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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 • 0 0 0 0 service tickets. One for open Service Ticket Quotes and the other for Activities open Service Tickets. Service Activitie SERVICE TICK. Click on the navigation menu item popup Service amics 365 Business Central On the main command bar of the Business Manager CRONUS Inc Service \sim Planned Maintenance ~ Profile the Service menu option is for ODT Service Customers Vendors Items Bank Accounts Chart of Accour and contains sub-menu options. INSIGHT FROM LAST MONTH You closed 2 more dea in the same period last Service sub-menu options amics 365 Business Central CRONUS Inc Service \smallsetminus Planned Maintenance Fina Service Ticket Quotes Service Tickets Service Units Complete INSIGHT FROM LAST MONTH You closed 2 more dea in the same period last

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.





kyle@opendoorer p.com March 17, 2025 7/369

ODT Service Help

Planned Maintenance sub-menu options

mamics 365 Busines	s Central
	CRONUS Inc Service V Planned Maintenance V Fina
	Planned Maintenance Worksheet Planned Maintenance Quotes
	imes This is a sandbox environment (preview) for test, demo, or development
	INSIGHT FROM LAST WEEK
	The best-selling item w
	SYDNEY Swivel Chair, c

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

h Management \smallsetminus	Sales \smallsetminus	Purchasing \smallsetminus	Setup & Extensions $\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!$		Intelligent Cloud
	ACTIONS				
	+ Service Ticket Quote		+ Sales Order	>	Service Manage
	+ Servi	ce Ticket	+ Sales Invoice	>	Service
	+ Servi	ce Unit	+ Purchase Quote	>	Planned Mainte
	+ Service Template		+ Purchase Order		New
	+ Sales Quote		+ Purchase Invoice		Payments

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 submenu options.
- Service, which contains sub-menu options.
- Planned Maintenance, which contains submenu options.

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

\sim Purchasing \sim	Setup & Extensions \	Intelligent Cloud Insights	/
IONS			1
Service Ticket Quote	+ Sales Order	> Service Management \sim	> 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	



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

·	Setup & Extensions \	 Intelligent Cloud Insight 	5 🗸
IONS			
Service Ticket Quote	+ Sales Order	Service Management	> Reports
Service Ticket	+ Sales Invoice	> Service ~	> Setup
Service Unit	+ Purchase Quote	> Planned Maintenance	🗉 Excel Rep
Service Template	+ Purchase Order	> New	
Sales Ouote	+ Purchase Invoice	> Payments	

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**

Click on the navigation menu item popup Service

ig \lor Setup & Extensions \lor Intelligent Cloud Insights \lor					
Ticket Quote	+ Sales Invoice	> Planned Maintenance \lor			
Ticket	+ Purchase Quote	> New			
Unit	+ Purchase Order	> Payments			
Template	+ Purchase Invoice	> Reports			
uote	> Service Management	> Setup			
rder	> Service	E Excel Reports			

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



ODT Service Help

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 submenu 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 submenu 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



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 serving 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.





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ODT Service Help

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		FAJNL-GLR Recurring Fixed Asset G/L RF00001				
		GINL-PMT Payment Journal G04001				
		GJNL-RCPT Cash Receipts Journal G02001				





⁻ Technology Inc.

kyle@opendoorer p.com March 17, 2025 16/369

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How to Set Up Service Management Setup

Business Manager Profile

2.2.1.3.

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



Click on the navigation menu item popup Service Management	↔ Purchasing ← Setup & Extensions ← Intelligent Cloud Insights ←
	Service?
	IONS 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 Management Setup	\sim Purchasing \sim Setup & Extensions \sim Intelligent Cloud Insights \sim
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	ODT Se	ervice Hel	р		24/36
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	+ New
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Click on the back button	s Central CRONUS Inc Service Plan Customers Vendors Items Bank This is a sandbox environment (preview) INSIGHT FROM LAST MONTH The largest pc invoice was fc

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 at 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	Actions + Service Ticket Quote + Purchase Quote > Payments + Service Ticket + Purchase Order > Reports + Service Unit + Purchase Invoice > Setup + Service Template > Service Management > CAL Test To + Sales Quote * Service Management Setup > Excel Repor + Sales Order * Service Ticket Types * Service Templates * Service Templates * Service Templates * Service Templates
Click on Filter Service Units By Customer No.	V Posted Service Inv. Nos. ·· SV-INV+ V V Planned Maint. Invoic PM-INV V V Posted Planned Maint PM-INV+ V V Filter Service Units By Image: State Sta
Click on the toggle field Filter Service Units By Customer No.	V Posted Service Inv. Nos. ·· SV-INV+ st V Planned Maint. Invoic PM-INV Reg V Posted Planned Maint PM-INV+ V V Filter Service Units By E
Click on the back button	s Central CRONUS SERVICE, Inc Servic Customers Vendors Items Bank Headline Good afterno Service Unit Nos, SERV-UNI Service Ticket Nos, SERV-TIX

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 Detals 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.

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Dynamics 365 Business Central

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**

	CRONUS Inc Service > Planned Maintenance > Customers Vendors Items Bank Accounts Chart of Ac INSIGHT FROM LAST MONTH The largest posted sa invoice was for \$21,58
Click on the navigation menu item New	ness Central CRONUS Inc Service <> Planned Maintenance <> Finance <> Cash M Customers: All <
Click on the button OK	; your syster Sell-to C OK Cancel Ongoing Sa Quotes Ongoing Sa
Click on the field Name	10 New Document Request Approval Navigate Customer More options 50 General Rt No. C00010 Name *



Enter the text Internal Servicing Customer.	
-	10 A: New Document Request Approval Navigate Customer More options
	Re
	Re
	Je No
	Name ······ * 1
	Balance (\$)
	Balance Due (\$)
	Credit Limit (\$)
Click on Tax Liable, Yes	Address & Contact >
	Invoicing
	Copy Sell-to Addr. to Qte From · · · Company
	Tax Liable
	Tax Area Code · · · · · · · · · · *
	Tax Identification Type · · · · · · Legal Entity
	Tax Exemption No.
Click on the field Tax Area Code	
Click on the field Tax Area Code	
Click on the field Tax Area Code	Invoicing
Click on the field Tax Area Code	Invoicing Copy Sell-to Addr. to Qte From · · · Company
Click on the field Tax Area Code	Invoicing Copy Sell-to Addr. to Qte From · · · Company • Tax Liable · · · · · · · · ·
Click on the field Tax Area Code	Invoicing Copy Sell-to Addr. to Qte From · · · Company • Tax Liable · · · · · · · · · · · · · · · · · · ·
Click on the field Tax Area Code	Address & contact / Invoicing Copy Sell-to Addr. to Qte From ··· Company • Tax Liable ····· • Tax Area Code ···· • Tax Identification Type ···· · Legal Entity •
Click on the field Tax Area Code	Invoicing Copy Sell-to Addr. to Qte From ··· Company Tax Liable Tax Area Code Tax Identification Type Legal Entity Tax Exemption No.
Click on the field Tax Area Code	Invoicing Copy Sell-to Addr. to Qte From ··· Company Tax Liable ····· Tax Area Code ····· Legal Entity Tax Identification Type ···· Legal Entity Tax Exemption No. ··· ··
Click on the field Tax Area Code	Invoicing Copy Sell-to Addr. to Qte From ··· Company Tax Liable Tax Area Code Tax Identification Type Legal Entity Tax Exemption No,
Click on the link in cell Code with the value	Invoicing Copy Sell-to Addr. to Qte From ··· Company Tax Liable Tax Area Code Tax Identification Type Legal Entity Tax Exemption No. Copy Sell-to Addr. to Ote From ··· Company
Click on the field Tax Area Code Click on the link in cell Code with the value ATLANTA, GA	Invoicing Copy Sell-to Addr. to Qte From ··· Company Tax Liable Tax Area Code Tax Identification Type Tax Exemption No. Copy Sell-to Addr. to Qte From ··· Company Tax Liable Copy Sell-to Addr. to Qte From ··· Company Tax Liable Copy Sell-to Addr. to Qte From ··· Company Get
Click on the field Tax Area Code Click on the link in cell Code with the value ATLANTA, GA	Invoicing Copy Sell-to Addr. to Qte From ··· Company Tax Liable Tax Area Code Tax Identification Type Legal Entity Tax Exemption No. Copy Sell-to Addr. to Qte From ··· Company Tax Liable Copy Sell-to Addr. to Qte From ··· Company Tax Liable Tax Liable Tax Liable Tax Liable Tax Liable Tax Area Code
Click on the field Tax Area Code Click on the link in cell Code with the value ATLANTA, GA	Invoicing Copy Sell-to Addr. to Qte From ··· Company Tax Liable Tax Area Code Tax Identification Type Legal Entity Tax Exemption No. Copy Sell-to Addr. to Qte From ··· Company Tax Liable Copy Sell-to Addr. to Qte From ··· Company Tax Liable Tax Liable Tax Liable Tax Area Code Tax Liable Tax Liable Tax Liable Tax Identification Type ···· Company
Click on the field Tax Area Code Click on the link in cell Code with the value ATLANTA, GA	Invoicing Copy Sell-to Addr. to Qte From Tax Liable Tax Area Code Tax Exemption No. Copy Sell-to Addr. to Qte From Copy S
Click on the field Tax Area Code Click on the link in cell Code with the value ATLANTA, GA	Invoicing Copy Sell-to Addr. to Qte From Tax Liable Tax Area Code Tax Identification Type Legal Entity Tax Exemption No. Copy Sell-to Addr. to Qte From Company Tax Liable Copy Sell-to Addr. to Qte From Company Tax Liable Copy Sell-to Addr. to Qte From Company Tax Liable Tax Liable Tax Liable Tax Area Code Tax Identification Type CODE DESCRIPTION ATLANTA GA Statest record "ATLANTA, GA
Click on the field Tax Area Code Click on the link in cell Code with the value ATLANTA, GA	Invoicing Copy Sell-to Addr. to Qte From Tax Liable Tax Area Code Tax Identification Type Legal Entity Tax Exemption No. Copy Sell-to Addr. to Qte From Company Tax Liable Copy Sell-to Addr. to Qte From Company Tax Liable Tax Liable Tax Identification Type Cope Description Tax Identification Type Tax Identification Type CoDE Description AtLANTA, GA Select record "ATLANTA, GA" [CAGO, IL MIAMI, FL
Click on the field Tax Area Code	Invoicing Copy Sell-to Addr. to Qte From Tax Liable Tax Area Code Tax Identification Type Legal Entity Tax Exemption No. Copy Sell-to Addr. to Qte From Copy Sell-to Addr. to Qte From<
Click on the field Tax Area Code Click on the link in cell Code with the value ATLANTA, GA	Invoicing Copy Sell-to Addr. to Qte From Tax Liable Tax Area Code Tax Identification Type Legal Entity Tax Exemption No. Copy Sell-to Addr. to Qte From Company Tax Liable Tax Liable Copy Sell-to Addr. to Qte From Company Tax Liable Tax Liable Tax Liable Tax Area Code Tax Identification Type CoDE DESCRIPTION Tax Exemption No. ATLANTA GA Select record "ATLANTA, GA Image: Solution Type NATL, GA Atlanta, GA - North + New



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. $\overline{\bullet}$ Click on the back button Dynamics 365 Business Central CRONUS CUSTOMER CARD | WORK DATE: 4/8/2019 \leftarrow Customers: 200010 · Internal Servicing Request Approval Navigate New Document Customer Tax Exemption No.

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**

> Purchasi	ng – Setup & Extensions	 Intelligent Cloud Insigh 	ts 🗸
IONS			
Service Ticket C	Quote + Sales Order	> Service Management	> Reports
Service Ticket	+ Sales Invoice	> Service	> Setup
Service Unit	+ Purchase Quote	> Planned Maintenance	Excel Report
Service Templat	e + Purchase Order	> New	
Sales Quote	+ Purchase Invoice	> Payments	

Payments >



Click on the navigation menu item Service Ticket Types	\sim Purchasing \sim Setup & Extensions \sim Intelligent Cloud Insights \sim
	DNS ervice Ticket Quote + Sales Order ervice Ticket + Sales Invoice ervice Unit + Purchase Quote ervice Template + Purchase Order ales Quote + Purchase Invoice @ Service Templates @ Service T
Click on the navigation menu item New	
	;, Inc. Service SERVICE TICKET TYPES I WORK DATE: 4/8/2019 Items Bank Acco Search + New Edit List Delete
	was for
Click on the cell Code	Inc Service ~ Plan SERVICE TICKET TYPES WORK DATE: 4/8/2019 Press Vendors Items Bank Search New Edit List Delete Edit a sandbox environment (preview) Items Items <t< th=""></t<>
	DM LAST MONTH largest pc pice was fc
Enter the text Regular Service .	Inc Service V Plan SERVICE TICKET TYPES WORK DATE: 4/8/2019 Vendors Items Bank Search + New Edit List Image: Delete Im
	a sandbox environment (preview) DM LAST MONTH largest pc Vice was fc



ODT Service Help

Click on the cell Description		
	YPES WORK DATE: 4/8/2019	√ SAV
	New 🚯 Edit List 📋 Delete 📲 Open in Excel	
	DESCRIPTION	APPLIES TO 1 TYPE
		ervice
Enter the text Regular Service .		
	YPES WORK DATE: 4/8/2019	√ SAV
	New 🖽 Edit List 📋 Delete 📲 Open in Excel	
	DESCRIPTION	APPLIES TO 1 TYPE
	Service R	Service
Click on the cell Applies to Ticket Type		
	√ SAVED 27	ud Insights
	🖬 Open in Excel 🛛 🝸 🚞	
	ON APPLIES TO TICKET TYPE	gement
	vice Service	9
	JENIKE	tenance
Click on Service	2	ud Insights
	🕼 Open in Excel 🛛 🖓 🗮	-
	APPLIES TO TICKET	
		gement
	e is nothing to show in this view)	tenance

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





kyle@opendoorer p.com March 17, 2025 32/369

Click on the back button

s Central	
CRONUS Inc Service V Plan	SERVICE TICKET TYPES WORK DATE: 4/8/2
Customers Vendors Items Bank .	Back
INSIGHT FROM LAST WEEK	CODE
	REGUALR SERVICE
The best-sellir	WALK IN
Mobil 1 5W30	

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 demontrates the setup of a Maintenance Group.

Click on the navigation menu item popup Service Management	· ✓ Purchasing ✓	Setup & Extensions∨	Intelligent Cloud Insights	~
	IONS Service Ticket Quote Service Ticket Service Unit Service Template Sales Quote	+ Sales Order + Sales Invoice + Purchase Quote + Purchase Order + Purchase Invoice	 > Service Management ~ > Service > Planned Maintenance > New > Payments 	> Reports > Setup Excel Report
Click on the navigation menu item Maintenance Groups	DNS ervice Ticket Quote ervice Ticket ervice Unit ervice Template ales Quote	+ Sales Order + Sales Invoice + Purchase Quote + Purchase Order + Purchase Invoice	 > Service Management Service Management Setup Service Ticket Types Maintenance Groups Service Templ View or edit ma Service Units Manufacturers Models 	Reports Setup Excel Reports intenance groups.

pendoor	Open Door Technology Inc.	kyle@opendoorer p.com
TECHNOLOGY	ODT Service Help	March 17, 2025 33/369
Click on the navigation menu item Ne	w	
	;, Inc. Service - AAINTE	ENANCE GROUPS WORK DATE: 4/8/2019
	Items Bank Acco 🔎 Se	earch 🕂 New 😨 Edit List 📋 Delete 🛛 Open i
	чтн сг	ROUP STAR DDE DESCRIPTION DATE
	jest pos	(There is nothing t
	was for	
Click on the cell Group Code	S Inc Service ~ Plan 🔶	MAINTENANCE GROUPS WORK DATE: 4/8/2019
	s Vendors Items Bank	🔎 Search 🕂 New 🐺 Edit List 📋 Delete 🚦
	S a sandbox environment (preview)	GROUP CODE DESCRIPTION
	ir top cliste	LIGHTTRUCK Light Truck
	Tipe Art be	
	-ine Art, Do	
Enter the text SKIDSTEER .	S Inc Service ~ Plan 🔶	MAINTENANCE GROUPS WORK DATE: 4/8/2019
	s Vendors Items Bank	🔎 Search 🕂 New 👿 Edit List 📋 Delete 🛽
	s a sandbox environment (preview)	GROUP CODE DESCRIPTION
	ROM LAST WEEK	LIGHTTRUCK Light Truck
	-ine Art, bo	
Click on the cell Description		5 WORK DATE: 4/8/2019
	Bank , $ ho$ Search + New	🐯 Edit List 📋 Delete 📲 Open in Excel 🛛 N
	(preview) GROUP CODE	DESCRIPTION BLOC
		Light Truck
	DC	



ODT Service Help

Enter the text Skid Steers.

Bank .	🔎 Search	+ New	🐼 Ec	dit List	📋 Delete	💶 Open in Excel	
preview)							
	GROUP	CODE		DESCRI	PTION		BLO
~	LIGHTT	RUCK		Light Tru	ck		
2	SKIDSTE	EER	1	s			
d s							
10							

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

Click on the back button

s Central				
CRONUS Inc Service > Plan	← M	IAINTENANCE GROUPS	WOR	K DATE: 4/8/
Customers Vendors Items Bank	Back		III I	Edit List
imes This is a sandbox environment (preview)				
INSIGHT FROM LAST WEEK		GROUP CODE		DESCRIPTI
		LIGHTTRUCK		Light Truck
The best-sellir		SKIDSTEER	÷	Skid Steers
The Sest semi				
Mobil 1 5W30				

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.	Service Template
The Template No. field is used to define the template. The field allows for both alphabetic and numeric	Navigate
characters.	General
This field is mandatory.	Template No.
,	Description
	Template Lines Manage
Click on the link Description	Service lettiplate
The description field is used to provide a longer	Navigate
definition of what the Service Template is for.	General
	Template No
	Description
	Template Lines Manage
	SERVICE TEMPLATE NO. TYPE NO.
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.	Template Type
* All	Specifies the template type of the service template. Press Ctrl+F1 to learn more
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.



ODT Service Help

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 T

	Template Type
	Maintenance Group Code
	Specifies the maintenance group code of the service Press Ctrl+F1 to learn more
DESCRIPTION	0141
DESCRIPTION	QUAN

Click on the column header Service Template No.	Template No. 😽			
This field is used for adding/nesting a service template to a template.	Description			
All related Template Details (job planning lines) for the nested template are included on the current template.	Template Lines Manage SERVICE TEMPLATE NO. TYPE Resource			
Click on the column header Type	Template No. · · · · · · · · · · · · · · · · · · ·			
The Type field is used when entering lines for a Resource, an Item, a G/L Account or Text.	Oil Change for Skid Steers Oil Change for Skid Steers Specifies the type of the service template line.			
Text can be either a description comment or a Standard Text Code.	Template Lines Manage Press Ctrl+F1 to learn more SERVICE TEMPLATE NO. TYPE NO.			
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	Resource			

Text can	be either	a description	n comm

NOTE:

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.

	OILCHAN	OILCHANGE - SS Oil Change for Skid Steers		
	Oil Chang			
Manage				
TEMPLATE NO.	TYPE	NO.	✓ DESCRIPTION	
	Resource			




Click on the column header Description The description will default from the Service Template, Resource, Item, G/L Account and Standard	Steers		Template Type · · · · · · · · · · · · · · · · · · ·	
Text Code, when selected. The description can be overridden.		DECODIDION		
When the Type of Text is selected, then a description can be entered.		DESCRIPTION	~	
Click on the column header Quantity	Ten	nplate Type · · · · · · · ·	Service	
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.	Ma	intenance Group Code · · ·	SKIDSTEER	R
When the Service Template No. field is populated, then this field is not to be populated.	RIPTION		<u>QUANTITY</u> ~ 0.00	UNIT
Click on the column header Unit Cost	e	All		
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.	Group Code		Specifies the unit cost of the serve template line. Press Ctrl+F1 to learn more	ice
When the Service Template No. field is populated, then this field is not to be populated.		QUANTITY	UNIT COST~	UNIT PRICE
Olish an the estimate headen Unit Drive				
	All		T	
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.			Specifies the unit price of the ser template line. Press Ctrl+F1 to learn more	vice
When the Service Template No. field is populated, then this field is not to be populated.	QUANTITY	UNIT COST	<u>UNIT PRICE</u> ~ Sort on 'Unit Pric	e

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

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- 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 pested 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	;∨ Purchasing∨	Setup & Extensions ~	Intelligent Cloud Insights	~
	IONS			.
	Service Ticket Quote	+ Sales Order	> Service Management \smallsetminus	> Reports
	Service Ticket	+ Sales Invoice	> Service	> Setup
	Service Unit	+ Purchase Quote	> Planned Maintenance	E Excel Report
	Sales Quote	+ Purchase Invoice	> New > Payments	
	Jules Quote	T dicide involce	- Tuymenta	
Click on the navigation menu item Service				
Templates	DNS	+ Salas Ordar	Sonrico Managomont) Poports
	ervice Ticket	+ Sales Invoice	Service Management Setup	> Setup
	ervice Unit	+ Purchase Quote		Excel Reports
	ervice Template	+ Purchase Order	E Service Ticket Types	
	ales Quote	+ Purchase Invoice	🙀 Maintenance Groups	
			Service Templates	
		Open the list of ser	vice templates where you can set up ter	mplates items and servi
			🔄 Manufacturers	
			- 🖫 Models	
			ODT Service Online Help	
Click on the navigation menu item New				
	, Inc. Service		PLATES WORK DATE: 4/8/2019	
	Items Bank Ace	∽ Search	+ New Manage 🛛 Ope	n in Excel 🛛 🕅
	NTH	TEMPLATE N	Create a new entry. 0. TEMPLATE TYP	e descriptio
	o custo	r		(There is nothing t
	Art ha			
	ALL, DO	C		

3/17/2025



Click on the field Template No.	emplate	
	······*	er
	·····	Ла
		_
	manage TE	
Enter the text OilChange-SS .	emplate	
		_
		-
	······*	er Aa
	Manage	
Click on the field Description	10L - 33	
		_
	OILCHANGE - SS	er
	OILCHANGE - SS	ier Az
	OILCHANGE - SS	ier Aa
	Manage ATE NO. TYPE NO. DESCRIPTION	ier Aa
Enter the text Oil Change for Skid Steers .	OILCHANGE - SS T Manage Manage ATE NO. TYPE NO. DESCRIPTION	ier Aa
Enter the text Oil Change for Skid Steers .	OILCHANGE - SS T Manage ATE NO. TYPE NO. DESCRIPTION	ier Aa
Enter the text Oil Change for Skid Steers .		
Enter the text Oil Change for Skid Steers .	OILCHANGE - SS T Manage Manage ATE NO. TYPE NO. DESCRIPTION OILCHANGE - SS T OILCHANGE - SS T	er Az
Enter the text Oil Change for Skid Steers .	OILCHANGE - SS T Manage Manage ATE NO. TYPE NO. DESCRIPTION OILCHANGE - SS T OILCHANGE - SS T	er er er
Enter the text Oil Change for Skid Steers .	OILCHANGE - SS T Manage Manage ATE NO. TYPE NO. DESCRIPTION OILCHANGE - SS T OILCHANGE - SS T Manage Manage	er As er



Click on the field Template Type	
	All 🗸
	S
Click on the item Service in the list	
Click on the term Dervice in the list	
	All
	B Service Planned-Maintenance Service
	QUANTITY UNIT COST UNIT PRICE
Click on the field Maintenance Group Code	
	······ All
	F
	QUANTITY UNIT COST UNIT PRICE
Click on the link in cell Group Code with the value	
SKIDUTEEK	late Type · · · · · · · · · · · · · · · · · · ·
	enance Group Code
	GROUP CODE DESCRIPTION
	SKIDSTEER Skid Steers
	QUANTITY UNIT COST UNIT
	0.00 0.00

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



Click on the cell Type with the value Resource Item G/L Account Text	Oil Change for Skid Steers
	Template Lines Manage
	SERVICE TEMPLATE NO. TYPE NO.
	Resource
Click Resource in the options displayed.	
	Template Lines Manage
	Resource V
	Resource Ite Resource Grenscourt
	Text
Click on the cell No.	Oil Change for Skid Steers
Click on the cell No.	Oil Change for Skid Steers
Click on the cell No.	Oil Change for Skid Steers
Click on the cell No .	
Click on the cell No .	
Click on the cell No .	
Click on the cell No .	
Click on the link in cell No , with the value LABOR	
Click on the cell No.	
Click on the cell No.	Oil Change for Skid Steers Manage TEMPLATE NO. Resource Manage
Click on the cell No .	Oil Change for Skid Steers Manage TEMPLATE NO. Resource Resource Manage Manage
Click on the cell No .	Oil Change for Skid Steers Manage TEMPLATE NO. TYPE Resource Manage Manage Manage Manage NO. DESCRIPTION Resource NO. DESCRIPTION Resource NO. NAME LABOR Labor - Oil Change
Click on the cell No.	Oil Change for Skid Steers i Manage TEMPLATE NO. TYPE NO. Resource Image PLATE NO. TYPE NO. DESCRIPTION Image PLATE NO. TYPE NO. DESCRIPTION Image PLATE NO. TYPE NO. DESCRIPTION Image Image Image NO. NAME Image Image Image <
Click on the cell No.	Oil Change for Skid Steers Manage TEMPLATE NO. TYPE Resource DESCRIPTION Manage PLATE NO. TYPE NO. DESCRIPTION Resource NO. DESCRIPTION Image NO. DESCRIPTION Image NO. DESCRIPTION Image NO. Image NO. Image NO. Image NO. Image NO. Image NO. Image Image Image <t< th=""></t<>



ODT Service Help

OBIG	
Click on the cell Quantity with the value 1.00	Maintenance Group Code SKIDSTEER
The default quantity is 1.00. The quantity is to be overridden when it is to be a different number.	
	RIPTION QUANTITY U
	- Oil Change 1.00
Click on the cell Unit Cost with the value 22.25	ance Group Code · · · · · · · SKIDSTEER
The Unit Cost defaults from the Resource Card.	
	QUANTITY UNIT COST UN
	1.00 22.25
Click on the cell Unit Price with the value 75.00	······ SKIDSTEER ~
The Unit Price defaults from the Resource card.	
	QUANTITY UNIT COST UNIT PRICE
	1.00 22.25 75.00
Click on the cell Type	
	Tamplato Linos
	Manage
	SERVICE TEMPLATE NO. TYPE NO.
	i resource LADOR



Click on the item Item in the list					
	Template	Lines Manage			
	SEF	RVICE TEMPLATE NO.	TYPE	NO.	
			Resource	LABOR	
			Resource		
			Item count Text		
Click on the cell No.					
	Manage				
	TEMPLATE NO.	TYPE	NO.	DESCRIPTI	ON
		Resource	LABOR	Labor - Oil	Change
		Item	v		
Click on the link in cell No. with the value 1001	T				
	IPLATE NO.	TYPE	N0.	DESCRIPTION	
		Resource	LABOR	Labor - Oil Cha	nge
	:	Item		~	B
			N0.	DESCRIPTION	0 M
			1001	Oil Filter	P
			10 Select record	Mobile Oil 5W30	P
			1003	Air Filter for Skid Steer	P
			1896-S	ATHENS Desk	P
			+ New		
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.					
	RIPTION			QUANTITY	UNIT
	- Oil Change			1.00	
	ter			1.00	



Click on the cell Unit Cost with the value 3.50		L		
The Unit Cost defaults from the Item card.				
		QUANTITY	UNIT COST	UNI
		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.			E	
	QUANTITY	UNIT COST	UNIT PRICE	
	1.00	22.25	75.00	
	1.00	3.50	11.75	
Click on the cell Type				- 1
	Template Lines	Manage		
	SERVICE T	EMPLATE NO. TYPE	N0.	
		Resou	Irce LABOR	
		Item	1001	
Click on the item Item in the list	Template Lines	Manage		
Click on the item Item in the list	Template Lines	Manage		
Click on the item Item in the list	Template Lines SERVICE T	Manage EMPLATE NO. TYPE	N0.	
Click on the item Item in the list	Template Lines SERVICE T	Manage EMPLATE NO. TYPE Resou	NO. rce LABOR 1001	
Click on the item Item in the list	Template Lines	Manage EMPLATE NO. TYPE Resou Item	NO. rce LABOR 1001 urce V	
Click on the item Item in the list	Template Lines	Manage EMPLATE NO. TYPE Resou Item Resou Resou	NO. Irce LABOR 1001 urce V	
Click on the item Item in the list	Template Lines	Manage EMPLATE NO. TYPE Resou Item Resou Resou	NO. Ince LABOR 1001 urce V	



Click on the cell No.

	Manage			
	TEMPLATE NO.	TYPE	NO.	DESCRIPTION
		Resource	LABOR	Labor - Oil Change
		Item	1001	Oil Filter
		Item	•	
	· -··-			
ick on the link in cell No. with the value 1002		Resource	LABOR	Labor - Oil Change
		Item	1001	Oil Filter
		Item		\sim
			NO. DES	SCRIPTION
			1001 Oil	Filter
			1002 Oil	Gasket
			10.0	Oil 5W30
			1004 Air	Filter for Skid Steer
			1896-S ATH	FNS Deck
			1050-5 AIT	ILIND DESK
			+ New	
	SERV	ICE TEMPLATE NO.	TYPE	N0.
			Resource	LABOR
			Item	1001
			Item	1002
			Resource	*
ick on the item Item in the list		ines manage		
	SEDV		TYPE	NO
	JERV	TELL PATE NO.	Pesourco	LABOR
			Itom	1001
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			Item	1002
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Click on the cell No.	Manage						
	TEMPLATE NO.		TYPE	N0.		DESCRIPTION	
			Resource	LABOR		Labor - Oil Change	
			ltem	1001		Oil Filter	
			ltem	1002		Oil Gasket	
			ltem	*			
Click on the link in cell No , with the value 1003		iter		1001	0	L Cardinat	
		. Iter	n	1002	U	Gasket	
		: Iter	n		\sim		B
				NO.	DESCRIPTI	DN I	
				1001	Oil Filter		PC
				1002	Oil Gasket		P
				1003	Mobile Oil	5W30	PO
				10 Select rec	ord "1003" er fo	r Skid Steer	P
				1896-S	ATHENS De	sk	PO
				+ New			_
Click on the cell Quantity with the value 1.00							_
	RIPTION				QUANTITY	UNI	т
	- Oil Change				1.00)	
	ter				1.00)	
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	e Oil 5W30				1.00)	
							_
Enter the text 5.							
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	- Oil Change				1.00)	
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	e Oil 5W30				1.	00	



namics 365 Business Central
SERVICE TEMPLATE WORK DATE: 4/8/2019
Back OILCHANGE - SS
Navigate
General
Template No. OILCHANGE - SS
Description · · · · · · · · · · · · · · · · · · ·

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

Click on the navigation menu item New		
	i, Inc. Service ->	SERVICE TEMPLATES WORK DATE: 4/8/2019
	Items Bank Acco	
	NTH	Create a new entry. TEMPLATE NO. TEMPLATE TYPE DESCRIPTION
	p custor	OILCHANGE - SS : All Oil Change
	Art, bou	
Double click on the field Template No.	emplate	<u> </u>
	*	Ter
		Ma
	Manage	
Enter the text AirFilter - SS .	emplate	~
	····· * A	Ter
	·····	Ma
	Manage	



Enter the text Changing the Air Filter on Skid TTE NO. TYPE NO. DESCRIPTION Enter the text Changing the Air Filter on Skid TTE NO. TYPE NO. DESCRIPTION TTE NO. TYPE NO. DESCRIPTION Click on the 6 field Temp late Temp
Enter the text Changing the Air Filter on Skid Steers. Enter the text Changing the Air Filter on Skid TTPE NO. DESCRIPTION Enter the text Changing the Air Filter on Skid TTPE NO. DESCRIPTION Enter the text Changing the Air Filter on Skid TTPE NO. DESCRIPTION Enter the text Changing the Air Filter on Skid TTPE NO. DESCRIPTION Enter the text Changing the Air Filter on Skid TTPE NO. DESCRIPTION Enter the text Changing the Air Filter on Skid TTPE NO. DESCRIPTION Enter the text Changing the Air Filter on Skid TTPE NO. DESCRIPTION Enter the text Changing the Air Filter on Skid TTPE NO. DESCRIPTION Enter the text Changing the Air Filter on Skid TTPE NO. DESCRIPTION Enter the text Changing the Air Filter on Skid TTPE NO. DESCRIPTION Enter the text Changing the Air Filter on Skid TTPE NO. DESCRIPTION Enter the text Changing the Air Filter on Skid TTPE NO. DESCRIPTION Enter the text Changing the Air Filter on Skid TTPE NO. DESCRIPTION Enter the text Changing the Air Filter on Skid TTPE NO. DESCRIPTION Enter the text Changing the Air Filter on Skid TTPE NO. DESCRIPTION Enter text text text text text text text t
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Enter the text Changing the Air Filter on Skid Steers. Inter the text Changing the Air Filter on Skid Inter text Changing the Air Filter on Skid In
Enter the text Changing the Air Filter on Skid Steers.
Manage ATE NO. TYPE NO. DESCRIPTION Enter the text Changing the Air Filter on Skid ETTPICICE Image Steers. Image Image Manage Image Image Ite NO. TYPE NO. DESCRIPTION
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ATE NO. TYPE NO. DESCRIPTION
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uick on the field lemplate lype
Click on the item Service in the list
All Service
Service Maintenance



Click on the field Maintenance Group Code					
		Service		•	
	e			~	
				ß	
		QUANTITY	UNIT COST	UNIT PRICE	
Click on the link in cell Group Code with the value SKIDSTEER					
	late Type · · · · · · ·		Service		
			GROUP CODE	DESCRIPTION	
				Skid Steers	
		Q	UANTITY	UNIT COST	UNI
			0.00	0.00	
Click on the cell Type	Description		Changing t	the Air Filter on Skid Steers	
As Resource is the default Type, and this line entry is					
for a Resource, the Type does not need to be changed.	Template Li	ines Manage			
·	SERV	ICE TEMPLATE NO.	TYPE Resource	NO.	
			Resource Item G/L Account		
			Text		
Click on the cell No.		Changir	ng the Air Filter on Skid Stee	rs	
	Manage				
	TEMPLATE NO.	TYPE	N0.	DESCRIPTION	
	TEMPLATE NO.	TYPE Resource	NO.	DESCRIPTION	

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Click on the link in cell No with the value LABOR	Manage			
	Manage			
	PLATE NO.	TYPE	NO.	DESCRIPTION
		Resource		\sim
			NO. NA	AME
			LABOR La	bor - Oil Change
			MARK M	ark Hanson
			MARY M	ary A. Dempsey
			TIMOTHY Ti	mothy Sneath
			+ New	
Click on the cell Description with the value Labor - Oil Change	ter on Skid Steers	5	Maintenance Gr	oup Code · · · · · · · · · · · · · · · · · · ·
	0.	DESCRIPTION		۵
	ABOR	🗸 Labor - Oil Chan	ge	
Fates the first labor. Dealers A's Eliter				
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	Tomplet	a lines Manara		
	Templat	e Lines Manage		
	s	ERVICE TEMPLATE NO.	TYPE	N0.
			Resource	LABOR



