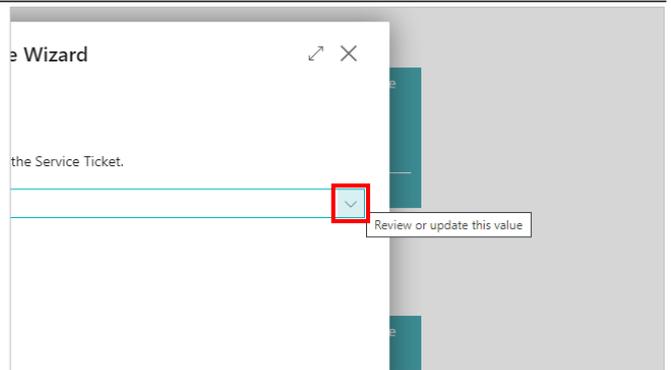


ODT Service Help

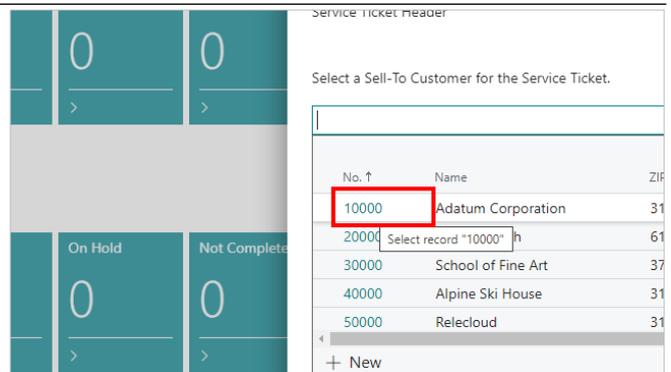
You must first select the Sell-To Customer for this Service Ticket



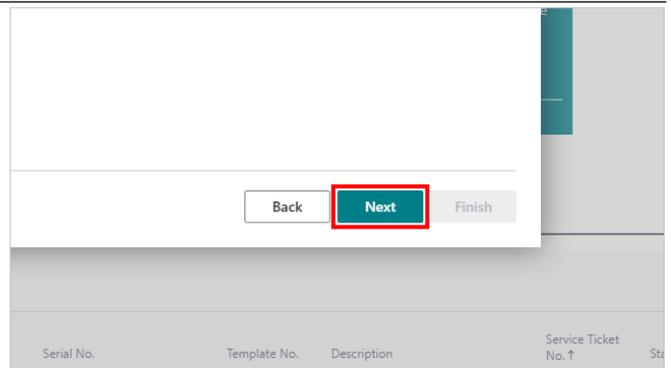
Click on the lookup button **Review or update this value**



Click on **No.**

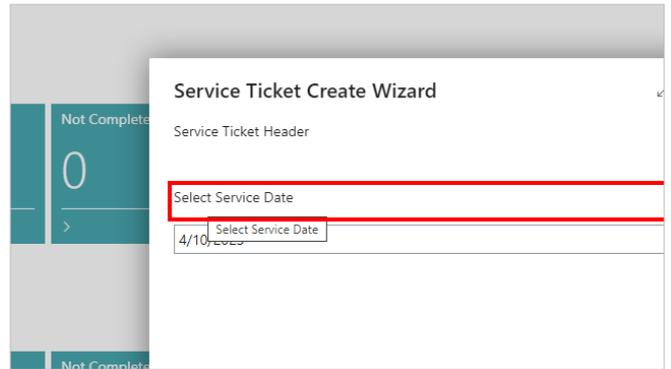


Click on the button **Next**

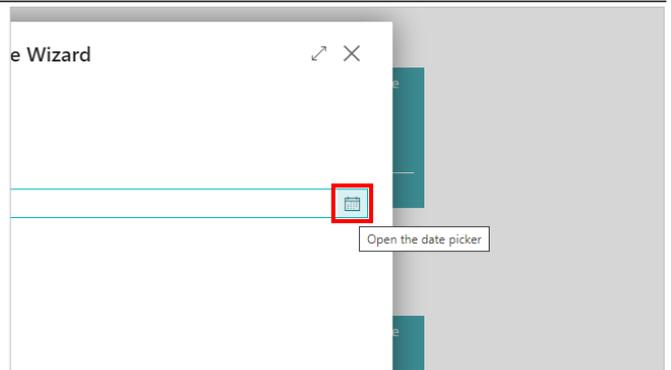


ODT Service Help

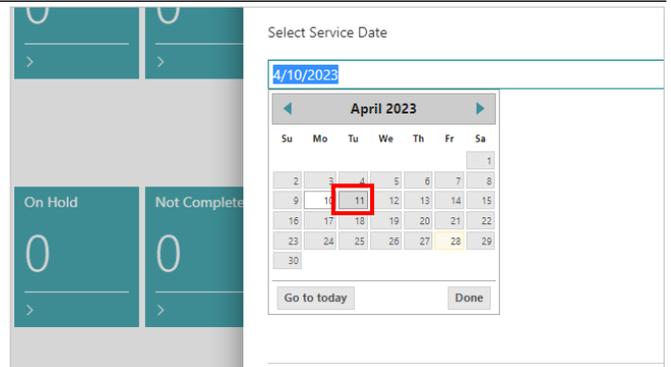
Select the Service Date to be used for the ticket



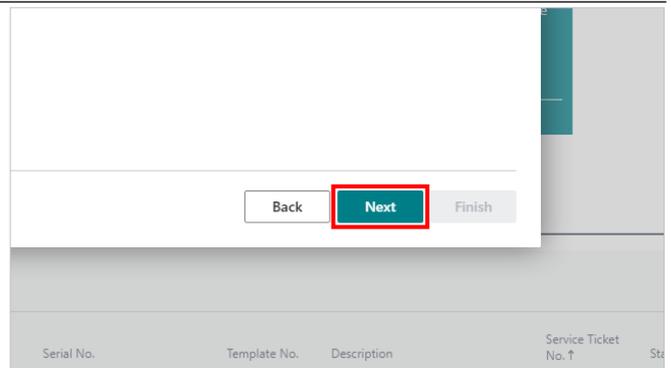
Click on the link **Open the date picker**



Click on a date in the calendar

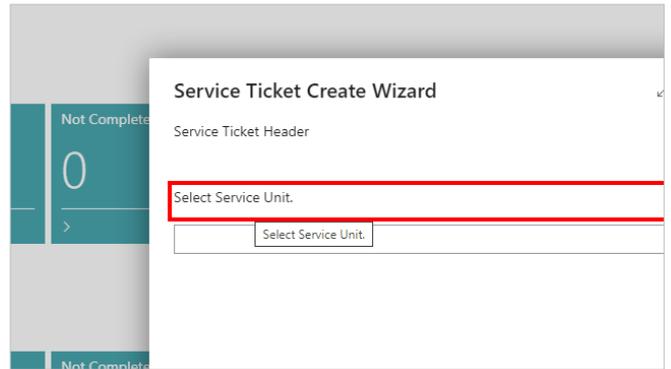


Click on the button **Next**

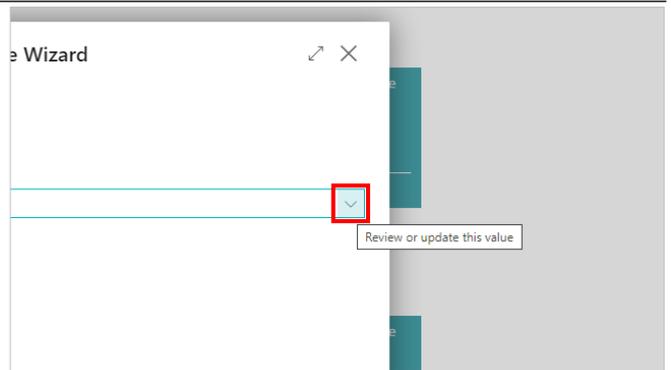


ODT Service Help

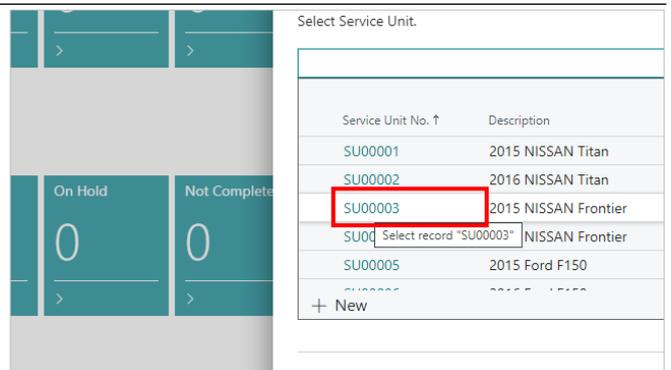
Select the Service Unit that will be used to perform service



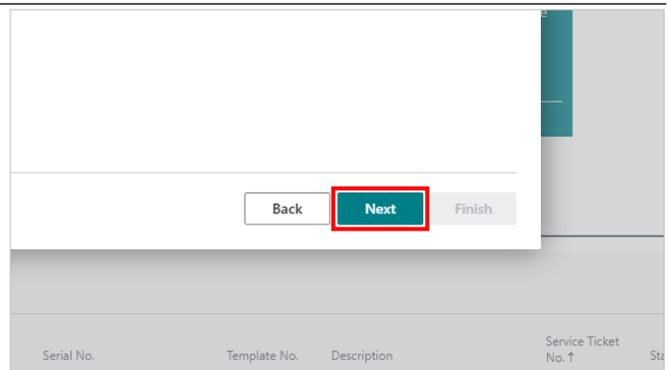
Click on the lookup button **Review or update this value**



Click on **Service Unit No.**

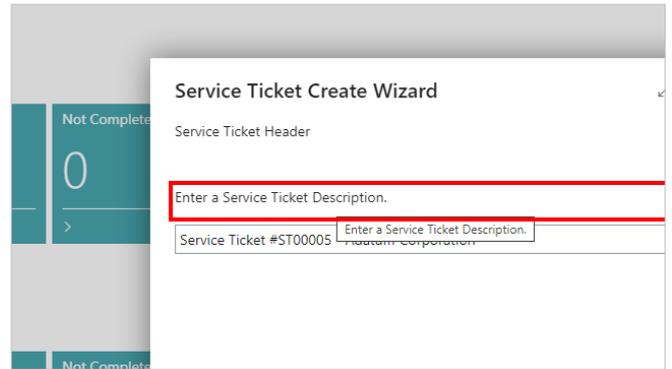


Click on the button **Next**

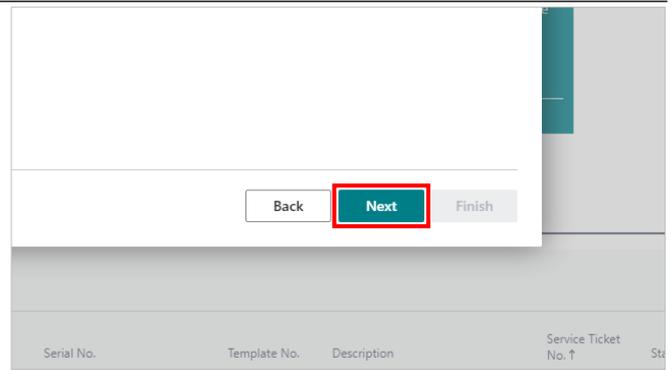


ODT Service Help

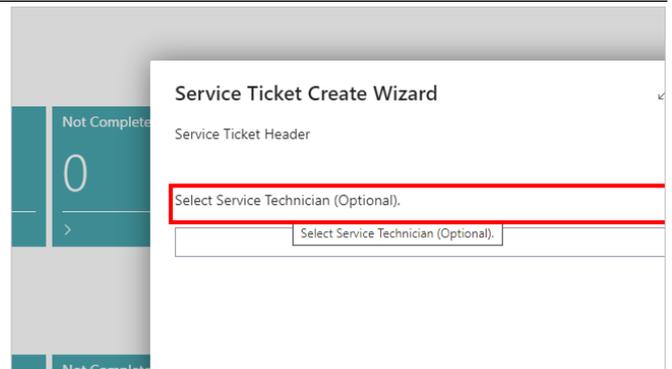
The Service Ticket Description will default from the selected template. If you wish to change the description, you will be given the option to do so.



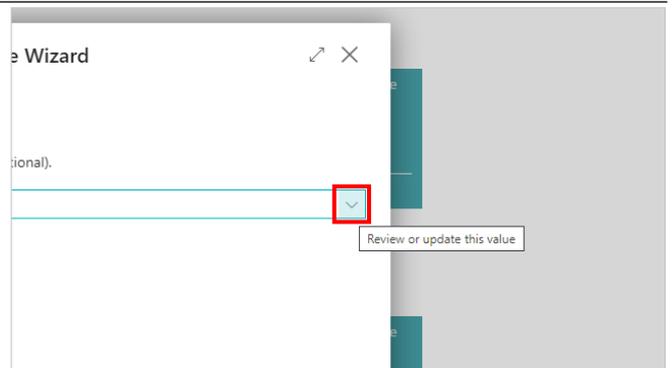
Click on the button **Next**



You may select a Technician to be assigned to this ticket.

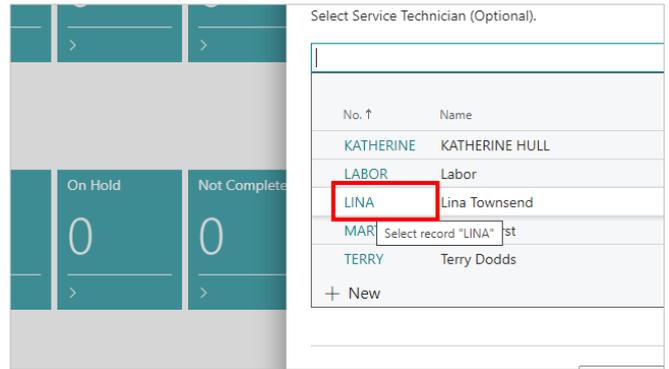


Click on the lookup button **Review or update this value**



ODT Service Help

Click on **No.**

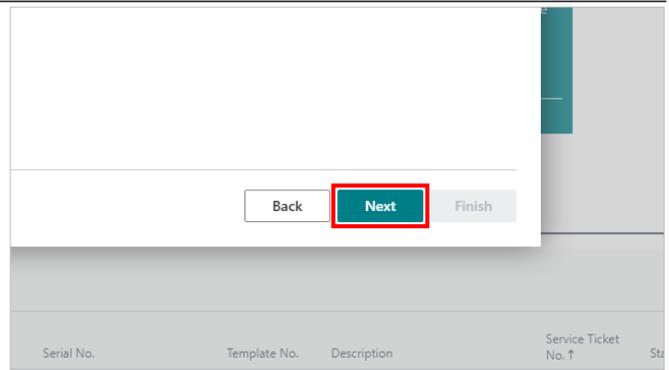


The screenshot shows a dialog box titled "Select Service Technician (Optional)". It contains a search bar and a table of technicians. The "No." column has a red box around the value "LINA".

No. ↑	Name
KATHERINE	KATHERINE HULL
LABOR	Labor
LINA	Lina Townsend
MAR	Select record "LINA" st
TERRY	Terry Dodds

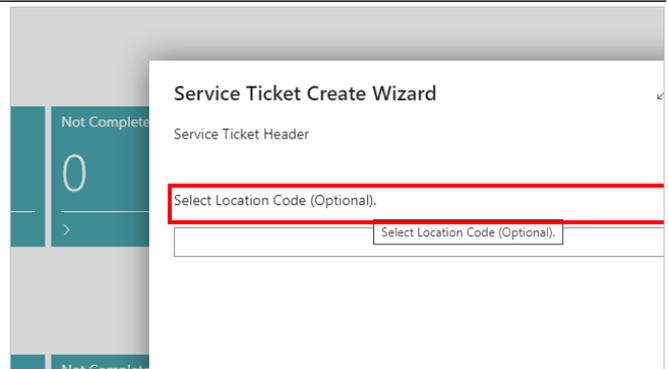
Below the table is a "+ New" button.

Click on the button **Next**



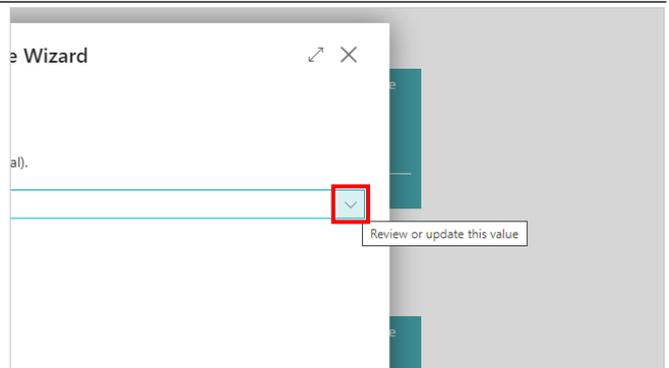
The screenshot shows a dialog box with three buttons: "Back", "Next", and "Finish". The "Next" button is highlighted with a red box.

You may select a Location Code for this ticket.



The screenshot shows a "Service Ticket Create Wizard" dialog box. It has a "Service Ticket Header" section and a "Select Location Code (Optional)" field. The field is highlighted with a red box.

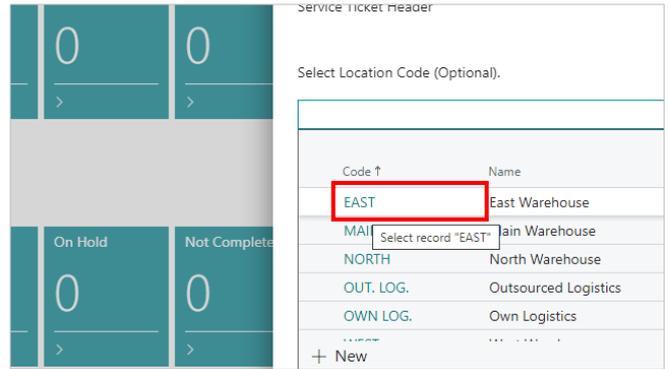
Click on the lookup button **Review or update this value**



The screenshot shows a dialog box with a dropdown menu. A red box highlights the dropdown arrow. A tooltip "Review or update this value" is visible next to the dropdown.

ODT Service Help

Click on East

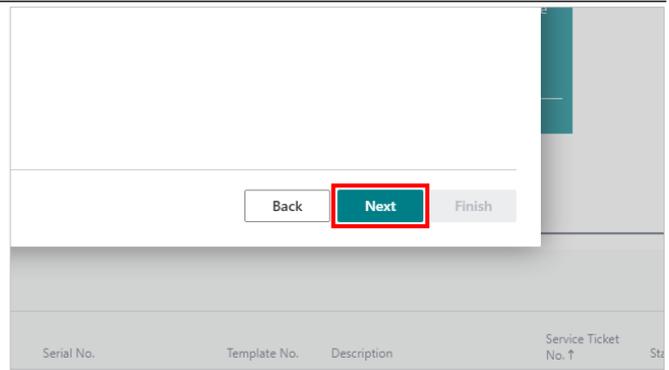


Service Ticket Header

Select Location Code (Optional).