Click on the item Item in the list							
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			Resource	T LABOR			
			Resource				
			G/L_Account				
			Newe				
Click on the cell No							
	Manage						
	TEMPLATE NO.	TYPE	NO	DESCRIPTION	4		
		Resource	LABOR	Labor - Replac	ce Air Filte		
		Item	Ŧ				
Click on the link in cell No. with the value 1004		ltem		~			
			_		B/ OF		
			NO. D	ESCRIPTION	MI		
			1001 C)il Filter	PC		
			1002 C	Nobile Oil 5W30	PC		
			1004 A	ir Filter for Skid Steer	PC		
			Select record "10	04" NS Desk	PC		
			+ New				
Click on the back button	Dynamics 365 Bu	usiness Central		1			
	,						
	(\leftarrow					
		Back	co Tomol	ato			
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		Template No		AIREILTER -	- 55		
		Description		Changing t	the Air Fill		
		Description -		changing t	os con citi		

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

endoor	Open Door Technology Inc.	kyle@opendoorei p.com
TECHNOLOGY	ODT Service Help	March 17, 2025 52/369
Click on the navigation menu item N e	ew i, Inc. Service (c) Items Bank Acco THREE MONTHS Sed 16 r ame pei	SERVICE TEMPLATES WORK DATE: 4/8/2019 Search + New Manage B Open in Excel TEMPLATE NO. TEMPLATE TYPE DESCRIPT AIRFILTER - SS : Service Changing OILCHANGE - SS Service Oil Change
Click on the field Template No.	emplate *[
Enter the text SS-General Service .	emplate * Manage	
Click on the field Description	Manage	al Service Te



Enter the text Skid Steer General Service.	empiau	3		
		SS-GENERAL SE	RVICE	Ter
				Ma
	Manage			
	inanoge			
	ATE NO.	TYPE	N0.	DESCRIPTION
Click on the field Template Type				
		All		•
	e	All Service		
		Planned Mainten Field	ance	
				62
Click on the item Service in the list				
		All		•
	e	All Service		
		Planned Mainten	ance	
		QUANTITY	UNIT COST	UNIT PRICE
Click on the field Maintenance Group Code				
		Service		•
	e			\sim
				E
		QUANTITY	UNIT COST	UNIT PRICE



Click on the link in cell Group Code with the value				
SKIDSTEER	late Type		Service	
	enance Group Coo	le · · · · · · · · · · · · · · · · · · ·		
			GROUP CODE	DESCRIPTION
			SKIDSTEER	Skid Steers
			+ New Select r	record "SKIDSTEER"
		۵۱	JANTITY	UNIT COST UNIT
			0.00	0.00
Click on the cell Type with the value Resource Item G/L Account Text	Description	ן	Skid Ste	eer General Service
Select Resource.	Template	Lines Manage		
	SE	RVICE TEMPLATE NO.	TYPE	N0.
			Resource	
				Resource
Click on the cell No.		Skid Stee	r General Service	
	Manage			
	TEMPLATE NO.	TYPE	NO.	DESCRIPTION
		Resource Resource	·	
		Item G/L Account		
		Text		
Click on the link in cell No. with the value LABOR	Manage			
	PLATE NO.	TYPE	N0.	DESCRIPTION
		Resource		\sim
			NO.	NAME
			LABOR	Labor - Oil Change
			MARK	Mark Hanson
			MARY	Mary A. Dempsey
			TIMOTHY	Timothy Sneath
			+ New	



Click on the cell Description with the value Labor - Oil Change	Service Maintenance Group Code			
	0.	DESCRIPTION	QL	
	ABOR	V Labor - Oil Change		
Enter the text Labor - Lube.	Service	Maintenance Group Code		
	0.	DESCRIPTION	QL	
	ABOR	ц		
Click on the cell Quantity with the value 1.00	N	Maintenance Group Code		
Click on the cell Quantity with the value 1.00	N	Maintenance Group CodeSKIDSTEER		
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Click on the cell Quantity with the value 1.00 Enter the text .5 .	RIPTION - Lube	Maintenance Group Code		
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kyle@opendoorer p.com March 17, 2025 56/369

Click on the cell Service Template No.	
	Template Lines Manage
	SERVICE TEMPLATE NO. TYPE NO
	Resource LA
Click on the lookup button in the cell Service	
Template No.	
	Template Lines Manage
	SERVICE TEMPLATE NO. TYPE NO.
	Resource LABOR
Click on the link in cell Template No. with the value	P Search + New Manage ▲ Open in Excel
OILCHANGE - SS	Service Template Service Templates + New
	AVIGATE NO. TEMPLATE NO. TEMPLATE TYPE
	OILCHANGE - SS : Service
	escription
	emplate Lines Manage
Click on the cell Service Template No.	
	Template Lines Manage
	SERVICE TEMPLATE NO. TYPE NO. Resource
	OILCHANGE - SS ···· Resource



Click on the lookup button in the cell Service				
Template No.		Template Lines	Manage	
		SERVICE TEMPI	ΔΤΕ ΝΩ ΤΥΡΕ	NO
			Resource	LABOR
		OILCHANGE - SS	Resource	2
			··· Resource	2
			Look up value	
	_			
Click on the link in cell Template No. with the value AIRFILTER - SS				Manage 🛛 🛛 Open in Excel
	Service	e Template	SERVICE TEMPLATES +	New
	lavigate		TEMPLATE NO.	TEMPLATE TYPE
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	emplate No.		Select record AINFIL	TEK - 33
	escription · · · ·			
Click on the cell Type	Templa	te Lines Manage		
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	A	IRFILTER - SS ····	Resource	-
Click on the cell Type with the value Resource Item G/L Account Text	Templa	te Lines Manage		
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Click on the item G/L Account in the list	remplate Li	nes ivianage		
Choic of the term O/E Account in the list				
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			Item	
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	- SS	Resource		Changing the Air Filter
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			40100 Incom 40150 Incom 40200 Incom 40250 Job Sa 40300 Sales + New	VIE In Ie, Services In Ie - Shop Supplies In Ie, Product Sales In ales In Discounts In
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	QUANTITY			
	QUANTITY	22.25	UNIT PRICE	
	0.50	22.25	0.00	
	0.00	0.00	0.00	
	1.00	10.00	0.00	
Enter the text 20.00 .			63	
	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	

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	Actions
	+ Service Ticket Quote + Sales Invoice > Planned Mair
	+ Service Ticket + Purchase Quote > New
	+ Service Unit + Purchase Order > Payments
	+ Service Template + Purchase Invoice > Reports
	+ Sales Quote > Service Management > Excel Reports
	+ Sales Order > Service
Click on the navigation menu item Service	+ Sales Quote > Service Management 🗄 Excel Report
Checklists	+ Sales Order 😽 Service Management Setup
	W Capica Ticket Turac
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Click on the pavigation menu item Now	
Click of the havigation mend tern New	Dynamics 365 Business Central
	Sandard Service Checklists
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	→ <u>20KCHK</u>
	CHECKLIST DEMO
Enter the text Inspection.	Dynamics 365 Business Central
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	Checklist Code 1



Enter the text Inspection list.	Description 20 K Checklist 001
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bendoor	Open Door Technology Inc.	kyle@opendoorer p.com March 17, 2025
TECHNOLOGY	ODT Service Help	62/369
Click on the item Text in the list	ists	Sandard Service Checklist lines
	cklist Code ↑ PECTION CHK ECKLIST DEMO	✓ Search + New Image: Edit List Image: Delete Type Description → ✓ Image: Text Def Text Named Value
Click on the cell Description	Sandard Servi	ce Checklist lines
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Enter the text Inspection .	Sandard Servi	ce Checklist lines
	〕 Delete ↓ Search Type → Text	New B Edit List Delete Named Values
Click on the cell Type	Standard Service Checklists	Standard Service Checklist lines

endoor	Open Door Technology Inc.	kyle@opendoorer p.com March 17_2025
TECHNOLOGY	ODT Service Help	63/369
Click on the cell Type	Standard Service Checklists > Image: Standard Service Checklists > Image: Standard Service Checklists Image: Standard Service Checklists Image: Standard Service Checklists <	Standard Service Checklist lines
Click on the item Option in the list	Checklist Code ↑ → RECORDING 20KCHK TEST 2 TEST LIST	Junitaria Servec Checking Intest Image: Contract of the service of
Click on the cell Description	vice Checklists ← Standard Service Ch + New ecklist Code ↑ CORDING CCRDING CCRDING Text Option ✓ SST 2 SST LIST	hecklist lines New BEdit List Delete Named Values Description Inspection O.0 O.0 O.0 O.0 O.0 O.0 O.0 O.
Enter the text Tires .	vice Checklists ← Standard Service Cl + New ecklist Code ↑ CORDING CCRDING ST 2 ST LIST ST LI	necklist lines - New Edit List Description Inspection O, Inspection O, O, O, O, O, O, O, O, O, O





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ODT Service Help

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2.5.5. How to Copy an Existing Checklist

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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.



kyle@opendoorer p.com March 17, 2025 75/369

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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.

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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.



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ODT Service Help

Click on the link in cell Code with the value S450	
	ai No
	·····
	CODE NAME
	isition Date
	+ New
	vice Date
Click on the field Maintenance Group Code	✓ Model No. · · · · · · · · · · · · · · · · · ·
NOTE	Year
NUTE: This field is mandatory in order to include this unit on	Date Manufactured
a Service Quote or Service Ticket	Acquisition Date
	In-service Date
Click on the link in cell Group Code with the value	✓ Model No. · · · · · · · · · · · · · · · · · · ·
Click on the link in cell Group Code with the value SKIDSTEER	✓ Model No
Click on the link in cell Group Code with the value SKIDSTEER	V Model No. · · · · · · · · · · · · · · · · · · ·
Click on the link in cell Group Code with the value SKIDSTEER	Model No. Year Date Manufactured Acquisition Date
Click on the link in cell Group Code with the value SKIDSTEER	Model No. Year Date Manufactured Acquisition Date
Click on the link in cell Group Code with the value SKIDSTEER	Model No. · · · · · · · · · · · · · · · · · · ·
Click on the link in cell Group Code with the value SKIDSTEER	AT GROUP CODE DESCRIPTION Skid Steers Skid Steers
Click on the link in cell Group Code with the value SKIDSTEER	AT GROUP CODE GROUP CODE DESCRIPTION SKIDSTEER Skid Steers + New Select record "SKIDSTEER"
Click on the link in cell Group Code with the value SKIDSTEER	AT
Click on the link in cell Group Code with the value SKIDSTEER	AT GROUP CODE DESCRIPTION SKIDSTEER Skid Steers + New Select record "SKIDSTEER"
Click on the link in cell Group Code with the value SKIDSTEER	AT GROUP CODE GROUP CODE DESCRIPTION SkiDSTEER Skid Steers + New Select record "SKIDSTEER"
Click on the link in cell Group Code with the value SKIDSTEER	Model No, · · · · · · · · · · · · · · · · · · ·
Click on the link in cell Group Code with the value SKIDSTEER	AT GROUP CODE DESCRIPTION SKIDSTEER Skid Steers + New Select record "SKIDSTEER" Dynamics 365 Business Central
Click on the link in cell Group Code with the value SKIDSTEER	AT GROUP CODE GROUP CODE DESCRIPTION SKIDSTEER Skid Steers New Select record "SKIDSTEER" Dynamics 365 Business Central SERVICE UNIT CARD WORK DATE: 4/8/2019 Back LOODOO1
Click on the link in cell Group Code with the value SKIDSTEER	Model No. · · · · · · · · · · · · · · · · · · ·
Click on the link in cell Group Code with the value SKIDSTEER	Model No
Click on the link in cell Group Code with the value SKIDSTEER	Model No Year Date Manufactured At GROUP CODE DESCRIPTION SKIDSTEER Skid Steers + New Select record "SKIDSTEER" Dynamics 365 Business Central SERVICE UNIT CARD WORK DATE: 4/8/2019 Back SU00001 Actions Navigate
Click on the link in cell Group Code with the value SKIDSTEER	Model No
Click on the link in cell Group Code with the value SKIDSTEER	Model No

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	Create Servicet From Template Actions Navigate Fewer options	
	SU00002	No
	Skid Steer Loader - Internal	Lin Sei
		ZIF
Click on the item Fixed Asset in the list		
	SU00002	No
	Skid Steer Loader - Internal	Lin
	Item Fixed Asset Item	Ser
	C00010 V	ZIP Co
Click on the field No.		
	······	
	······	
Click on the link in cell No. with the value FA000100		
The No. field list is automatically filtered based on the Link Type selected.		
	Description NO. DESCRIPTION	
	+ Ne Select record "FA000100"	
	Code	

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.



Click on the link Tell me what you want to do. Quickly access actions, pages, reports, documentation, and apps and consulting	Sandbox Q Q @ ? •
services.	2
	> Planned Maintenance
	ler > Payments
	pice > Reports
	E Excel Reports
Click on the field Type to start search :	
	Planned Mainte Tell me what you want to do
	counts Chart of A
	Don't know what to search for? Try exploring
	more deals than + Service Ticket Quo
	+ Service Unit
	+ Service Template + Sales Quote
	+ Sales Order
Enter the text Item .	
Enter the text Item .	Planned Mainte Tell me what you want to do
Enter the text Item .	Planned Mainte Tell me what you want to do
Enter the text Item .	Planned Mainte Tell me what you want to do counts Chart of A Don't know what to search for? Try exploring
Enter the text Item .	Planned Mainte Tell me what you want to do counts Chart of A Don't know what to search for? Try exploring + Service Ticket Quo +
Enter the text Item .	Planned Mainte Tell me what you want to do Tourts Chart of A Don't know what to search for? Try exploring More deals than wright lact woor + Service Ticket + Service Unit
Enter the text Item .	Planned Mainte Tell me what you want to do Tell me want to do Tell me what you want to do Tell me what you want to do Tell me what you want to do Tell me want to
Enter the text Item .	Planned Mainte Tell me what you want to do Tourts Chart of A Don't know what to search for? Try exploring More deals than Priod last year + Service Ticket Quo + Service Ticket Quo + Service Ticket + Sales Quote + Sales Order
Enter the text Item.	Planned Mainte Tell me what you want to do Tourts Chart of A Don't know what to search for? Try exploring More deals than Priod last year Offer items or services to a customer. Sales Order Sales Order
Enter the text Item.	Planned Mainte Tell me what you want to do Tell me what you want to do Tourts Chart of A Don't know what to search for? Try exploring Don't know what to search for? Try exploring + Service Ticket Quo + Service Ticket Quo + Service Ticket Quo + Service Ticket Quo + Service Ticket + Sales Order Create a new sales order for items or services.
Enter the text Item.	Planned Mainter Tell me what you want to do counts Chart of / Image: Don't know what to search for? Try exploring More deals than + Service Ticket Quo + Service Ticket Quo + Service Ticket Year + Sales Quote + Sales Order Offer items or services to a customer. * Sales Order * Create a new sales order for items or services. * Service Ticket Create a new service contract for service product and service items.
Enter the text Item.	Planned Mainter Tell me what you want to do counts Chart of A Image: Don't know what to search for? Try exploring More deals than Priod last year + Service Ticket Quo + Service Ticket Quote + Sales Quote + Sales Order Create a new sales order for items or services. Service Ticket Create a new service contract for service product and service items. Go to Pages and Tasks
Enter the text Item.	Planned Mainter Tell me what you want to do counts Chart of A Don't know what to search for? Try exploring More deals than + Service Ticket Quo + Service Ticket Contract for service Ticket Create a new sales order for items or service. Service Ticket Create a new service contract for service product and service items. Go to Pages and Tasks > Items Lists
Enter the text Item.	Planned Mainter Tell me what you want to do counts Chart of / Don't know what to search for? Try exploring MORE deals than + Service Ticket Quo + Service Ticket Quote + Sales Quote + Sales Order Create a new sales order for items or services. Service Ticket Create a new service contract for service product and service items. Go to Pages and Tasks > Item Tracing Tasks
Enter the text Item.	Planned Mainter counts Tell me what you want to do Image: Chart of Amount of



ODT Service Help

Click on the link for the Item that you wish to use to create Service Units.	C Items Work Date: 4/12/2021
	No.
	1000 : Basic Vehicle Inventory
	1896-Open record "1000" NS Desk Inventory
	1900-S PARIS Guest Chair, black Inventory
	1906-S ATHENS Mobile Pedestal Inventory
	1908-S LONDON Swivel Chair, blue Inventory
Ensure that the selected item has Serial Numbers enabled.	Replenishment >
	Planning >
	Item Tracking
	Item Tracking Code · · · · · · · SNALL
	Serial Nos. · · · · · · SN1
	Warehouse >
Inder the Service Tab in the Item card there are	
options to set up automatically creating service units	Serial Nos.
when sening and when purchasing.	Warehouse >
For demonstration purposes we will use Sales, however a similar process can be used to setup and process automatic errotion on purphase	Service
process automatic creation on purchase.	Auto Create Service Unit-Sales
	Auto Create Service Unit-Purchase
	Maintenance Group Code
Click on the toggle field Auto Create Service Unit-Sales	Serial Nos. · · · · · · · · · · · · · · · · · · ·
	Warehouse >
	Service
	Auto Create Service Unit-Sales
	Auto Create Service Unit-Purchase
	Maintenance Group Code



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
Click on the lookup button Maintenance Group Code	SN1
	Manufacturer Warranty Policy Warranty Type Choose a value for Maintenance Group Code
Click on the link in cell Group Code with the value LIGHTTRUCK	Item Tracking Code SNALL Serial Nos. SN1 Warehouse > Group Code 1 Bervice UGHTTRUCK Auto Create Service Unit-Sales SKIDSTEE
	Auto Create Service Unit-Purchase · · · · · + New Maintenance Group Code · · · · · · · · · · · · · · · · · · ·

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 \vee	Sales - Purchasing -	Setup & Extensions	5∨ ≡
	Actions		
	+ Service Ticket Quote	+ <u>Sales Order</u>	> Service Managemer
	+ Service Ticket	+ Sales Invoice	> Service
	+ Service Unit	+ Purchase Quote	> Planned Maintenan
	+ Service Template	+ Purchase Order	> New
	+ Sales Quote	+ Purchase Invoice	> Payments



Click on the lookup button Customer Name	
	Prepare Order Request Approval Print/Send Navigate More options
	Due Date 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 Mc
	Customers $\wp \sim + New \cdots$
	→ 10000 : Adatum Corporation 20000 Trey Research
	30000 School of Fine Art
	40000 Alpine Ski House 50000 Relectoud
	ge More options
Click on the lookup button in the cell No.	Order Date
	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	Lines Manage More options
will be assigned to the Service Unit that gets created.	Type No. Description Locatio
	→ Item × ∨ ×
	No.1 Description Me
	1896-S ATHENS Desk PC
	Subtotal Excl. lax (USD) 1900-S PARIS Guest Chair, black PC
	Inv. Discount Amount Excl. Tax (US 1906-S ATHENS Mobile Pedestal PC 1908-S LONDON Swivel Chair blue PC
	Invoice Discount %



Click on the cell Location Code	4/12/2021 🛅 Status -	
	e options	
	No. Description Location Code Quantity	Qty. to Assemble to Order
	1000 V Basic Vehicle	
	0.00 Total Excl	. Tax (USD)
Click on the link in cell Code with the value EAST	ons	
	Qty. tr	o Assemble
	Basic Vehicle WEST V 1	
	Code & Name	
	EAST East Ware	house
	MAIN Main War	ehouse
	→ <u>WEST</u> West War	ehouse
	+ New	
	· · · · 0 Total Incl. Tax (US	iD) · · · · · · · ·
Click on the cell Quantity	2/2021 🛅 Status	
	Otv to Assemble	
	Description Location Code Quantity to Order	Reserved Quant
	Basic Vehicle WEST V	
	0.00 Total Excl. Tax (USD) ····	
Enter the text 1.	2/2021 🛅 Status	
	Oty, to Assemble	
	Description Location Code Quantity to Order	Reserved Quant
	Basic Vehicle WEST *	
	cal	
	12:00:00 AM	
	11/3/2026	
	0.00 Total Excl. Tax (USD)	

endoor	Dpen Door Technolo	gy Inc.	kyle@opendoorer p.com March 17, 2025
TECHNOLOGY	ODT Service He	lp	90/369
Click on the navigation menu item popu	p Posting Dynamics	365 Business Central	
	¢	Sales Order Work Date: 4/12/2021	tum Corporation
		Process Report Release Posti	ng Prepare Order Request Approva
		General	
		Customer Name	Adatum Corporation
		Contact · · · · · · · · · · · · · · · · · · ·	Robert Townes 4/12/2021
Click on the navigation menu item Post	Dynamics	365 Business Central	
	E	Sales Order Work Date: 4/12/2021 S-ORD101005 · Adat	tum Corporation
		Process Report Release Posti	ng Prepare Order Request Approva
		Finalize the document or journal by Customer Name	posting the amounts and quantities to the related acc Adatum Corporation
		Contact ·····	Robert Townes 4/12/2021
Click on the button OK	-		
) Ship) Invoice) Ship and Invoice	Price Excl. Tax Tax Area 50.00 ATLANT
	_		DK Cancel
	50.00	Total Excl. Tax (USD)	
After the color of new Comics Linit will be		Total Incl. Tay (LISD)	
After the sale, a new Service Unit will ha	ave been created.		

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

			Sandbo
les ∨ Purchasing ∨	Setup & Extensions	∼ ≡	
ons 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 Units	Service Ticket Quote	+ Sales Order	> Service Management	> Reports
-	Service Ticket	+ Sales Invoice	📌 Service Management Setup	> Setup
	Service Unit	+ Purchase Quote	Service Ticket Types	E Excel Repor
	Service Template	+ Purchase Order		
	Sales Quote	+ Purchase Invoice	Naintenance Groups	
			🗄 Service Templates	
			🖲 Service Units	
			🖫 Manufacturers	
			I Models	
			l Service Unit Meter Worksheet	
			ODT Service Online Help	
Notice that a new Service Unit has been created		SU00006	2016 Ford F150	
based on the item that was sold.		SU00007	2017 Bobcat S70 Skid-Steer	
		SU00008	2017 Bobcat S450 Skid-Steer	
	rvice Tickets -	SU00009	2018 Bobcat S70 Skid-Steer	
	ben	SU00010	2018 Bobcat S450 Skid-Steer	
)	SU00011	Basic Vehicle	ltem 10

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.





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Click on Fixed Assets Lists	
	ned Maintenance > Tell me what you want to do
	counts Chart of A Fixed Asset
	Go to Pages and Tasks
	> Fixed Assets Lists
	> Fixed Asset Setup Administrat
	WITH IS > Index Fixed Assets Tasks
	Go to Reports and Analysis
Click on the link in cell No. with the value FA000100	
	Calculate Depreciation 🗈 Copy Fixed Asset
	No. † Description
	FA000090 : test truck
	FA000100 : Flatbed Truck
Under the Convice teb of the Fixed Accet there are	Electronic Document
Under the Service tab of the Fixed Asset, there are	
options to enable Automatically Creating Service Units on sale and on purchase.	Vehicle License Plate
options to enable Automatically Creating Service Units on sale and on purchase.	Vehicle License Plate
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	Vehicle License Plate
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.	Vehicle License Plate ······
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.	Vehicle License Plate
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.	Vehicle License Plate
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.	Vehicle License Plate
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.	Vehicle License Plate
Onder 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.	Vehicle License Plate
Onder 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.	Vehicle License Plate Vehicle Year SAT Federal Autotransport SAT Federal Autotransport Service Auto Create Service Unit-Sales Auto Create Service Unit-Purchase Electronic Document Vehicle License Plate Vehicle Year Vehicle Year
Onder 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	Vehicle License Plate Vehicle Year SAT Federal Autotransport Service Auto Create Service Unit-Sales Auto Create Service Unit-Purchase Vehicle License Plate SAT Federal Autotransport
Onder 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.	Vehicle License Plate Vehicle Year SAT Federal Autotransport Service Auto Create Service Unit-Sales Auto Create Service Unit-Purchase Electronic Document Vehicle License Plate Vehicle License Plate SAT Federal Autotransport Service Sat Federal Autotransport Service Service
Onder 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	Vehicle License Plate Vehicle Year SAT Federal Autotransport Service Auto Create Service Unit-Sales Electronic Document Vehicle License Plate Vehicle Year SAT Federal Autotransport SAT Federal Autotransport Service Auto Create Service Unit-Sales SAT Federal Autotransport Service Auto Create Service Unit-Sales
Onder 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	Vehicle License Plate Vehicle Year SAT Federal Autotransport Service Auto Create Service Unit-Sales Auto Create Service Unit-Purchase Vehicle License Plate Vehicle Vear SAT Federal Autotransport Image: Service Unit-Purchase Image: Service Unit-Purchase Sat Federal Autotransport Sat Federal Autotransport



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.	SAT Trailer Type
	Maintenance Group Code
	Manufacturer
Click on the lookup button Maintenance Group Code	Choose a value for Maintenance Group Code
Click on the link in cell Group Code with the value LIGHTTRUCK	insured inv
	SAT Trailer Type
	SCT Permission Type · · · · · · · · · · · · Group Code ↑ Description
	SCT Permission Number LIGHTTRUCK Light Truck
	SKIDSTEE Select record "LIGHTRUCK"
	Maintenance Group Code · · · · · · · · · · · · · · · · · · ·

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

Actions	+ Salas Ordar	
+ Service Ticket Quote	+ Sales Invoice	 Service Management Service
+ Service Unit	+ Purchase Quote	> Planned Maintenan
+ Service Template	+ Purchase Order	> Warranty
+ Sales Quote	+ Purchat Create a new	purchase order. ies



Click on the lookup button Vendor Name	
	Approval Order More options
	eate Whse. Receipt 🛛 😭 Create Inventory Put-away/Pick 🛛 👫 Send Intercompany Purchase Order
	··· Vendor Invoice No. ······
	Choose a value for Vendor Name
	Status
	ns Order Fewer ontions
Click on the link in cell No. with the value 10000	Print/Send Request Approval Order More options
	Release 🗸 🛗 Create Whse. Receipt
	Vendors $\mathcal{D} \lor + New \cdots$
	No. ↑ Name
	→ <u>10000</u> : Fabrikam, Inc.
	20000 Select record "10000" onsultants
	40000 Graphic Design Institute
	50000 Nod Publishers
	ge Line Functions Order Fewe 81000 Raw material supplier
Click on the field Vendor Invoice No .	
	npany Purchase Order 📲 Archive Document
	Show more
	No. · · · · · · · · · · · · · · · · · · ·
	Balance (\$
	Balance (L
	Outstandi
	Amt. Rcd.
Enter the text 12345.	
	npany Purchase Order 📲 Archive Document
	Show more ① Detai
	vendor
	No
	Open Balance (\$
	- Balance (L
	Outstandi
	Amt Pod





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Click on the lookup button in the cell Type	Document Date
	Lines Manage Line Functions Order Fewer options
	Type No. Item Reference No. Description → [tem] ★ Choose a value for Type
	Subtotal Excl. Tax (USD)
Fixed Asset	→ Item ✓ ★ Option Values 4 G/L Account Sub Account Inv. Fixed Asset Invc Charge (Item) Select from full list
Click on the cell No.	Document Date
	Lines Manage Line Functions Order Fewer options Type No. No. Description → Fixed Asset ★
Click on the link in cell No. with the value FA000100	Type No. Item Reference No. Description → Fixed Asset ★ ✓ 6/9/2023 Description RU00002 Subtotal Excl. Tax (USD) FA000100 Flatbed Truck
	Inv. Discount Amount (USD) · · · · + New Invoice Discount % · · · · · · · · · · · · · · · · · ·



Click on the cell Quantity		c	tatus.		0	
Check of the cen Quantity			latus		Open	
		Location Co	ode Bin Code	Quantity	Reserved Quantity	Unit of Measure Code
				*	_ ·	
Enter the text 4		0.00 Tr	otal Excl. Tax (USD)			
		S	tatus		Open	
		Location Co	ode Bin Code	Quantity	Reserved Quantity	Unit of Measure Code
				*	1	
Click on the cell Direct Linit Cost Evel Tex		0.00 Te	otal Excl. Tax (USD)			
Click of the cell Direct Offit Cost Exci. Tax	/2022			Status		
	Order Few	er options				
	Quantity	Reserved Qua	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Tax Group Code
	1		_	*	ATLANTA, GA	NONTAXABLE
Enter the text 10000				0.00 Total Ex	cl. Tax (USD) · · · · ·	
Enter the text 10000 .	/2022			0.00 Total Ex	cl. Tax (USD)	
Enter the text 10000 .	/2022			0.00 Total Ex	cl. Tax (USD)	
Enter the text 10000 .	/2022 Order Few	ver options		0.00 Total Ex	cl. Tax (USD)	
Enter the text 10000 .	/2022 Order Few Quantity	ver options Reserved Quai	Unit of tity Measure Code	0.00 Total Ex Status Direct Unit Cost Excl. Tax	cl. Tax (USD) · · · · · ·	Tax Group Code
Enter the text 10000 .	/2022 Order Few Quantity 1	rer options Reserved Quai	tity Unit of -	0.00 Total Ex Status Direct Unit Cost Excl. Tax 1000	Lax (USD)	Tax Group Code NONTAXABLE
Enter the text 10000 .	/2022 Order Few Quantity 1	ver options Reserved Quar	Unit of ntity Measure Code	0.00 Total Ex Status Direct Unit Cost ExcL Tax * 1000	Tax Area Code	Tax Group Code
Enter the text 10000 .	/2022 Order Few Quantity 1	rer options Reserved Quai	ntity Unit of 	0.00 Total Ex Status Direct Unit Cost Excl. Tax 1000	Tax Area Code	Tax Group Code NONTAXABLE

0.00 Total Excl. Tax (USD)



2.9. How to Setup Service Status

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



Click on the navigation menu item popup Service Management	Actions + Service Ticket Quote + Sales Invoice > Planned Mai + Service Ticket + Purchase Quote > New + Service Unit + Purchase Order > Payments + Service Template + Purchase Invoice > Reports + Sales Quote > Service Management ~ + Sales Order > Service
Click on the navigation menu item Service statuses	Service Templates Service Checklists Service Units Manufacturers
	Bervice Statuses Coper de lint of service statuses Oper de lint of serv
Click on the navigation menu item New	vice Inc. Service ODTSM Service Status List endors Items Bank Search + New Edit List Delete Status Line Type Code Description
Click on the cell Status Line Type	US Service Inc. Service ers Vendors Items Bank Status Line Status Line
	od afterno



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	US Service Inc. Service ← ODTSM Service Status List ers Vendors Items Bank Od afterno Both Header and Line Ticket Header Ticket Line
Click on the cell Code	Service ← ODTSM Service Status List tems Bank
Enter the text Entered .	Service ← ODTSM Service Status List tems Bank
Click on the cell Description	← ODTSM Service Status List ✓ Search + New ✓ Search + New ✓ Status Line Delete Type Code Description ✓ Both Headt Entered 0





Enter the text Initial entry .	€ (0	DTSM Service Status	List					
	-		v 🐺 Edit List	🗓 Delete				
	-	Status Line	Cada	Description		I	Presentation	n
	-	→ Both Head	ENTERED				(0
	st					√ Saved	Д	
	🐺 Edit Lis	t 🗑 Delete					Ŕ	2
	Code	Description		Presentation Order ↑	State	Insert Status Hea	Insert Status Line	1
	ENTERED	Initial entry		0	Pending			
Presentation Order indicates at what position in the								
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	st					√ Saved		
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	st B Edit Lis	it 🔋 Delete				√ Saved	□ I Insert	
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 .	st Edit Lis Code	it 📋 Delete		Presentation Order 1	State	√ Saved Insert Status Hea	Insert Status Line	
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 .	st Edit Lis Code ENTERED	tt Delete Description Initial entry		Presentation Order †	State	✓ Saved Insert Status Hea	Insert Status Line	
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 .	st Edit Lis Code ENTERED	it Delete Description Initial entry		Presentation Order 1	State	✓ Saved Insert Status Hea	Insert Status Line	
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 .	st Edit Lis Code ENTERED	t Delete Description Initial entry		Presentation Order 1	State Pending	Saved	□ Insert Status Line	
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 .	st © Edit Lis Code ENTERED	t Delete Description Initial entry		Presentation Order 1	State Pending	Saved	□ Insert Status Line	
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The **Update Service Unit Status** option will cause the status of the Service Unit to change when this ticket status is selected.

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

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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



0	pen Door Technology I	nc. kyle@opendoor			
TECHNOLOGY		p.co March 17, 202			
	ODT Service Help	T Service Help 103			
Click on the navigation menu item Servic	ts	+ Service Unit + Purchase Order + Service Template + Purchase Invoice + Sales Quote > Service Management + Sales Order > Service Service Ticket Quotes Service Tickets Service Units Completed Service Tickets			
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	Open Door Technology Inc.	kyle@opendoorer
pendoor		p.com March 17, 2025
TECHNOLOGY	ODT Service Help	104/369
Click on the navigation menu item N	lew	
		UNIT METERS WORK DATE: 4/15/2019
	SUUU , o sei	arch + New 🐺 Edit List 📋 Delete 🕼 Open i Create a new entry.
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	No. • • • • • •	

	Open Door Technology I	nc. kyle@opendoorer
		p.com March 17. 2025
	ODT Service Help	105/369
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ODT Service Help

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How to Update a Service Unit Meter

Business Manager Profile

2.10.1.3.

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2.10.1.4.

How to View Service Meter Usage History

Business Manager Profile

Click on the Service Meter.





Click on the navigation menu it	tem popup Actions
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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	Sandbooles \lor Purchasing \lor Setup & Extensions \lor Intelligent Cloud Insights \lor \mid \equiv				
	IONS Service Ticket Quote Service Ticket Service Unit Service Template Sales Quote	+ Sales Order + Sales Invoice + Purchase Quote + Purchase Order + Purchase Invoice	 > Service Management > Service > Planned Maintenance > New > Payments 	> Reports > Setup E Excel Report	
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 Workshee Open the service Open the service	t unit meter worksheet.	


kyle@opendoorer p.com March 17, 2025 109/369

ODT Service Help

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

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20	fc	SU00007			HOUR	
03	IC	SU00008			HOUR	

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

Click on the cell New Meter Reading	
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Click on the cell New Meter Reading

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Open Door Technology Inc.

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	JR		0.00	1,530.00	tenance
	JR		0.00		
When you are finished filling in the new service meter readings, close the page and the new readings will be	s Central				
saved.	CRONU	US Servi	ce, Inc. Servic		ER WORKSHEET WORK
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	IONS				
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				<i>.</i>	
Olisten the manipuling many item Ormited Unit Mater	Color Over		L Duracha an Investor	Maintenance Groups	
Unck on the navigation menu item Service Unit Meter	sales Quot	e	- Purchase Invoice	B c	
VVOIRSHEEL				Service Templates	
				Service Units	
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				language Service Unit Meter Wor	rksheet
				ODT Service Online	n the service unit meter wor
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Notice that the current meter readings have now been updated with the new readings entered previously.

	Maintenance Sub-				
	Group Code 1	Meter Code ↑	Default	Current Meter Reading	New M
1		ODOM		1,000.00	
		ODOM		1,500.00	
		HOUR		1,530.00	
		HOUR	~	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 + S + Service Ticket + F + Service Unit + F + Service Template + F + Sales Quote > S + Sales Order > S	ales Invoice > Planned Mair Purchase Quote > New Purchase Order > Payments Purchase Invoice > Reports ervice Management > > Setup ervice I Excel Reports
Click on the navigation menu item Maintenance Groups	+ Service Ticket + Pr + Service Unit + Pr + Service Template + Pr + Sales Quote > So + Sales Order *	Irchase Quote > New Irchase Order > Payments Irchase Invoice > Reports ervice Management > Setup Service Management Setup Service Ticket Types Valuate and Groups Service Ticket Types Service Units Manufacturers Models

opendoor	Open Door Technology Ind	c. kyle@opendoorer p.com
TECHNOLOGY	ODT Service Help	March 17, 2025 113/369
Click on the cell Group Code with SKIDSTEER	the value S Service, Inc. s Vendors Items ROM THE LAST THREE MO J Closed he same	Servic ← MAINTENANCE GROUPS WORK DATE: 4/15/2019 Bank NTHS 16 Final Code ↑ Description Final SkiDSTEER Skid Steers SkiDSTEER
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ODT Service Help

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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		ED MAINTENANCE SCHEDULES WORK DATE: 4/15/2019						NOT SA
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ixed Period Recurri Recurring Usage curring Usage & Perio

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ODT Service Help

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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.



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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

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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.

Process Report	Actions Naviga	e Fewer option	i							
General										Sho
Customer No.		10000			✓ Service	Date		7/3/2019		
Customer Name		Adatum Corpe	ration		Service	Ticket Type		REGUALR SERVICE		
Description		Service Ticket	ST00017 - Adatum Cor	reporation	Assigne	d Technician		LABOR		
Order Date		4/15/2019			Default	Service Unit No.		\$100005		
Heading	SU00005		2015 Ford F150	0				-		
TASK TYPE	UNIT NO.	SERIAL NO.	DESCRIPTION	SER	START DATE	END DATE	BUDGET (TOTAL COST)	ACTUAL (TOTAL COST)	BILLABLE (TOTAL PRICE)	(INVOICED PRI
Heading	SU00005		2015 Ford F150	0	-	-			-	
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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.

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

ODT Service Help



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.



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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

	\checkmark Finance \checkmark Cash Management \checkmark	Sales \lor Purchasing \lor Setup	& Extension:
	School 23,102	ACTIONS + Service Ticket Quote + Sale + Service Ticket + Sale + Service Ticket + Sale + Service Template + Pur + Sales Quote + Pur	es Order es Invoice or service produc chase Order chase Invoice
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Click on the link in cell No. with the value C00010	stomer ivo.					
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For servicing of company owned equipment, a	scription · · · · · ·			20000	Trev Research	
Customer with the field, Internal Customer, enabled	dar Data			30000	School of Fine Art	
must be selected.	der bate			40000	Alpine Ski House	
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	ince official circo	Manage Mo	4	(Select record	"C00010"	
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Click on the link Open the date picker						
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Click on a date in the calendar						
Select the date on which the service to be performed	rice Date		4/	8/2019		
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	ault Service Unit No.			7 8 9 10	11 12 13 18 19 20	
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ODT Service Help

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Click on the lookup button Service Ticket Type	
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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 **SU00002**

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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 Busin	ness (Central
	\leftarrow	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





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Click on the navigation menu item Add Service Template	SERVICE TICKET I WORK DATE: 4/8/2019 STO0001 · Service Ticket #S Process Report Actions Navigate Fewer options * Add Service Template @ Confirm Actuals @ View Job Jour Add Service Template Co0010 Customer No. C00010 Description Service Ticket #ST000
Click on the link in cell Template No. with the value SS-GENERAL SERVICE	STOOOOO1 · Service SERVICE TEMPLATES + New TEMPLATE NO. Service SS-GENERAL SERVICE Service SS-GENERAL SERVICE Select record "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	_
	tal	SU00002	Skid Steer General Service	_
		SU00002	Labor - Lube	4/1
		SU00002	Oil Change for Skid Steers	4/1
		SU00002	Air Filter for Skid Steers	4/1
		SU00002	Income - Shop Supplies	4/1
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Enter the text test Battery . Press the Arrow down key.	S tal	SU00002 SU00002	Skid Steer Loader - Internal Skid Steer General Service Labor - Lube Oil Change for Skid Steers Air Filter for Skid Steers Income - Shop Supplies Skid Steer General Service	- 4/1 4/1 4/1 4/1 -
Enter the text test Battery . Press the Arrow down key.	S	SU00002 SU00002	Skid Steer Loader - Internal Skid Steer General Service Labor - Lube Oil Change for Skid Steers Air Filter for Skid Steers Income - Shop Supplies Skid Steer General Service T	- 4/1 4/1 4/1 4/1 -



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ODT Service Help

Steer General Service or - Lube Change for Skid Steers iilter for Skid Steers me - Shop Supplies Steer General Service Battery ions Navigate Pewer option Internal Ser Service Tick 4/8/2019 Ianage Line Fewer option	ns e
or - Lube Change for Skid Steers ilter for Skid Steers me - Shop Supplies Steer General Service Battery ions Navigate rewer option Internal Ser Service Tick	Image: Control of the second secon
Change for Skid Steers ilter for Skid Steers me - Shop Supplies Steer General Service Battery ions Navigate Fewer option Internal Ser Service Tick 4/8/2019 Ianage Line Fewer option ine * Add Service Tores internal	a a a a a a a a a a a a a a a a a a a
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ine * Add Service Terrelate	e 🖸 View S
III NU. SEKIAL NU.	
00003	Child Ch
00002	Skid Ste
00002	Skid Ste
View Service Ticket Details	SEK
Skid Steer Loader - Internal	
Skid Steer General Service	
Labor - Lube	
Oil Change for Skid Steers	
Air Filter for Skid Steers	
S WORK DATE: 4/8/2019	
	🗊 Item Avail
🐺 Edit List 📋 Delete	SERVICE
ЯL	ILS WORK DATE: 4/8/2019

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



Click on the cell Line Type with the value Cost Tracking Only Fixed Price Billing Time and	LS WORK DATE: 4/8/2019
Materials	😨 Edit List 📋 Delete 🚭 Item Availability By Location 🛛 🖓 Open in Excel 🛛 Navigate
Note that the Line Type is automatically set to Cost Tracking Only.	JOB TASK SERVICE TEMPLATE NO. TO UNIT NO. NO. LINE TYPE NO. DESC
This occurs as the Customer card has the field, Internal customer, enabled.	0080000 Cost Tracking Resource Cost Tracking Only
Click on the cell Type with the value Resource Item	
G/L Account Text	TE: 4/8/2019
Select the applicable type to be used for the line.	t Delete 🕄 Item Availability By Location 🖾 Open in Excel Navigate Fewer opti
In this example the line is for a technician to perform a	SERVICE TEMPLATE UNIT NO. NO. LINE TYPE TYPE NO. DESCRIPTION
task, therefore, Resource is used.	SU00002 Cost Tracking Resource
Click on the cell No.	
Click on the cell No .	왕 Item Availability By Location 때 Open in Excel Navigate Fewer options
Click on the cell No.	Item Availability By Location Image: Bold of the second
Click on the cell No.	Item Availability By Location Image: Content of the second se
Click on the cell No .	
Click on the cell No.	Item Availability By Location Image: General Sector Se
Click on the cell No . Click on the link in cell No . with the value LABOR	Item Availability By Location Image: General Sector Se
Click on the cell No . Click on the link in cell No . with the value LABOR	
Click on the cell No . Click on the link in cell No . with the value LABOR	Item Availability By Location Image: General Sector S
Click on the cell No . Click on the link in cell No . with the value LABOR	Item Availability By Location SERVICE TEMPLATE NO. LINE TYPE TYPE NO. Cost Tracking Resource Resource Resource Item C/L Account Text SERVICE TEMPLATE NO. LINE TYPE Text Service TEMPLATE NO. LINE TYPE TYPE NO. NO. NO. NO. NO. NO. NO. NO. NO. NO. NO. NO. NO. NO. NO. NO. NO. NO. NO. NO. NO. NO. NO. NO. NO. NO. NO.
Click on the cell No . Click on the link in cell No . with the value LABOR	
Click on the cell No . Click on the link in cell No . with the value LABOR	Filem Availability By Location GOPen in Excel Navigate Fewer options SERVICE TEMPLATE NO. Cost Tracking Resource Item G/L Account TemPLATE NO. LINE TYPE TYPE NO. DESCRIPTION SERVICE TEMPLATE NO. DESCRIPTION DE Cost Tracking Resource NO. NO. NAME LABOR Labor - Oil Change Lister record "LABOR" Jartin MARK MARK MARY Mary A. Dempsey



Enter the text Labor - Check Battery.	😸 Item Avail	ability By Locatior	n MB Open in i	xcel Nav	rigate Fewer op	tions
The description will default from Resource card	SERVICE TEMPLATE		TYPE	NO	DESCRIPTION	DE
selected and can be overridden to be indicative of the task to be performed	10.	Cost Trackin	g Resource	LABOR		
Click on the cell Quantity	Navigat	te Fewer optic	ons		UNIT OF	
	DES	SCRIPTION	SE	QUANTI	TY CODE	UNIT COST
	Lab	or - Check Battery			HOUR	22.25
Enter the text .25.						
Enter the budgeted quantity for performing the task.	Navigat	te Fewer optic	ons			
	DES	SCRIPTION	DE SE	QUANTI	UNIT OF MEASURE TY CODE	UNIT COST
	Labo	or - Check Battery	/		HOUR	22.25
				,		
Click on the cell Service Unit No. with the value SU00002	← ser	RVICE TICKET DET	AILS WORK DAT	E: 4/8/2019		
Note that the Service Unit No. is automatically	۶	O Search + Ne	ew 💀 Edit List	t 📋 Delete	🗊 Item Availabil	ity By Location
populated.		JOB NO. T	JOB TASK NO. T	SERVICE UNIT NO.	SERVICE TEMPLATE NO.	LINE TYPE TYP
		ST00001	0080000	✓ SU00002		Cost Tracking Res



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ODT Service Help

Dynamics 365 Business C	entral				
$\epsilon \epsilon$	SERVICE TICKET DE	5 WORK DATE:	4/8/2019		
	ho Search + N	ew	🐯 Edit List	📋 Delete	🗊 Item Availat
	JOB NO. 🝸		JOB TASK NO. T	SERVICE UNIT NO.	SERVICE TEMPLATE NO.
	ST00001	÷	008000	SU00002	\sim

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.





Oli la contra la classica de contra la CDT Ocarda e	Bogin Tota	\$1100002		Skid Sto	or Conoral Son <i>i</i>			
Click on the lookup button in the cell OD1 Service	Posting	SU00002		labor -	lube			
Unit No.	Posting	SU00002		Oil Char	nae for Skid Ster			
	Posting	SU00002		Air Filter	r for Skid Steers			
	Posting	SU00002		Income	- Shop Supplies			
	End-Total	SU00002		Skid Ste	er General Servi			
	Postina	SU00002		Test Bat	terv			
	Heading	:			,			
			Look up value					
	Ticket Details							
	Ticket Details							
Click on the link in cell Service Unit No. with the	SERVICE TICKET I WORK DA	TE: 4/8/2019		ew Manage	🚺 Open in			
value SU00003	SERVICE HORE I WORK DA							
	ST00001 ·	- New						
Select the Service Unit to be added to the ticket	5100001							
Select the Service Onit to be added to the ticket.	Process Report	Actions Naviga	SERVICE	DESCRIPTION				
NOTE.				DESCRIPTION				
	Customer Name		<u>SU00002</u> :	Skid Steer Loa	ader - Internal			
The Default Service Unit field on the General tab will	Description		<u>SU00003</u> :	Skid Steer Loa	ader S450			
automatically be cleared, as ticket is now for multiple	Order Date	Select reco	rd "SU00003"					
units.	Order Date							
			4					
	Ticket Units/Lines	Manage Line						
Click on the cell Task Type		Posting	SU00002		La			
		Posting	SU00002		Oi			
		Posting	SU00002		Ai			
		Posting	SU00002		In			
		End-Total	SU00002		Sk			
		Posting	SU00002		Te			
		Heading	SU00003		Sk			
		Heading						
		-						
		Ticket Details	5					
		Ticket Details						
					SERVICE			
Click on the item Posting in the list		Posting	SU00002		Oi			
<u> </u>		Posting	SU00002		Ai			
		Posting	SU00002		In			
		End-Total	SU00002		Sk			
		Posting	SU00002		Te			
		Heading	SU00003		Sk			
		Heading	_					
		Posting Heading						
		Total						
		Tick Begin-Total						
		i chu-iotal						
		Ticket Details			CEDUIOE			
			JOB TASK	SERVICE	TEMPLATE			
		IOB NO	NO	LINIT NO	NO			



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Click on the cell Description	ş		SU00002		Labor - Lube		4/1
	J		SU00002		Oil Change for Skid Steers		4/1
	J		SU00002		Air Filter for Skid Steers		4/1
	,		SU00002		Income - Shop Supplies		4/1
	al		SU00002		Skid Steer General Service	0	
			SU00002		Test Battery		4/1
			SU00003		Skid Steer Loader S450		
	ls						
				SEF	VICE		
Enter the text Check fluid levels Press the Arrow	J		SU00002		Oil Change for Skid Steers		4/1
un kov	,		SU00002		Air Filter for Skid Steers		4/1
ир кеу.			SU00002		Income - Shop Supplies		4/1
	al -		SU00002		Skid Steer General Service		
			SU00002		Test Battery		4/1
			SU00003		Skid Steer Loader S450		
		:			d		
	ls						
				SEF	VICE		
Press the Arrow down key.	,		SU00002		Oil Change for Skid Steers		4/1
	J		SU00002		Air Filter for Skid Steers		4/
	,		SU00002		Income - Shop Supplies	0	4/
	al		SU00002		Skid Steer General Service		
			SU00002		Test Battery		4/1
		÷	SU00003		Skid Steer Loader S450		
		÷			Check fluid levels		_
	ls			SEF	VICE		
			_	Process Keport	Actions Navidate Few	er options	
Click on the navigation menu item popup Manage				Customer Name	Inter	al Servicina (Custome
				Description	Soni	na Tickot #STO	00001
				Order Date	36101	040	/0001-1
				Order Date	4/0/2	019	
				Ticket Units/Lines	Manage Line Fewer	options	
				TASK TYPE Begin- lotal	ODT SERVICE UNIT NO. SERIAL N SU00002	10. D	DESCRIP kid Steer
				Posting	SU00002	La	abor - Lu
				Posting	SU00002	Oi	il Chang
				Posting	SU00002	Δi	ir Filtor fr





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

		internal Service	ing customer	
		Service Ticket	#ST00001 - Internal Servicing Custo	mer
		4/8/2019		liii
s/Lines	Manage Li	ne Fewer options		
ne 🌬	Delete Line 🏾 翔 Ad	dd Service Template	🗟 View Service Ticket Details	
TPE	UNIT NU.	SERIAL NU.	View or edit service ticke	t details for the se
- Iotal	500002		Skid Steer General Service	
ing	SU00002		Labor - Lube	- 4
ina	SU00002		Oil Change for Skid Steers	
				-
ing	SU00002		Air Filter for Skid Steers	

Click on the navigation menu item New

Dynamics 365 Busin	ness Central			
< <	← SERVICE TICKET DE	TAILS WORK DATE:	4/8/2019	
		New 🐺 Edit List	ii Delete	🧊 Item Availat
	JOB NO. 🕊	Create a new entry. JUB TASK NO. T	SERVICE UNIT NO.	SERVICE TEMPLATE NO.

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

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

Click on the cell No.

🗊 Item Ava	ilability By Locat	tion 🛛 🚺 Op	en in Excel	Navigate Fewer options	
SERVICE TEMPLAT	E				
N0.	LINE TYP	PE TYPE	N0.	DESCRIPTION	
	Cost Trac	king Resourc	e ▼		
		Resource			
		G/L Acco	unt		
		Text			
ltem Availabil	lity By Location	MB Open Ir	n Excel IN	lavigate Fewer options	
SERVICE	lity By Location	MB Open Ir	n Excel N	lavigate Fewer options	
SERVICE TEMPLATE	IITY BY LOCATION	VPF		Navigate Fewer options	
SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	Navigate Fewer options	
SERVICE TEMPLATE NO.	LINE TYPE	TYPE Resource	NO.	lavigate Fewer options DESCRIPTION	
SERVICE TEMPLATE NO.	LINE TYPE	TYPE Resource	NO.	lavigate Fewer options DESCRIPTION	
SERVICE TEMPLATE NO.	LINE TYPE	MB Open in TYPE Resource	NO.	DESCRIPTION	
Fitem Availabil SERVICE TEMPLATE NO.	LINE TYPE	MB Open in TYPE Resource	NO.	Lavigate Fewer options DESCRIPTION NAME Labor - Oil Change	
gr Item Availabil SERVICE TEMPLATE NO.	LINE TYPE	Upen in TYPE Resource	NO. NO. LABOR LINDA	Avigate Fewer options DESCRIPTION NAME Labor - Oil Change Linda Martin	
gr item Availabil SERVICE TEMPLATE NO.	LINE TYPE	Upen in TYPE Resource	NO. NO. LABOR LINDA MARK	Aavigate Fewer options DESCRIPTION NAME Labor - Oil Change Linda Martin Mark Hanson	
9 Titem Availabil SERVICE TEMPLATE NO.	LINE TYPE Cost Tracking	Upen in TYPE Resource	NO. NO. LABOR LINDA MARK MARY	Avigate Fewer options DESCRIPTION NAME Labor - Oil Change Linda Martin Mark Hanson Mary A. Dempsey	
er Item Availabil SERVICE TEMPLATE NO.	LINE TYPE Cost Tracking	Upen in TYPE Resource	NO. NO. LABOR LINDA MARK MARY	Aavigate Fewer options DESCRIPTION NAME Labor - Oil Change Linda Martin Mark Hanson Mary A. Dempsey Timethy Speath	



Click on the cell Description with the value Labor - Oil Change	
	ilability By Location 🛛 🖾 Open in Excel Navigate Fewer options
	E DE LINE TYPE TYPE NO. DESCRIPTION SE QUA
	Cost Tracking Resource LABOR V Labor - Oil Change
Enter the text Labor - Check Fluid Levels.	
	ilability By Location 🛛 Open in Excel Navigate Fewer options
	E DE LINE TYPE TYPE NO. DESCRIPTION SE QUA
	Cost Tracking Resource LABOR
Click on the cell Quantity	
	Naviate Fauer options
	UNIT OF
	DE MEASURE DESCRIPTION SE QUANTITY CODE UNIT COST
	Labor - Check Fluid Levels I HOUR 22.25
Enter the text .25 .	
	Navigate Fewer options
	DESCRIPTION SE QUANTITY CODE UNIT COST
	TUCK Huid Levels



Dynamics 365 Business (Central				
€ € €	SERVICE TICKET DETAILS WORK DATE: 4/8/2019				
Ba	ck O Search + N	lew	🐯 Edit List	📋 Delete	🗊 Item Availat
	JOB NO. 🝸		JOB TASK NO. T	SERVICE UNIT NO.	SERVICE TEMPLATE NO.
	ST00001	÷	0100000	SU00003	

3.3.2.5. How to Print the Service Ticket

Click on the navigation menu item popup Report	Dynamics 3	865 Busines	is Central
		÷	SERVICE TICKET WORK DATE: 4/8/2019
			ST00001 · Service Ticket #S
			Process Report Actions Navigate Fewer options
			General
			Customer No. C00010
			Customer Name
Click on the navigation menu item Print	,		
		~	SERVICE TICKET WORK DATE: 4/8/2019
			ST00001 · Service Ticket #S
			Process Report Actions Navigate Fewer options
			Print
			Customer No. C00010
			Customer Name
			Description Service Ticket #ST00
Click on Send to Print Preview Cancel	Gervice Ticket #	ST00001 - I	Job Planning Line
The standard Microsoft Dynamics 365 Business	4/8/2019		Show results:
Central, printing options are available to select from.			Job lask No. V IS.
	ewer options		
	AL NO.	DESCRIF	Send to Print Preview
		Skid Steer G	eneral Service
		Cabor - Lube Oil Change f	e 4/15/2019 4/15/2019 for Skid Steers 4/15/2019 4/15/2019
		Air Filter for	Skid Steers





The following picture displays the Service Ticket document.

Service Tick	et					Page June 7, 201
Service Ticket #ST0000	01 - Inter	nal Servicing Custo	omer			
Assigned Technician:						
Service Date: 4/15/201	19					
internal Servicing Cu:	stomer		CRONUS 7122 South Westminste Atlanta, 31	S SERVICE, Ashford Stree er 772	Inc. t	
Description		Task Type	No.	Quantity	Unit Price	Total Price
SU00002-Skid Steer Loader - Skid Steer General Service	Internal					
Jahor - Luba		Pasourca	LABOR	0.5	75.00	375
cabbi - cobe	Parts: 0.00	Labor: 37.50	Other: 0.00	0.5	75.00	37.5
Dil Change for Skid Steers						
Labor - Oil Change		Resource	LABOR	1	75.00	75.0
Oil Filter		Item	1001	1	11.75	11.7
Oil Gasket		Item	1002	1	2.75	2.7
Mobile Oil 5W30		Item	1003	5	10.75	53.7
Pe	orts: 68.25	Labor: 75.00	Other: 0.00			143.2
Air Filter for Skid Steers						
Labor - Replace Air Filter		Resource	LABOR	0.5	75.00	37.5
Air Filter for Skid Steer		item	1004	1	20.75	20.7
Po ncome - Shop Supplies	arts: 20.75	Labor: 37.50	Other: 0.00			58.2
Income - Shop Supplies		G/L Account	40150	1	20.00	20.0
1	Parts: 0.00	Labor: 0.00	Other: 20.00	10		20.0
Fest Battery						
Labor - Check Battery		Resource	LABOR	0.25	75.00	18.7
1	Parts: 0.00	Labor: 18.75	Other: 0.00			18.7
Pi 5000003-Skid Steer Loader S	arts: 89.00 450	Labor: 168.75	Other: 20.00	Tot	al SU00002:	277.7
Lineux pluta levels		0	11000	0.05	75.00	10.7
cabor - check Huld Levels	Parts: 0.00	Labor: 18 75	Other: 0.00	0.25	/5.00	18.7
		2000. 10.13	0.00		Total Parts: Total Labor:	89.00

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

5 B	usiness	Central
	\leftarrow	SERVICE TICKET WORK DATE: 4/8/2019
		ST00001 · Service Ticket #ST0000
		Process Report Actions Navigate Fewer options
		General
		Customer No
		Customer Name Internal Servicing Customer

endoor	Open Door Te	echnology Inc.	. kyle@opendoore p.com March 17, 2025
	ODT Ser	vice Help	137/36
Click on the navigation menu	item popup Ticket	¢	SERVICE TICKET I WORK DATE: 4/8/2019 STOODOO1 · Service Ticket # Process Report Actions Navigate Fewer options Ticket ~ Customer No. Customer Name Description Service Ticket #S
Click on the link View or edit set up for the selected reco	the checklists that are rd.		Process Report Actions Navigate Fewer options Ticket ∨ Dimensions Could a structure Checklist View or edit the checklists that are set up for the selected record Order Date Ticket Units/Lines Manage Line Fewer options
Click on the link in cell Check SS-GENSERV CHECKLIST	list Code with the value	SERVICE TICKET STOOO Process Repo General Customer No. Customer Name Description	TI WORK DA TICKET CHECKLISTS I WORK DATE: 4/8/2019 O O O CHECKLIST CODE CHECKLIST COpen record "SS-GENSERV CHECKLIST" in
Click on the navigation menu	item popup Report	Dynamics 365 Business	s Central TICKET CHECKLIST I WORK DATE: 4/8/2019 STOODOOT · SS-GENERAL SE Report General Checklist Code SS-GENSERV CHE Name Skid Steer General

p.com March 17, 2025 138/369 **ODT Service Help** Click on the navigation menu item Print Checklist... TICKET CHECKLIST | WORK DATE: 4/8/2019 \leftarrow ST00001 · SS-GENERAL SE Report 📮 Print Checklist... Print the ticket checklist. SS-GENSERV CHECK Checklist Code Skid Steer General S Name Click on Send to ... Print Preview Cancel The standard Microsoft Dynamics 365 Business NSERV CHECKLIST Central, printing options are available to select from. teer General Service Cheo Send to... Print Preview Cancel MIN. VALUE MAX. VALUE MEASURE CODE DECIMAL VALUE 0.00 0.00 0.00 The following picture displays the Checklist document which is for the template, SS-General Service. Ticket No.: ST00001 - Service Ticket #ST00001 - Internal Servicing Customer Skid Steer General Service Checklist **CRONUS SERVICE**, Inc. Internal Servicing Customer 7122 South Ashford Street Westminster Atlanta, 31772 Assigned Technician: Labor - Oil Change Service Date: 4/15/2019 Description Value 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 Technician:

Open Door Technology Inc.

kyle@opendoorer

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

Service Date:

The entry is optional.

Page 1



Click on the cell Description with the value Coolant						
			Checklist Details	Mai	nage	
			DECODIDIO	NI.		MIN
			DESCRIPTIO			MIN
			Check Under	the Hood		
			Windshield V	Vasher Fluid	Level	
			Coolant		:	
			Brake Fluid		Cooli	int
			Check Tires		(22)	
			Tire Conditio	n: LF Iread: /	32	
			Tire Conditio	n: KF Iread: /	/32	
			Tire Conditio	n: LR Tread: / n: RR Tread: /	/32	
Click on Boolean Value						
	LUE	MAX. VALUE	UNIT OF MEASURE CODE	BOOL VALUE	DECIMAL VALUE	OPTION VALU
	0.00	0.00			0.00	
	0.00	0.00			0.00	
	0.00	0.00			0.00	
	0.00	0.00			0.00	
	0.00	0.00			0.00	
	0.00	32.00			0.00	
	0.00	32.00			0.00	
	0.00	32.00			0.00	
	0.00	32.00			0.00	
Click on the cell Description with the value Brake Fluid			Checklist Details	5 Mai	nage	
			DESCRIPTIO	N		MIN.
			Check Under	the Hood		
			Windshield V	Vasher Fluid	Level	
			Coolant			
			Brake Fluid			
			Check Tires			
			Tire Conditio	n: LF Tread: /	/32	
			Tire Conditio	n: RF Tread: ,	/32	
			Tire Conditio	n: LR Tread: ,	/32	
			Tire Conditio	n: 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			0.00	
	0.00	0.00			0.00	
	0.00	0.00			0.00	

0.00

0.00

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0.00 0.00

0.00

0.00

32.00

32.00

32.00

32.00

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0.00

0.00

0.00

0.00

0.00



MAX. VALUE	UNIT OF MEASURE CODE	BOOL VALUE	DECIMAL VALUE	OPTION VALUE
0.00			0.00	
0.00		\$	0.00	
0.00			0.00	
0.00		\$	0.00	
0.00			0.00	-
32.00			0.00	
32.00			0.00 .00	
32.00			0.00	
32.00			0.00	
0.00			0.00	

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			0.00	
	0.00			0.00	
	0.00			0.00	
	0.00			0.00	
	0.00			0.00	
	32.00			0.00	
	32.00			0.00	
	32.00			0.00	
	32.00			0.00	
	0.00			0.00	

Enter the text 20 .	MAX. VALUE	UNIT OF MEASURE CODE	BOOL VALUE	DECIMAL VALUE	OPTION VALUE
	0.00			0.00	
	0.00			0.00	
	0.00			0.00	
	0.00			0.00	
	0.00			0.00	
	32.00			2	
	32.00			0.00	
	32.00			0.00	
	32.00			0.00	
	0.00			0.00	
Click on the cell Decimal Value with the value 0.00	MAX. VALUE	MEASURE CODE	VALUE	DECIMAL VALUE	OPTION VALUE
	0.00			0.00	
	0.00			0.00	
	0.00			0.00	
	0.00			0.00	
	0.00			0.00	
	32.00			20	
	32.00			0.00	
	32.00			0.00	
	32.00			0.00	





Enter the text 21.

MAX. VALUE MEASURE CODE VALUE DECIMAL VALUE OPTION VALUE

	0.00		0.00	
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lick on the cell Decimal Value with the value 0 00	0.00		0.00	
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inter the text 10 .	0.00 0.00 0.00 0.00 32.00 32.00 32.00 32.00 0.00 0.00 0.00 0.00 0.00 0.00		0.00 0.00 0.00 0.00 20.00 21.00 1d 0.00 0.00 0.00	
inter the text 10 .	0.00 0.00 0.00 0.00 32.00 32.00 32.00 32.00 32.00 0.00 0		0.00 0.00 0.00 0.00 20.00 21.00 1d 0.00 0.00 0.00 0.00 0.00 0.00 0.	
Enter the text 10 .	0.00 0.00 0.00 0.00 32.00 32.00 32.00 32.00 32.00 0.00 0		0.00 0.00 0.00 0.00 20.00 21.00 1d 0.00 0.00 0.00 0.00 0.00 0.00 0.	
Enter the text 10 . Click on the cell Decimal Value with the value 0.00	0.00 0.00 0.00 0.00 32.00 32.00 32.00 32.00 32.00 0.00 0		0.00 0.00 0.00 20.00 21.00 14 0.00 0.00 0.00 0.00 0.00 0.00 0.	
Enter the text 10 . Click on the cell Decimal Value with the value 0.00	0.00 0.00 0.00 0.00 32.00 32.00 32.00 32.00 32.00 0.00 0		0.00 0.00 0.00 0.00 20.00 21.00 14 0.00 0.00 0.00 0.00 0.00 0.00 0.	
Enter the text 10 . Click on the cell Decimal Value with the value 0.00	0.00 0.00 0.00 0.00 32.00 32.00 32.00 32.00 32.00 0.00 0		0.00 0.00 0.00 20.00 21.00 1d 0.00 0.00 0.00 0.00 0.00 0.00 0.	
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Enter	the	text	8.

0.00		0.00	
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0.00		0.00	
0.00		0.00	
32.00		20.00	
32.00		21.00	
32.00		10.00	
32.00		8	
0.00		0.00	

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

			0.00		
Click on the cell Option Value			0.00		
		•	0.00		
			20.00		
			21.00		
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	21.00				
	10.00				
	8.00				
	0.00			\sim	
		V,	ALUE		
		N	1obil		
		9	Select record "Mobil"		
		+ New			Select from full list
	0.00	V	ALUE	~	
		+ New	Select record "Mobil"		Select from full list
		+ ivew			select from full list



Click	on	the	back	button
0.000	~		Saon	North Olivert

Dynamics 365 Busi	iness Central
[TICKET CHECKLIST I WORK DATE: 4/15/2019 Back ST00001 · SS-GENERAL SEF
	General
	Checklist Code SS-GENSERV CHECK
	Name Skid Steer General S

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	Dynamics 365 Business Central					
	SERVICE TICKET WORK DATE: 4/8/2019					
	ST00001 · Service Ticket #S					
	Process Report Actions Navigate Fewer options					
	General					
	Customer No					
	Customer Name Internal Servicing Cu					
Click on the link Confirm Actuals						
Click on the link Confirm Actuals	SERVICE TICKET WORK DATE: 4/8/2019					
Click on the link Confirm Actuals	 ← service ticket work date: 4/8/2019 ST00001 · Service Ticket #ST00 					
Click on the link Confirm Actuals	ST00001 · Service Ticket #ST00 <u>Process</u> Report Actions Navigate Fewer options					
Click on the link Confirm Actuals	← SERVICE TICKET WORK DATE: 4/8/2019 STOODOO1 · Service Ticket #STO(Process Report Actions Navigate Fewer options ¥ Add Service Template Confirm Actuals View Job Journal					
Click on the link Confirm Actuals	SERVICE TICKET WORK DATE: 4/8/2019 STOODOO1 · Service Ticket #STO(Process Report Actions Navigate Fewer options Add Service Template Confirm Actuals View Job Journal Customer No.					
Click on the link Confirm Actuals	SERVICE TICKET WORK DATE: 4/8/2019 STOODOO1 · Service Ticket #STO(Process Report Actions Navigate Fewer options Add Service Template Confirm Actuals View Job Journal Customer No. Customer Name Internal Servicing Customer					

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.

endoor	Open Door Teo	hnolog	gy Inc.				kyle(@opendo	oorer .com
TECHNOLOGY	ODT Serv	ice Hel	р				Ma	arch 17, 2 144	2025 4/369
Click on Job Task			Ser	vice Ticket #S	ГОООС	Document	110.	Ľ	4/45/2046
			4/8	/2019		Posting Da	te		4/15/2019
				,		Template N	lame · · · ·		JOB
						Batch Nam	e		ASTAPLET
		Manage	Line Few	er options					
		ODT SERVIC	E			Job Task			
		UNIT NO.	SERIAL	NO.	DESC	Show results			
		SU00002		:	Skid S	Where:	Job No.		v i
		SU00002			labor		500 140.		
		SU00002			Dil Ch	And:	Job Task N	No.	▼ i
		SU00002			Air Fil				
Click on Job Planning Line						Show results			
		SU00002		:	Skid	Where:	I-h Ni-		• i
		SU00002			skid s	merer	JOD NO.		•
		SU00002			Dil Ch	And:	Job Task N	No.	• i
		SU00002			Air Fil				
		SU00002		1	ncom				
		SU00002		5	Skid S		in a Lin a		
		SU00002			Test B	JOD Plann	ling Line		
		SU00003		:	Skid !	Show results			
		\$100003		10	heck	where:	Туре		•
						And:	No.		۰
						And:	Planning	Date	v i
Click on the button OK									
	e	2							_
									_
	-		•	IS:			•		
	-		•	is:			\sim		
	-	<u>.</u>		is:					
		ng Date	•						
	n	cy Date	•	is:					F
								MEAS	URE
						OK	Cancel	ITTY CODE	
)	or Oil Chang		ОК		1 HOUR	
	u u	1001		Filtor	e			1 PCS	
Click on the button OK									
							-		
	14		sfully transferr	ed to the jour	nal				
	10		ing control				COST)	ACTUAL (TOTA COS	T)
							_		_
						ОК	-		_
						ОК	11.13		-
			4/15/2019	4/15/201	9		37.50		-
			4/15/2019	4/15/201	9		15.38		-
			4/15/2019	4/15/201	9		10.00		-
			-	-	9		5.56		-
			-/15/2015	4/13/201			5.50		-

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.