Code ↑	Name
EAST	East Warehouse
MAIN	Main Warehouse
NORTH	North Warehouse
OUT. LOG.	Outsourced Logistics
OWN LOG.	Own Logistics
+ New	

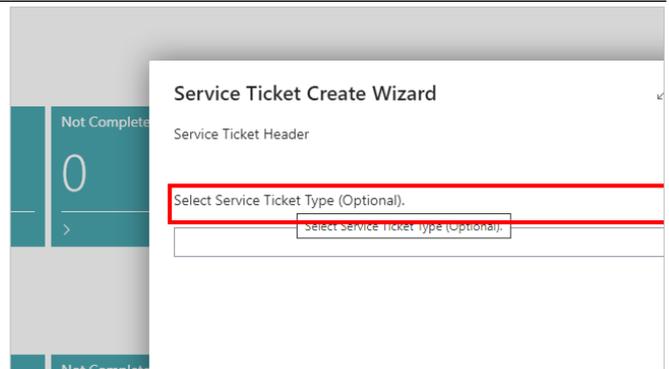
Click on the button **Next**



Back **Next** Finish

Serial No.	Template No.	Description	Service Ticket No. ↑	St
------------	--------------	-------------	----------------------	----

You may select a Service Ticket Type



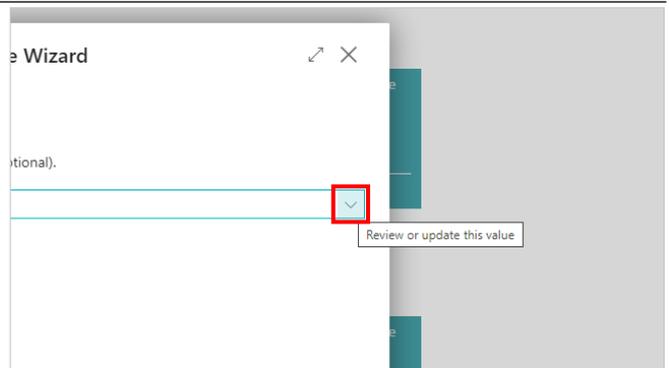
Service Ticket Create Wizard

Service Ticket Header

Select Service Ticket Type (Optional).

select service ticket type (Optional)

Click on the lookup button **Review or update this value**



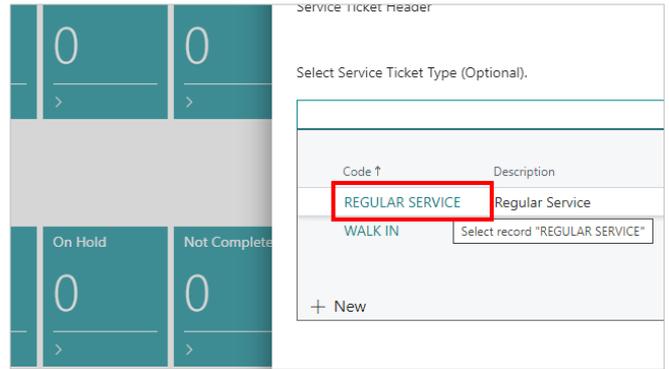
Service Ticket Create Wizard

optional).

Review or update this value

ODT Service Help

Click on **Code**



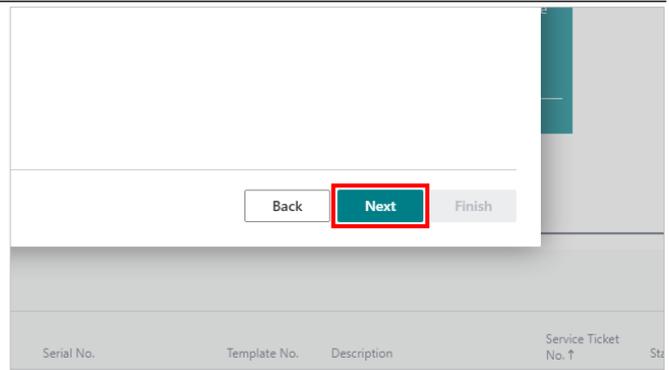
Service Ticket Header

Select Service Ticket Type (Optional).

Code ↑	Description
REGULAR SERVICE	Regular Service
WALK IN	Select record "REGULAR SERVICE"

+ New

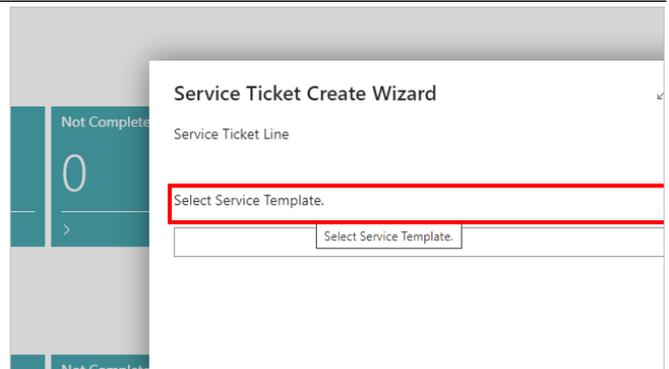
Click on the button **Next**



Back **Next** Finish

Serial No.	Template No.	Description	Service Ticket No. ↑	Sta
------------	--------------	-------------	----------------------	-----

Next, select the Service Template that will be used for the ticket



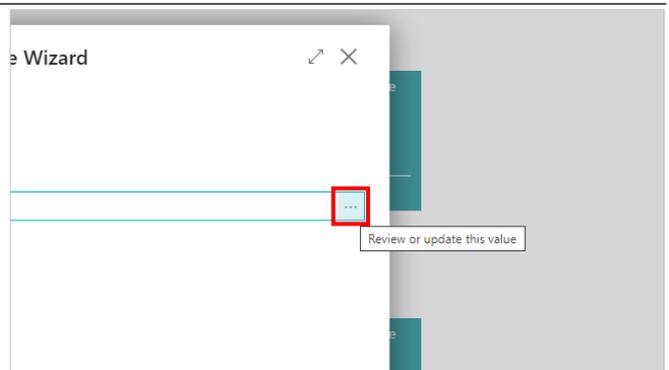
Service Ticket Create Wizard

Service Ticket Line

Select Service Template.

Select Service Template.

Click on the lookup button **Review or update this value**



Service Ticket Create Wizard

Review or update this value

Click on **Template No.**

Template No.	Template Type	Description
→ 20KSERVICE	All	20,000 KM Se
40KSERVICE	All	40,000 KM Se
50POINTINS...	All	50 point insp
OILCHANGE...	All	Oil Change
REPLACEAIR...	All	Replace Air Fi
ROTATETIR...	Select record "REPLACEAIRFILTER-LT"	res

Click on the button **Finish**

Notice that the new ticket has now been added to the Service Ticket Queue

On Hold	Not Complete	Not Started	Started	On Hold
0	0	1	0	0

6.3. Time Tracking

The Service Technician role center provides Time Tracking functionality so technicians can track the time spent on service tasks. Time can be tracked through ODT Service, or there is the option to integrate time tracking with standard BC time sheets.

6.3.1. How to Configure Time Tracking

The Time Tracking feature has a number of additional options that can be configured if you wish. These options can be found in Service Management Setup.

ODT Service Help

By default, time tracking only allows a user to be clocked in to one task at a time. If you wish to allow clocking in to multiple tasks at the same time, this can be enabled in Service Management Setup

▼	Report Service Items as	Parts
▼	Report Non-Inventory Items as	Parts
▼	Restrict closing service ticket if open PO lines exist.	<input type="checkbox"/>
▼	Archive quotes when the user runs action "Make Ti...	<input type="checkbox"/>
▼	Show Completed Task Queue	<input type="checkbox"/>
▼	Allow Multiple Clocking	<input checked="" type="checkbox"/>
▼	Auto Assign User on Clock In	<input checked="" type="checkbox"/>
▼	Prompt to Clock In/Out on Task	Always
▼	Prompt to Change Status	Always

By default, users will need to be assigned to tasks manually. This toggle will enable users to be automatically assigned to a task upon Clocking In to the Task Card.

▼	Report Non-Inventory Items as	Parts
▼	Restrict closing service ticket if open PO lines exist.	<input type="checkbox"/>
▼	Archive quotes when the user runs action "Make Ti...	<input type="checkbox"/>
▼	Show Completed Task Queue	<input type="checkbox"/>
▼	Allow Multiple Clocking	<input checked="" type="checkbox"/>
▼	Auto Assign User on Clock In	<input checked="" type="checkbox"/>
▼	Prompt to Clock In/Out on Task	Always
▼	Prompt to Change Status	Always

When opening and closing a Task Card, a prompt is displayed asking if the uses wishes to Clock In or Out. This option can control how frequently this prompt is displayed.

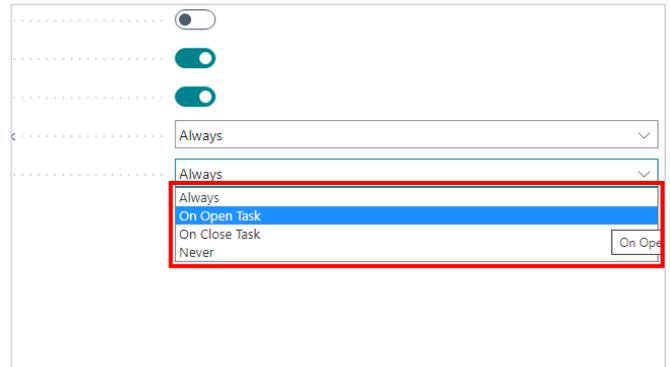
▼	Restrict closing service ticket if open PO lines exist.	<input type="checkbox"/>
▼	Archive quotes when the user runs action "Make Ti...	<input type="checkbox"/>
▼	Show Completed Task Queue	<input type="checkbox"/>
▼	Allow Multiple Clocking	<input checked="" type="checkbox"/>
▼	Auto Assign User on Clock In	<input checked="" type="checkbox"/>
▼	Prompt to Clock In/Out on Task	Always
▼	Prompt to Change Status	Always

When opening and closing a Task Card, a prompt will be displayed asking the user if they want to update the task status. This option can control how frequently this prompt is displayed.