	Dynamic	cs 365 Busir	ness Cent	ral			
		Manag	e <u>Proce</u>	ss Prepare	Post/Print	Job Line	Actions Na
		EDIT -	JOB JOUR	NALS - ASTAPLE	ION · ODT\ASTA	APLETON JOURN	AL.
		Batch I	Name				
		LINE	TYPE	BIN CODE	WORK TYPE CODE	UNIT OF MEASURE CODE	QUANTITY
						HOUR	0.5
						PCS	
						PCS	f
Click on the navigation menu item popup Post/Print	Dynamic	s 365 Busin	iess Cent	al			
		Manage	Proce	ss Prepare	Post/Print	Job Line	Actions Na
		E Re	concile	acalc. Remaini	ng Usage		
		Batch N	lame				
		LINE	TYPE	BIN CODE	WORK TYPE CODE	UNIT OF MEASURE CODE	QUANTITY
						HOUR	0.5
						HOUR	
						PCS	
		Manag Po Fi Batch I	e Proce	ss Prepare Post and Print cument or journal by	Post/Print	Job Line	Actions Na
		LINE	TYPE	BIN CODE	WORK TYPE CODE	UNIT OF MEASURE CODE	QUANTITY
						HOUR	0.5
						HOUR	
						PCS	
Click on the button Yes	25	4.25	4.2	5 42	5 2	0.75	0.75
Click on the button Yes	25 00	4.25 10.00	4.2	5 4.2 0 10.0	5 2 0 2	0.75 2	0.75
Click on the button Yes	25 00 25	4.25 10.00 22.25	4.2 10.0 5.5	5 4.2 0 10.0 6 5.5	5 2 0 2 6 7	0.75 2 0.00 2 5.00 1	0.75 0.00 8.75
Click on the button Yes	25 00 25 Do y	4.25 10.00 22.25	4.2 10.0 5.5	5 4.2 0 10.0 6 5.5 mal lines?	5 2 0 2 6 7 Yes <u>Ves</u> op Supplies	0.75 2 0.00 2 5.00 1 1 No	0.75



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on OK	4.25	4.25	4.25	20.75	20.75	0.00
	10.00	10.00	10.00	20.00	20.00	0.00
	22.25	5.56	5.56	75.00	18.75	0.00
	the second se	5			18.75	0.00
	ournai lines we	ere successtully p	losted.			
				OK		
		Ir	icome - Shop Sup	DIIES		
		4/15/2019	4/15/2019		5.56	_
					Close	
					Close	
	ACTUAL (TOT	TAL BILLABL	E (TOTAL	BILLABLE		
	co	51)	PRICE) (INV	JICED PRICE)		
		-		-		
		-	-	-		
		-	-	-		

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	Dynamics 365 Business Central
	SERVICE TICKET WORK DATE: 4/15/2019
	ST00001 · Service Ticket #S
	Process Report Actions Navigate Fewer options
	General
	Customer No
	Customer Name Internal Servicing Cu
Click on the navigation menu item Mark Complete	
	 (2) + ¹
	et #ST00001 - Internal Servicing Custor
	ptions
	ew Job Journal 📓 Create Service Sales Invoice 🥥 Mark Complete
	ew Job Journal Create Service Sales Invoice Mark Complete Mark the current service ticket as completed. Service Date
	ervicing Customer

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Click	on	the	button	Yes
-------	----	-----	--------	-----

				_		
? Are yo	u sure you w	ant to mark this	service ticket as com	pleted?	(TOTAL COST)	ACTUAL (TOT CO:
			Yes	No	_	
					11.13	11
Steers		4/15/2019	4/15/2019		37.50	37
eers		4/15/2019	4/15/2019		15.38	15
plies		4/15/2019	4/15/2019		10.00	10
Service		_	_		85.13	85
		4/15/2019	4/15/2019		5.56	5

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	Dynamics 365 Business Central
	(c)
	Service Ticket
	Process Report Ticket Actions Related Fewer options
	General
	Customer No.
	Customer Name
Click on the new institute properties Conv. Decument	Description · · · · · · · · · · · · · · · · · · ·
Click on the navigation menu item Copy Document	
	reate Service Sales Invoice Sales Mark Complete
	Contact
	Service Ticket Type
	Assigned Technician
The Include Header toggle can be used to toggle if information from the header of the selected ticket is	Options
copied. It is enabled by default if a customer has not	Document No ST00095
default if a customer has been selected before	Sell-to Customer No
copying.	Sell-to Customer Name · · · · · · · · Adatum Corporation
	Include Header
	Recalculate Lines
	Advanced >



		0,0000		
The Recalculate Lines toggle can be used to toggle if service lines that get copied should have their prices	_	Document No.	STO	0095
recalculated after being copied.		Sell-to Customer No	p. · · · · · · · · 100	00
		Sell-to Customer Na	ame · · · · · · · · Ada	tum Corporation
		Jackuda Haadaa		
		nciude Header		
		Recalculate Lines		5
		Advanced >		
				ОК
Click on the lookup button Document No.	nt		Z X	
	Last used entire	ns and filters		
	Last used optio			
	ST00095			
	10000		Review or upda	ite the value for Document No.
	Adatum Corpor	ration		
			_	
Select the convice ticket that you want to conv				
Select the service ticket that you want to copy.				
Click on the link in cell No. with the value ST00004	ICKET ACTIONS	Related Fewer of	ptions	
				- New ···
				THEW .
		*	No. ↑ ▼	Description
			<u>ST00004</u>	Service Ticket #ST00002 -
		6/16/202	ST00007	Service Ticket #ST00007 -
		6/16/202	ST00009	Service Ticket #ST00009 -
			ST00010	Service Ticket #ST00010 -
			ST00018	Service Ticket #ST00018 -
	eader			
Click on the button OK	te lines			
	CC Enres			
	ad \			
	.ed >			_
			ОК	Cancel
	Def	er		
	Serv	vice Start Date	End Date	Budget (Total Cost) A



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

ST00	103 ·	Servic	e Ticke	t #S1	-00103 - Adat
Process	Report	Ticket	Actions	Related	d Fewer options
General					
Customer	No. • • • •				10000
Customer	Name · ·				Adatum Corporation
Descriptio	ı				Service Ticket #ST00103 -
Order Date	<u>.</u>				4/12/2021

3.4. Service for External Equipment

3.4.1. Overview of External Customer Equipment Servicing

3.4.1.1. Overview

ODT Service is essencially 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.

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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	 ✓ Sales ✓ Purchasing ✓ Inventory Cash Receipt Journals Transfer Orders 	Posted Documents Setup & Extensic
	ut	Service Ticket Quote Sales Order Service Ticket - Sales Return Orr Sales Quote Sales Quote Sales Credit Mer Sales Invoice Service
Click on the field Customer No.	Actions Report Fewer options	
		 ✓ Ser Ser Ass Def
Click on the link in cell No. with the value 10000 Select the applicable Customer.	ocess Report Actions Report Fi	ewer options
	stomer Name scription der Date	N0. NAME CF 10000 Adatum Corporation 20000 Select record "10000" pearch 30000 School of Fine Art 40000 Alpine Ski House
Click on the field Service Date	cket Units/Lines Manage Line ODT SERVICE	50000 Relectoud
	ion <u>June 2015</u> <u>Su Mo Tu We</u> <u>2 3 4 5</u> <u>9 10 11 12 48</u> <u>16 19 48 10</u>	Show more

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Click on the link Previous	Corporation
	Service Date
	Assigned Technician
	Possigned rectinician 1 Default Service I Init No 2 3 4 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
	Sanitas Data
	Service Date
	Assigned Technician
	Default Service Unit No.
	16 17 18 19 20 21 22 23 24 5 26 77 28 29
	30
Click on a date in the calendar	
Select the date on which the service is to be	ice Date
performed, if different from the defaulted date, from	ice Ticket Type
the Users' Work Date.	gned Technician
	ault Service Unit No.
	21 22 23 24 25 26 27 28 29 30 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 20 </th
	Today Done
	BUDGET (TOTAL ACTUAL (TOTAL BILLABLE (TOTAL BI E END DATE COST) COST) PRICE) (INVOICED
Click on the field Service Ticket Type	
	Show more
	····· 4/15/2019 🛗
	······
	······



Click on the lookup button Service Ticket Type	
	Show more
	4/15/2019
	Look up value
	FI
Click on the link in cell Code with the value REGULARSERVICE	RVICE TICKET QUOTE WORK DATE: 4/8/20
The specification of a Ticket Type is optional.	T00002 · Service Service TICKET TYPES + New
The use of the Ticket Type to specify differing types of	cess Report Actions Report CODE DESCRIP
servicing can be beneficial for analysis of past servicing.	eneral RegularSERVICE Regular S Color to second "REGUL ARSERVICE" Regular S
C .	stomer No.
	stomer Name
Click on the field Assigned Technician	
	Show more
	4/15/2019
	······
	E
Click on the link in cell No. with the value LABOR	
The specification of an Assigned Technician is	vice Date vice Type ····································
optional.	igned Technician
	fault Service Unit No
	LABOR Labor - Oil Change
	MARK Mark Hanson
	TE END DATE COST) TIMOTHY Timothy Sneath
	+ New





ODT Service Help

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.

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

	4/15/2019		
	REGULARSERVICE		
	LABOR		~
			\sim
			E3
BUDGET (TOTA COS	L ACTUAL (TOTA I) COS	AL BILLABLE (TOTAL T) PRICE)	BILLABLE (INVOICED PRICE)
BUDGET (TOTA COS e Ticket Type	L ACTUAL (TOTA f) COS	AL BILLABLE (TOTAL T) PRICE) REGULARSERVICE	BILLABLE (INVOICED PRICE)
BUDGET (TOTA COS ³ e Ticket Type	L ACTUAL (TOTA 1) COS	AL BILLABLE (TOTAL T) PRICE) REGULARSERVICE	BILLABLE (INVOICED PRICE)
BUDGET (TOTA COS e Ticket Type red Technician It Service Unit No	L ACTUAL (TOTA) COS	LL BILLABLE (TOTAL T) PRICE) REGULARSERVICE LABOR	BILLABLE (INVOICED PRICE)
BUDGET (TOTA COS e Ticket Type red Technician It Service Unit No	L ACTUAL (TOTA) COS	LL BILLABLE (TOTAL T) PRICE) REGULARSERVICE LABOR	BILLABLE (INVOICED PRICE)
BUDGET (TOTA COS ⁻ e Ticket Type ······ ned Technician ····· It Service Unit No. ···	L ACTUAL (TOTA) COS	LL BILLABLE (TOTAL T) PRICE) REGULARSERVICE LABOR SERVICE UNIT NO SU00001	BILLABLE (INVOICED PRICE)
BUDGET (TOTA COS' e Ticket Type red Technician It Service Unit No END DATE	L ACTUAL (TOTA) COS	LL BILLABLE (TOTAL T) PRICE) REGULARSERVICE LABOR LSERVICE UNIT NO SU00001 SU000 SU000 SU000 SU000 SU000 SU000 SU000 SU000 SU000 SU000 SU000 SU000 SU000 SU00001	BILLABLE (INVOICED PRICE) DESCRIPTION Skid Steer Loader
BUDGET (TOTA COS ⁻ e Ticket Type ······ ned Technician ····· It Service Unit No. ···	L ACTUAL (TOTA) COS BUDGET (TOTAL COST)	LL BILLABLE (TOTAL T) PRICE) REGULARSERVICE LABOR SERVICE UNIT NO SU00001 SU0001 SU000 Select record + New	BILLABLE (INVOICED PRICE) DESCRIPTION Skid Steer Loader

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.

lick on the navigation menu item popup Process	Dynamics 365 Business Central
	SERVICE TICKET QUOTE WORK DATE: 4/15/2019
	ST00002 · Service Quote #
	Process Report Actions Report Fewer options
	General
	Customer No
	Customer Name Adatum Corporation

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Click on the navigation menu item Add Service Template		¢	SERVICE TICK STOOO Process Re Make Tic Customer No. Customer Nan Description	ET QUOTE WORK DATE: 4/15/2019 DO2 · Service port Actions Report ket % Add Service Template Add Service Template	Quote # Fewer options Cancel Ticket 10000 Adatum Corporation Service Quote #ST00
Click on the link in cell Template No. with the value SS-GENERAL SERVICE	ST00002	۰S	ervice	SERVICE TEMPLATES + New	1
	rocess Report	Acti	ons Report	TEMPLATE NO.	TEMPLATE TYPE
	ieneral			AIRFILTER-SS	Service
	ustomer No.			SS-GENERAL SERVICE	: Service
	ustomer Name			Select record "SS-GENE	RAL SERVICE"
	escription · · · · · ·				
	rder Date				

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 D	Description
----------------------------	-------------

	11	SU00001	Skid Steer Loader S450	_
I		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	_
	П	



Click on the pavigation many item papun Manage			Cus	stomer no				10000	
Click on the havigation mend item popup Manage			Cus	stomer Na	me · · · · ·			Adatum C	orporation
			Des	scription ·				Service Q	uote #ST00002 - A
			Ore	dor Data				4/8/2019	
			UIC	Jer Date				4/0/2019	
			Tic	ket Units	/Lines	Manage	Line	Fewer opti	ons
				TASK TY	'PE	ODT SER UNIT NO.	VICE	SERIAL NO.	DESCRIP
				Headin	g	SU00001			Skid Stee
				Begin-T	otal	SU00001			Skid Steer
				Postin	g	SU00001			Labor - Lu
Click on the navigation menu item View Service	TTC-			Ľ		poration			
Ticket Details					Service Quo	te #ST00002	2 - Adatun	n Corporation	
					4/8/2019				Ē
		Delete Line	<u>3-</u> 7	Add Servio	ce Template	🗟 View	/ Service T	icket Details	SEK
	a	50000	01			Skid S	teer Loa	View or edit servi	ce ticket details for th
	otal	SU0000)1			Skid S	teer Gener	ral Service	
	ıg	SU0000)1			Labor	- Lube		
	ıg	SU0000)1			Oil Ch	ange for S	kid Steers	
	a	SU0000)1			Air Filt	er for Skid	d Steers	
Click on the navigation menu item New	Dynan	nics 365 Bu	ısines	ss Central	I				
		\leftarrow	\leftarrow	SERVI	CE TICKET D	ETAILS WO	ORK DATE:	4/15/2019	
				0 5	earch +	New	Edit List	🗎 Delete	🕄 Item Availab
				/- 0		-	Edit Elst	Delete	C nem / Wando
				J	DB NO. T	Create a ne JOB NO.	TASK	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.

t	📋 Delete	🗊 Item Availab	ility By Location	🚺 Ope	n in Excel	Navigate	Fewer opt
	SERVICE UNIT NO.	SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCR	IPTION
			Time and Ma	Resource	_		
				Resour			



Click on the cell No.		
	70	
	Ttem Availability By Location	Open in Excel Navigate Fewer options
	SERVICE TEMPLATE NO. LINE TYPE TYPE	E NO. DESCRIPTION
	Time and Mat Reso	purce V
	Reso Item	
	G/L A Text	Account
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	SERVICE TEMPLATE NO. LINE TYPE TYPE	NO. DESCRIPTION DE
	Time and Mat Resource	
		NO. NAME
		LIN Select record "LABOR" Trin
		MARK Mark Hanson
		TIMOTHY Timothy Sneath
		+ New
Click on the cell Description with the value Labor -		
Click on the cell Description with the value Labor - Oil Change		
Click on the cell Description with the value Labor - Oil Change	ability By Location 🛛 🚺 Open in Excel	Navigate Fewer options
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	ability By Location 🛛 🚺 Open in Excel	Navigate Fewer options
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.	ability By Location III Open in Excel	Navigate Fewer options DESCRIPTION DESCRIP
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Click on the cell Quantity					
	Navigate Fewer options				
	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					
Litter the budgeted quantity for performing the task.	Navigate Fewer options				
	DESCRIPTION	DE SE	QUANTITY	UNIT OF MEASURE CODE	UNIT COST
	Labor - Test Battery			HOUR	22.25
Click on the cell Service Unit No . with the value					
Click on the cell Service Unit No. with the value SU00001	SERVICE TICKET DETAIL	_S WORK DATE:	4/15/2019		
Click on the cell Service Unit No. with the value SU00001 Note that the Service Unit No. is automatically	SERVICE TICKET DETAIL	LS WORK DATE:	4/15/2019	ltem Availabi	lity By Location
Click on the cell Service Unit No . with the value SU00001 Note that the Service Unit No. is automatically populated.	SERVICE TICKET DETAIL	LS WORK DATE:	4/15/2019	Bitem Availabi SERVICE TEMPLATE NO	lity By Location
Click on the cell Service Unit No. with the value SU00001 Note that the Service Unit No. is automatically populated.	SERVICE TICKET DETAIL	S I WORK DATE: Edit List JOB TASK N. T 0080000	4/15/2019 Delete SERVICE UNIT NO. SU00001	Eltem Availabi SERVICE TEMPLATE NO.	iity By Location
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Click on the cell Service Unit No. with the value SU00001 Note that the Service Unit No. is automatically populated.	SERVICE TICKET DETAIL Search + New JOB NO. T ST00002 : Dynamics 365 Business Cer Certification State Back	LS I WORK DATE: DOB TASK NO. T OO80000 I I I I I I I I I I I I I	4/15/2019	P Item Availabi SERVICE TEMPLATE NO. ATE: 4/15/2019 ist Delet SERVICE	Iity By Location

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.

andoor	Open Door Te	chnology In	С.	kyl	e@opendoorer
		vice Help		Ν	/larch 17, 2025
	ODT Serv	лсе пер			130/309
Click on the cell Task Type			Begin-Tot	al SU00001	Ski
			Posting	SU00001	Lab
			Posting	SU00001	Oil
			Posting	SU00001	Air
			Posting	SU00001	Inc
			End-lotal	SU00001	Ski
			Posting	300001	
			Ticket Detai	ls	
			Ticket Details		
Click on the item Heading in	the list		Posting	SU00001	Lab
- ····································			Posting	SU00001	Oil (
			Posting	SU00001	Air f
			Posting	SU00001	Inco
			End-lotal	SU00001	Skid
			Posting	500001	lest
			Posting		
			Heading Total		
			Begin He	ading	
Click on the cell ODT Sorvice			Begin-Total	IOR TASK	SERVICE SERVICE
Click of the cell ODT Service	; Unit NO.		Posting	SU00001	Labor - Lui
			Posting	SU00001	Oil Change
			Posting	SU00001	Air Filter fo
			Posting	SU00001	Income - S
			End-Total	SU00001	Skid Steer
			Posting	SU00001	Test Batter
			Heading		
			licket Details		
		1	icket Details		
Click on the lookup button in	the cell ODT Service	Begin-Tot	tal SU00001		Skid Steer General Servic
Unit No.		Posting	SU00001		Labor - Lube
		Posting	SU00001		Air Filter for Skid Steer
		Posting	SU00001		Income - Shop Supplies
		End-Total	SU00001		Skid Steer General Servic
		Posting	SU00001		Test Battery
		Heading	:		
				Look up value	
		Ticket Deta	ils		
		Ticket Details	1		





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ODT Service Help

Click on the link in cell Service Unit No. with the value SU00004	SERVICE TICKET QUOTE WORK DATE: 4/15/20 STOODOO2 · Service Process Report Actions Report General Customer No. Customer Name Description Order Date	Search + New Manage Open in Existence 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 SU00001 SU00001 SU00001 SU00001 SU00001 SU00001 SU00001 SU00004	Labor - Lube 6/1 Oil Change for Skid Steers 6/1 Air Filter for Skid Steers 6/1 Income - Shop Supplies 6/1 Skid Steer General Service
Enter the text Check Fluid Levels.	SER	VICE Labor - Lube 6/1 Oil Change for Skid Steers 6/1 Air Filter for Skid Steers 6/1 Income - Shop Supplies 6/1 Skid Steer General Service _ Test Battery 6/1 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.

		Check Fluid Levels	
1	SU00004	Skid Steer Loader S70	_
	SU00001	Test Battery	6/1
	SU00001	Skid Steer General Service	_
	SU00001	Income - Shop Supplies	6/1
	SU00001	Air Filter for Skid Steers	6/
	SU00001	Oil Change for Skid Steers	6/
	5000001	Labor - Lube	6/1

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Press the Arrow up key.		SU00001		Oil Change for	Skid Steers		6/1
		SU00001		Air Filter for Sk	id Steers		6/1
		SU00001		Income - Shop	Supplies		6/1
		SU00001		Skid Steer Gen	eral Service		-
		SU00001		Test Battery			6/1
	1	SU00004		Skid Steer Loa	ader S70		-
				Check Fluid Le	vels		-
	ls						
			SER	VICE			
Click on the nevigation monulitam perup Manage			Customer No.		10000		
Click on the navigation menu item popup Manage			Customer Name		Adatum Co	orporation	
			Description · · · · · ·		Service Qu	ote #ST000	02 - A
			Order Date		4/8/2019		
			Ticket Units/Lines	Manage	Line Fewer optic	ins	
			TASK TYPE Begin- lotal	ODT SERVICE UNIT NO.	SERIAL NO.	DES Skid S	CRIP
			Posting	SU00001		Labor	r - Lui
			Posting	SU00001		Oil Ch	hange
			Postina	SUI00001		Δir Fil	lter fr
lick on the navigation menu item View Service	me		Adatami	orporation			
licket Details	Service Quote #ST00002 - Adatum Corporation						
	4/8/2019						
	s/Line	s Manao	ue Line Feweropti	ons			
	ie i	× Delete Line	# Add Service Templa	ite 🖸 View Ser	vice Ticket Details		
	1 ME	SU00001	J. SERIAL NU.	Skid Steer G	iene View or edit servic	e ticket detail	< Is for †
	a	SU00001		Labor - Lub	e		
	a	SU00001		Oil Change	for Skid Steers		
	a	SU00001		Air Filter for	Skid Steers		
	- Ig	SU00001		Income - Sh	op Supplies		
Click on the navigation menu item New	Dyn	aamics 365 Bus	siness Central	r details work i	DATE: 4/15/2019		

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



	New Availability Pullocation 🕮 Open in Fund
	TEMPLATE NO. LINE TYPE NO. DESCRIPTION
	Time and Mat Resource
	ltem G/L Account
	Text
	Item Availability by Location 🙀 Open in Excel Navigate Fewer options
Click on the link in cell No. with the value LABOR	SERVICE
	TEMPLATE DE NO. LINE TYPE NO. DESCRIPTION SE
	Time and Mat Resource
	NO. NAME
	LABOR Labor - Oil Change
	MARK Mark Hanson
	MARY Mary A. Dempsey
	TIMOTHY Timothy Sneath + New
Click on the cell Description with the value Labor - Oil Change	ilability By Location 🛛 🎝 Open in Excel Navigate Fewer options
Click on the cell Description with the value Labor - Oil Change	Iability By Location III Open in Excel Navigate Fewer options
Click on the cell Description with the value Labor - Oil Change	ilability By Location III Open in Excel Navigate Fewer options E LINE TYPE TYPE NO. DESCRIPTION SE QUA Time and Mat Resource LABOR Labor - Oil Change
Click on the cell Description with the value Labor - Oil Change	Iability By Location I Open in Excel Navigate Fewer options E LINE TYPE TYPE NO. DESCRIPTION SE QUA Time and Mat Resource LABOR V Labor - Oil Change
Click on the cell Description with the value Labor - Oil Change	ilability By Location I Den in Excel Navigate Fewer options E LINE TYPE TYPE NO. DESCRIPTION SE QUA Time and Mat Resource LABOR Labor - Oil Change
Click on the cell Description with the value Labor - Oil Change	Iability By Location I Open in Excel Navigate Fewer options E LINE TYPE TYPE NO. DESCRIPTION SE QUA Time and Mat Resource LABOR Labor - Oil Change
Click on the cell Description with the value Labor - Oil Change Enter the text Labor - Check Fluid Levels .	ilability By Location I Open in Excel Navigate Fewer options E LINE TYPE TYPE NO. DESCRIPTION SE QUA Time and Mat Resource LABOR Labor - Oil Change
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Click on the cell Description with the value Labor - Oil Change Enter the text Labor - Check Fluid Levels .	Iability By Location Image Provided Pr



Click on the cell Quantity					
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	Labor - Check Fluid L	evels 🔲	нс	DUR	22.25
Enter the text .25 .					
Enter the quantity of time it will take to perform the task.	Navigate Fewer optic	ons			
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	Labor - Check Huid L	evels	I HC	JUR	22.25
Click on the back button	Dynamics 365 Business	Central			
	€ €	SERVICE TICKET DETAIL	S WORK DATE:	4/15/2019	
	1000		🐯 Edit List	📋 Delete	🕄 Item Availat
		JOB NO. 🔻	JOB TASK NO. T	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 Busines	s Central
÷	SERVICE TICKET WORK DATE: 4/8/2019
	ST00003 · Service Ticket #
	Process Report Actions Navigate Fewer options
	General
	Customer No
	Customer Name Adatum Corporation



Click on the navigation menu item Print	
	SERVICE TICKET WORK DATE: 4/8/2019
	ST00003 · Service Ticket #
	Process Report Actions Navigate Fewer options
	Print
	Prepare to print the document. A report request window for the document Customer No
	Customer Name Adatum Corporation
	Description Service Ticket #ST00
Click on Send to Print Preview Cancel	
	ERIAL NO. DESC Job Planning Line
The standard Microsoft Dynamics 365 Business	Skid Sti Show results:
Central, printing options are available to select from.	Oil Cha
	Air Filte
	Skid S
	Test B Send to Print Previ
	Skid St
document.	Service Ticket Page 1 June 10, 2019 Assigned Technician: LABOR Service Ticket #5100003 - Adatum Corporation
document.	Service Ticket Service Ticket #ST00003 - Adatum Corporation Assigned Technician: LABOR Service Date: 4/15/2019
document.	Service Ticket June 10.2019 Service Ticket #ST00003 - Adatum Corporation Assigned Technician: LABOR Assigned Technician: LABOR Service Date: 4/15/2019 Adatum Corporation CRONUS SERVICE, Inc. Robert Townes 7122 South Activation Street 10, 031772 Hatnat, 31772 10, 631772 Hatnat, 31772
document.	Page 1 Service Ticket #ST00003 - Adatum Corporation Assigned Technician: LABOR Service Ticket #ST00003 - Adatum Corporation Assigned Technician: LABOR Service Date: 4/15/2019 Adatum Corporation CRONUS SERVICE, Inc. 7122 South Asinot Steel: 122 Market Square (a A 31772 USA Description Task Type No. Quantity Unit Price Total Price
document.	Adatum Corporation Adatum Corporation Assigned Technician: LABOR Service Date: 4/15/2019 Adatum Corporation Robert Townes 132 South Ashford Street 132 Market Souare 203 Description Tak Type No. Quantity Unit Price Total Price Store General Service
document.	Page 1 Service Ticket #ST00003 - Adatum Corporation Assigned Technician: LABOR Assigned Technician: LABOR Service Date: 4/15/2019 Adatum Corporation CRONUS SERVICE, Inc. Robert Townes 7122 South Adrinos Street: Name 10. 2019 Adatum Corporation CRONUS SERVICE, Inc. Robert Townes 7122 South Adrinos Street: Name 10. 2019 Westminner Iso Westminner Iso Street Exercise 1 Sub0001-Skid Steer Leader 5450 Skid Steer Leader 5450 Skid Steer Content Service Labor - Laber Labor - Laber LABOR 0.5 75.00 37.50
document.	Page 1 Service Ticket #S100003 - Adatum Corporation Assigned Technician: LABOR Assigned Technician: LABOR Service Date: 4/15/2019 Adatum Corporation CRONUS SERVICE, Inc. Robert Townes T122 South Addroid Street 102 Market Square Westminder 103 Market Square Westminder 104 Market Square Westminder 105 Market Stader 1458 Hand 19772 USA Task Type No. Quantity Unit Price Total Price Market Square Westminder Atanta, 31772 Atanta, 31772 Total Price Total Price Market Stader 1548 Ker Connol Service Labor: Labor Other 0.05 Total Price Total Price Labor: Lube Resource Labor: 27.00 Other 0.05 Total Total Price Market Square Labor: 27.00 Other 0.05 Total Total Price
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document.	Page 1 Active Ticket #ST00003 - Adstum Corporation Assigned Technician: LABDR Assigned Technician: LABDR Brevice Ticket #ST00003 - Adstum Corporation Assigned Technician: LABDR Brevice Ticket #ST00003 - Adstum Corporation Assigned Technician: LABDR Brevice Tournes Robert Tournes 102 Market Source 103 Market Source 104 Market Source 103 Market Source 104 Fee Camber Market Source 103 Market Source 103 Fee Camber 104 Fee Camber 104 Fee Camber 105 Fee Camber 106 Fee Camber 101 Finter 101 Finter 101 Finter 101 Finter 101 Finter 1001 finter 101 Finter 1001 finter 101 Finter 1001 finter 101 Finter 1001 finter
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endoor	Open Boor Technol	iogy inc.	p.coi		
TECHNOLOGY	ODT Service H	lelp	March 17, 2025 164/369		
Click on the navigation menu item pe	opup Process Dynami	ics 365 Business C	entral		
		÷	SERVICE TICKET QUOTE WORK DATE: 4/15/2019		
			ST00002 · Service Quote		
			Process Report Actions Report Fewer options		
			General		
			Customer No		
			Customer Name Adatum Corpora		
Click on the navigation menu item M	ake Ticket				
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			ST00002 · Service Quote		
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		<	SERVICE TICKET QUOTE WORK DATE: 4/15/2019 STOOOOO2 · Service Quote Process Report Actions Report Fewer options Make Ticket Add Service Template Cancel Ticket Convert the current service ticket quote to a service ticket Customer No. Customer Name Addatum Corpora		
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3.4.3. How to Process External Customer Service Tickets

3.4.3.1.

3.4.3.2.

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.

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- 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.

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	
	∨ Sales ∨ Purchasing ∨ Inventory ∨ Posted Documents ∨ Setup & Extensi
	Cash Receipt Journals Transfer Orders
	ACTIONS
	+ <u>Service Ticket Qu</u> ote + Sales Order + <u>Service Ticket</u> + Sales Return Or
	+ Sales Create a new service contract for service produ
	+ Sales Invoice > Service
Click on the field Customer No.	icket
	Actions Navigate Fewer options
	As
Click on the link in cell No. with the value 10000	ocess Report Actions Navigate Fewer options
Select the applicable systemer	eneral
Select the applicable customer.	stomer No.
	stomer No
Select the applicable customer.	stomer No
Select the applicable customer.	stomer No
Select the applicable customer.	stomer No. NO. NAME C stomer Name stomer Name der Date Date Stomer Name stomer Name stomer Name stomer Name stomer Name stomer Name NO. NAME C
Select the applicable customer.	stomer No
	stomer No
Click on the link Open the date picker	stomer No
Click on the link Open the date picker	stomer No
Click on the link Open the date picker	stomer No
Click on the link Open the date picker	stomer No
Click on the link Open the date picker	stomer No
Click on the link Open the date picker	stomer No
Click on the link Open the date picker	stomer No



Click on Previous Next June 2019

Open Door Technology Inc.

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OD1 Serv	vice Help
	Corporation

4/8/2019 Service Date June 2019 Þ Service Ticket Type Su Mo Tu We Th Fr Sa Assigned Technician 5 6 4 2 Default Service Unit No.
 9
 10
 11
 12
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 16
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 30 Corporation Click on the link Previous 4/8/2019 Service Date May 2019 ▶ Service Ticket Type Tu We Th Fr Sa Su Mo Assigned Technician 1 2 3 4
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 25
 Default Service Unit No. 26 27 28 29 30 31 Click on a date in the calendar 4/8/2019 rice Date Select the date on which the service is to be ◀ April 2019 ► performed, if different from the defaulted date, from rice Ticket Type Tu We Th Sa Su Мо Fr the Users' Work Date. gned Technician 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 ault Service Unit No. 23 24 25 26 27 28 29 30 Today Done BUDGET (TOTAL ACTUAL (TOTAL BILLABLE (TOTAL BII END DATE COST) COST) PRICE) (INVOICED UH Click on the field Service Ticket Type Show more 4/15/2019 Ē

51



Click on the lookup button Service Ticket Type					
	4/45/2040			Show more	
	4/13/2019				k up value
				\checkmark	
				F1	
Click on the link in cell Code with the value REGULARSERVICE	RVICE TICKET WO	ORK DATE:	4/8/2019		😨 Edit List 🧻 Delete 🛛
The specification of a Ticket Type is optional.	T00003	3 · S	ervice	SERVICE TICKET TYPE	5 + New
The use of the Ticket Type to specify differing types of	ocess Report	Acti	ions Naviga	CODE	DESCRIP
servicing can be beneficial for analysis of past servicing.	neral		-	REGULARSERVI Sele	ct record "REGULARSERVICE"
	stomer No.				
	scription				
Click on the field Acciment Technician					
Click of the field Assigned Technician					
					Show more
		4	/15/2019		
		R	REGULARSERVICE		
	PUPPET	TOTAL	ACTUAL /TOTA		DILLADIE
Click on the link in cell No. with the value LABOR	vice Date			4/15/2019	
The technician/resource who is to perform the service	vice Ticket Type			REGULARSERVICE	
can be assigned on the header of the ticket.	fault Service Unit N	No			
The selection of an Assigned Technician is optional.		10.		NO.	NAME
				LABOR LIN Select record	Labor - Oil Change "LABOR" rtin
			BUDGET (TOTAL	MARK	Mark Hanson
	TE END DATE	E	COST) TIMOTHY	Timothy Sneath
				+ New	





ODT Service Help

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**

			Show more
	4/15/2019		
	REGULARSERVICE		
	LABOR		~
			~
			E3
BUDGET (TOTAL COST)	ACTUAL (TOTA COS	AL BILLABLE (TOTAL 5T) PRICE)	BILLABLE (INVOICED PRICE)
e licket lype		REGULARSERVICE	
ned Technician		LABOR	
It Service Unit No.			
It Service Unit No.		SERVICE UNIT NO.	DESCRIPTION
Ilt Service Unit No.		SERVICE UNIT NO.	DESCRIPTION Skid Steer Loader S4
IIt Service Unit No	BUDGET (TOTAL COST)	SERVICE UNIT NO. SU00001 SUSSECT record "SU + New	DESCRIPTION Skid Steer Loader S4 20001* ¹ kid Steer Loader S7
END DATE	BUDGET (TOTAL COST)	SERVICE UNIT NO. SU00001 SU Select record "SU + New	DESCRIPTION Skid Steer Loader S4 00001" ¹ kid Steer Loader S7

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**

Dynamics 365 Busines	s Central
\	SERVICE TICKET WORK DATE: 4/8/2019
	ST00003 · Service Ticket #5
	Process Report Actions Navigate Fewer options
	General
	Customer No
	Customer Name Adatum Corporation

3/17/2025



kyle@opendoorer p.com March 17, 2025 169/369

ODT Service Help

Click on the navigation menu item Add Service Template		ERVICE TIC STOC Process Add Se Customer Ni Customer Ni Description	KET I WORK DATE: 4/8/2019 10003 · Service Report Actions Navigat rvice Template Confirm Actions d Service Template ame	Ticket # Fewer options Jour Adatum Corporation Service Ticket #ST00
Click on the link in cell Template No. with the value SS-GENERAL SERVICE	ST00003	·Service	SERVICE TEMPLATES + Ne	w
	rocess Report	Actions Naviga	TEMPLATE NO.	TEMPLATE TYPE
	ieneral		AIRFILTER-SS	Service
	ustomer No		SS-GENERAL SERVICE	Service
	ustomer Name			
	escription			
	rder Date			

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.

		SU00001	Skid Steer Loader S450	_
	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
	1	SU00001	Skid Steer General Service	_
Enter the text Tost Battory Dress the Arrow down	s	SU00001	Skid Steer Loader S450	
Enter the text rest dattery. Fress the Arrow down	tal	SU00001	Skid Steer General Service	-
кеу.		SU00001	Labor - Lube	4/1
		SU00001	Oil Change for Skid Steers	4/1
The ODT Service Unit No. field will automatically be		SU00001	Air Filter for Skid Steers	4/1
populated with the same Service Unit No., when		SU00001	Income - Shop Supplies	4/1
moving off and back to the line. The Task Type is left	1	SU00001	Skid Steer General Service	_
as the default of Posting			Т	
			Lease and the second	

3/17/2025





kyle@opendoorer p.com March 17, 2025 170/369

ODT Service Help

Press the Arrow up key			SU00001		Skid Steer L	oader S450.	(
	tal		SU00001		Skid Steer G	eneral Service	(
			SU00001		Labor - Lube	2	0	4/1
			SU00001		Oil Change f	for Skid Steers	(4/1
			SU00001		Air Filter for	Skid Steers	0	4/1
			SU00001		Income - Sh	op Supplies	(4/1
	1		SU00001		Skid Steer G	eneral Service	(
		÷			Test Battery		(
							(
	S							
Click on the navigation menu item popul Manage				customer No.		1000	00	
click on the navigation ment item popup manage				Customer Name		Adat	tum Corporati	ion
				Description		Serv	ice Ticket #ST	00003 - A
				Order Date		4/8/	2019	
				Ticket Units/Lines	Manage	line Fewe	r options	
					ODT SERVI	CE	, options	
	(<		TASK TYPE	UNIT NO.	SERIAL	NO.	DESCRIE
				Begin-Total	SU00001		5	Skid Stee
				Posting	SU00001			Labor - L
Click on the navigation menu item View Service	inc			Adatam co	rporation			
Ficket Details				Service Tick	et #ST00003 -	Adatum Corpora	ation	
				4/8/2019				İ
	s/Lin	nes	Manag	ge Line Fewer option	ns			
	ıe	€× (elete Line	* Add Service Template	🗟 View S	Service Ticket Det	tails	
	TFE			J. SERIAL NU.	1	/iew or edit service t	ticket details for	the select
	g		SU0000	1	Skid Ste	er Loader 5450		
	- Iota	31	500000	4	Skid Ste	er General Servic	e	
	ing		500000	1	Labor -	Lupe	-	
	ing		500000	1	Ala File	ige for Skid Steer	15	
	Ind		500000		Alf Filler	TOF Skid Steers		
Click on the navigation menu item New	Dy	ynam	ics 365 Bu		DETAILS WOR	RK DATE: 4/8/2019	9	
					New 💀 E	dit List 📋 De	elete 🛛 🕄 Ite	m Availa
				JOB NO. 🔽	JOB T NO. T	ASK SERVI	ICE TEI NO. NO	RVICE MPLATE).

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.



Click on the cell No.							
	🕄 Item Avai	lability By Loca	ition 🚺 Ope	n in Excel	Navigate F	ewer options	
	SERVICE TEMPLATE			NO	DESCRIPTI	ION	
	NO.	Time and	d Mat Resource	NO.	DESCRIPTI		
Click on the link in cell No. with the value LABOR	🤠 item Availabili	ty by Location	Open in	EXCEI INA	avigate Fewer	options	
	SERVICE TEMPLATE NO.	LINE TYPE	TYPE	NO.	DESCRIPTION		DE SE
		Time and Ma	it Resource	~			
				NO	NAME		
				LABOR	Labor - Oil (Change	
				LINDA	Linda Martii	n	
				MARK	Mark Hanso	on	
				MARY	Mary A. Der	mpsey	
				+ New	Timothy She	eath	
Click on the cell Description with the value Labor - Oil Change The default description will be from the Resource card	ilability By Locatio	on 📲 Oper	n in Excel	Navigate F	ewer options		
task to be performed.	E LINE TYPE	TYPE	N0.	DESCRIPTI	ION	DE SE	QUA
·	Time and N	Mat Resource	LABOR	∨ Labor - Oil	Change		
Enter the text Labor - Test Battery.							
	ilability By Locatio	on 🚺 Oper	n in Excel	Navigate F	ewer options		
	E LINE TYPE	TYPE	NO.	DESCRIPTI	ION	DE SE	QUA
	Time and I	Aat Resource	LABOR				
						-	



Click on the cell Quantity					
	Navigate Fewer options	5			
				UNIT OF	
	DESCRIPTION	DE SE	QUANTITY	MEASURE CODE	UNIT COST
	Labor - Test Battery			HOUR	22.25
Enter the text .25.					
Enter the quantity for performing the task.	Navigate Fewer options	5			
				UNIT OF	
	DESCRIPTION	DE SE	QUANTITY	MEASURE CODE	UNIT COST
	Labor - Test Battery			HOUR	22.25
Click on the cell Service Unit No , with the value					
Click on the cell Service Unit No. with the value SU00001		LS WORK DATE:	4/8/2019		
Click on the cell Service Unit No. with the value SU00001	SERVICE TICKET DETAI	LS WORK DATE:	4/8/2019	tem Availabi	lity By Location
Click on the cell Service Unit No. with the value SU00001 Note that the Service Unit No. is automatically	SERVICE TICKET DETAI	LS WORK DATE:	4/8/2019	ltem Availabi	lity By Location
Click on the cell Service Unit No. with the value SU00001 Note that the Service Unit No. is automatically populated.	SERVICE TICKET DETAI	LS WORK DATE:	4/8/2019	Item Availabi SERVICE TEMPLATE NO.	ility By Location
Click on the cell Service Unit No. with the value SU00001 Note that the Service Unit No. is automatically populated.	← SERVICE TICKET DETAI	LS WORK DATE: Edit List JOB TASK NO. T	4/8/2019 Delete SERVICE UNIT NO. SU00001	Item Availabi SERVICE TEMPLATE NO.	lity By Location
Click on the cell Service Unit No. with the value SU00001 Note that the Service Unit No. is automatically populated.	← SERVICE TICKET DETAI	LS WORK DATE: DOB TASK NO. T 0080000	4/8/2019	ltem Availabi SERVICE TEMPLATE NO.	lity By Location
Click on the cell Service Unit No. with the value SU00001 Note that the Service Unit No. is automatically populated.	SERVICE TICKET DETAIL	LS WORK DATE: Edit List JOB TASK NO. T 0080000	4/8/2019 Delete SERVICE UNIT NO. SU00001	Item Availabi SERVICE TEMPLATE NO.	lity By Location
Click on the cell Service Unit No. with the value SU00001 Note that the Service Unit No. is automatically populated.	← SERVICE TICKET DETAIL	LS WORK DATE:	4/8/2019 Delete SERVICE UNIT NO. SU00001	운 Item Availabi SERVICE TEMPLATE NO.	lity By Location
Click on the cell Service Unit No. with the value SU00001 Note that the Service Unit No. is automatically populated.	SERVICE TICKET DETAI	LS WORK DATE: Edit List JOB TASK NO. T 0080000	4/8/2019 Delete E SERVICE UNIT NO. SU00001	Item Availabi SERVICE TEMPLATE NO.	lity By Location
Click on the cell Service Unit No. with the value SU00001 Note that the Service Unit No. is automatically populated.	← SERVICE TICKET DETAI	LS WORK DATE: Edit List JOB TASK NO. T 0080000	4/8/2019 Delete SERVICE UNIT NO. SU00001	Item Availabi SERVICE TEMPLATE NO.	lity By Location
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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.



kyle@opendoorer p.com March 17, 2025 173/369

Click on the cell Teels Type	Bogin Tota	SU00001		Sh
Glick on the cell Task Type	Desting	SU00001		36
	Posting	SU00001		0
	Posting	SU00001		A
	Posting	SU00001		In
	End-Total	SU00001		SI
	Posting	SU00001		Te
	Ticket Details			
	Ticket Details			
Click on the cell Task Type with the value Posting	Begin-Tota	al SU00001		Sk
Heading Total Begin-Total End-Total	Posting	SU00001		La
neading Total Degin-Total Lite-Total	Posting	SU00001		Oi
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		Posting		
Click on the item Heading in the list	Posting	SU00001		Lab
onor on the torn nou any in the net	Posting	SU00001		Oil
When adding a line for a different Service Unit the	Posting	SU00001		Air
Task Type must be set to Heading	Posting	SU00001		Inc
Task Type must be set to heading.	End-Total	SU00001		Sk
	Posting	SU00001		Te
	Posting	·		
	Heading Heading Total B Heading Tick, End-Total			
	Here Details	JOB TASK	SERVICE	SERVICE TEMPLATE
Click on the cell ODT Service Unit No.	Begin-Total	SU00001		Skid Stee
	Posting	SU00001		Labor - L
	Posting	SU00001		Oil Chang
	Posting	SU00001		Air Filter
	Posting	SU00001		Income -
	End-Total	SU00001		Skid Stee
	Posting	SU00001		Test Batte
	Heading 🔻			
	Ticket Details			
	Ticket Details			



Click on the lookup button in the cell ODT Service Unit No.	Begin-Total SU00001 Posting SU00001	Skid Steer General Servic Labor - Lube Oil Change for Skid Steer Air Filter for Skid Steers Income - Shop Supplies Skid Steer General Servic Test Battery
	Ticket Details Ticket Details	
Click on the link in cell Service Unit No. with the value SU00004	ST00003 · Service	
Select the Service Unit to be added to the ticket.	Process Report Actions Naviga	SERVICE UNIT NO. DESCRIPTION
NOTE: The Default Service Unit field on the General tab will automatically be cleared, as the ticket is now for multiple units.	General Customer No. Customer Name	SU00001 :: Skid Steer Loader S450 SU00004 :: Skid Steer Loader S70 Select record "SU00004" :
	Description · · · · · · · · · · · · · · · · · · ·	٩
Click on the cell Description	SU00001	Labor - Lube 4/1 Oil Change for Skid Steers 4/1 Air Filter for Skid Steers 4/1 Income - Shop Supplies 4/1 Skid Steer General Service
	ls	ЛСЕ
Enter the text Check Fluid Levels . Press the Arrow down key.	SU00001 SU00004	Labor - Lube 4/1 Oil Change for Skid Steers 4/1 Air Filter for Skid Steers 4/1 Income - Shop Supplies 4/1 Skid Steer General Service
	SER	/ісе





ls			
		Check Fluid Levels	
	SU00004	Skid Steer Loader S70	_
	SU00001	Test Battery	4/
l.	SU00001	Skid Steer General Service	_
1	SU00001	Income - Shop Supplies	4/
1	SU00001	Air Filter for Skid Steers	4/
1	SU00001	Oil Change for Skid Steers	4/

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 many item popula Manage			customer	NO.		100	00	
Click on the havigation ment tient popup Manage			Customer	Name · · · · · ·		Ada	atum Corpora	ation
			Description	n		Ser	vice Ticket #S	ST00003 - A
			Order Date	<u>-</u>		4/8	/2019	
			Ticket Un	nits/Lines	Manage	Line Fewe	er options	
	<		TASK	(TYPE gin- lotal	ODT SERVIO UNIT NO. SU00001	SERIAL	NO.	DESCRIP Skid Steer
			Po	osting	SU00001			Labor - Lut
			Po	osting	SU00001			Oil Change
	1115		P/	nstina Maggam Cons	SU00001			Air Filter fo
Click on the navigation menu item View Service Ticket Details				Service Ticke	t #ST00003 -	Adatum Corpor	ration	
				4/8/2019				Ē
	s/Lines	Manag	e Line	Fewer options	;			
	ie 達 [Delete Line	🧚 Add Se	rvice Template	🛱 View S	ervice Ticket De	etails	718
	- lotal	5000001	. 5	ENAL NO.	Skid Steel	· (View or edit se	ervice ticket det	ails for the se
	ing	SU00001			Labor - Lu	ıbe		4
	ing	SU00001			Oil Chang	e for Skid Steer	rs	4
	ing	SU00001			Air Filter f	or Skid Steers		- 4
	ing	SU00001			Income -	Shop Supplies		4
Click on the navigation menu item New	Dynam	nics 365 Bu	siness Cent	ral				
		\leftarrow	← ser	VICE TICKET DE	TAILS WOR	K DATE: 4/8/201	19	
			٩	Search + N	New 💀 Ec	lit List 📋 De	elete	tem Availab
				JOB NO. 🔻	Create a new JOB TA NO. T	ASK SERV	/ICE T NO. N	ERVICE EMPLATE IO.

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



Click on the cell No.							
	🗊 Iten	n Availability	y By Locatior	n 🚺 Open i	in Excel Na	vigate Fewer opt	ions
	SER TEM NO.	/ICE PLATE	LINE TYPE	TYPE	N0.	DESCRIPTION	l
			Time and M	at Resource			
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	SERVICE TEMPLAT NO.	E	E TYPE T	YPE N	10. DE:	SCRIPTION	DE SE
		Time	e and Mat Re	esource	~		
					NO. LABOR LING Select recor MARK	NAME Labor - Oil Change d "LABOR" tin Mark Hanson	
					MARY TIMOTHY + New	Mary A. Dempsey Timothy Sneath	
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	ilability By L	ocation	Vpen in	Excel N	Navigate Fewer	options	-
task to be performed.	LINE	TYPE T	YPE esource	NO.	DESCRIPTION	SE	QUA
						3	
Enter the text Labor - Check Fluid Levels.							
	ilability By L	ocation	📲 Open in	Excel 1	Navigate Fewer	options	
	e Line	TYPE T	YPE	NO.	DESCRIPTION	DI SI	 QUA
	Time	and Mat Re	esource	LABOR	4		
	Time	and Mat Re	esource	LABOR	4		



Click on the cell Quantity					
	Navigate Fewer option	ns			
	DESCRIPTION	DE SE	QUANTITY	UNIT OF MEASURE CODE	UNIT COST
	Labor - Check Fluid Le	evels		HOUR	22.25
Enter the text .25 .					
Enter the quantity of time it will take to perform the task.	Navigate Fewer option	ns			
	DESCRIPTION	DE SE	QUANTITY	UNIT OF MEASURE CODE	UNIT COST
	Labor - Check Fluid Le	vels		HOUR	22.25
Click on the cell Coming Unit No. with the value					
Click on the cell Service Unit No. with the value SU00004	SERVICE TICKET DETA	AILS WORK DATE	: 4/8/2019	ltem Availabili	ity By Location
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3.4.3.5.	How to Print the	Servic	e Tick	ket
Click on the navigation menu item popup Report			cs 365 Busin	ness Central
				SERVICE TICKET WORK DATE: 4/8/2019
				ST00001 · Service Ticket #
				Process Report Actions Navigate Fewer options
				General
				Customer No. C00010
				Customer Name
Click on the navigation	menu item Print	-,		
			•	SERVICE TICKET WORK DATE: 4/8/2019
				ST00001 · Service Ticket #
				Process Report Actions Navigate Fewer options
				Print Prepare to print the document. A report request window for the docum
				Customer No. C00010
				Customer Name
				Description Service Ticket #S
Click on Send to Prin	nt Preview Cancel	Service Ticke	t #ST00001 - I	Job Planning Line
The standard Microsoft Central, printing options	Dynamics 365 Business s are available to select from.	1/8/2019		Show results: Where: Job Task No. • is:
		ewer option:	5	
		AL NO.	DESCRIF	Send to., Print Preview
			Skid Steer	r General Service
			Oil Chang	ge for Skid Steers 4/15/2019 4/15/2019 4/15/2019 4/15/2019
			Air Eiltor f	for Skid Steers ///15/2019 ///15/2019





The following picture displays the Service Ticket document.

Service Ticket						
Service Ticket #ST000	01 - Inter	nal Servicing Custo	omer			
Assigned Technician:						
Service Date: 4/15/20	19					
Internal Servicing Customer			CRONUS SERVICE, Inc. 7122 South Anford Street Westminster Atlanta, 31772			
Description		Task Type	No.	Quantity	Unit Price	Total Price
SU00002-Skid Steer Loader - Skid Steer General Service	Internal					
Jahor - Luba		Pasourca	LABOR	0.5	75.00	375
cabbi - cobe	Parts: 0.00	Labor: 37.50	Other: 0.00	0.5	75.00	37.5
Dil Change for Skid Steers						
Labor - Oil Change		Resource	LABOR	1	75.00	75.0
Oil Filter		Item	1001	1	11.75	11.7
Oil Gasket		Item	1002	1	2.75	2.7
Mobile Oil 5W30		Item	1003	5	10.75	53.7
Pi	arts: 68.25	Labor: 75.00	Other: 0.00			143.2
Air Filter for Skid Steers						
Labor - Replace Air Filter		Resource	LABOR	0.5	75.00	37.5
Air Filter for Skid Steer		item	1004	1	20.75	20.7
Pi ncome - Shop Supplies	arts: 20.75	Labor: 37.50	Other: 0.00			58.2
Income - Shop Supplies		G/L Account	40150	1	20.00	20.0
	Parts: 0.00	Labor: 0.00	Other: 20.00	10		20.0
Fest Battery						
Labor - Check Battery		Resource	LABOR	0.25	75.00	18.7
	Parts: 0.00	Labor: 18.75	Other: 0.00			18.7
P. 5U00003-Skid Steer Loader S	arts: 89.00 450	Labor: 168.75	Other: 20.00	Tot	al SU00002:	277.7
neck fluid levels		0	11000	0.07	75.00	
Labor - Check Huld Levels	Parts: 0.00	Labor 19 75	Other: 0.00	0.25	/5.00	18.7
	ura. 0.00	LUDOT. 10./3	other. 0.00		Total Parts: Total Labor:	89.00

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

365 Business Central									
	Service Ticket Work Date: 4/12/2021 ST00003 · Service Ticket #ST00003 - Adatum Co								
	Process Report Ticket Actions Related Fewer options General								
	Customer Name · · · · · · · · · Adatum Corporation ~								
	Description · · · · · · · · · · · Service Ticket #ST00003 - Adatum Corporation								
	Order Date								

opendoor	Open Door T	kyle@opendoorer p.com			
TECHNOLOGY					
Click on the navigation menu	tem popup Tickot				
		Service Ticket Work Date: 4/12/ STO0003 · Service Process Report Ticket Ticket ~ Customer Name Description Order Date	2021 Ce Ticket #ST00003 - Adatu Actions <u>Related</u> Fewer options Adatum Corporation Service Ticket #ST00003 - Adatum Corpora 4/12/2021		
Click on the navigation menu	tem Checklist	Process Report Ticket Ticket ~ Dimensions Checklist Attachments Service Date Contact · · · · · · · · · · · · · · · · · · ·	Actions <u>Related</u> Fewer options Adatum Corporation Service Ticket #ST00003 - Adatum Corpore 4/12/2021 4/12/2021 Robert Townes		
Click on the link in cell Check SS-GENSERV CHECKLIST	l ist Code with the value	S C SERVICE TICKET I WORK DA C STOOOO3 · Process Report G General Customer No. Customer Name Description	TICKET CHECKLISTS WORK DATE: 4/8/2019 Search + New Manage Report CHECKLIST CODE SS-GENSERV CHECKLIST Open record "SS-GENSERV CHECKLIST" in a new v		
Click on the navigation menu	tem popup Report	Dynamics 365 Business Central	t I WORK DATE: 4/8/2019 D3 · SS-GENERAL SE ss-genserv Check Skid Steer General S		


			· 4/8/2019	
	<u> </u>			~ -
		ST00003 · SS	S-GENERAL S	SE
		Report		
		Rint Checklist		
		Print the ticket checklist.		
		Checklist Code	SS-GENSERV C	СНЕСК
		Name · · · · · · · · · · · · · · · · · · ·	Skid Steer Gen	neral S
Click on Send to Print Preview Cancel			5.00005	
The standard Microsoft Dynamics 365 Business				
Central, printing options are available to select from.				
	teer General Service Chec			
		Send to	. Print Preview Ca	ancel
	MIN. VALUE	MAX. VALUE MEASURE CODE	VALUE DECIMAL VALU	JE C
	0.00	0.00	0.0	00
	0.00	0.00	0.0	00
The following picture displays the Checklist document which is for the template, SS-General Service.	Ticket No.: ST000 Skid Steer General Se Adatum Corporati	03 - Service Ticket #ST00003 - Adat ervice Checklist ion CRONUS SEF 7122 South Ashfc	tum Corporation RVICE, Inc. and Street	
	192 Market Square	Westminster		
	192 Market Square , GA 31772 USA	Westminster Atlanta, 31772		
	Kobert Townes 192 Market Square . GA 31772 USA Assigned Technician: Lab	Westminster Atlanta, 31772 2007 - Oil Change Service Date: 4/15	5/2019	
	Koper Lownes 192 Market Square , GA 31772 USA Assigned Technician: Lab	Westminster Atlanta, 31772 xor - Oli Change Service Date: 4/15	5/2019 Value	
	Kopert rownes 192 Market Square , GA 31772 USA Assigned Technician: Lab Description Check Under the Hood Wordshida Washe Elido	Westminster Atlanta, 31772 por - Oil Change Service Date: 4/15	5/2019 Value	
	Robert rownes 192 Market Square , GA 31772 USA Assigned Technician: Lab Description Check Under the Hood Windshield Washer Fluid Coolant Description	Westminster Atlanta, 31772 bor - Oil Change Service Date: 4/15	5/2019 Value	
	Kobert rownes 192 Market Square , GA 31772 USA Assigned Technician: Lab Description Check Under the Hood Windshield Washer Fluid Coolant Brake Fluid Check Tires	Westminster Atlanta, 31772 por - Oil Change Service Date: 4/15	5/2019	
	Kobert rownes 192 Market Square , GA 31772 USA Assigned Technician: Lab Description Check Under the Hood Windshield Washer Fluid Coolant Brake Fluid Check Tires Tire Condition: RF Tread., Tire Condition: RF Tread.	Westminster Atlanta, 31772 bor - Oil Change Service Date: 4/15 Level	5/2019	
	192 Market Square , GA 31772 USA Assigned Technician: Lab Description Check Under the Hood Windshield Washer Fluid Coolant Brake Fluid Check Tires Tire Condition: LF Tread. Tire Condition: RF Tread. Tire Condition: RF Tread.	Vestminster Atlanta, 31772 bor - Oil Change Service Date: 4/15 Level	Value	
	ISP Market Square GA 31772 USA Assigned Technician: Lab Description Check Under the Hood Windshield Washer Fluid Colant Brake Fluid Check Tires Tire Condition: LR Tread. Tire Condition: LR Tread. Tire Condition: LR Tread. Tire Condition: RR Tread. Tire Condition: RR Tread. Tire Condition: RR Tread. Tire Condition: RR Tread.	Vestminster Atlanta, 31772 bor - Oil Change Service Date: 4/15 Level	5/2019	
	Nober Lowies 192 Market Square , GA 31772 USA Assigned Technician: Lab Description Check Under the Hood Windshield Washer Fluid Coolant Brake Fluid Check Tires Tire Condition: LF Tread., Tire Condition: RF Tread.,	Vestminster Atlanta, 31772 Dor - Oil Change Service Date: 4/15 Level	5/2019	
	ISOBET Lowies ISO Market Square G A 31772 USA Assigned Technician: Lab Description Check Under the Hood Windshield Washer Fluid Coolant Brake Fluid Check Tires Tire Condition: LF Tread:, Tire Condition: RF Tread; Tire Condition: RF Tread; Coll Type	Westminster Atlanta, 31772 bor - Oil Change Service Date: 4/15 Level	5/2019	
	Nobert rownes 192 Market Square , GA 31772 USA Assigned Technician: Lab Description Check Under the Hood Windshield Washer Fluid Colant Brake Fluid Check Tires Tire Condition: RF Tread., Tire Condition: RF Tread., Tire Condition: RF Tread., Tire Condition: RF Tread.,	Westminster Atlanta, 31772 bor - Oil Change Service Date: 4/19 Level	5/2019	
	Nober Lowies 192 Market Square , GA 31772 USA Assigned Technician: Lab Description Check Under the Hood Windshield Washer Fluid Coolant Brake Fluid Check Tires Tire Condition: LF Tread., Tire Condition: RF Tread., Tire Condition: RF Tread., Tire Condition: RF Tread.	Westminster Atlanta, 31772 Door - Oil Change Service Date: 4/15 Level	5/2019	
	Robert rownes 192 Market Square , GA 31772 USA Assigned Technician: Lab Description Check Under the Hood Windshield Washer Fluid Coclant Brake Fluid Check Tires Tire Condition: LF Tread. Tire Condition: LF Tread. Tire Condition: RF Tread. Tire Condition: RF Tread. Oil Type	Westminster Atlanta, 31772 bor - Oil Change Service Date: 4/15 Level	5/2019	
	ISOBET LOWIES ISO NAMES SQUARE SQUARE SQUARE GA 31772 USA Assigned Technician: Lab Description Check Under the Hood Windshield Washer Fluid Coolant Brake Fluid Check Tires Tire Condition: LF Tread; Tire Condition: LF Tread; Tire Condition: LF Tread; Coll Type Technician:	Vestminster Atlanta, 31772 bor - Oil Change Service Date: 4/15 Level	5/2019	

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

The entry is optional.



The Checklist must be set to Edit mode to enter the technicians' findings.

+ ii
L SERVICE · SS-GEN Make changes on the page. ECKLIST
SERV CHECKLIST
er General Service Checklist

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					L	
			Checklist Details	Mar	nage	
			DESCRIPTIO	Ν		MIN. V.
			Check Under	the Hood		_
			Windshield W	/asher Fluid I	Level	-
			Brake Fluid			
			Check Tires			
			Tire Condition	n: LF Tread: /	32	
			Tire Condition	n: RF Tread: /	32	
			Tire Condition	n: LR Tread: /	32	
Click on Boolean Value						
				2001		
	LUE	MAX. VALUE	MEASURE CODE	VALUE	DECIMAL VALUE	OPTION VALUE
	0.00	0.00			0.00	
	0.00	0.00			0.00	
	0.00	0.00			0.00	
	0.00	0.00			0.00	
	0.00	0.00			0.00	
	0.00	32.00			0.00	
	0.00	32.00			0.00	
Click on the cell Description with the value Coolant						
Click of the cell Description with the value Coolant				1		
			Checklist Details	Mar	nage	
			DESCRIPTIO	N		MIN. V.
			Check Under	the Hood		
			Windshield V	Vasher 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





Click on Doolean value	Click	on	Boo	lean	Value
-------------------------------	-------	----	-----	------	-------

LUE	MAX. VALUE	UNIT OF MEASURE CODE	BOOL VALUE	DECIMAL VALUE	OPTION VALUE
0.00	0.00			0.00	
0.00	0.00			0.00	
0.00	0.00			0.00	
0.00	0.00			0.00	
0.00	0.00			0.00	
0.00	32.00			0.00	
0.00	32.00			0.00	
0.00	32.00			0.00	
0.00	32.00			0.00	

Click on the cell $\ensuremath{\text{Description}}$ with the value $\ensuremath{\text{Brake}}$ $\ensuremath{\text{Fluid}}$

Checklist Details Manage		
DESCRIPTION		MIN
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			0.00	
0.00	0.00			0.00	
0.00	0.00			0.00	
0.00	0.00			0.00	
0.00	0.00			0.00	
0.00	32.00			0.00	
0.00	32.00			0.00	
0.00	32.00			0.00	
0.00	32.00			0.00	
0.00	0.00			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			0.00	
0.00			0.00	
0.00			0.00	
0.00			0.00	
0.00			0.00	
32.00			0.00	
32.00			0.00	
32.00			0.00	
32.00			0.00	
0.00			0.00	



Enter the text 22 .	MAX. VALUE	UNIT OF MEASURE CODE	BOOL VALUE	DECIMAL VALUE	OPTION VALUE
	0.00			0.00	
	0.00		v	0.00	
	0.00			0.00	
	0.00		 Image: A start of the start of	0.00	
	0.00			0.00	
	32.00			2	
	32.00			0.00	
	32.00			0.00	
	32.00			0.00	
	0.00			0.00	
Click on the cell Decimal Value with the value 0 00	MAX. VALUE	MEASURE CODE	VALUE	DECIMAL VALUE	OPTION VALUE
	0.00			0.00	
	0.00			0.00	
	0.00			0.00	
	0.00			0.00	
	0.00			0.00	
	32.00			22	1
	32.00			0.00	
	32.00			0.00	
	32.00			0.00	
	0.00			0.00	
Enter the text 22 .	MAX. VALUE	MEASURE CODE	VALUE	DECIMAL VALUE	OPTION VALUE
	0.00			0.00	
	0.00		1	0.00	
	0.00			0.00	
	0.00		1	0.00	
	0.00			0.00	
	32.00			22.00	
	32.00				
				22	
	32.00			22	
	32.00 32.00			22 0.00 0.00	
	32.00 32.00 0.00			22 0.00 0.00 0.00	
	32.00 32.00 0.00			0.00 0.00 0.00	
Click on the cell Decimal Value with the value 0 .00	32.00 32.00 0.00			0.00 0.00 0.00	
Click on the cell Decimal Value with the value 0.00	32.00 32.00 0.00			0.00 0.00 0.00 0.00	
Click on the cell Decimal Value with the value 0.00	32.00 32.00 0.00 0.00 0.00 0.00			0.00 0.00 0.00 0.00 0.00 0.00 0.00	
Click on the cell Decimal Value with the value 0.00	32.00 32.00 0.00 0.00 0.00 0.00 0.00			0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.0	
Click on the cell Decimal Value with the value 0.00	32.00 32.00 0.00 0.00 0.00 0.00 0.00 0.0			22 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0	
Click on the cell Decimal Value with the value 0.00	32.00 32.00 0.00 0.00 0.00 0.00 0.00 0.0			22 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0	
Click on the cell Decimal Value with the value 0.00	32.00 32.00 0.00 0.00 0.00 0.00 0.00 0.0			22 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0	
Click on the cell Decimal Value with the value 0.00	32.00 32.00 0.00 0.00 0.00 0.00 0.00 0.0			22 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0	
Click on the cell Decimal Value with the value 0.00	32.00 32.00 0.00 0.00 0.00 0.00 0.00 0.0			22 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0	
Click on the cell Decimal Value with the value 0.00	32.00 32.00 0.00 0.00 0.00 0.00 0.00 0.0			22 0.00 0.00 0.00 0.00 0.00 0.00 0.00 22.00 22.00 22 0.00 0 0.00	
Click on the cell Decimal Value with the value 0.00	32.00 32.00 0.00 0.00 0.00 0.00 0.00 32.00 32.00 32.00 32.00 0.00			0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.0	



ODT Service Help

Enter the text 12	0.00		0.00	
	0.00		0.00	
	0.00		0.00	
	0.00		0.00	
	0.00		0.00	
	32.00		22.00	
	32.00		22.00	
	32.00		1	
	32.00		0.00	
	0.00		0.00	
Click on the cell Decimal Value with the value 0.00	0.00		0.00	
	0.00		0.00	
	0.00	Image: A start of the start	0.00	
	0.00		0.00	
	32.00		22.00	
	32.00		22.00	
	32.00		12	
	32.00		0.00	
	0.00		0.00	
Enter the text 11 .	0.00		0.00	
	0.00		0.00	
	0.00	Ø	0.00	
	0.00		0.00	
	32.00		22.00	
	32.00		22.00	
	32.00		12.00	
	32.00		11	
	0.00		0.00	

The following demonstrates the entry where there are multiple option values to choose from.

Click on the cell **Description** with the value **Oil Type**

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	Brake Fluid Check Tires Tire Condition: LF Tread: /32 Tire Condition: RF Tread: /32 Tire Condition: RR Tread: /32 Tire Condition: RR Tread: /32 Oil Type	Brake Fluid	
Check Tires Check Tires Tire Condition: LF Tread: /32 Tire Condition: RF Tread: /32 Tire Condition: RR Tread: /32 Tire Condition: RR Tread: /32 Cold Type Co	Check Tires Check Tires Tire Condition: LF Tread: /32 Tire Condition: RF Tread: /32 Tire Condition: RR Tread: /32 Tire Condition: RR Tread: /32 Oil Type Oil Type Oil Type	erence rivere	
Tire Condition: LF Tread: /32 Tire Condition: RF Tread: /32 Tire Condition: RF Tread: /32 Tire Condition: RR Tread: /32 iii Oil Type Oil Type	Tire Condition: LF Tread: /32 Tire Condition: RF Tread: /32 Tire Condition: RF Tread: /32 Tire Condition: RR Tread: /32 Oil Type Oil Type	Check Tires	
Tire Condition: El Fread: /32 Tire Condition: RF Tread: /32 Tire Condition: RR Tread: /32 Tire Condition: RR Tread: /32 Oil Type	The Condition: Printed / 22 Tire Condition: RF Tread: /32 Tire Condition: RR Tread: /32 Tire Condition: RR Tread: /32 Oil Type Oil Type	Tire Condition: LE Tread: /32	
Tire Condition: LR Tread: /32 Tire Condition: RR Tread: /32	Tire Condition: LR Tread: /32 Tire Condition: RR Tread: /32 Oil Type Oil Type	Tire Condition: RF Tread: /32	
Tire Condition: RR Tread: /32 : Oil Type : Oil Type	Tire Condition: RR Tread: /32 I Oil Type I Oil Type Oil Type	Tire Condition: LR Tread: /32	
Oil Type	Oil Type :	Tire Condition: RR Tread: /32	
Oil Type	Oil Type	Oil Type	÷
		Oil Type	2



ODT Service Help

			0.00		
Click on the cell Option Value		•	0.00		
		•	0.00		
			22.00		
			22.00		
			12.00		
			11.00		
			0.00		
			-		
Click on the link in cell Value with the value Mobil	22.00				
	12.00				
	11.00				
	0.00		`	~	
		V	ALUE		
		N	lobil		
		Q	Select record "Mobil"		
	L	+ New		Se	lect from full list
Click on the back button					
	Dynamics 36	5 Busines	s Central		
		(TICKET CHECKLIST V	VORK DATE: 4/15/2019	
		В	ST00003	8 · SS-GENE	RAL SE
			Report		
			General		
			Checklist Code		SS-GENSERV CHEC
			Name · · · · · · · · · · ·		Skid Steer General

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 popup Process	Dynamics 36	5 Busines	s Central
	÷	÷	SERVICE TICKET WORK DATE: 4/15/2019
	100		ST00003 · Service Ticket #\$
			Process Report Actions Navigate Fewer options
			General
			Customer No
			Customer Name
Click on the navigation menu item Confirm Actuals			
	< <	- SERV	ICE TICKET WORK DATE: 4/15/2019
		ST	00003 · Service Ticket #ST0
		Proce	ss Report Actions Navigate Fewer options
		¥	Add Service Template
		Custo	mer No
		Custo	Mer Name Adatum Corporation
		Descr	iption Service Ticket #ST00003 - Ada
Click on the field Posting Date	alues from:	· · · · La	ast used options and filters
Verify the Posting Date is the correct date and if not,			
then enter or select the applicable date.			4/15/2019
).	····· D	OCST00003
	ne	J(Type the date in the format hi/th/typyy
		A	STAPLETON
			ACTUAL (TOTAL

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

		Document	vo.	DOCSTOOO	
Service Ticket #S	50000	Posting Date	2	4/15/2019	
4/8/2019		Template Na	ame · · · · · · · · · · · · · · · · ·	JOB	
		Batch Name		ASTAPLETO	N
Fewer options					
IAL NO.	DESC	Job Task			
	Skid :	Show results:			
	Skid S	Where:	Job No.	▼ is:	ST00003
	Labor Oil Ch	And:	Job Task No.	▼ is:	
	Air Fil				

TECHNOLOGY	Open Door Technology Ind ODT Service Help	kyle@opendoorei p.com March 17, 2025 188/369		
Click on Job Planning Line	Skid	Show results:		
	Skid S	Where: Job No.	▼ is: ST00003	
	Labor Oil Cr	And: Job Task No.	▼ is:	
	Air Fil			
	Incom Skid S			
	Test B	Job Planning Line		
	Skid : S Check	Where: Type	▼ is:	
		And: No.	v is:	
		And: Rianning Data	is:	
Click on the button OK	_	Thanning Date		
	e			
	•	is:	•	
	•	is:	~	
	ing Date 🔻	is:		
	ncy Date	is:	_	
			UNIT OF MEASURE	
		ОК	Cancel 0.5 HOUR	
	urce LABOR I	Labor - Oil Change	1 HOUR	
Click on the button OK	1001	Oil Eilter		
			-	
	ies were successfully transf	ferred to the journal.	(TOTAL ACTUAL (TOTAL BILL COST) COST)	
		OK	11.13 _	
	4/15/2019	4/15/2019	37.50	
	4/15/2015	4/15/2019	10.00 _	

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.