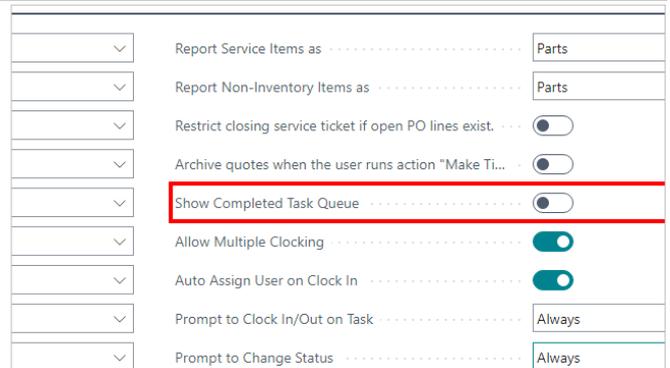
▼	Archive quotes when the user runs action "Make Ti...	<input type="checkbox"/>
▼	Show Completed Task Queue	<input type="checkbox"/>
▼	Allow Multiple Clocking	<input checked="" type="checkbox"/>
▼	Auto Assign User on Clock In	<input checked="" type="checkbox"/>
▼	Prompt to Clock In/Out on Task	Always
▼	Prompt to Change Status	Always

ODT Service Help

Both of the above prompts will always occur by default, but can be changed to display only when opening or only when closing a task, or they can set to never display at all.



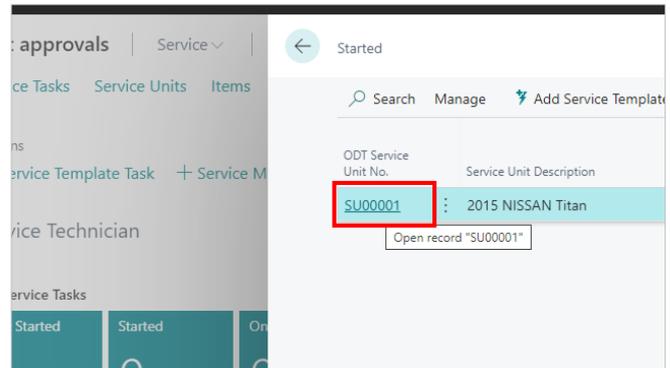
When this option is enabled, additional Queues will be displayed in the Technician Role Center that will show a list of all completed tasks and tickets.



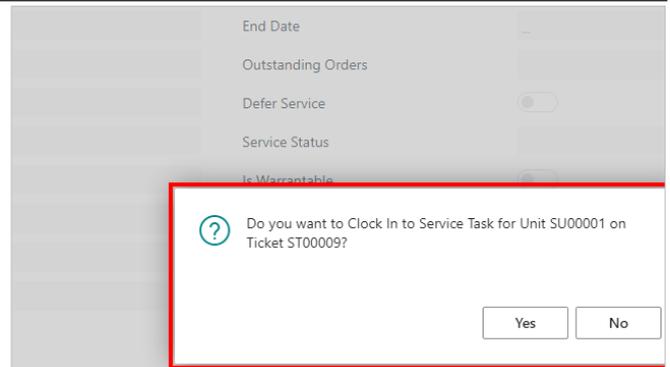
6.3.2. How to Track Time

The following demonstrates how to use the Time Tracking feature of the Technician Role Center

Click on the link in cell **ODT Service Unit No.** with the value **SU00001**

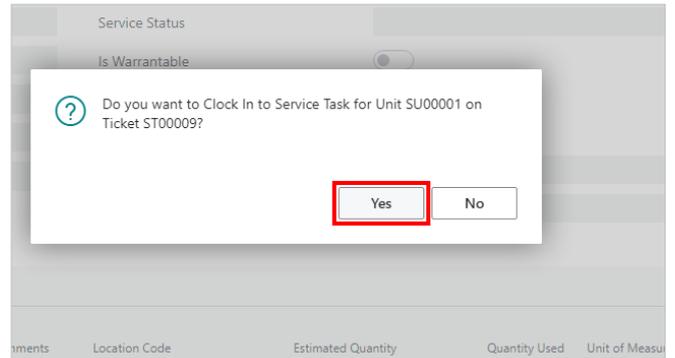


When opening the Service Ticket Task, you will be prompted to Clock In.

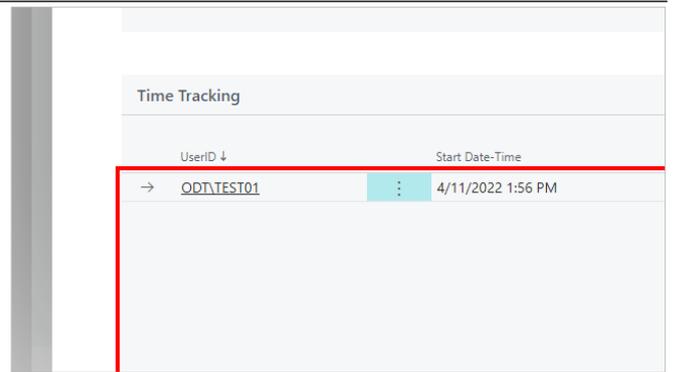


ODT Service Help

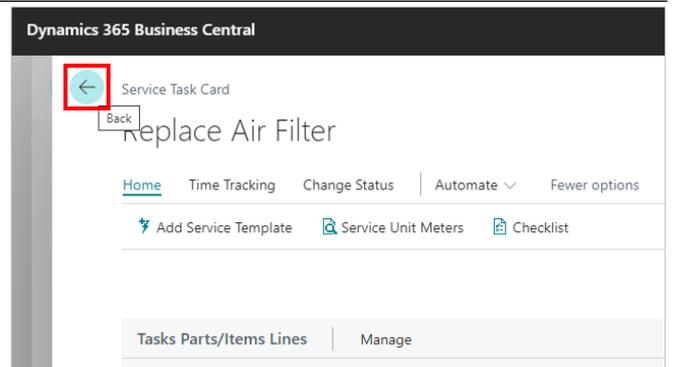
Click on the button **Yes**



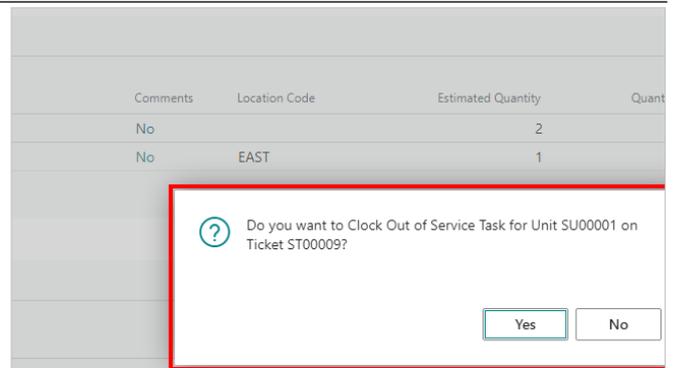
The Time Tracking tab on the Task Card will display the list of time tracking entries



Click on the back button

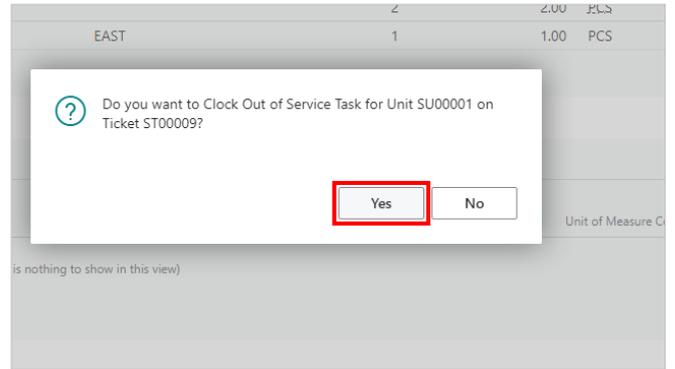


When closing the Task Card, you will be prompted if you want to Clock Out.

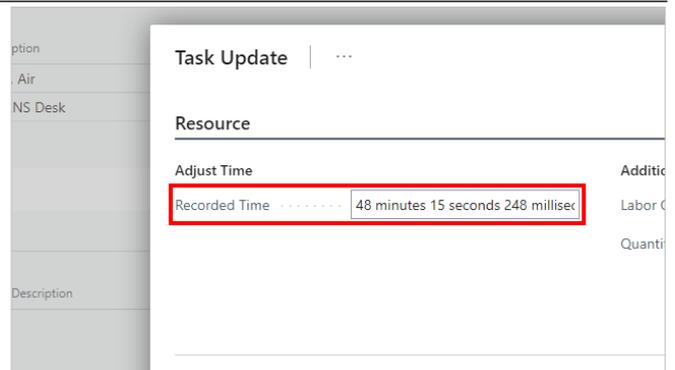


ODT Service Help

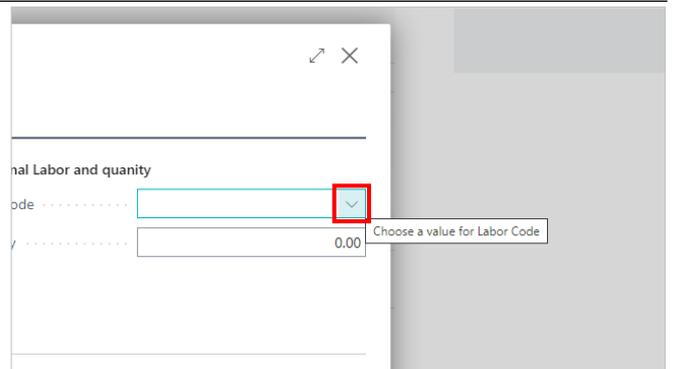
Click on the button **Yes**



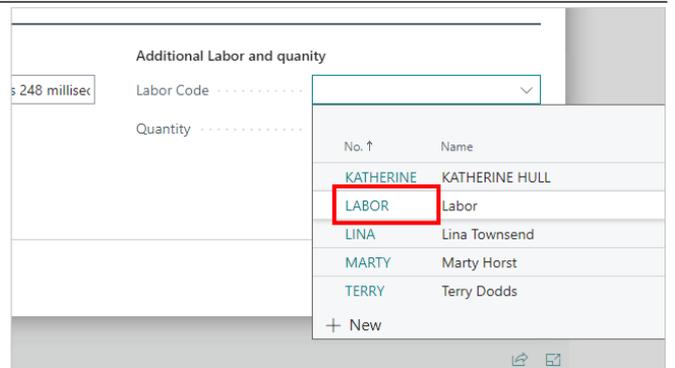
When clocking out, you will be given the option to adjust the time that is recorded.