4/15/2019

4/15/2019

Click on the navigation menu item popup Post/Print

Dynamics 36	55 Busines	s Central							
	Manage	Process	Prepare	Post/Print	Job	Line		Actions	Na
	EDIT - JOE	3 JOURNAL	S - ASTAPL	ETON · ODT\AS1	TAPLET	ON JOURI	NAL		
	Batch Nan	ne							
	LINE TY	PE	LOCATION CODE	BIN CODE	W C	ORK TYP	E	UNIT OF MEASURE CODE	
								HOUR	
								HOUR	
								PCS	
								PCS	

5.56



Click on the link Post	Dynamics	365 Bu	siness Centra				
Alternatively Post and Print can be selected.		Man	age Process	Prepare	Post/Print Jo	b Line	Actions Na
			Post 🖶 Pos	t and Print			
		Bato	:h Name				
		LI	NE TYPE	LOCATION CODE	BIN CODE	WORK TYPE CODE	UNIT OF MEASURE CODE
							HOUR
							PCS
							PCS
Click on the button Yes	1	4.25	4.25	4.25	4.25	5 20	0.75 20
	1 5 2	22.25	22.25	5.56	10.00) 10 5 7	0.00 10. 5.00 18
						7:	5.00 18
	? Do you	i want to	post the journa	l lines?			
				_			
					Yes No		
				Income - Sho	p : Yes lies	-	
			4/15/2019	4/15/20)19	5.56	
Click on the button OK	4.25	4.2	25 4	.25	4.25	20.75	20.75
	10.00	10.0	00 10 25 5	.00 1	0.00 5.56	10.00 75.00	10.00
		ter for i for			5.50	75.00	18.75
	ournal lines w	ere succe	essfully posted.				
				_	_		
					ок		
			Income -	Shop Supplies	ОК		
		4/15/2	2019 4/1	5/2019	5.5	66	_
Click on the button Close							
						Close	
	ACTUAL (TO	TAL F	BILLABLE (TOTA	L BIL	LABLE	Close	
	CC	DST)	PRICE) (INVOICED	PRICE)		
		-		-	-		
		-	37.5				

3.4.3.8. How to Print the Proforma Invoice

The following demonstrates printing the proforma invoice for a service ticket.

andoor	Open Door	Technology Inc.	kyle@opend
TECHNOLOGY	ODT S	۲ March 17, 19	
Click on the navigation menu item	popup Report	Dynamics 365 Business Central	
		Consider Tigket Work Dates	4/6/2020
		ST00001 · Ser	vice Ticket #ST00001 -
		Process Papart Tick	at Actions Polated Fower ontion
		General	
		General	
		Description	Service Ticket #S
		Order Date	4/6/2020
Click on the navigation menu item I	Print Proforma	Dynamics 365 Business Central	
		Service Ticket Work Date:	4/6/2020
		ST00001 · Ser	vice Ticket #ST00001 -
		Process <u>Report</u> Tick	et Actions Related Fewer option
		🖶 Print 📮 Print Pr	oforma
		Customer Name	Adatum Corpora
		Description	Service Ticket #S
		Order Date	4/6/2020
Click on the toggle field Print Com	pany Address		
)1 - Adatu Printer	(Handled by the browser)
		Options	
		Number of Copies	
		Print Company Address	
		Filter: Job	
		scription × No.	ST00001
Click on the button Preview		:er	1:
			3
		ced >	
		Cand to Det	Int Proving Cancel
		Send to Pri	Cancel
		No. Description	Defer Unit of Serv Quantity Measure Cor
		LABOR Labor - Lube	0.5 HOUR



The following picture is an example of a proforma invoice.

				Service	Protorm
CRONUS SERVICE	E, Inc				Page:
7122 South Ashfo	ord Street				
Westminster			Service Ticket	Number:	STODOG
Atlanta, GA 31772	2		Service Ticket	Date:	4/6/202
Sold To: Ad	atum Corporation		Ship To:	Adatum Corporation	
Ko	bert lownes			Robert Lownes	
19.	2 Market Square			192 Market Square	
US	A			USA	
Tax Ident. Type	Legal Entity		Custo	omer ID	100
Chie Mie			P.O.	Number	416.000
Ship Date	4/6/2020		P.O.	Person	Peter Saddo
Terms	1 Month/296	8 days	Sales		- eter 53000
Item No.	Description	Unit	Quantity	Unit Price	Total Pri
SU00001-2015 N	NISSAN Titan				
20,000 KM Servi Labor - Lube	ce				
LABOR	Labor - Lube	Hour	0.50		
Oil Change	Parts: 0.00	Labor: 0.00	Other: 0.00		
LABOR	Jabor - Oil Change	Hour	1.00	75.00	75
OULEILTER	Filter Oil	Diere	1.00	11.75	11
OUGASKET	Gasket Oil	Piece	1.00	2.75	2
MORILIEWZO	Mobil 1 EW20	Diece	5.00	10.75	£2.
and dict of the dist	Parts: 68.25	Labor: 75.00	Other: 0.00	10.75	143.
Rotate Tires					
LABOR	Labor - Rotate Tires	Hour	0.50	75.00	37.
	Parts: 0.00	Labor: 37.50	Other: 0.00		37.
	Parts: 68.25	Labor: 112.50	Other: 0.00	Total SU00001:	180.
20.000 KM Servi	ce				
Oil Change					
LABOR	Labor - Oil Change	Hour	1.00	75.00	75.
OILFILTER	Filter, Oil	Piece	1.00	11.75	112
OILGASKET	Gasket, Oil	Piece	1.00	2.75	2.
MOBIL15W30	Mobil 1 5W30	Piece	5.00	10.75	53.
	Parts: 68.25	Labor: 75.00	Other: 0.00		143.
	Parts: 68.25	Labor: 75.00	Other: 0.00	Total SU00004:	143.
Amount Subject t	to Sales Tax 324.00			Subtotal:	324.0
Amount Exempt f	from Sales Tax 0.00			Invoice Discount:	0.0
				Total Sales Tax	12.

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	Dynamics 365 Business Central				
	(SERVICE TICKET WORK DATE: 4/15/2019			
	100	ST00003 · Service Ticket #S			
		Process Report Actions Navigate Fewer options			
		General			
		Customer No			
		Customer Name Adatum Corporation			
Click on the navigation menu item Create Service					
Sales Invoice	DATE: 4/15/2019	 (2) + 			
	· Service	Ticket #ST00003 - Adatum Co			
	Actions Navigate	Fewer options			
	te 🛛 🔒 Confirm Actual	Is 📓 View Job Journal 📓 Create Service Sales Invoice 🕏 Mark Com			
		[10000 \sigma Serv			
		Adatum Corporation Serv			
		Service Ticket #ST00003 - Adatum Corporation Assi			



Click on the field Posting Date						
Verify that the Posting Date is the correct date. If not, then enter or select the applicable date.		EDIT - JOB CREATE SALES INVOICE				
then enter or select the applicable date.	#ST(Optio	ns			
	Posting Date					e Tormac Mi/di/yyyy
	Job Task					
	ration	Show res	ults:	_ is	5' 0700000	
Click on Job Task	-ket a	#ST(Options			
			Posting Dat	e	4/15/2019	
	wer options		Create Invo	ice per	Job	
	00		Job Task			
	tum Corpora	tion	Show results:			
	rice Ticket #S	T00003 - A	Where:	Job No.	▼ is: ST000	003
	2019		And:	Job Task No.	▼ is:	
			Limit totals to	8		
Click on the button OK	Job Task I	No.	▼ IS			
	to:					
	Planning	Date Filter	v v is			
					AL (T)	ACTUAL (TOTAL COST)
				ОК	Cancel _	-
			4/15/2015	4/13/2013 OK		11.13
	ers		4/15/2019	4/15/2019	37.50	37.50
	3		4/15/2019	4/15/2019	10.00	10.00
	ice		_		85.13	85.13

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**

s 3(55 Business Central
	Service Ticket Work Date: 4/12/2021 ST00003 · Service Ticket #ST00003 - Adatum Co
	Process Report Ticket Actions Related Fewer options General
	Customer Name · · · · · · · · Adatum Corporation ~
	Description · · · · · · · · · · · · Service Ticket #ST00003 - Adatum Corporation
	Order Date

ope	

Click on the navigation menu item popup Ticket	Dynamics 365 Business Central
	Customer Name Adatum Corporation Description Service Ticket #ST00003 - Adatum Corporation Order Date 4/12/2021
Click on the navigation menu item Sales Invoices/Credit Memos	ST00003 · Service Ticket #ST00003 - Adatu Process Report Ticket Actions Related Fewer options Ticket ~ Dimensions Service Ticket #ST00003 - Adatum Corporation Service Ticket #ST00003 - Adatum Corporation Adatum Corporatio
Click on the cell Document Type with the value Invoice	SERVICE TICKET I WORK DATE: 4/15/2019 Search Copen Sales Invo/Credit Memo VIEW - JOB INVOICES Process Report Actions Naviga DOCUMENT DOCUMENT NN. LINE NO. General Invoice S-INV102222 O Invoice
Click on the navigation menu item Open Sales Invoice/Credit Memo	CKET I WORK DATE: 4/15/2019



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Click on the navigation menu item popup Posting	
	CE TICKET WORK DATE: 4/15/2019 Manage Posting Prepare Invoice Release Re
	General
	s Report Actions Naviga
	ral Contact · · · · · · Robert Townes
	ner No
	Lines Manage More options
Click on Post Post and New Post and Send Preview Posting	
The standard Microsoft Dynamics 365 Business	K DATE: 4/15/2019 Manage Posting Prepare Invoice Release Request Approva
Central options are available for posting.	• Service Post Dest and New Service Preview Post
	General
	Actions Naviga Customer Name Adatum Corporation Po
	Contact · · · · · · Robert Townes · · · Du
	Lines Manage More options
Click on the navigation menu item Post	s Central
	SERVICE TICKET I WORK DATE: 4/15/2019 Manage Posting Prepare Invoice Rel
	CTOOOO2 . Convict Post Post and New * Post and S
	STOUDUS SETVICE Finalize the document or journal by posting the am General
	Process Report Actions Navige
	General Contact · · · · · · · Robert Townes
	Customer No.
	Customer Name Lines Manage More options
Click on the button Yes	Labor - Lube 0.5 HOUR
	Labor - Oil Change 1 HOUR
	Do you want to post the invoice?
	PCS HOUR
	Yes No PCS
	Ves HOUR
	Labor - Check Fluid Levels 0.25 HOUR



Click on the button Yes

Open Door Technology Inc.

ODT Service Help

	Labor - Lube		0.5	HOUR	
	Labor - Oil Change		1	HOUR	
	The inveice is posted as number DC I	NIV/10221E and a	actual to the	PCS	
?	Posted Sales Invoices window.	NV 103213 and n	loved to the	PCS	
				PCS	
	Do you want to open the posted invo	bice?		HOUR	
				PCS	
		Yes	No	110110	
				HOUR	
		Yes	0.20	HOUR	
					Þ

The following demonstrates printing the Service Invoice.

Click on the navigation menu item popup Print/Send	Dynamics 365 Business Central			
	< ·	POSTED SALES INVOICE WORK DATE: 4/15/2019		
		PS-INV103215 · Adatum Co		
		Invoice Correct Print/Send Navigate Electronic Document		
		General		
		No PS-INV103215		
		Customer Adatum Corporation		
Click on the navigation menu item Print Service Invoice		D SALES INVOICE WORK DATE: 4/15/2019		
	PS	-INV103215 · Adatum Corporatio		
	Invoice	Correct Print/Send Navigate Electronic Document Actions		
	월 S	end 🖶 Print 🖻 Email 🔛 Print Service Invoice		
	No.	Print Service Invoice PS-INV103215		
	Custon	er Adatum Corporation		
	Contac	t Robert Townes		
Click on Print Company Address, No				
By default the first time the Print - Service Invoice is	EDIT	- SERVICE - INVOICE		
disabled. Therefore, to print company information, this	Cor op	tions		
field must be enabled.	Print	Company Address		
	Log	Interaction · · · · · · · · · · · ·		
	Show	v Assembly Components · · · · · ·		



Click on Send to Print Preview Cancel	And: Bill-to Customer No. V is:
The standard Microsoft Dynamics 365 Business Central, printing options are available to select from.	Labor - Lube And: No. Printed Is: Labor - Oil Chai And: No. Printed is: Oil Filter Oil Gasket Mobile Oil SW Send to Print Labor - Replace Send to Print Air Filter for Sti 1 20.00 Income - Shop Supplies 1 20.00 Labor - Test Battery 0.25 HOUR Labor - Check Fluid Levels 0.25 HOUR
The following pictures display a posted Service Invoice.	CRONUS SERVICE. Inc. 7122 South Anthord Street. Westminister Atlanta, 31772 Involte Number: PS-INV103215 Involte Date: 4/15/2019
	Bill Te: Adatum Corporation Robert Townes 102 Marks Square (GA 31772 USA Tax (dent. Type Legal Entry) Tax (dent. Type Legal Entry) Tax (dent. Type Legal Entry) DisA Tax (dent. Type Legal Entry) Tax (dent. Type Legal Entry) DisA Tax (dent. Type Legal Entry) DisA Tax (dent. Type Legal Entry) DisA Tax (dent. Type Legal Entry) DisA DisA Tax (dent. Type Legal Entry) DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA DisA
	Service Ticket #ST00003 - Adatum Corporation Item/Description Unit Quantity Unit Price Total Price SU00001-Skid Ster Loader 5450 Skid Ster conrect Service Air Filter for Skid Steers
	LABOR Labor 75.00 38.69 1004 Air Fitter for Stdd Steer Filece 1 20.75 21.79 Parts: 20.75 Labor: 37.59 Other: 0.00 60.42 Income - Shop Supplies 1 20.00 21.00 Parts: 0.00 Labor: 0.00 Other: 20.00 21.00 Labor: - Lube - - -
	Labor Lobe Hour 0.5 75.00 38.62 Parts: 60.0 Labor 37.50 Others 0.00 38.62 OII Change for 5kid Steers 0 0.00 38.62 DII Change for 5kid Steers 0 0.00 7.25 DIO Change for 5kid Steers 1 7.500 77.25 DIO Change for 5kid Steers 1 1.75 12.34 DIO2 Of Gastert Piece 1 2.75 2.88 DIO3 Mobile OI SVRD Piece 5 10.75 56.44 Parts: 68.25 Labor 75.00 Other 0.00 148.91



CRONUS 7122 So	uth Ashford Street				INVOICE
Westmin	nster				Page: 2
Atlanta,	31772			Invoice Number: Invoice Date:	P5-INV103215 4/15/2019
2.01					
To: A	Adatum Corporation			Ship	
R	Robert Townes			To: Adatum Corporation	
1	92 Market Square			Robert Townes	
1	GA 31772			192 Market Square	
L	JSA			USA	
ax Iden	it. Type Le	gal Entity			10000
Inite Let				PO Number	10000
hip Via		15/2010		P.O. Date	4/15/2019
Due Det	4/ •	15/2019		Our Order No.	
Lore Dati	- 5/	Jonth / 796 8 days		SalesPerson	Peter Saddow
Fest Bat	ttery				
Fest Bat ABOR	ttery Labor - Test Battery Parts: 0.00	Hour Labor: 18.75	0.25 Other: 0.00	75.00	19.31
Test Bat ABOR	ttery Labor - Test Battery Parts: 0.00	Hour Labor: 18.75	0.25 Other: 0.00	75.00	19.31 19.31
Fest Bat ABOR SU0000	ttery Labor - Test Battery Parts: 0.00 Parts: 89.00 04-Skid Steer Loader S70 ter General Service	Hour Labor: 18.75 Labor: 168.75	0.25 Other: 0.00 Other: 20.00	75.00 Total SU00001	<u>19.31</u> 19.31 <u>288.26</u>
Fest Bat ABOR GU0000 Gkid Ste Theck F	Labor - Test Battery Parts: 0.00 Parts: 89.00 04-Skid Steer Loader S70 per General Service luid Levels	Hour Labor: 18.75 Labor: 168.75	0.25 Other: 0.00 Other: 20.00	75.00 Total SU00001	<u>19.31</u> 19.31 <u>288.26</u>
Fest Bat ABOR SU0000 Skid Ste Check F ABOR	ttery Labor - Test Battery Parts: 0.00 Parts: 89.00 D4-Skid Steer Loader S70 eer General Service luid Levels Labor - Check Fluid Level	Hour Labor: 18.75 Labor: 168.75	0.25 Other: 0.00 Other: 20.00	75.00 Total SU00001 75.00	19.31 19.31 288.26
Fest Bat ABOR SU0000 Skid Ste Check F	ttery Labor - Test Battery Parts: 0.00 Parts: 89.00 04-Skid Steer Loader S70 ter General Service luid Levels Labor - Check Fluid Level Parts: 0.00	Hour Labor: 18.75 Labor: 168.75 2 s Hour Labor: 18.75	0.25 Other: 0.00 Other: 20.00 0.25 Other: 0.00	75.00 Total SU00001 75.00	19.31 19.31 288.26 19.32 19.32
GU0000 GU0000 Guikid Ste Theck Fi ABOR	ttery Labor - Test Battery Parts: 0.00 Parts: 89.00 04-Skid Steer Loader S70 ter General Service luid Levels Labor - Check Fluid Level Parts: 0.00 Parts: 0.00	Hour Labor: 18.75 Labor: 168.75 2 s Hour Labor: 18.75 Labor: 18.75	0.25 Other: 0.00 Other: 20.00 0.25 Other: 0.00 Other: 0.00	75.00 Total SU00001 75.00 Total SU00004	19.31 19.31 288.26 19.32 19.32
SU0000	ttery Labor - Test Battery Parts: 0.00 Parts: 89.00 04-Skid Steer Loader S70 rer General Service luid Levels Labor - Check Fluid Level Parts: 0.00 Parts: 0.00	Hour Labor: 18.75 Labor: 168.75 2 s Hour Labor: 18.75 Labor: 18.75	0.25 Other: 0.00 Other: 20.00 0.25 Other: 0.00 Other: 0.00	75.00 Total SU00001 75.00 Total SU00004	19.31 19.31 288.26 19.32 19.32
GU0000	ttery Labor - Test Battery Parts: 0.00 Parts: 89.00 04-Skid Steer Loader S70 ter General Service luid Levels Labor - Check Fluid Level Parts: 0.00 Parts: 0.00 Subject to Sales Tax USD	Hour Labor: 18.75 Labor: 168.75 2 s Hour Labor: 18.75 Labor: 18.75	0.25 Other: 0.00 Other: 20.00 0.25 Other: 0.00 Other: 0.00	Total SU00001 75.00 75.00 Total SU00004 Subtotal:	19.31 19.31 288.26 19.32 19.32 19.32
interim and the second se	ttery Labor - Test Battery Parts: 0.00 Parts: 89.00 04-Skid Steer Loader S70 Parts: 89.00 04-Skid Steer Loader S70 Parts: 0.00 Parts: 0.00 Parts: 0.00 Subject to Sales Tax USD Exempt from Sales Tax USD	Hour Labor: 18.75 Labor: 168.75 2 s Hour Labor: 18.75 Labor: 18.75 296.50 0.00	0.25 Other: 0.00 Other: 20.00 0.25 Other: 0.00 Other: 0.00	Total SU00001 75.00 75.00 Total SU00004 Subtotal: Invoice Discount: Total Subtotal:	19.31 19.31 288.26 19.32 19.32 19.32 296.50 0.00
imount	ttery Labor - Test Battery Parts: 0.00 Parts: 89.00 D4-Skid Steer Loader S70 Parts: 89.00 D4-Skid Steer Loader S70 Parts: 0.00 Parts: 0.00 Parts: 0.00 Subject to Sales Tax USD Exempt from Sales Tax USD	Hour Labor: 18.75 Labor: 168.75 2 s Hour Labor: 18.75 Labor: 18.75 296.50 0.00	0.25 Other: 0.00 Other: 20.00 0.25 Other: 0.00 Other: 0.00	Total SU00001 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.00 75.0	19.31 19.31 288.26 19.32 19.32 19.32 296.50 0.00 11.08

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**

	÷	~	- SERVICE TI	ICKET WORK DATE: 4,	/15/2019	
	100		STO(0003 · Se	ervice Tio	cket #S
			Process	Report Action	ns Navigate Fev	ver options
			General			
			Customer N	No		0
			Customer N	Name · · · · · · · · · · · ·	Adat	tum Corporation
Click on the navigation menu item Mark Complete						
				 + 	Ē	
	et #ST(000	03 - A	datum (Corporat	ion
	ptions					
	ew Job Journal	🗟 Crea	te Service Sales	Invoice 🥑 Mark C	omplete	
				~ 5	Mark the current service	ticket as completed
	Corporation			S	Service Ticket Type	
	cket #ST00003 - A	datum C	orporation	A	Assigned Technician	
Click on the button Yes Upon selecting Yes, the related Job Card, Status field will be set to Completed.					_	
	? Are you su	re you w	ant to mark this	service ticket as comp	leted? (TOTAL COST)	ACTUAL (TOT CO:
				Yes	No	11
	Steers		4/15/2019	4/15/2019	37.50	37
	eers		4/15/2019	4/15/2019	15.38	15
	plies		4/15/2019	4/15/2019	10.00	10
	Service		-	-	85.13	85
			4/15/2019	4/15/2019	5.56	5

3.4.3.11. How to use the Copy Document Feature

The following demonstrates how to sue the Copy Document Feature. Please note that the Service Ticket that will be used for this example was created in advance.

op



Click on the navigation menu item popup Process	Dynamics 365 Business Central
	E 10 10 10 10 10 10 10 10 10 10 10 10 10
	Service Ticket
	Process Report Ticket Actions Related Fewer options
	General
	Customer No.
Click on the navigation menu item Copy Document	
с I,	(2) + 10
	\bigcirc
	reate Service Sales Invoice 🛛 Mark Complete 🕫 Copy Document
	Contact ·····
	Assigned Technician
The Include Header taggle can be used to taggle if	
information from the header of the selected ticket is	Options
copied. It is enabled by default if a customer has not	Document No. ST00095
default if a customer has been selected before	Sell-to Customer No. · · · · · · 10000
copying.	Sell-to Customer Name · · · · · · Adatum Corporation
	Recalculate Lines
	Advanced >
The Recalculate Lines toggle can be used to toggle if	
service lines that get copied should have their prices recalculated after being copied.	Sell-to Customer No
······	Sell-to Customer Name · · · · · · Adatum Corporation
	Include Header
	Recalculate Lines
	Advanced >
	ок



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ODT Service Help

Click on the lookup button Document No.	Image: state of the state o
Select the service ticket that you want to copy.	
Click on the link in cell No. with the value ST00004	Actions Related rewer options Jobs $\mathcal{P} \sim + \text{New} \cdots$ * No. 1 T Description 5100002 Service Ticket #ST00002 - Service Ticket #ST00004 - ST00007 Service Ticket #ST00004 - Service Ticket #ST00007 - Service Ticket #ST00009 - ST00010 ST00010 Service Ticket #ST00010 - ST00015 Service Ticket #ST00015 - ST00018
Click on the button OK	eader te Lines te Lines CoK Cancel Defer Service Start Date End Date Budget (Total Cost) A
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 Name Adatum Corporation Description Service Ticket #ST00103 - Ad Order Date 4/12/2021 Service Date 4/12/2021 Contact Robert Townes

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**

eller en lite havigalien mena tem pepap eer nee	Transfer Orders
	ACTIONS
	+ Service Ticket Quote + Sales Order > Planned Maintena
	+ Service Ticket + Sales Return Order > Tasks
	+ Sales Quote + Sales Credit Memo > Sales
	+ Sales Invoice > Service > Peports
Click on the navigation menu item Service Units	+ Service Ticket Quote + Sales Order > Planne
	+ Service Ticket + Sales Return Order > Tasks
	+ Sales Quote + Sales Credit Memo > Sales
	+ Sales Invoice > Service > Report
	🛗 Service Ticket Quotes
	🗟 Service Tickets
	🗑 Service Units
	Open the list of service units.
Click on the link in cell Service Unit Ne , with the	
	SERVICE UNITS WORK DATE: 4/8/2019
	🔎 Search 🕂 New Manage 🖪 Open in Excel 🛛 Naviga
	SERVICE UNIT NO. DESCRIPTION
	SU00001 Skid Steer Loader S450
	SU Open record "SU00001" in a new window pader - Internal
	SU00003 Skid Steer Loader S450
	SU00004 Skid Steer Loader S70
Click on the navigation menu item Create Service	Dynamics 365 Business Central
If the selected service unit is already on another open	
service ticket a message will be displayed to indicate	SERVICE UNIT CARD WURK DATE: 4/8/2019
this and confirm if you want to proceed	SU00001
and and community you want to proceed.	
	🗋 Create Service Ticket 🛛 🚱 Create Servicet From Template
	Create a new service ticket for the surrant service unit
	General General
	Service Unit No. SU00001
	Description Skiel Steer Lander S
	Skid Steer Loader S





Sei Sei Ass Det

ODT Service Help

Click on the field Customer No.	· Service	Ticket #ST00004 - Adatur	n C		
The Customer No. is automatically populated based on the Customer setup on the Service Unit.	Actions Navigate Fewer options				
		10000 ~	Se		
		Adatum Corporation	Se		
		Service Ticket #ST00004 - Adatum Corporation	As		
		4/8/2019	De		
Click on the field Service Date	on				
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		Show more			
servicing is to occur on.		4/8/2019			
		Type the date in the format M/d/yyyy	1		
		SU00001 ~			
Click on the field Default Service Unit No.		Show more	Ť		
The Service Unit No. from which the Create Service		4/8/2019			
Ticket was ran from will automatically populate the					
Default Service Unit field.		~			
		SU00001 ~			

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.

BUDGET (TOTAL

COST)

ACTUAL (TOTAL

COST)

BILLABLE (TOTAL

PRICE)

BILLABLE

(INVOICED PRICE)

How to Create a Service Ticket with a Service Template 3.5.3.

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

Transfer Orders			
	ACTIONS + Service Ticket Quote + Service Ticket + Sales Quote + Sales Invoice	+ Sales Order + Sales Return Order + Sales Credit Memo > Service >	 > Planned Maintena > Tasks > Sales > Reports







ODT Sel	vice neip 204/309					
Click on the field Customor No.						
Chek on the held Customer No.	Page Actions Navigate Fewer options					
The Customer No. is automatically populated based on the Customer setup on the Service Unit.	005 - SERVICE TICKET #ST00005 - ADATUM CORPORATION					
	······ [10000]					
	Adatum Corporation					
	Service Ticket #ST00005 - Adatum Corporation					
	4/8/2019					
Click on the field Service Date	Sandbox Q (
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	7 Show more					
servicing is to occur on.	····· 4/8/2019 ඕ					
The Ticket Units/Lines are automatically created	Type the date in the format M/d(gggy					
based on the date from the users' Work Date.	~					
pop-up will occur asking if the user would like to update the lines. The user should select Yes, to update the lines	SU00001 V					
Click on the field Default Service Unit No						
	Show more					
The Service Unit No. from which the Create Service Ticket was ran from will automatically populate the	4/8/2019					
Default Service Unit field.	······					
	SU00001					
	BUDGET (TOTAL ACTUAL (TOTAL BILLABLE (TOTAL BILLABLE COST) COST) PRICE) (INVOICED PRICE)					
Click on the cell Description with the value Oil						
Change for Skid Steers	Manane line Fewer ontions					
The Service Template will automatically populate the Ticket Units/Lines, and the details of the template will	ODT SERVICE DEFER UNIT NO. SERIAL NO. DESCRIPTION SERVI					
populate the Service Ticket Details.	SU00001 Skid Steer Loader 5450					
	: 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.



> Find entries.

> Payments

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ODT Service Help

3.6. Service Warranties

3.6.1. How to set up Warranty Types Click on the navigation menu item popup Warranty + Service Ticket Quote + Purchase Quote + Purchase Order + Service Ticket + Service Unit + Purchase Invoice + Service Template > Service Management + Sales Quote > Service + Sales Order > Planned Maintenance + Sales Invoice > Warranty \sim Click on the navigation menu item Warranty Types + Service Unit + Purchase Invoice + Service Template > Service Management + Sales Quote > Service + Sales Order > Planned Maintenance + Sales Invoice > Warranty Warranties 🗟 Warranty Types Click on the navigation menu item New ies Service ~ \leftarrow Warranty Policy Types | Work Date: 1/25/2024 ndors Items Bank + New🐯 Edit List eate a new entry. Code 1 mornin <u>GENERAL</u> LIMITED

Click on the cell Code

3/17/2025

nties Service ~ P

Vendors Items Bank

d mornin

← Warranty Policy Types | Work Date: 1/25/2024

🐯 Edit List

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Code 1

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Enter the text Power Train		
	nties Service P	Warranty Policy Types Work Date: 1/25/2024
	Vendors Items Bank	
		Code î Descri
	d mornin	→ P
		GENERAL Gene
Click on the cell Description		
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	🕏 Edit List 📋 Delete	ピ 7 ≣
	Descripti	ion
	limited	
Enter the text Power Train .		
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Enter the text Power Train .	Date: 1/25/2024	✓ Saved 口 ピ ピ ピ マ ≔ ion
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Enter the text Power Train . Click on the back button	Date: 1/25/2024 Edit List Delete Description Edit List Delete Description Description Edit List Description Description Edit List Description Securitation Edit List Description Securitation Edit List Description Edit	✓ Saved ☐ ☐ ✓ If I I I I I I I I I I I I I I I I I I
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Enter the text Power Train . Click on the back button	Date: 1/25/2024	$ \begin{array}{c} $



3.6.2.	How to set up Warr	anies
Click on the nav	vigation menu item popup Warranty	ons Service Ticket Quote + Sales Order > Service Management > New Service Ticket + Sales Invoice > Service > Payments Service Unit + Purchase Quote > <u>Planned Maint</u> enance > Reports
		Service Template + Purchase Order > Warranty > Excel Report Sales Quote + Purchase Invoice > Find entries Get star
Click on the nav	vigation menu item warranties .	Actions + Service Ticket Quote + Sales Order > Service Management > New + Service Ticket + Sales Invoice > Service > Pay + Service Unit + Purchase Quote > Planned Maintenance > Rep + Service Template + Purchase Order > Warranty + Sales Quote + Purchase I Warranties Warranty Types
Click on the nav	vigation menu item New	ies Service ∨ P ← Warranty Policy List Work Date: 1/25/2024 endors Items Bank ✓ Search + New Image: Edit List Image: Delete Ø Edit Warranty Policy No. 1 Description Afterno SN00001 inissan 2022 SN00002 bobcat
Click on the field	d Description	+ New Warranty Policy Policy No. General 21 Warranty Policy No. 22 Warranty Policy No. Description manufactor Warranty Vendor v Warranty Policy Lines Manage Warranty Type Line

pendoor	Open Door To	echnology	Inc.		kyle@opend	boorer p.com
TECHNOLOGY	ODT Se	rvice Help			20 20	2025 08/369
Enter the text Warranty Policy	y 2022.	+ New	Warranty	Policy	y	
		/ Policy No.	General			
)2)2	Warranty Policy No. · ·	SN00003		Manufact
		03	Description · · · · · ·	W		Policy Effe
			Warranty Vendor		~	
			Warranty Policy Line	s Mana	ge	
			Warranty Type		Line Effecti	ve Co
Click on the lookup button Mar	nufacturer	Ŵ	√ Saved	d 2		
					otries	
		acturer		\sim	inites	
		Effective Date		Choose a	value for Manufacturer	
					Reports	
				A []		
Select the manufacturer this w	arranty will apply to.		Ľ	сы		
Click on the link in cell Code w	ith the value BOBCAT					ntries
		Ma	nufacturer · · · · · · ·		\sim	nto
		Poli	cy Effective Date	Code 1	Name	ms
		\sim		BOBCAT	Bobcat	
				FORD SAN	Select record "BOBCAT" Nissan	
		Line	Coverage- Coverag	+ New		
		Date ↑	Usage Usage ÜON	1 Duration	Pero	
Select the date this policy will be Click on the link Open the dat	pecome effective. e picker					
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		facturer	BOBCAT	\sim	nts	
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				Open ti	he date picker for Policy Effecti	ve Date
				ê 61		
		Coverage- Coverage	e- Coverage-	Covera		Get starte



ODT Service Help

Click on a date in the calendar	ntries
	Manufacturer · · · · · · BOBCAT ·
	Policy Effective Date · · · · I III S
	January 2024 keports
	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 Line 21 22 23 24 25 26 27
	Effective Coverage- Coverag 28 29 30 31 Date ↑ Usage Usage U
	0 Go to today Done
Click on the cell Warranty Type	Warranty Vendor
	Warranty Policy Lines Manage
	Warranty Type Description
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.	verranty type Description De
Click on the link in cell Code with the value POWER	Jordan Moresby Description
TRAIN	test General
	LIMITED limited
	Salet record "DOWER TRAIN
	+ New

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**

Wa	rranty Policy L	ines	Mana	ige		
	Warranty Type ↑		Line Effective Date↑	Coverage- Usage	Coverage- Usage UOM	Coverage- Duration
	POWER TRAIN	÷	1/1/2024	0		
\rightarrow				0		



Enter the text 10000 .	Warranty Vendor
	Warranty Policy Lines Manage
	Line Warranty Type Effective Coverage- Coverage-
	→ POWER TRAIN : 1/1/2024
Click on the cell Coverage Licage LICM	
Click on the cell Coverage-Usage UCIM	rranty Vendor · · · · · · · · · · · · · · · · · · ·
	arranty Policy Lines Manage
	Line Warranty Type Effective Coverage- Coverage- Coverage-
	↑ Date ↑ Usage Usage UOM Duration Percent • POWER TRAIN 1/1/2024 10000 0.00 0.00
	induction consider consider consider consider
Click on the link in cell Code with the value KM	Vertex T Usage Usage <thusage< th=""> Usa</thusage<>
	Adatum Corporation Description
	1 Hour
	6/21/2022 Kilo
	L Select record "KM" Liter
	MILES Miles + New
Coverage Duration determines how long this policy will remain in effect.	
Click on the cell Coverage-Duration	Lines Manage
	Line Effective Coverage- Coverage- Coverage-
	Date 1 Usage Usage DOM Duration Percent : 1/1/2024 10000 KM 0.00 0.00



Enter	the	text	1y.
-------	-----	------	-----

nes	Manag	ge				
	Line Effective Date↑	Coverage- Usage	Coverage- Usage UOM	Coverage- Duration	Coverage- Percent	
÷	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		Vanage				
		Coverage- Usage	Coverage- Usage UOM	Coverage- Duration	Coverage- Percent	
	.4	10000	КМ	1y	0.00	
Enter the text 50 .			~		L	
	Manage					් සි
		Coverage- Usage	Coverage- Usage UOM	Coverage- Duration	Coverage- Percent	
	.4	10000	KM	1Y	5	
Click on the back button						
	Central					
	test	\leftarrow	Warranty Policy	List Work I	← Warranty Po	olicy Work Date: 1/25/2024
	Custor		, ○ Search	+ New	SNO	0003
	Headlin		Warranty F	Policy No.	General	
	G		SN00001		Warranty Po	blicy No SN00003
			→ <u>SN00003</u>		Description	Warranty Policy 2
					Warranty Ve	ndor · · · · ·



Click on	the	back	button
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s Central	
test warranties Service ~ P Customers Vendors Items Bank	Warranty Policy List Work Date: 1/25/2024 Back Search + New Edit List
Good mornin	Warranty Policy No. ↑ Descriptic \$N00001 nissan 2 \$N00002 bobcat → \$N00003 Warranty

3.6.3. How to Assign Warranties to Service Units

Click on the navigation menu item popup Service Management		
	Actions	
	+ Service Ticket Quote	+ Purchase Quote > Find entries
	+ Service Ticket	+ Purchase Order > New
	+ Service Unit	+ Purchase Invoice > Payments
		Service Management S
	+ Sales Quote	Service Service Excel Report
	+ Sales Order	Denned Maintenance
	+ Sales Invoice	> Warranty
Click on the newlastion monulitam Open the list of	+ Sales Quote	* Service Management Setup 🗉 Excel Repor
Click of the havigation menu item Open the list of	+ Sales Order	
service units.	+ Sales Invoice	Egy Service Licket Types
		🙀 Maintenance Groups
		B Service Templates
		E Service Checklists
		🖲 Service Units
		Upen the list of service units.
		I Models
		Service statuses
		la Service Unit Meter Worksheet
Select the Service Unit you wish to assign a warranty		SU00005 2015 Ford F150
		SU00006 2016 Ford F150
Click on the link in cell Service Unit No. with the value SU00010		SU00007 2017 Bobcat S70 Skid-Steer
	Get started: Complete a few ste	SU00008 2017 Bobcat S450 Skid-Steer.
		SU00009 2018 Bobcat S70 Skid-Steer
	rice Activities	SU00010 2018 Bobcat S450 Skid-Steer.
	ce	Open record "SU00010"
	rice Tickets - Service Tickets - Open 17	

Ope	kyle@opendoore p.cor	
TECHNOLOGY	ODT Service Help	March 17, 202 213/36
Click on the navigation menu item popup R e	elated Dynamics 365 Business Central	
	Service Unit Card Work Date: 1/3	25/2024
	Actions Related	
	Service Unit No.	SU00010 2018 Bobcat S450 Skid-Steer Loade
Click on the navigation menu item Service Varranties	Unit	≥ + ₪
	🕞 Service Ledger Entries 💧 Attachments	Service Unit Warranties
	Link Description	
Click on the navigation menu item New		
	/25/2024 Cervice Unit	Warranties Work Date: 1/25/2024 → New Edit List © Delete Create a new entry. ce Unit No. ↑ ▼ Varranty Policy No
	SU00010 2018 Bobcat S	(There is no
Click on the lookup button Warranty Policy	/ No.	ت ب ^ر
		Choose a value for Warranty Policy





Click on the navigation menu item popup Service Management Actions + Service Ticket Quote + Purchase Quote > Find entries + Service Ticket + Purchase Order > New + Purchase Invoice + Service Unit > Payments > Service Management > + Service Template > Reports Excel Report + Sales Quote > Service + Sales Order > Planned Maintenance + Sales Invoice > Warranty Click on the navigation menu item Service Templates + Service Unit + Purchase Invoice > Payments + Service Template > Reports > Service Management + Sales Quote E Excel Repor 📌 Service Management Setup + Sales Order Service Ticket Types + Sales Invoice Maintenance Groups Service Templates where you can se Service Checklists Service Units Anufacturers 🖳 Models



Select the Service Template you wish to assign a	lline		Template No.	Terrelate Trans - Description			
warranty.	and may	cnin	20KSERVICE	: All 20.000 KM S			
Click on the link in cell Template No. with the value	000 110		40KSERVICE	All 40,000 KM S			
OILCHANGE-SS			50POINTINS	All 50 point insp			
			OILCHANGE-LT	All Oil Change			
			OILCHANGE	: All Oil Change			
			REPLAC Open rec	ord "OILCHANGE-SS" Replace Air F			
			REPLACEAIRF	All Replace Air F			
	Get started: Complete	e a few ste	ROTATETIRES	All Rotate Tires			
	1		SKIDSTEERGE	All Skid Steer G			
Click on the action tennle adit/view	fice Activities						
			A IA	+ 🖻			
			Make changes	on the page.			
	E-SS Maintenance Group Code						
	P Total Cost						
				Total Price			
Click on the cell Warranty Type			✓ Total Price · · · ·				
	Ticket Detail Lin Type		ine Warranty Type	Quantity			
	Change	Both Budge	et an	1.00			
		Both Budge	et an	1.00			
		Both Budge	et an	1.00			
	V30	Both Budge	et an	6.00			
	T						
Select the warranty that this Service Template will	T	ype	Warranty Type	Quantity U			
Apply to. Click on the link in cell Code with the value POWER	je B	Both Budget an	~	1.00			
TRAIN	B	Soth Budget an	kl	Description			
	B	Both Budget an	CHICAGO, IL	General			
			LIMITED	limited			
			POWER TRAIN	Power Train			
			+ New	ord "POWER TRAIN"			





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ODT Service Help

Repeat this process for all lines in the Service Template

Ticket Detail Line Type	Warranty Type	Quantity	Unit Co
Both Budget an	POWER TRAIN	1.00	22.2
Both Budget an	POWER TRAIN	1.00	3.5
Both Budget an	POWER TRAIN	1.00	0.
Both Budget an	POWER TRAIN \sim	6.00	2.2

a) Werk Deve 1/25/2024 34 · Service Ticket #ST00034 - The Cannon Group PLC

3.6.5. How to Process a Warranty on Service Tickets

The following example will start from a new service ticket.

		General					See 10	
		Customer No.			Contact	Mr. Andy Teal		
		Cultomer Name	The Cannon Group PLC		Senice Ticket Type			
		Description	Service Ticket #5700034 - The Cannon Group PLC		Assigned Technician		¥	
		Order Date	1/25/2824		Default Service Unit No.			
		Service Date	1/25/2824		Starting Date			
		Address	192 Market Sincere		Ending Date			
		Address 2			Location code			
		City	Atlanta		for referror			
		Post Code	31772		Open PO Lines best	No		
		Country/Region Code	us		Selecter parts	0		
		Contact No.	CT0000000		partspir son	~		
		Phone No.						
		Mobile Phone No.						
		Enal	mr.andy.teal@contoso.com					
		Ticket Units/Lines Manage Line Fev	war options				a 10	
		Offering Int. Der Reins in						
		→ Posting	Cashirtin	O D	Instant Roddellow Cost New	carlota cost anata tota most		
Click on the lookup button Default Service Unit No							<u>^</u>	
chek en the leekup satisf Beruart een nee entrie						Show less		
						SHOW less		
	1							
		Mr. Andy Teal						
						~		
						Ť		
	1				Ch	loose a value for	Default Service Unit No.	
						rtmta		
						1114		
						~		
	1							
	1							
		500000	5 E01510		ronaei			
Select the Service Unit that has the warranty applied		5110000	4 201 C MI		F			
4. 14 S T T		500000	4 2016 NI	SSAN	Frontier			
to It.		SU0000	5 2015 Fo	rd F15	0			
Click on the link in cell Service Unit No. with the								
Click of the link in cell Service officiate. With the		SU0000	6 2016 Fo	rd F15	0			
value SU00010		SU0000	7 2017 Bo	bcat S	70 Skid-Steer			
		5110000	9 2017 B-		450 Skiel Steam			
		50000	о 2017 B0	DCat 3	450 Skid-Steer			
		SU0000	9 2018 Bo	bcat S	70 Skid-Steer			
		<u>SU0001</u>	0 : 2018 Bo	bcat S	450 Skid-Steer			
		Se	lect record "SU00010"					
	Open Door Technology Inc.		kyle@opendoore		endoorer			
-----------------------------------------------------------	-----------------------------	------------------	-------------------------	-------------------------	----------------------------	---------------------------	---------------------------------	
TECHNOLOGY				p.com March 17, 2025				
	ODT Ser	ODT Service Help					217/369	
Click on the button Yes			[Start	ng Date · · · · ·			
			This service unit no. e	exists on other	ig Date	et(s)]	
			(ST00018). Do you wa	int to proceed	adding it to this ti	cket?		
					Yes	No		
		1		Sales	person			
Click on the navigation menu iter	m popup Manage		Contact No.			CT00000	8	
			Mobile Phone No.					
			Email · · · · · · ·			mr.andy.	teal@contoso.com	
			Ticket Units/Lin	es <u>Ma</u>	nage Line I	Fewer options		
			Task Type	ODT Se No.	rvice Unit Serial №	10.	Descript	
			ightarrow Heading	: SU000)10		2018 B	
Click on the navigation menu iter Femplate	m Add Service		Mobile Phone No.					
			Email			mr.andy.te	al@contoso.com	
			Ticket Units/Line	s Mana	age Line Fe	ewer options		
			[}] New Line	× Delete Line	ັ≇ Add Servic	e Template	🗟 Service Unit M	
			→ Heading	SU0001	.0		2018 Bo	
Select the service that will be pe warranty	normed under	Ticket	Actions Related	Fewer option	ıs			
Click on the link in cell Template DILCHANGE-SS	• No. with the value			^{/25/202} Se	rvice Templa	ates 🔎	\vee + New …	
				92 Mark	Template No.	Template Type T	Description	
			A		OILCHANGE REPLACEAIR Se	All	Oil Change HANGE-SS" ace Air	
				1772	SKIDSTEERG	All	Skid Steer (
			U	S				
			C	1000008				

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The Is Warrantable field can be used to toggle if the service is being performed under warranty. Click on Is Warrantable	otal Cost)	Billable (Total Price) 154.00	Billable (Invoiced Price) –	E Service Status	중 62 s Narr	
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 Sta
	24	- 39.75	-	76.99		
				Open record "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**



3/17/2025



Service >



Click on the navigation menu item popup Service Management	rchasing ~	=			
	ons Service Ticket Service Ticket Service Unit Service Templa Sales Quote	Quote + + + ate + +	- Sales Order - Sales Invoice - Purchase Quote - Purchase Order - Purchase Invoice	 > Service Management ~ > Service > Planned Maintenance > Warranty > Find entries 	 > Search in da > New > Payments > Reports Excel Report
Click on the navigation menu item Open the list of service units.	Service Ticket Service Unit Service Templ Sales Quote	+ + + + +	- Sales Invoice - Purchase Quote - Purchase Order - Purchase Invoice	Service Management Setup Service Ticket Types Maintenance Groups Service Templates Service Checklists Service Units Open the list of service units Manufacturers Models Service statuses Service Unit Meter Worksheei	 New Payments Reports Excel Report
Click on the link in cell Service Unit No. with the value SU00015		SU00007 SU00008 SU00009 SU00010 SU00011 <u>SU00015</u> SUT0000	2017 Bobcat 2018 Bobcat 2018 Bobcat 2018 Bobcat Eobcat : Flatbed Truc 2 Delivery tru	t \$70 Skid-Steer t \$450 Skid-Steer t \$70 Skid-Steer t \$450 Skid-Steer Fixed Asset ck Fixed Asset	FA000100 (FA000110
Ensure that the Fixed Asset or Item is linked to a Service Unit		General Service Uni Descriptior Serial No. Link Type No. Custome	it No	SU00015 Flatbed Truck Fixed Asset FA000110	



Apply Maintenance Expense will only work for Internal Customers	Al Payments >						
	Shipping >						
	Statistics >						
	Service						
Click on the navigation menu item popup Service Management							
·	s \sim Purchasing \sim Shopify \sim \equiv						
	ons .						
	Service Ticket Quote + Sales Order Select Environment > Service Management > Search in						
	service Ticket						
	Service Template + Purchase Order > Warranty > Reports						
	ales Quote + Purchase Invoice > Find entries 🗄 Excel Rep						
Click on the navigation menu item Service	es \lor Purchasing \lor Shopify \lor \equiv						
	tions						
	Service Ticket Quote + Sales Order <u>> Service Management</u> > Search i						
	Service Ticket + Sales Invoice Service Management Setup > New						
	Service Unit + Purchase Quote						
	Service lemplate + Purchase Order > Reports						
	Big Service Templates						
Comico Monogoment Cotur contains to togels	Allow Multiple Clocking ······ (●)						
between manually or automatically posting	Auto Assian User on Clock In						
maintenance expense for fixed assets and items.	Prompt to Clock In/Out on Task						
	Aways						
	Maintenance Expense Amount Type for for a Price						
	Show Journal and Post Manually FA Expense						
	Show Journal and Post Manually Item Expense						



The automatic or manual posting of Items and Fixed		Auto Assign User on Clock In	•
Assets can be toggled separately.	~	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	
	~	Show Journal and Post Manually Item Expense	
	~		
	~	Calendar to Use	STANDARD
Click on Maintenance Expense Amount Type Total		Show Completed Task Queue	
Cost Total Price	~	Allow Multiple Clocking	
	~	Auto Assign User on Clock In	
	~	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	
	~	Show Journal and Post Manually Item Expense	
	~		
Click on the field Maintenance Expense Amount			
Type			
	ç	Always	~
	c · · · · · · · · · · · · · · · · · · ·	Always Always	~
	с	Always Always Total Price	× × ×
	c Type y FA Expense	Always Always Total Price	~ ~ ~
	r Type y FA Expense y Item Expense	Always Total Price	~ ~ ~
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Click on the item Total Price in the list	c	Always Always Total Price	
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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	Home Report Ticket	Actions Automate Fewer options Confirm Actuals View Job Journal Cre Adatum Corporation Adatum Corporation Service Ticket #ST00014 - Adatum Corporation 4/11/2022 Robert Townes
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	4/11/2022	Open PO Lines Exist
	4/11/2022	Service Ticket Status
	Robert Townes	Apply Maintenance Expense
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	ne Fewer options	
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	al No. Description	Serv Start Date End Date
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		SU00008 2017 Bobcat S450 Skid-Steer.
		SU00009 2018 Bobcat S70 Skid-Steer
		SU00010 2018 Bobcat S450 Skid-Steer.
	Manage Line Fewer options	SU00011 Bobcat
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Expense toggle must be enabled	Assigned technician	
Click on the toggle field Apply Maintenance	Location Code	
Lypense	Open PO Lines Exist	No
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Click on the navigation menu item Apply Maintenance Expense	Dynamics 365 Business Central
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Click on the button Yes	Email Service Ticket Status PENDING
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Now that the maintenance has been applied, we can view it from the Fixed Asset card.



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	ODT Service Help	228/369		
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If you applied a maintenance expense to an item, this can be viewed using the revaluation journal.						
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		1	0.00	10.00	10.00	1
		1	0.00	10.00	10.00	
		1	0.00	10.00	10.00	1
		1	0.00	10.00	10.00	

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



3/17/2025



The dates in the Visual Resource Scheduler will display according to what is specified in the Base		Lines			
Calendar.			Date 1		Day↑ No
		\rightarrow	4/10/2023	:	Monday
			4/11/2023		Tuesday
			4/12/2023		Wednesday
			4/13/2023		Thursday
			4/14/2023		Friday
			4/15/2023		Saturday
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There are some additional settings that can be configured in Service Management Setup.

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

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ons			
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Service Ticket	+ Sales Invoice	> Service	> New
Service Unit	+ Purchase Quote	> Planned Maintenance	> Payments
Service Template	+ Purchase Order	> Warranty	> Reports
Sales Quote	+ Purchase Invoice	> Find entries	Excel Repor



Click on the navigation menu item Service Management Setup	sing \lor Shopify \lor	=		
	ons Service Ticket Quote Service Ticket Service Unit Service Template Sales Quote	+ Sales Order + Sales Invoice + Purchase Quote + Purchase Order + Purchase Invoice	Service Management Service Management Setu Service Ticket Types Maintenance Groups Service Templates	 > Search in d. > New s for Service Mans > Reports Excel Report
The Calendar To Use field specifies that Base Calendar that will be used when displaying the Visual Resource Scheduler.		Prompt to Clock iny out o	E Service Checklists	Always
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The Resource Default E	nd Hour field specifies the		warranty Policy Nos.	VVI	T-PUL
default time that will be s added to the schedule. T	cheduled when a resource is The default time is set to 1		Filter Service Units By Customer No.		
hour, but you can change this if r	e this if needed.		Visual Resource Scheduler		
			Schedule View · · · · · · · · · · · · · · · · · · ·	Res	source Time line Day
			Resource Default End Hour		
			Hide Weekend	•••••••••••••••••••••••••••••••••••••••	\supset
The Hide Weekend field	will toggle if weekends are		The service on a by customer no.	C	
displayed on the visual r	Resource Scheduler		Visual Resource Scheduler		
			Schedule View	Rei	source Time line Day
			Resource Default End Hour		
		- F	Hide Weekend		$\overline{)}$
Work Start Time specifie	s what time the work day	~	Prompt to Change Status		Aiways
starts on the Visual Reso	burce Scheduler.				
	_				
	-	\sim	Calendar to Use		STANDARD
	-	1.00	0 Work Start Time		8:00:00 AM
			Work End Time		5:00:00 PM

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Work End Time specifies what time the work ends starts on the Visual Resource Scheduler.		
		Calendar to Use STANDARD
	1.00	Work Start Time 8:00:00 AM
		Work End Time 5:00:00 PM
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	line Week \sim	Work Start Time · · · · · · 8:00:00 AM
only display a list of service tickets	1.00	Work End Time · · · · · · 5:00:00 PM
		Create Labor Line
	\sim	Default List · · · · · · · Tickets/Tasks V
Click on the back button	Dynamics 365 B	usiness Central
	Back C	ervice Management Setup Create Default Data Automate ~ Fewer options neral
	Serv	ice Unit Nos. SERV-UNI
	Auto	omatic Service Unit Nos.
	Serv	rice Ticket Nos. SERV-TIX

Next, you must configure the resources that will appear in the Visual Resource Scheduler.

Click on the button Search









lick on the toggle field Include in Visual Resource		Last Date Woomen	12/0/2025	
Schedule		Use Time Sheet		
	-	Time Sheet Owner User ID		
	~	Time Sheet Approver User ID		
		Warranty Type		
	_	Include in Visual Resource Schedule		
		Budget Resource		
Resources displayed in the visual scheduler will be		No		LINA
sorted based on there Resource Group.		Name		Lina Townsend
		Туре		Person
				Feison
		Base Unit of Measure		HOUR
	L	Base Unit of Measure		HOUR LINA TOWNSEND
	l	Base Unit of Measure · · · · · · · · · · · · · · · · · · ·		HOUR LINA TOWNSEND TEAM 2
		Base Unit of Measure Search Name Resource Group No.		HOUR LINA TOWNSEND TEAM 2
	¢	Base Unit of Measure · · · · · · · · · · · · · · · · · · ·		HOUR LINA TOWNSEND TEAM 2
	C	Base Unit of Measure Search Name Base Unit of Measure Search Name Besource Group No.		HOUR LINA TOWNSEND TEAM 2

3.8.2. How to use the Visual Resource Scheduler







Click on Visual Resource Scheduler Administration □	Journes Char	COLA COLA COLA COLA COLA COLA COLA COLA	a current pa visual Resource Open sche to Pages a Visual Res Visual Res	e Scheduler ge (Business Mal ource Scheduler eduler to assign r nd Tasks ource Scheduler ource Scheduler	nager) esource to a ta Entries	sk	Administrati Lists
	you can try c	out O) Search He	Ip for "Visual Res	ource Schedul	er"	
On the left side of the screen is a list of the resources that were configure to display on the visual scheduler, sorted by Resource Group	÷	Visual Reso	urce Schedu	ler	Visual Pa	source Schedule	Entries 🔀
solled by Resource Group		Start Date: 06	/06/23	us Prext	J visual ne	source schedule	
		Resourc	es	8:00 A	М	9:00 AM	10:00 AM
		KATHE	RINE				
		TEAM 2	X.				
		KYLE					
The center of the screen displays the days and times that can be scheduled.	ource Schedule	Entries 💦	Expand All	ᄎ Collapse	All 🙀 Refr	esh 🛄 Day	Week
					Tuesday, Ju	ine 6, 2023	
	9:00 AM	10:00 A	и	11:00 AM	12:00 PM	1:00 (РМ
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						Ŕ	
green represents a task that has already been			Tickets,	/Tasks			
scheduled.	4:00 P	Μ	School of F SU00007 Alpine Ski I	ine Art ST00003 2017 Bobcat S70 House ST00004	Skid-Steer Load	er Shop Supplie	
			Alpine Ski I SU00004	Address ST00005	ntier Replace Ai	r Filter	
			SU00003 Trey Resea	2015 NISSAN From rch ST00009	ntier Oil Change		

To assign a ticket or task, click and drag an item from the list on the right, to the schedule in the center.

Adatum Corporation ST00010



ODT Se	ervice Help	Mar	239/3
Nick and hold the left mouse button on Adatum		SU00009 2018 Bobcat S70 Skid-Steer Loader Reg	blace Air F
Corporation ST00017		Adatum Corporation ST00010 SU00006 2016 Ford E150 Oil Change	
		Trey Research ST00011	1 -1
		SU00008 2017 Bobcat S450 Skid-Steer Loader O Trey Research ST00012	l Change
		SU00005 2015 Ford F150 Oil Change Alpine Ski House ST00014	
		SU00005 2015 Ford F150 Rotate Tires	
		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	
elease the left mouse button on the link Adatum or poration ST00017	esh 🛄 Day 🛄 We	ek 🖩 Month	
		•	Tio
	June 7, 2023 1:00 PM	2:00 PM 3:00 PM 4:00	PM
			Sch SU
		Adatum Corporation SI	Alpi
			Alpi
			Ada
			SU Tre
			SU
otice that all tasks that were part of the ticket have			
ow been assigned to the resource	June 7. 2023	•	Tic
, , , , , , , , , , , , , , , , , , ,	1:00 PM	2:00 PM 3:00 PM 4:00	PM Sch
			SU Alpi
		SU00005 2015 Ford F150 SU00005 2015 Ford F150	SU
		SU00005 2015 Ford F150	SU
			Ada SL
			Trey
			Ada
			SU Trey
ou con also assign tasks individually			ડા
lick and hold the left mouse button on SU00003		TICKETS/ TASKS	
015 NISSAN Frontier Oil Change	4:00 PM	School of Fine Art ST00003 SU00007 2017 Bobcat S70 Skid-Steer Loader Sho	op Suppl <u>i</u> e
	5 Ford F150	Alpine Ski House ST00004	
	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	
		SU00009 2018 Bobcat S70 Skid-Steer Loader Rep	place Air F
		Adatum Corporation ST00010 SU00006 2016 Ford F150 Oil Change	
		Trey Research ST00011 SU00008 2017 Bobcat S450 Skid-Steer Loader O	il Change
		Trey Research ST00012	
		SU00005 2015 Ford E150, Oil Chapro	



ODT Service Help

Release the left mouse button on the link SU00003 2015 NISSAN Frontier Oil Change

une 8,	2023				lickets
	1:00 PM	2:00 PM	3:00 PM	4:00 PM	School of
					SU00007
					Alpine Ski
			SU00005 2015 Ford F1	50	SU00005
			SU00005 2015 Ford F1	50	Alpine Ski
			SU00005 2015 Ford F1	50	SU00004
			SUUUUS 2015 Ford F1	50	Adatum Co
			SU00003 2015 NISSAI	N Fr	SU00003
					Trey Resea
					SU00009
					Adatum Co
					SU0000t
					successes
					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	une 8, 2023				
SU00003 2015 NISSAN Frontier Oil Change	1:00 PM	2:00 PM	3:00 PM	4:00 PM	School of F
STUDUU/ Status: Released			SU00005 2015 Ford F	150	Alpine Ski I
			SU00005 2015 Ford F	150	SU00005 Alpine Ski I
			SU00005 2015 Ford F	150	SU00004
			SU00003 2015 NISSA	N En	Adatum Cc SU00003
					Trey Resea
			2015 NISSAN Frontie	r Task:	SU00009 Adatum Cc
			Oil Change Ticket: ST Status: Released S	00007 tart	SU00006
			Date:06/08/23 Start 3:00:00 PM,Enc	Time:	Trey Resea SU00008
			Date:06/08/23,End 4:00:00 PM	lime:	Trey Resea
Release the left mouse button on the link SU00003	une 8, 2023	2-00 PM	2-00 PM	4-00 PM	
2015 NISSAN Frontier Oil Change ST00007 Status:	1:00 PW	2:00 PW	5:00 PW	4:00 PW	School of F
Released			SU00005 2015 Ford F	150	Alpine Ski I
			SU00005 2015 Ford F	150	SU00005 Alpine Ski I
			SU00005 2015 Ford F SU00005 2015 Ford F	150	SU00004
			SU00003 2015 NISSA	N Frontier Oil Change ST	Adatum Co 00007 SU00003
			Sonio		Trey Resea
			2015 NIS	SAN Frontier Task	500009
			Oil Chang	o Tickoti ST00007	Adatum Co
			Oil Chang Status	e Ticket: ST00007 Released Start	Adatum Co SU00006
			Oil Chang Status Date:06/ 3:01	Pe Ticket: ST00007 Released Start 08/23 Start Time: 0:00 PM,End	Adatum Cc SU00006 Trey Resea SU00008

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 S100003	
		SU00007 2017 Bobcat S70 Skid-Steer Loader Shop Supplie	
5 Ford E150		Alpine Ski House ST00004	
		SU00005 2015 Ford F150 Oil Change	
5 Ford F150		Alpine Ski House ST00005	
5 Ford F150		SU00004 2016 NISSAN Frontier Replace Air Filter	
5 Ford F150 .		Adatum Corporation ST00007	
5 NISSAN Fro	ontier Oil Change ST00007	SU00003 2015 NISSAN Frontier Oil Change	
		Trey Research ST00009	
		SU00009 2018 Bobcat S70 Skid-Steer Loader Replace Air I	
		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	

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Release the left mouse button on the link SU00003 2015 NISSAN Frontier Oil Change	SU00005 2015 Ford F150 SU00005 SU00005 2015 Ford F150 Alpine Ski I SU00005 2015 Ford F150 SU00004 SU00005 2015 Ford F150 Adatum Cc SU00002 2015 NISSAN Frontier Oil Change ST00007 Toron Research
	Service Unit: SU00003 SU00009 2015 NISSAN Frontier Task: Adatum Cc Oil Change Ticket: ST00007 Status: Released Start Date:06/08/23 Start Time: SU00003 2015 NISSAN Fro 3:00:00 PM/End SU000005 Date:06/08/23,End Time: 4:00:00 PM 4:00:00 PM SU000005 Alpline: Ski1 SU000005 Alpline: Ski1 SU000005 Adatum Cc SU000005
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.	SU00005 SU00005 SU00005 SU00005 SU00005 SU00005 SU00005 SU00005 SU00005 SU00005 SU00005 SU00005 SU00005 SU00005 SU00005 SU00005 SU00005 SU00005 SU00005 SU00005 SU00005 SU00005 Trey Resea SU00005 SU00005 SU00005
	Service Unit: SU00006 Addatum Cc 2016 Ford F150 Task: Oil Change Ticket: ST00010 SU00003 2015 NISSAN Fn Trey Resea Status: On Hold Start Date:06/14/23 Start Time: 4:00:00 PM SU00006 2016 Ford F150 Trey Resea Jate:06/14/23 Start Time: 4:00:00 PM SU00005 2016 Ford F150 Trey Resea Jate:06/14/23 Start Time: 4:00:00 PM SU00005 2016 Ford F150 Trey Resea June Ski1 SU00005 SU00005
Double click on the link SU00003 2015 NISSAN Frontier Oil Change ST00007 Status: Released	SU00005 \$U00005 \$U00005 2015 Ford F150 \$U00005 \$U00005 2015 Ford F150 Alpine Ski 1 \$U00005 2015 Ford F150 \$U00004 \$U00005 2015 Ford F150 Adatum Co
	Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Succession Success
Double clicking on a task will display more detailed	Edit - Visual Resource Scheduler Event - 19
	🗊 Delete Current Event 🛛 🛱 Open Ticket Page
	General
	Technician Code · · · · · · LINA Oe
	Name Lina Townsend Sta
	Service Unit
	Job Task No



Click on the navigation menu item Open Ticket	9:00 AM 10:00 AM 11:00 AM 12:00 PM 1:00 PM
	Edit - Visual Resource Scheduler Event - 19
	Delete Current Event Page Open Ticket Page Open Service Ticket
	General
	Technician Code · · · · · · LINA · Desc
	Name · · · · · Lina Townsend Start
You can also open the ticket the task is part of to view information about it directly.	Home Report Ticket Actions V Automate V Fewer options
,	🍹 Add Service Template 🛛 🖓 Confirm Actuals 🛛 📓 View Job Journal 📓 C
	General
	Customer Name · · · · · · · Adatum Corporation
	Description · · · · · · · · · · · · · · · · · Service Ticket #ST00007 - Adatum Corp
	Order Date
	Service Date
	Contact · · · · · · · · · · · · · · · · · · ·
Click on Task Type	
	Tielet Unite // inco
	manage Line Fewer options
	ODT Service Task Type Unit No. Serial No. Description
	Task Type ODT Service Unit No. Serial No. Description → Heading : \$U00003 2015 NISSAN Posting : \$U00003 Oil Change
	Task Type ODT Service Unit No. Serial No. Description → Heading : SU00003 2015 NISSAN Posting : SU00003 Oil Change
	Task Type ODT Service Unit No. Serial No. Description → Heading : \$U00003 2015 NISSAN Posting : \$U00003 Oil Change
	Task Type ODT Service Unit No. Serial No. Description → Heading I SU00003 2015 NISSAN Posting I SU00003 Oil Change I Ticket Details I I
	Task Type ODT Service Unit No. Serial No. Description → Heading : SU00003 2015 NISSAN Posting : SU00003 Oil Change Image: Control of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of the service of t
Click on the navigation menu item popup Manage	Task Type ODT Service Unit No. Description → Heading : SU00003 2015 NISSAN Posting : SU00003 Oil Change Image: Contact rec. Contact rec. Contact rec.
Click on the navigation menu item popup Manage	Image: Task Type ODT Service Unit No. Serial No. Description → Heading : SU00003 2015 NISSAN Posting : SU00003 Oil Change Image: Ticket Details Image: Ticket Details Image: Ticket Details Ticket Details Image: Ticket Details Image: Ticket Details Mobile Phone No. Image: Ticket Details Image: Ticket Details
Click on the navigation menu item popup Manage	Image: Task Type ODT Service Unit No. Serial No. Description → Heading I SU00003 C015 NISSAN Posting I SU00003 C01 Change Image: Ticket Details Image: Ticket Details Image: Ticket Details Ticket Details Image: Ticket Details Image: Ticket Details Mobile Phone No. Image: Ticket Details Image: Ticket Details Mobile Phone No. Image: Ticket Details Image: Ticket Details Image: Ticket Details Image: Ticket Details Image: Ticket Details
Click on the navigation menu item popup Manage	Image: Task Type ODT Service Unit No. Serial No. Description → Heading Image: SU00003 2015 NISSAN Posting Image: SU00003 Oil Change Image: Ticket Details Image: SU00001 Ticket Details Image: SU00001 Phone No. Image: SU00001 Mobile Phone No. Image: SU00001 Image: Training Image: SU00001 Image: SU00001 Image: SU00001
Click on the navigation menu item popup Manage	Image ODT Service Unit No. Description → Heading : SU00003 2015 NISSAN Posting : SU00003 Oil Change Image :
Click on the navigation menu item popup Manage	Task Type ODT Service Unit No. Description → Heading : SU00003 2015 NISSAN Posting : SU00003 Oil Change I Ticket Details
Click on the navigation menu item popup Manage	Task Type ODT Service Unit No. Description → Heading : SU00003 2015 NISSAN Posting : SU00003 Oil Change I Ticket Details Image Image Ticket Details > Image Image Image Mobile Phone No. Image Image Image Ticket Units/Lines Image Image Image Ticket Units/Lines ODT Service Description Heading SU00003 2015 NISSAN



Click on the navigation menu item Technicians						
	View Service Ticket Details Attachments Technicians Task Comments View or add technician for the service ticket 4/10/2023 4/10/2023 37.50 1					
Notice that the Technician has automatically been assigned to the task.						
Click on the back button	s Central ket DO7 · Service Ticket #STC					
	Service Technician Code Report Ticket Actions ∨ Automate Service Template @ Confirm Actuals ⓐ V 192 Market Squ Atlanta					
Click on the back button	31772 Dynamics 365 Business Central Service Ticket Service Ticket Back 00007 · Service Ticket #ST00007 - Adata Mome Report Ticket Actions ~ Automate ~ Fewer options					



ODT Service Help

Click on the button Close

Start Time	3:00:00 PM		Adatum Corporation
			SU00005, 2015 Ford
End Date	6/14/2023		SU00005 2015 Ford
			SU00005 2015 Ford
and Time	4:00:00 PM		SU00005 2015 Ford
			Adatum Corporation
			SU00011 test item
			Adatum Corporation
		Close	SU00012 test item 2
		ciose	Trey Research STOO
			SU00013 test item 2
			1

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.