You will also be given the option to record any additional labor, if necessary. Click on the lookup button **Labor Code**



Click on the link in cell **No.** with the value **LABOR**



Click on the field **Quantity**

Additional Labor and quantity

onds 248 millise

Labor Code LABOR

Quantity 0.00

OK Cancel

Enter the text **1**.

Additional Labor and quantity

onds 248 millise

Labor Code LABOR

Quantity 1

OK Cancel

Click on the button **OK**

8 millise

Labor Code LABOR

Quantity 1

OK Cancel

Actual Time Recorded Time

When reopening the Task Card, notice that the Time Tracking tab has been updated to show the previous time recorded.

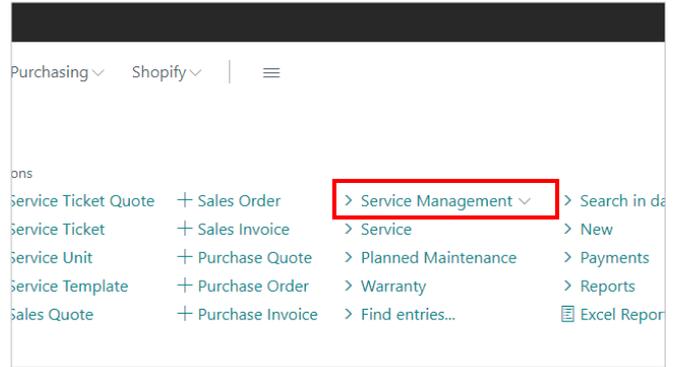
UserID ↓	Start Date-Time
→ ODTTEST01	4/11/2022 4:00 PM

6.3.3. How to use Time Sheet Integration

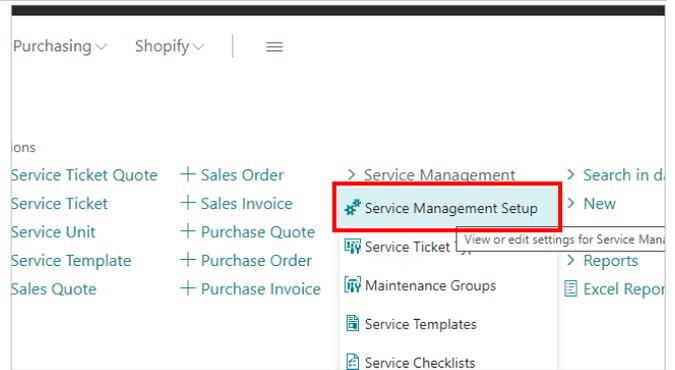
The following demonstrates how to use the Time Sheet Integration feature.

ODT Service Help

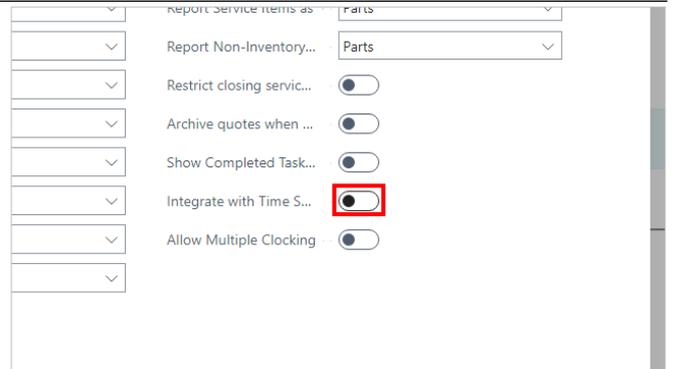
To use Time Sheet Integration, it must first be enabled in Service Management Setup. Click on the navigation menu item popup **Service Management**



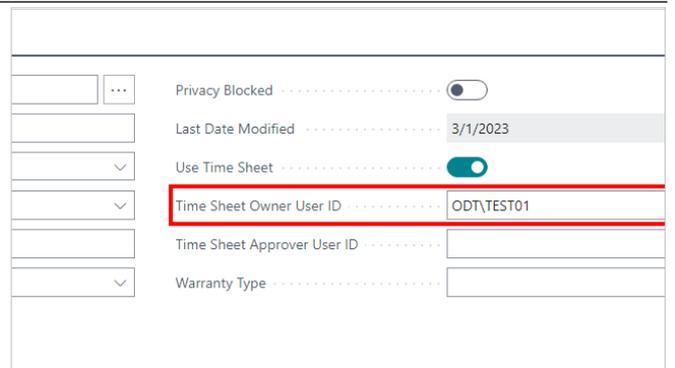
Click on the navigation menu item **Service Management Setup**



Click on the toggle field **Integrate with Time Sheets**

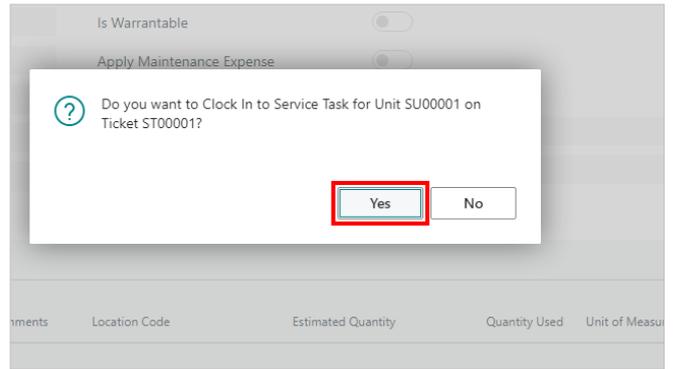


You must also ensure you have a Resource of type Person set up to use standard BC Time Sheets

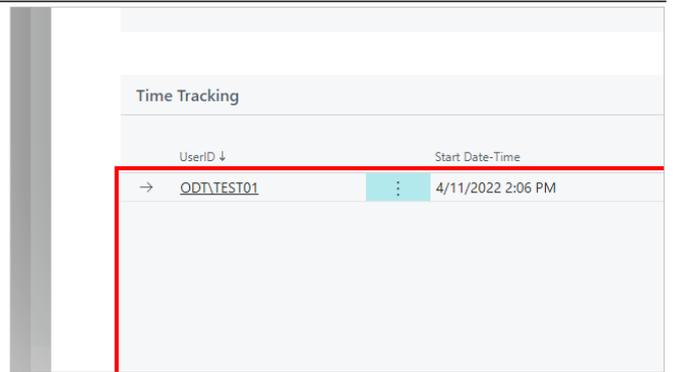


ODT Service Help

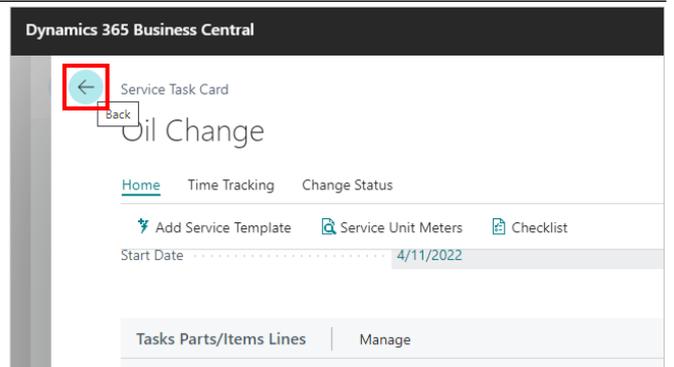
Click on the button **Yes**



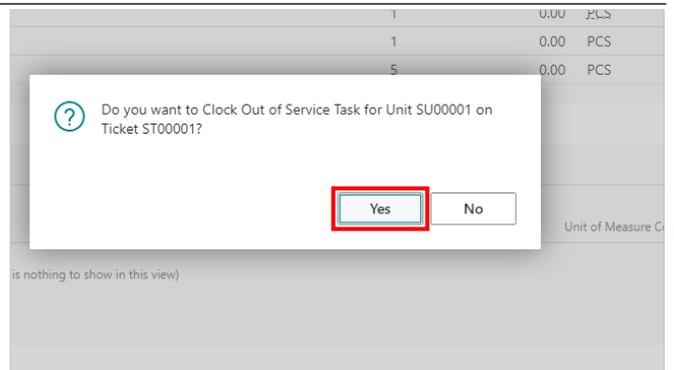
Notice that a Time Tracking line has been started for the user that has Clocked In



Click on the back button

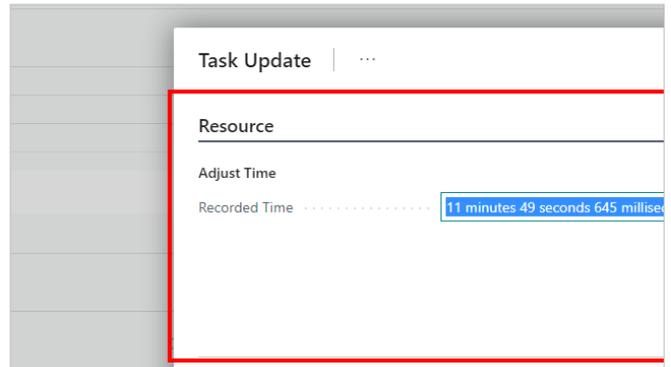


Click on the button **Yes**

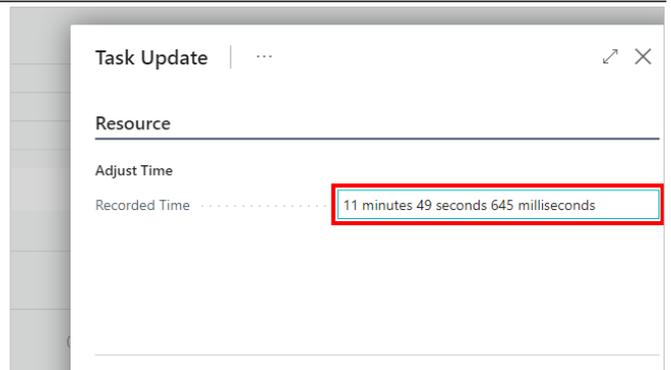


ODT Service Help

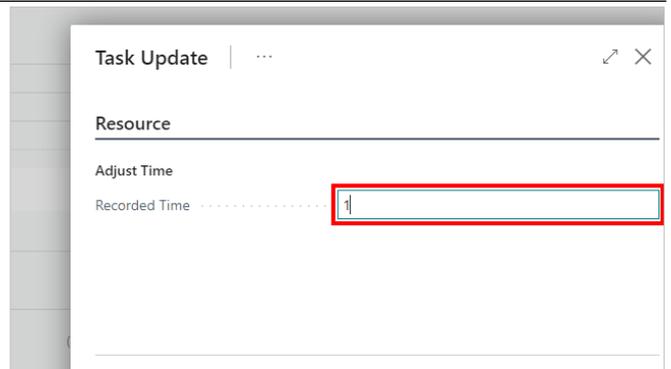
You will be given an option to adjust the recorded time.



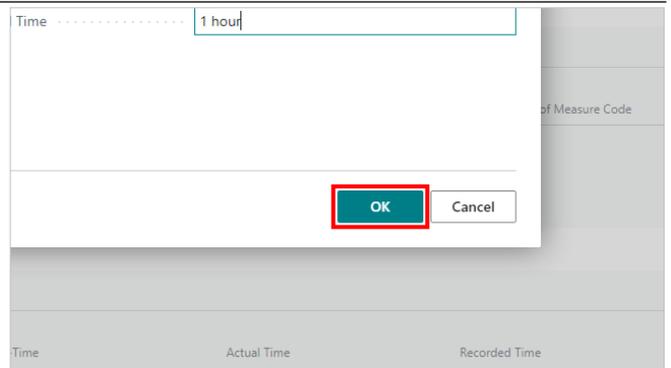
Click on the field **Recorded Time**



Enter the text **1 hour**.

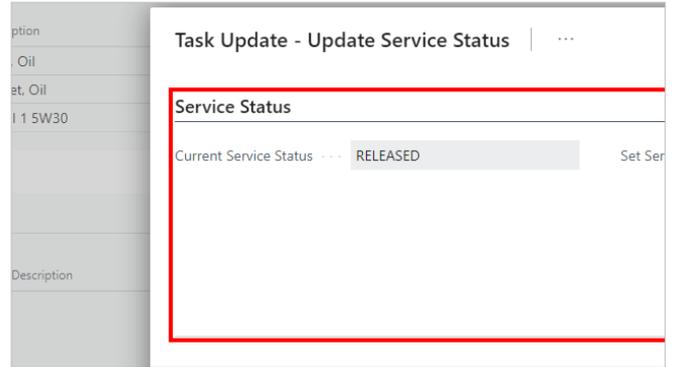


Click on the button **OK**

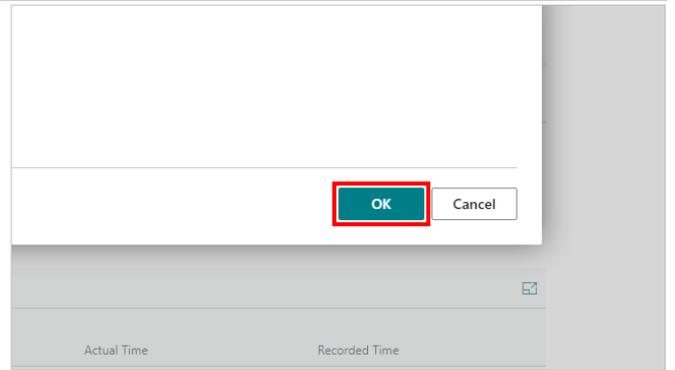


ODT Service Help

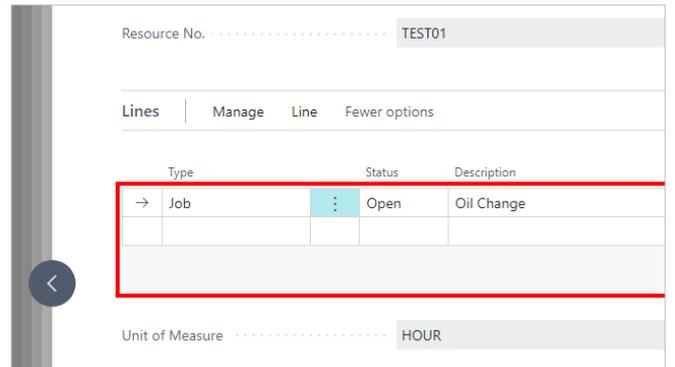
You will be given the option to update the task status if needed.



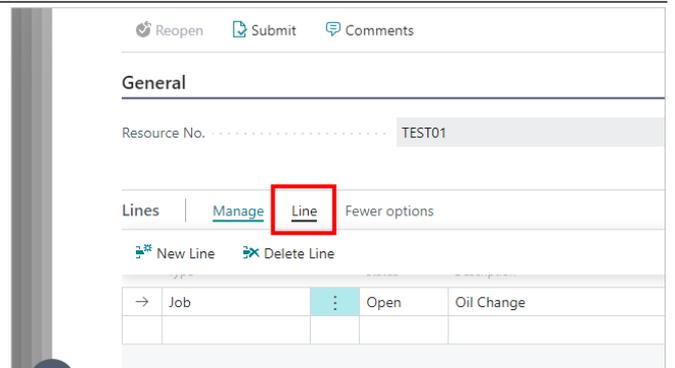
Click on the button **OK**



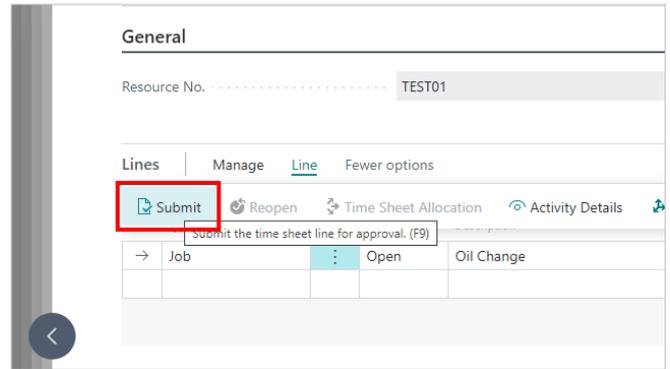
When viewing the standard BC timesheet, notice that an entry has been created for the service performed.



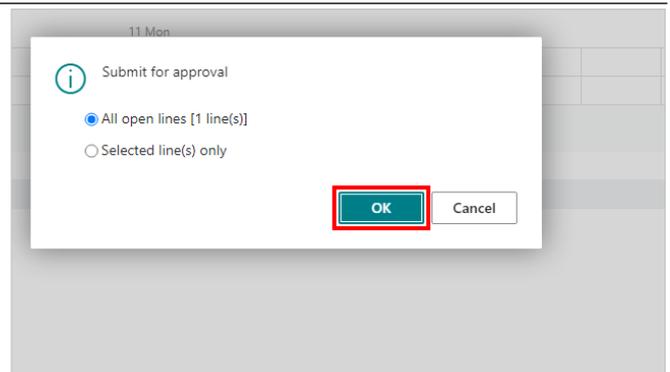
Click on the navigation menu item popup **Line**



Click on the navigation menu item **Submit**

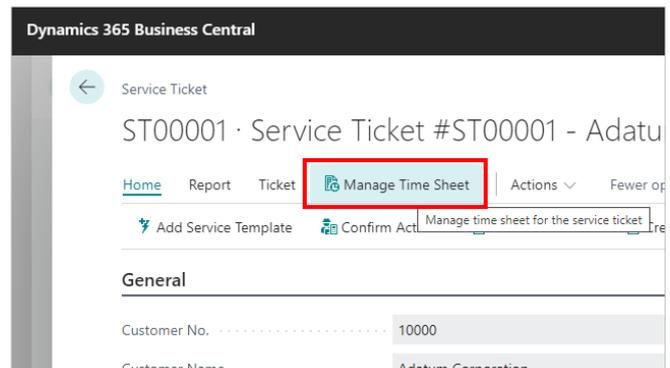


Click on the button **OK**

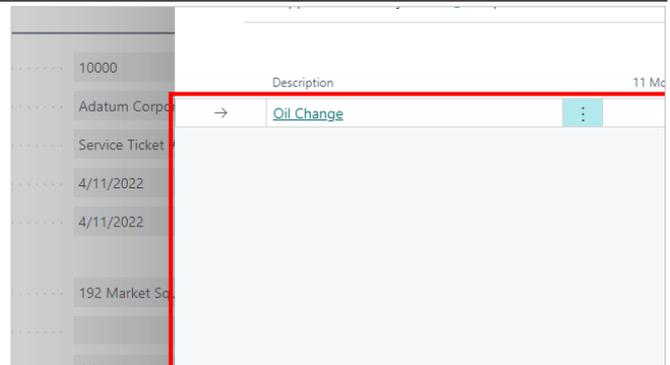


When approving a timesheet that has been submitted, it is possible to view it through the Service Ticket.

Click on the navigation menu item **Manage Time Sheet**

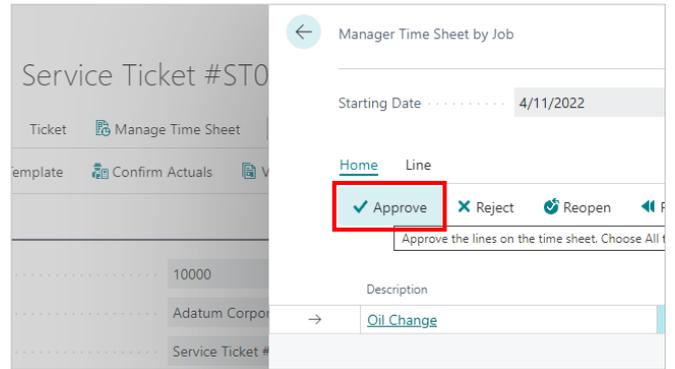


Notice that there is an entry for the time that was recorded on the timesheet, as well as options to approve or deny.

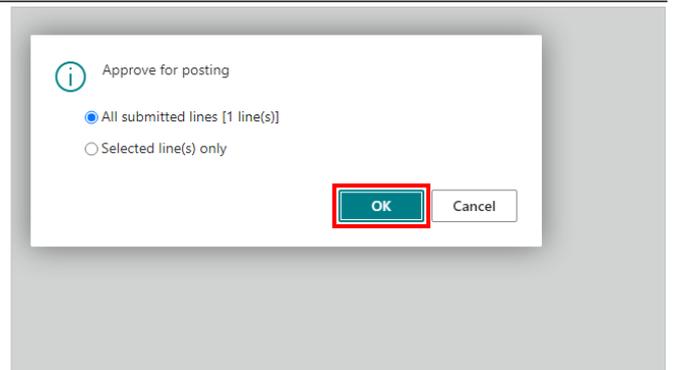


ODT Service Help

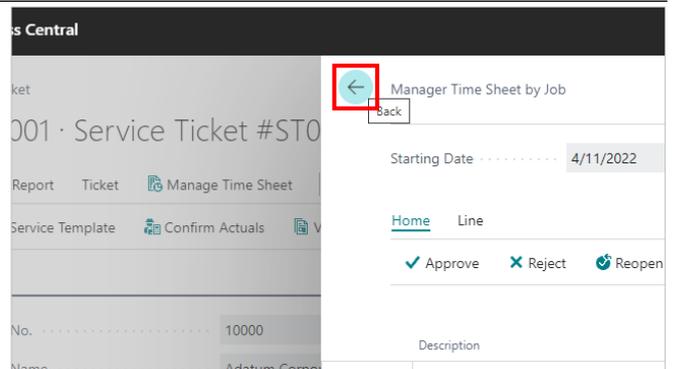
Click on the navigation menu item **Approve**



Click on the button **OK**

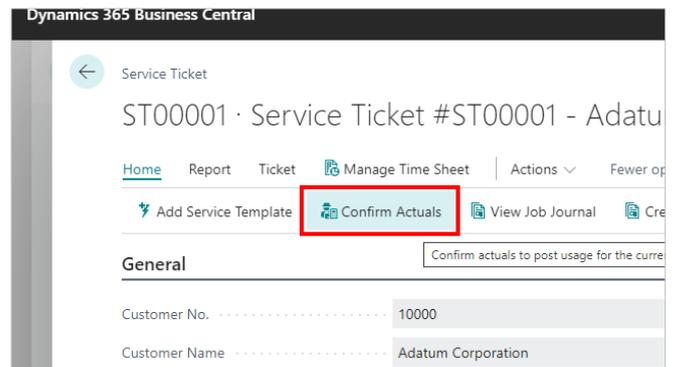


Click on the back button



Now that the time has been approved, an entry will be created for it when running Confirm Actuals

Click on the navigation menu item **Confirm Actuals**



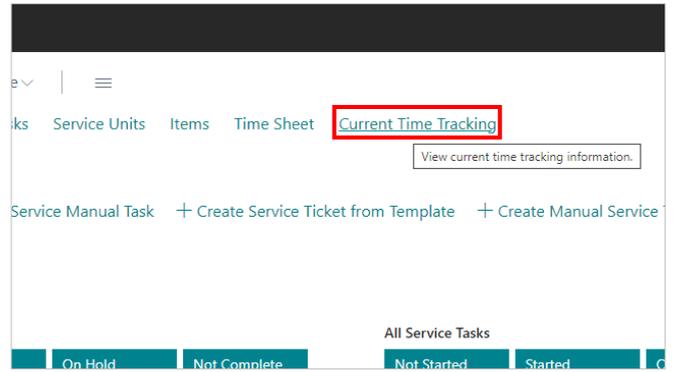
Notice that in addition to entries related to the service performed, there is an entry for the time that was approved.

Line Type	Posting Date	Document No.	Job No.	Job Task No.	Type
→ Both Budg...	4/11/2022	ST00001	ST00001	0020000	Reso
Both Budg...	4/11/2022	ST00001	ST00001	0020000	Item
Both Budg...	4/11/2022	ST00001	ST00001	0020000	Item
Both Budg...	4/11/2022	ST00001	ST00001	0020000	Item
	4/11/2022	DOCST00001	ST00001	0020000	Reso

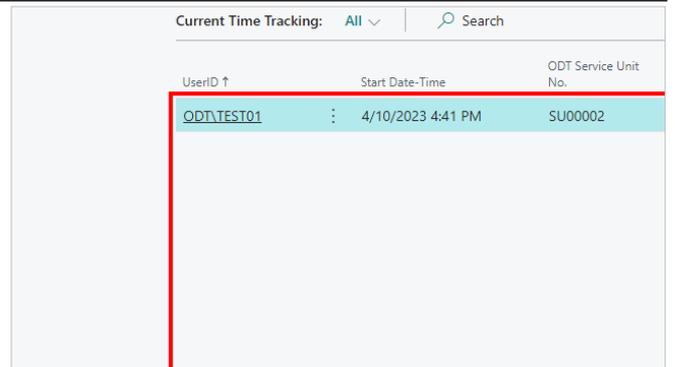
6.3.4. How to view the Time Tracking Menu

The following demonstrates how to view the Time Tracking Menu.

Click on the navigation menu item **Current Time Tracking**



The Time Tracking Menu will display a list of users who are Clocked In and information on the task they are working on.



UserID ↑	Start Date-Time	ODT Service Unit No.
ODTTEST01	4/10/2023 4:41 PM	SU00002

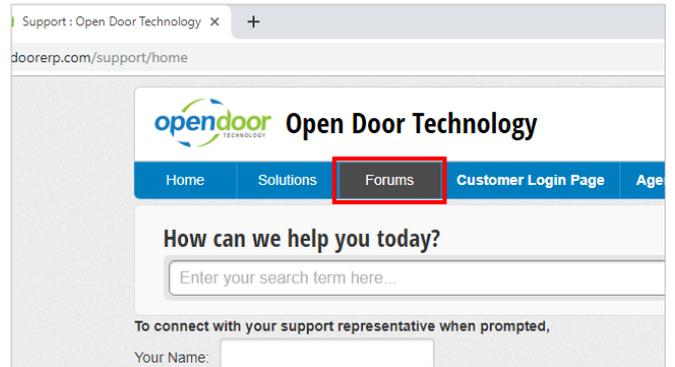
7. Support and ODT Service Help Information

7.1. How to Access ODT Service Release Notes

Release Notes are provided with each release of the ODT Service App. The Release Notes can be accessed via the following internet address: <https://support.opendoorerp.com>

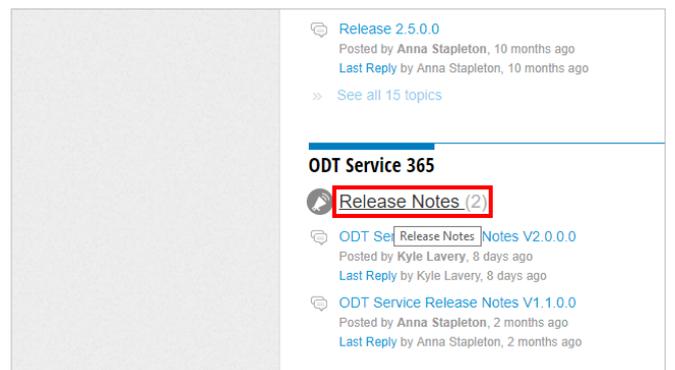
The following demonstrates the accessing of the release note documents. First, copy/paste the internet address into an internet browser.

Click on the link **Forums**



Scroll down to locate the forum on ODT Service.

Click on the link **Release Notes**

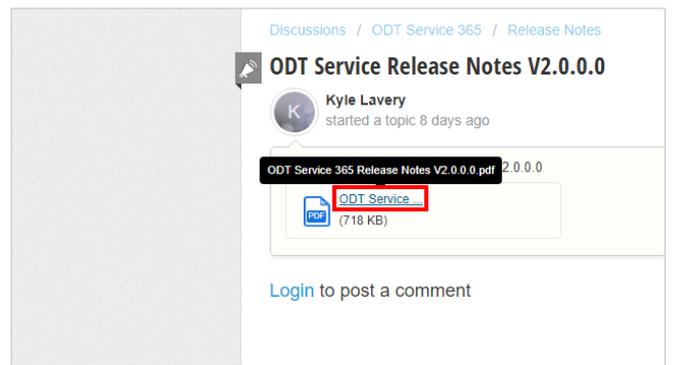


Click on the link **ODT Service Release Notes V2.0.0.0**



The Release Notes document(s) can be viewed directly from the website, or can be downloaded.

Click on the link **ODT Service ...**



The Release document contains sections for What's New, Issues Resolved, Known Issues and Upcoming Releases - Planned Modifications and New Features.

7.2. How to Access ODT Service Online Help

ODT Service Online Help can be directly accessed from an internet browser using the following address:

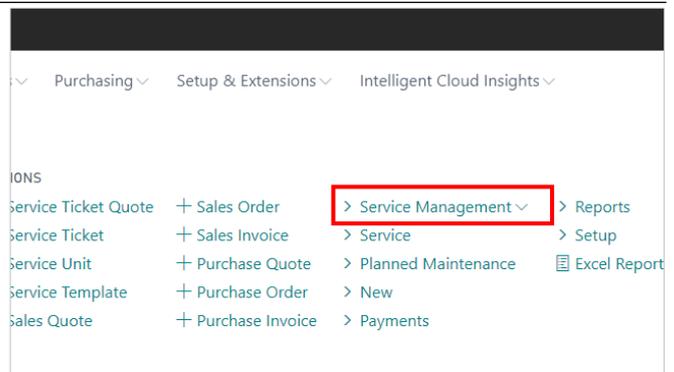
ODT Service Help

http://odtservice365help.opendoorerp.com/

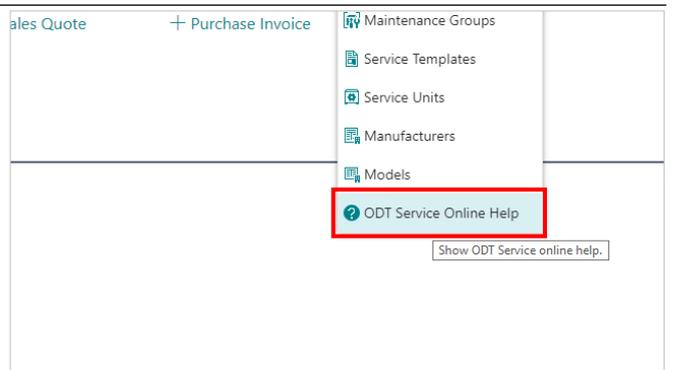
The following steps demonstrate how to access the ODT Service Online Help from the Business Manager Profile.

The same steps are available from the Sales Order Processor Profile.

Click on the navigation menu item popup **Service Management**



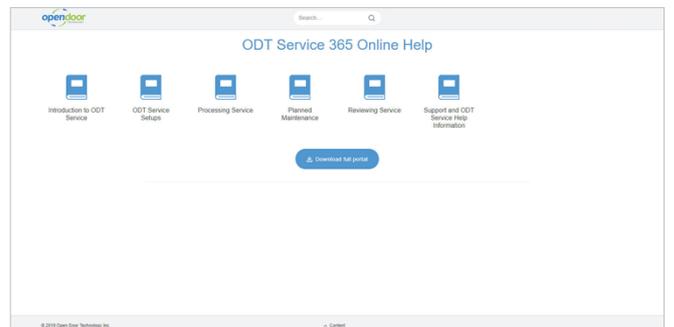
Click on the navigation menu item **ODT Service Online Help**



The following provides information on the ODT Service help site.

The picture provided here is the initial window for the ODT Service Online Help.

There are various categories which group the help to aide users in locating the help needed. In addition a user can use the Search at the top of the window to locate the help they are looking for.



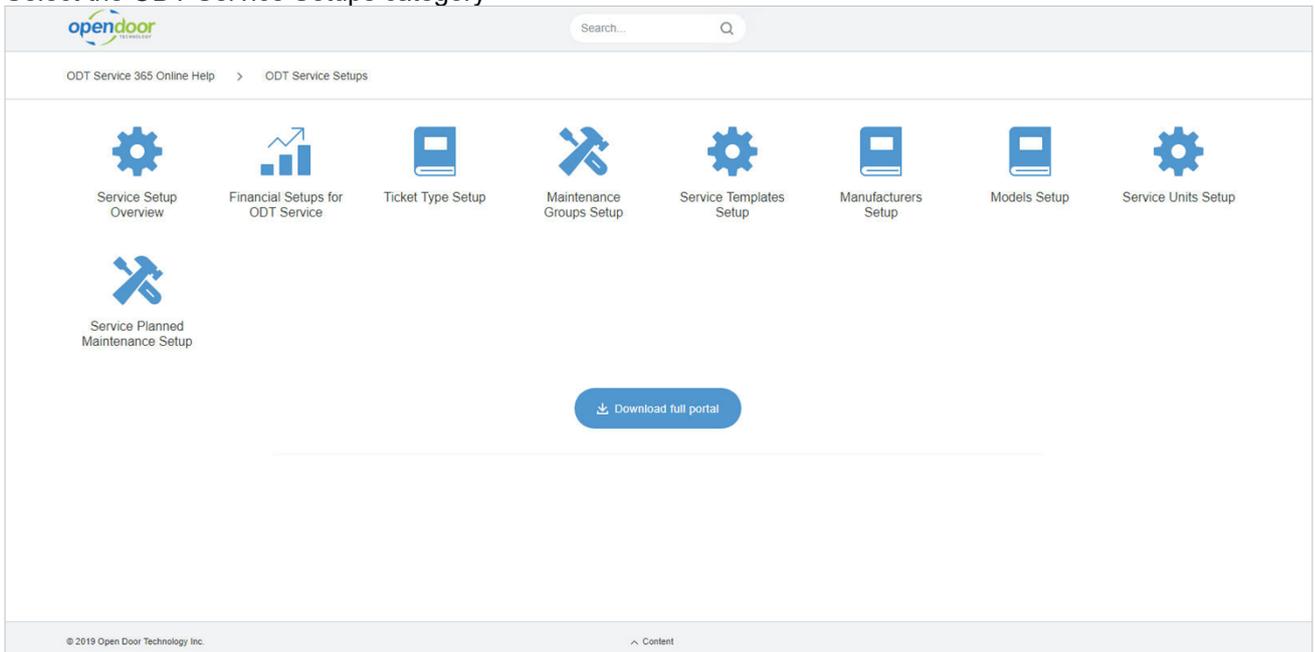
A Table of Contents can be viewed by clicking on the Content option at the bottom of the the window.

ODT Service Help

- Introduction to ODT Service
- ODT Service Introduction
- ODT Service Overview
- ODT Service Permissions
- ODT Service Setups
- Service Setup Overview
- ODT Service Setup Overview
- Financial Setups for ODT Service
 - How to Setup Service Management Setup
 - How to Setup an Internal Customer for Servicing
- Ticket Type Setup
 - How to Setup Service Ticket Types
- Maintenance Groups Setup
 - How to Setup Maintenance Groups
- Service Templates Setup
 - How to Setup Service Templates
- Manufacturers Setup
 - How to Setup Manufacturers
- Models Setup
 - How to Setup Models
- Service Units Setup
 - How to Setup Service Units
- Service Planned Maintenance Setup
 - How to Setup Service Unit Meters
 - How to Setup Planned Maintenance Schedules
- Processing Service
- Service Processing Overview
- ODT Service Processing Overview
- Service Tickets Overview
- Service Ticket Overview
- Servicing Internal Equipment
 - Overview of Internal Equipment Servicing
 - How to Enter and Process an Internal Service Ticket
- Processing in ODT Service for External Customers
 - Overview of External Customer Equipment Servicing
 - How to Process External Customer Service Quotes
 - How to Process External Customer Service Tickets
- How to Create a Service Ticket from a Service Unit
- How to Create a Service Ticket from a Service Unit
- Planned Maintenance
- Service Planned Maintenance Overview
 - Planned Maintenance Overview
 - Service Planned Maintenance Worksheet
 - How to Use the Planned Maintenance Worksheet
- Service Planned Maintenance Quotes
 - How to Process Planned Maintenance Quotes
- Service Planned Maintenance Tickets
 - How to Process Planned Maintenance Tickets
- Reviewing Service
- Reviewing Service History
 - How to Review Service History
 - How to Review Service Ledger Entries
- Support and ODT Service Help Information

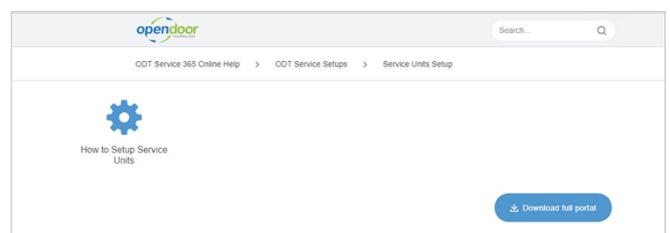
Select the category in which the information you are seeking would logically be located.

Select the ODT Service Setups category



Click on Service Units Setup, then How to Setup Service Units.

Select the category in which the information you are seeking would logically be located.



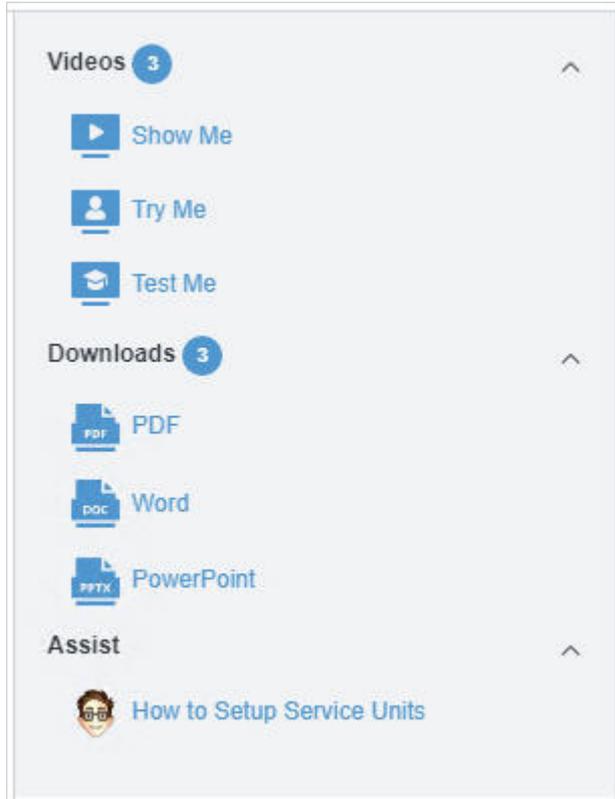
When a category is selected, the documentation will open in the Process Description format.

Other formats available include the following, which are accessed at the right as shown in the picture.

- A PDF Document

ODT Service Help

- Power Point Slides
- A Show Me Video
- A Teach Me Video
- A Test Me Video



In the Process Description format:

To move from one document to a different document included in the category selected, at the right and left of the screen, indicators are provided that enable you to move forwards and backwards through the documentation.