		LG Create	nine sh			
		No. 1		Name	Туре	Base Unit of Measure
		KATHERINE	÷	KATHERINE HULL	Person	HOUR
		KYLE		Kyle	Person	HOUR
		LABOR	_	Labor	Person	HOUR
		<u>LINA</u>	÷	Lina Townsend	Person	HOUR
		MARTY		Marty Horst	Person	HOUR
	Use Time	e Sneet		······································		
Б	Time She	eet Owner U:	ser ID 💀			
Б	Time She	eet Approver	User ID			
F	Warranty	/ Type · · · ·				
F	Include i	n Visual Res	ource Sc	nedule · · · · ·		
	Budget F	Resource ···				
)0	Tax Grou	ıp Code ····		LABOR		
	[La	st Date i	vioamea	12/14/2025	
		Us	e Time S	heet · · · · · · · · · · · · · · · · · ·		
		∼ Tir	me Shee	t Owner User ID		
		✓ Tir	me Shee	t Approver User ID		
		14/	arranty 1			-
		? TI SG M A	his Resor cheduler larking i re you si	urce is already set to include in \ as budget resource will de-sele ire you want to continue?	/isual Resource act this. Yes N	0
		0 Tax Grou	Ose Time Sneet IINA MARTY Ose Time Sneet Time Sheet Owner U Time Sheet Approver Warranty Type Unclude in Visual Reso Budget Resource 0 Tax Group Code U Time 0 Tax Group Code U Time U Time U Time Sheet Approver U Time Sheet Approver Time Sheet Approver U Time Sheet Approver U Time Sheet Counce Time Sheet Approver U Time Sheet Counce Time Sheet Approver U Time Sheet Approver U Time Sheet Approver Time Sheet Appr	No. î KATHERINE KYLE LABOR LINA I. MARTY	Up Cleare Inite Streets No. 1 Name KATHERINE K KATHERINE HULL KYLE Kyle LABOR Labor LINA I: Lina Townsend MARTY Marty Horst Ose Time Sheet Image: Street Time Sheet Owner User ID Image: Street Warranty Type Image: Street Include in Visual Resource Schedule Image: Street Budget Resource Image: Street Use Time Sheet Image: Street Use Time Sheet Approver User ID Image: Street Use Time Sheet Image: Street Warranty Type Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Street Note: Image: Image: Street Note: Image: Image: Street Note: Image	Do Cleare Hime SheetSut No. 1 Name Type KATHERINE K KATHERINE HULL Person KYLE Kyle Person LABOR Labor Person LINA E Lina Townsend Person MARTY Marty Horst Person MARTY Marty Horst Person Warranty Type Include in Visual Resource Schedule East Date Woomled Item Sheet Budget Resource Use Time Sheet Time Sheet Approver User ID Time Sheet Owner User ID Budget Resource Time Sheet Owner User ID Time Sheet Owner User ID Warranty Type Use Time Sheet Time Sheet Approver User ID Time Sheet Approver User ID Warranty Type Use Time Sheet Time Sheet Approver User ID Warranty Time Warranty Type Time Sheet Approver User ID Warranty Type Warranty Type Time Sheet Approver User ID Warranty Type /ul>



Click on the button Yes	Time Sheet Approver User ID	
		de-select this.
Click on the navigation menu item popup Service Management	Cash Management \vee Sales \vee	Purchasing \vee Shopify \vee
	now this again.	
	+ Service Unit + Service Template	+ Purchase Invoice > Ne > Service Management ∨ > Pag
	+ Sales Quote	> Service > Re
	+ Sales Order	> Planned Maintenance 📃 Exc
	+ Sales Invoice	> Warranty
Click on the navigation menu item Service Templates	+ Service Template + Sales Quote + Sales Order + Sales Invoice	> Service Management > P * Service Management Setup > R * Service Ticket Types > E * Maintenance Groups > R
		🗟 Service Templates
		Service Checklists
		Service Units
Olick on the link in cell Templete Ne with the value		En Manufacturers
OILCHANGE-SS		20KSERVICE All 20
	sold	40KSERVICE All 40
	3010	50POINTINS All 50
	0000	OILCHANGE-LT All O
		<u>OILCHANGE-</u> : All O
	Get started: Her	REPLACEAIRF All Re
		REPLACEAIRF All Re
	Service Activities	ROTATETIRES All Ro



Make sure that the Budget Resource has been added to the Service Template						
	Template	Lines	👫 New Line	🔀 Delete Line		
	Service Template No.		Туре	No.	Description	
	\rightarrow		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						
	T	ïcket Detail ine Type	Warranty Type	Quantity	Unit Cost	
	E	Both Budg	GENERAL	1.00	101.20	
	E	Both Budg	GENERAL	1.00	3.50	
	E	Both Budg	GENERAL	1.00	0.50	
	E	Both Budg	GENERAL	6.00	2.25	
	T	ïcket Detail ine Type	Warranty Type	Quantity	Unit Cost	
	E	Both Budg	GENERAL	1.0	0 101.20	
	E	Both Budg	GENERAL	1.00	3.50	
	E	Both Budg	GENERAL	1.00	0.50	
	E	Both Budg	GENERAL	6.00	2.25	
Click on the back button	Dynamie	cs 365 Busi	iness Central			
		Relati	CHANC ed ~ Autom	ate ~		
		Gene	ral			
		Templa	ate No.		OILCHANGE-SS	



After the Service Template has been set up, create a		
new Service Ticket	> >	ST00112 Service Ticket #ST001
		ST00117 Service Ticket #ST001
	Activities	ST00120 Service Ticket #ST00'
		ST00124 Service Ticket #ST001
	Sales This Month	ST00125 Service Ticket #ST001
	()	ST00129 Service Ticket #ST00'
		ST00130 Service Ticket #ST00
	>See more	Open record "ST00130"
Add the Service Template to the ticket	vice Unit Meters 🛛 🕅 Attachments	🖸 Task
	Service No, Serial No.	Defer Description Serv
	00007	2017 Bobcat S70 Skid-Steer
	00007	Oil Change
		Oil Change
Make sure that the ticket is set to a status of Released		Service Picture >
Make sure that the ticket is set to a status of Released so it will display in the Visual Scheduler	· · · · · [Service Picture ~
Make sure that the ticket is set to a status of Released so it will display in the Visual Scheduler	· · · · · [Service Picture ~
Make sure that the ticket is set to a status of Released so it will display in the Visual Scheduler	· · · · · [Service Picture ~
Make sure that the ticket is set to a status of Released so it will display in the Visual Scheduler	No PENDING	Service Picture ~
Make sure that the ticket is set to a status of Released so it will display in the Visual Scheduler	No PENDING	Service Picture >
Make sure that the ticket is set to a status of Released so it will display in the Visual Scheduler	• · · · · • • • • • • • • • • • • • • •	Service Picture V
Make sure that the ticket is set to a status of Released so it will display in the Visual Scheduler	- · · · · · [Service Picture >
Make sure that the ticket is set to a status of Released so it will display in the Visual Scheduler	• • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • •	Service Picture V
Make sure that the ticket is set to a status of Released so it will display in the Visual Scheduler	PENDING e Open PO Lines Exist	Service Picture >
Make sure that the ticket is set to a status of Released so it will display in the Visual Scheduler	No PENDING e • • • • Open PO Lines Exist No Service Ticket Status PEN	Service Picture V
Make sure that the ticket is set to a status of Released so it will display in the Visual Scheduler	Open PO Lines Exist No Open YO Lines Exist No Apply Maintenance Expe V	Service Picture V
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	Open PO Lines Exist No Open PO Lines Exist No Apply Maintenance Expe Admin Ticket	Service Picture V
Make sure that the ticket is set to a status of Released so it will display in the Visual Scheduler	Image: Service Ticket Status PEN Open PO Lines Exist No Service Ticket Status PEN Apply Maintenance Expe Admin Ticket Tag. →	Service Picture V
Make sure that the ticket is set to a status of Released so it will display in the Visual Scheduler	Image: Service Ticket Status Image: Service Ticket Status Apply Maintenance Expe Image: Service Ticket Status Admin Ticket Image: Service Ticket Status Maintenance Expe Image: Service Ticket Status Apply Maintenance Expe Image: Service Ticket Status Maintenance Expe Image: Service Ticket Status Image: Service Ticket Status Image: Service Ticket Status Maintenance Expe Image: Service Ticket Status Image: Service Ticket Status Image: Service Ticket Status Image: Service Ticket Status </th <th>Service Picture V</th>	Service Picture V
Make sure that the ticket is set to a status of Released so it will display in the Visual Scheduler	Image: Service Ticket Status No Open PO Lines Exist No Service Ticket Status PEN Apply Maintenance Expe Admin Ticket Tag → Tag → Work Description →	Service Picture V
Make sure that the ticket is set to a status of Released so it will display in the Visual Scheduler	Open PO Lines Exist Open PO Lines Exist No Apply Maintenance Expe Admin Ticket Tag Work Description	Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Picture V Service Pict



Click on the button Yes	
	Service ticket status changed from PENDING to RELEASED. Do you want to update the lines?
	Yes No
	Admin Ticket
	Tag
Click on Service Ticket Status	Ending Date
	Location Code
	Your Reference
	···· Open PO Lines Exist · · · · · · No
	Service Ticket Status · · · · · RELEASED
	Apply Maintenance Expe
	···· Admin Ticket · · · · · · · · ·
	Тад

Once the ticket has finished being set up, open the Visual Resource Scheduler

Click on the navigation menu item popup Service	١t	Actions + Service Ticket Quote + Service Ticket + Service Unit + Service Template + Sales Quote + Sales Order + Sales Invoice	 + Purchase Quote + Purchase Order + Purchase Invoice > Service Management > Service \scilon > Planned Maintenance > Warranty 	> Fin > Sea > Ne > Pay > Re E Exc
				_
Click on the navigation menu item Visual Resource Scheduler			 Service Tickets Service Units Completed Service Tickets 	
			Service Quote Archive	ssign reso
	nt en			



y, April 12:00 Pl

y, April

12:00 PI

ODT Service Help

Click and Drag the task to assign it to a Resource		atum Corporation	ST00111 N Titan Oil Char ST00120 t S450 Skid-Steer ST00125 t S70 Skid-Steer ST00130 t S70 Skid-Steer	nge er Loade Loader Loader	
	4			Þ	
Release the left mouse button on					
	Resources	8:00 AM 9:	00 AM 10:00	AM 11:00 AM	
	GROUP 1				
	KATHERINE	su	00007 20		
	KYLE				
	Unassigned				
	LABOR				
Notice that the task is automatically scheduled based on the amount of time that was specified on the	Start Date: 04/10/23				
Budget Resource used when creating the Service	Pasaursas			Mond	
remplate.	Resources	8:00 AM 9:	00 AM 10:00	AM 11:00 AM	
	GROUP 1				
	KATHERINE	SU	00007 2017 Bobcat	S70 Skid-Steer Loa	
	KYLE		Service Unit: 2017 Bobcat	SU00007 S70 Skid-	
	🗆 Unassigned		Steer Loade Change Ticke	r Task: Oil et: ST00130	
	LABOR		Status: Released Start Date:04/10/23 Start Time:		

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

3/17/2025



Click on the navigation menu item New						
	vico 11 Sonvico		Consider Tim	lusta Osas		
	andors Items Bar	nk.	Service Tic	:kets - Open		
	indors items bar			h + New Create	Manage Report Actio	ns ∨ Re
	nonth		Service Ticket No.	↑ Descri	iption	Order Date
	losed 13	3	<u>ST00013</u>	Servi	ce Ticket #ST00013 - Adat	4/10/2023
			ST00014	Servi	ce Ticket #ST00014 - Rele	4/10/2023
	same	\bigcirc	ST00015	Servi	ce Ticket #ST00015 - Adat	4/10/2023
			ST00016	Servi	ce Ticket #ST00016 - Rele	4/10/2023
Click on the lookup button Customer No		_	ST00017	Soni	co Tickot #ST00017 Adot	A/10/2022
	Related \lor Automate	e∨ Fewero	ptions			
	ctuals	ournal 🕞	Create Ser	vice Sales Invoid	ce 🏻 🖆 Update Meter Read	lina 🕑
			oreste ser			
					ervice Ticket Type	
				D	efault Service Unit No.	
				A	ssigned Technician	
	Starting Date					
				Ē Ei	nding Date	
Click on the link in cell No. with the value 50000	Customer No.		[~
	Customer Name		***	No. ↑	Name	ZIF
	Description · · · · ·			10000	Adatum Corporation	31
	Order Date			30000	School of Fine Art	37
	Service Date			40000	Alpine Ski House	31
	Sell-to			50000	Relectoud	31
	Address			+ New		
	Address 2 · · · · ·					
	City · · · · · · ·					
	Post Code · · · · ·					~
There is a new field labeled Admin Ticket. Toggling		Location Coo	1e · · · · ·			
this will indicate that this is an admin ticket to be used		Your Referen	ice		N.	
		Open PO Lin	es Exist			
		Apply Maint	et Status		PENDING	
		Admin Ticko	+	Jerise		
		Тад				
		Work Descri	ption			
			,			





Click o	n the	togale	field	∆dmin	Ticket
CIICK U		loggie	neiu	Aumm	IICKEL

L	Location Code
١	Your Reference
(Open PO Lines Exist
9	Service Ticket Status · · · · · PENDING
1	Apply Maintenance Expense
1	Admin Ticket · · · · · · · · · · · · · · · · · · ·
1	Tag
١	Work Description

Enter the events you would like to have in the Description field of the Task Lines

Click on the cell Description						
	nes	Manage	Line			
	<u>}</u> × [Delete Line	7 Add Service Template	🛱 Service Unit Meters	🛱 View Service 1	icket Deta
		ODT Service	Serial No.	Description	Defer	Start Date
		Unit No.	Senarivo.	Description		Start Date
Fater the test Marseller						
Enter the text vacation.						
	nes	Manage	Line			
	3× [Delete Line	# Add Service Template	🛕 Service Unit Meters	🛕 View Service 1	icket Deta
		ODT Service Unit No.	Serial No.	Description	Defer Serv	Start Date
				192 M	arket Square	
				com re	en con	
Click on the cell Decemintion						
Click on the cell Description	nes	Manage	Line			
	<u>}×</u> (Delete Line	Add Service Template	🛱 Service Unit Meters	🔾 View Service 1	icket Deta
		ODT Service	Serial No.	Description	Defer	Start Date
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Enter the text Sick .	nes Mana	je Line		
	🖹 Delete Lin	e 🆩 Add Service Template	🛱 Service Unit Meters	🛱 View Service Ticket Deta
	ODT Serv	ce Serial No.	Description	Defer Servy Start Date
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Enter the text Emergency .	nes Mana	je Line		
Enter the text Emergency .	nes Mana ≩× Delete Lin	e Ine Y Add Service Template	🗟 Service Unit Meters	🗟 View Service Ticket Deta
Enter the text Emergency .	nes <u>Mana</u> → Delete Lin ODT Serv Unit No.	ge Line Add Service Template ce Serial No.	C Service Unit Meters	View Service Ticket Deta
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Enter the text Emergency.	Image: Name B× Delete Lin ODT Service Unit No. Image: Name Image: Nam	t Meters ≧ View Service Time	Cket Details	Comments/Details
Enter the text Emergency. Click on the cell Service Status with the value RELEASED	Ness Mana	t Meters C View Service Ti Billable (Total Price) Pr	Cket Details	Ments Comments/Details Over Service Ticket Deta Defer Service Start Data Defer Service Star
Enter the text Emergency.	Nes Mana B× Delete Lin ODT Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service Unit No. Image: Service	t Meters View Service Time Keters Kete	Cket Details Attachn	Ments Comments/Details
Enter the text Emergency.	Ites Mana Image: Second state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state state st	t Meters	Cket Details Attachr	Image: New Service Ticket Deta Defer Start Date Image: New Service Ticket Deta Image: New Service Deta <t< th=""></t<>


Click on the navigation menu item popup Service	chasing \lor Shopify \lor \equiv
	pms Pervice Ticket Quote + Sales Order > Service Management > Search in data in the second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second seco
Click on the navigation menu item Visual Resource Scheduler	+ Service Unit + Purchat + Service Template + Purchat + Sales Quote + Purchat ⊕ Service Tickets ⊕ Service Units ⊕ Completed Service Tickets ⊕ Service Quote Archive ■ Visual Resource Scheduler Open scheduler to assign resource to a tas
Admin Tickets and related events are always displayed at the top of the task list and highlighted in green.	et Free Preview Mode Tickets/Tasks Free Preview Mode Tickets/Tas

Events can be assigned to technicians the same way you assign tasks

Click and hold the left mouse button on Vacation

et			Ŕ	
	Free	Preview Mo	^{de} Tickets/Tasks	
3) PM	2-00 PM	3-00 PM	Relectoud ST00005	
			Vacation Sick	
			Emergency Adatum Corporation ST00003	
			SU00003 2015 NISSAN Frontier Labor - Lube	
			SU00003 2015 NISSAN Frontier Oil Change SU00003 2015 NISSAN Frontier Rotate Tires	
			SU00003 2015 NISSAN Frontier 50 point inspection Trey Research ST00004	



Drag the event to the resource you want to assign it to.

. ^	Collapse All	🌆 Refr	esh 🛄 D	ay 🔛 We	eek 🛄 M	onth 🏅	Clear Filter	T Filter	Ticket
23							Mond	lay, April 10	, 2023
00 PM	2:00 PM	3:00 PM	4:00 PM	8:00 AM	9:00 AM	10:00 AM	11:00 AM	12:00 PM	1:00 PN
					Vacation				
				Tas Date:0 9 Da Tir	k: Vacation S)4/10/23 Star :00:00 AM Er te:04/10/23 me:10:00:00	Start rt Time: nd End AM			

Events are highlighted in green to be easy to identify

23							Mond	ay, April 10	, 2023
00 PM	2:00 PM	3:00 PM	4:00 PM	8:00 AM	9:00 AM	10:00 AM	11:00 AM	12:00 PM	1:00 PI
					Vacation				
						Sick			
						Emergency			

•••

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	Purchasing \lor Shopify \lor All Reports \equiv						
	ons Service Ticket Quote Service Ticket Service Unit Service Template Sales Quote	+ Sales Order + Sales Invoice + Purchase Quote + Purchase Order + Purchase Invoice	 > Service Management ~ > Service > Planned Maintenance > Warranty > Find entries 	> New > Payments > Reports E Excel Report			
Click on the navigation menu item Service Management Setup	Purchasing \lor S	hopify All Rep	ports =				
	tions - Service Ticket Quote - Service Ticket - Service Unit - Service Template - Sales Quote	 + Sales Order + Sales Invoice + Purchase Quote + Purchase Order + Purchase Invoice 	Service Management Service Management Setup External Connectors Wight Service Ticket Types	> New > Payments > Reports E Excel Repo			



ODT Service Help

The Auto Create Warranty RMA option must be enabled to use the RMA feature.	Image: Show Journal and Post Manually FA Expense Image: Always Image: Show Journal and Post Manually Itam Expense Image: Always Image: Show Journal and Post Manually Itam Expense Image: Always Image: Always Image: Always					
	Work Start Time R00-00 AM					
Click on the toggle field Auto Create Warranty RMA	Inprite Glock Iny Out on Fask Always Itenance Expense Amount Type Total Cost v Journal and Post Manually FA Expense Image: Cost Cost Cost Cost Cost Cost Cost Cost					
	k Start Time					
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.	V Prompt to Change status Anways V Maintenance Expense Amount Type Total Cost V Show Journal and Post Manually FA Expense Image: Show Journal and Post Manually Item Expense V Auto Create Warranty RMA Image: Show Journal And Post Manually Item Expense V Auto Create Disallowed Warranty Claim Sales Invoj					
	Not fast True					
	Work start time Cource AM Courc					
Click on the toggle field Auto Create Disallowed Warranty Claim Sales Invoice	Inperio Criange Status Intenance Expense Amount Type Intenance Expense Amount Type Intenance Expense Amount Type Intenance Expense Intenance Inte					
	k Start Time					

There are some additional fields that must be populated

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	ODT S	Service	Help					256/36
Click on the button Search		eports	=			Sea 2	Д 👹	?
		te) r) ce)	Service Man Service Planned Mai Warranty Find entries.	agement ntenance	> New > Payments > Reports Excel Repo	orts		
Enter the text Customer Posti	ng Groups.	ports	=			₿ <i>₽</i> 2	Q ©	?
		ote ler bice	 > Service Mai > Service > Planned Mai > Warranty > Find entries 	nagement aintenance	> New > Payment > Reports E Excel Rep	s		
Click on Customer Posting G	roups Administratic	ned Ma counts	intenance ~ Chart of A	Tell me what Customer P	: you want to do osting Groups			
		mc eric	ore c od la	Go to Page Custom Search for ' Search O Search	s and Tasks ler Posting Group: 'Customer Posting company data Help	g Groups'		Adminis
Click on the cell Disallowed W Account	arranty Claim							
		ng t	Credit Rounding Account 40920	Payment Tolerance Debit Acc. 40330	Payment Tolerance Credit Acc. 40330	Disallowed Warranty Claim Account		



Enter the Disallowed Warranty Claim Account number.	
	Credit Payment Disallowed ng Rounding Tolerance Warranty t Account Debit Acc. Credit Acc. Claim Account 40920 40330 40330 V
	Name Direct Post) Repairs and Maintenance for R Income Sta) Insurances, Rental Income Sta) Other Rental Expenses Income Sta
Click on the back button	Dynamics 365 Business Central Customer Posting Groups O Search Analyze + New Belete Clist
	Show All Accounts View All Acc Receivables Service Charge Payment Disc. Pa Code 1 on Account Acc. Debit Acc. C
Click on the button Search	E 🔎 Q @ ? 🧿 eports ≡
	 Service Management > New Service > Payments te > Planned Maintenance > Reports r > Warranty
Click on the field Tell me what you want to do	ned Maintenance V Tell me what you want to do
	g item was I Chair, green d





Click on the back button

Open Door Technology Inc.

ODT Service Help

Click on the link in cell No. with the value 50230

voice unding count	Debit Curr. Appln. Rndg. Acc.	Credit Curr. Appln. Rndg. Acc.	Debit Rounding Account	Credit Rounding Account	Payment Tolerance Debit Acc.	Pa To Cr
7300	67300	67300	67300	67300	40330	40
			No.	Name		In
			→ 50230	Cost of Lab	oor, Warranty/Cont	ract l
			+ New			Sho
Dynam	nics 365 Business	Central				
	← Vendor Post	ting Groups				
	Back Search	Analy	ze + New 📖	Edit List 📋	Delete 🖉 Edit	⊙ ∨
	Show All Ac	counts				
					View All Acc	
	Code ↑	Des	cription	c	on Payables Ac	count:

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						Ŀ	62
	ce Ticket Details	s 🛛 Attachmer	nts / 🖾 Techn	icians	🖸 Task 🛛 🖓 Co	omments	xê
	Billable (Total Price)	Billable (Invoiced Price)	Service Status	ls War	Comments/Detail:	s	Appl Mai Exp
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	143.25	-	PENDING		0/4		C
							•
Click on Is Warrantable							
						Ŕ	62
	ce Ticket Details	Attachmen	its 🛛 📴 Techni	icians	🖸 Task 🛛 👎 Co	omments	58
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							Mai Exp
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	- 143.25	-	PENDING		0/0 0/4		Appi Mai Exp
	143.25	-	PENDING		0/0 0/4		Appi Mai Exp
	143.25	-	PENDING		0/0 0/4	_	Appi Mai Exp
	143.25	-	PENDING		0/0 0/4	-	Mai Exp
	143.25	-	PENDING		0/0	-	Appr Mai Exp



Click on the link in cell Billable (Total Price) with the value 71 61						
	e Template	🛱 Service Unit	Meters 🔀 View S	Service Ticket Details	Attachme	ents 🛛 🔀 Tech
	l 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						
						- 84
						- 84
						•
					Clos	e
			Attachments			_
		[Documents		0	
Click on the navigation menu item Create Service Sales Invoice	rvice ⁻	Ficket #S⁻	T00013 - Tr	rey Resear	ch	Ø
	Priorities are	not defined for So	ource Code: SALES.	Don't show again	Do you want to	initialize Dimen
	t Actior	ns \lor Related \lor	Automate \vee Fi	ewer options		
	te 積 Co	nfirm Actuals	🗟 View Job Journal	🗟 Create Service	e Sales Invoice	😩 Update Me
		kyle@opend	doorerp.com		Work 1	lype Code
Click on the button OK	als by:				- 1	-
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	·r					
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	LABOR	Labor - Oil	Change		1 HOUR	

endoor	Open Door Technology Inc.	kyle@opendoorer p.com March 17, 2025
TECHNOLOGY	ODT Service Help	261/369
Click on the button OK	Service Line Completed Service Line Completed Service Is created. Start Date End Date Cost 4/8/2024 4/8/2024 37.5	OK P Comments K Image: Second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second
Click on the button Yes	Service Line Completed ······ E-Signature Status O you want to view the newly created Serv Start Date End Date Serv Start Date End Date 4/8/2024 4/8/2024	d invoice? Yes No © Comments Cost) Actual (Total Cost) Billable (To Pri 37.50 _ 71
Click on the button Post	Dynamics 365 Business Central Service Ticket Sales Invoice - SV00005 · Trey Manage Home Prepare Print/Sence Post ~ @ Release ~ Finance the document or journal by posti General Customer No. Customer Name	y Research d Request Approval Invoice Page Action ing the amounts and quantities to the related accounts in yo PODOC Trey Research
Click on the button Yes	Due Due Due Due Due Due Due Due Due Due	Date nal Document No. Yes No s c Description



A message will appear after posting confirming that the RMA document has been created.	Your Reference Ocument Date Posting Date Due Date Due Date External Document No External Document No OK
Click on the button OK	Due Date 4/22/2024
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	The invoice is posted as number PSV00003 and moved to the Posted Sales Invoices window.
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Click on the navigation menu item popup Related	nics 365 Business Central
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	Home Report Ticket Actions V Related V Automate V Fewer options
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	General
	Customer No. 2000



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ODT Service Help

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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**

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Notice that Disallowed Warranty Claim field has been updated to reflect the amount that is not approved	다. () () () () () () () () () () () () ()		
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Click on the button Post	Tax (USD) 41.00 Dynamics 365 Business Central		
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SV00006 Service Sales Invoice created for the disallowed warranty claim amount 30.625.
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After posting, there will be a link to the disallowed
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opendoor TECHNOLOGY	Open Door Technology Inc.				ky	kyle@opendoore p.col March 17, 202	
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Notice that the Customer Name customer specified on the Servic	is for the original e Ticket	Π.	Post V	🕒 Release 🗸 🗸			
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Notice that the Line Amount bein same amount that was denied in document	g charged is the the original RMA	Tax Area Code	Tax Group Code	Line Discount %	Line Amount Excl. Tax	Amount Including Tax	년 Qty. to Assign
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When everything is ready, the remaining amount can be charged back to the original customer

Click on the button Post	Dynamics 365 Business Central				
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Click on the button Yes	Campaign No.				
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3.10.Service Notifications

test

3.10.1. test

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Click on the back button

ODT Service Help

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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	ent \lor Sales \lor Purchasing \lor Shopify \lor All Reports \equiv					
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	Service Ticket Nos. SERV-TIX					
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	Planned Maintenance Ticket Nos. · · · · · · · PM-TIX					
	Service Invoice Nos. SV-INV					
	Posted Service Inv. Nos. SV-INV+					
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endoor	Open Door Technology Inc.	kyle@opendoorer p.com March 17, 2025
TECHNOLOGY	ODT Service Help	270/369
Ensure the Field Ticket Active togg	le is enabled Notification Send Notification Notification Remin Field Ticket Field Ticket Active	ider
Click on the toggle field Field Tick	et Active	Approval
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3.11.2. Setup Resources

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		> Resource Groups	Lists
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	LINA	Lina Townsend	Person HOUR
	MARTY	Marty Horst	Person HOUR
	RESOURCE	RESOURCE2	Person HOUR
	RESOURCE	RESOURCE3	Person HOUR
	TERRY	: Terry Dodds	Person <u>HOUR</u>
	Op	en record "TERRY"	
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3.11.3. Setup Service Templates

Management ent \lor Sales \lor Purchasing \lor Shopify \lor All Reports \equiv	
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+ Sales Quote + Purchasi E-Signature Report Setup	
백禄 Service Ticket Types	
🕅 Maintenance Groups	41
Service Templates	
E Service Notification Templates	Sh
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kyle@opendoorer p.com March 17, 2025 274/369

ODT Service Help

Click on the action toggle edit/view			
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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 Cu

things you can try o	ut				
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Click on the navigation menu item New		
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	nth	Make Ticket X Cancel Ticket
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Click on the lookup button Default Service Unit No	
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	4/8/2024 SU00010 2018 Bobcat 5450 Skid-Steel
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	Template No. Type T Description
	→ <u>20KSERVICE</u> : All 20,000 KM S
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Click on the button Yes		City	Atlanta	
The information from the Field Servi	ce Project Quote	nents 🖄 Task	Yes No Diate View Job Journal	
will default to the new Field Service	Project	है <u>त</u> Confirm Actuals General	🗟 Create Service Sales Invoice 🛛 🛇 Mark Comple	
		Customer No	10000 Adatum Corporation Service Ticket #FS00029 - Adatum Corp 4/8/2024 4/8/2024	
Select the line you want to create a	Field Ticket for.	→ New Line Image: Constraint of the second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second	View Service Unit Meters Add Service Template View Service Ticket Details ODT Service Unit No. Description SU00002 2016 NISSAI SU00002 Oil Change	

ondoor	Open Door Te	kyle@opendoor				
TECHNOLOGY		March 17, 20				
ODT Service Help 270						
Click on the navigation m	ienu item popup Line	Contact No.				
		Mobile Phone No.				
		Email	adatum.corporation@contoso.com			
		Ticket Units/Lines Manage	Line			
		🗜 New Line 💿 View	C Service Unit Meters			
		Celete Line 7 Add Service Ter	mplate 🛛 🗟 View Service Ticket Details			
		ODT Service Task Type Unit No.	Serial No. Description			
Click on the navigation m	nenu item Field Ticket	Mobile Phone No.				
		Email	adatum.corporation@contoso.com			
		Ticket Units/Lines Manage	Line			
		Dimensions 🗸 🚨 Field Ticket	🗟 Create Service Sales Invoice 🛛 🛱			
		ODT Service	Serial No. Descriptio			
		Heading SU00002	2016 N			
		→ Posting : SU00002	Oil Char			
Click on the button Yes						
		Do you want to create a new field ticket	: for Oil Change?			
			Ves			
		뵭 Send Proforma 🎼 Print & Send Proform	13			
		Defer Serv Start Date End Date	Budget (Total E Cost) Actual (Total Cost)			
Notice that some of the F	Field Ticket information has	📋 Field Service Project 🛛 👯 Sug	ggest 🗈 Copy 🐨 Post 🖶 Prin			
needed.	u can adjust these helds as	General				
		Field Ticket No.	FT00045			
		Field Ticket Date	4/8/2024			
		Field Service Project No.	FS00029			
		Field Service Line	0020000			
		Responsibility Center				
		Crew Member 1	kyle			
		Crew Member 2				



Click on Field Ticket Line		Gl	L · · · · · · · · · · · · · · ·				
		М	ajor				
		Lo	ocation Tab >				
		_					
		Fi	eld Ticket Line	Manage	Line		
			🗎 🕷 New Line 📑	× Delete Line			
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		-	→ Resource	KYLE	0020000	Both Budg	KYLE
The Field Ticket Lines contains information about the	- 10 C						
The Field Ticket Lines contains information about the							
lines as needed		Fi	eld Ticket Line	Manage	Line		
			∋ [#] New Line 🛛 🗟	× Delete Line			
					Project Task		
		Г	Туре	No.	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 Memb	oer 3			
		Ē	Site Contac	t · · · · · · · · · · · · · · ·			
			On-Site Cor	ntact Email			
		\sim	On-Site Pho	one No.			
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			Customergi	oup code	3	VIALL	
To begin the approval process, first the approval must							
Click on the nevigation many item Send							
Click on the havigation menu item Send							\smile
	utomate \vee	Few	ver options				
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]
	[FT0004	45			Crew Memb	er 3 · · · · · ·
		4/8/20)24		Ē	Site Contac	



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	
	rce Code: PROJJNL. Don't show again Do you want to initialize Dimension Priorities?
	ins
	The Post Print Send X Cancel A Approve X Paiert
	A rost germina. Ry send A cancel Y Approve A reject
	··· Crew Member 3
	Site Contact
Notice that the status has changed to Approved	
5 11	··· Crew Member 3 · · · · · · · · · · · · · · · · · ·
	Site Contact
	On-Site Contact Email
	On-Site Phone No.
	Status Approved
	Department Code SALES
	Customergroup Code SMALL
Click on the pavigation menu item popup Home	Dynamics 505 Business Central
click on the havigation mena term popup frome	Eidd Tidet
	F100045
	× Default Dimension Priorities are not defined for Source Code: PROJJNL. Don't
	Home Field Ticket Automate V Fewer options
	Dimensions
	General
	General

When you are done, the Field Ticket can be posted

Or	en Door Technology Inc. kyle@opendoorer p.com March 17, 2025 ODT Service Help 281/369
Click on the navigation menu item Post	Ticket 00045
	Default Dimension Priorities are not defined for Source Code: PROJINL Don't show again Do you me Field Ticket Automate \vee Fewer options
	Field Service Project 🍕 Suggest 🗈 Copy 🍽 Post 🖶 Print 🐼 Send 🗙 Cance
	Ticket No. FT00045 ••• ••• Ticket Date 4/8/2024 5
Click on the button Yes	On-Site Phone No. On-Site Phone No. Are you sure you want to post Ticket FT00045? Yes No
Click on the back button	Dynamics 365 Business Central Field Tickets

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 reoccuring 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	ales \lor Purchasing \lor Setup & Extensions \lor Intelligent Cloud Insights \lor					
	IONS					
	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 Planned Maintenance Worksheet						
	ACTIONS					
	+ Service Ticket Quote + Sales Order > Service Management > Re					
	+ Service Ticket + Sales Invoice > Service > Se					
	+ Service Unit + Purchase Quote > Planned Maintenance E Ex					
	+ Service Template + Purchase Planned Maintenance Worksheet					
	+ Sales Quote + Purchase Open the planned maintenance workshe					
	B Planned Maintenance Tickets					
	Service Units					
	Completed Planned Maintenance Tickets					

There are a variety of filters that can be used to idenitfy planned maintenance tickets. The following example will use the Service Unit filter.

Click on the lookup button **Select Service Unit(s)**

				\sim	
_					
				L	ook up valu
ed Ma	ntenance Ticket	More opt	ions	∇	
UOM	Meter Code	Current Meter Reading	Forecast Service Date	Estimated Usage	Created 1 No.



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Click on the link in cell Service Unit No. with the value SU00001	PLANNED MAINTENANCE WORKSHEET WOR Search + New Manage Open in Exercice UNITS
	Batch No. Service Unit No. ↑ Description FILTERS Service as at Date Stid Steer Loader Posting Date SU0001 ÷ Skid Steer Loader View open records only SU00003 Skid Steer Loader S450 Use Predictive Usage SU00004 Skid Steer Loader S70
Click on the povigation many item Coloulate Plan	Manage Calculate Plan 🔊 Process
Calculate Plan will display all service units that have triggered planned maintenance. Entries will be displayed based on the filters selected.	Service as at Date
	Manage Calculate Plan → Process Deferred Service Calculate Plan → Process Deferred Service Calculate Planned maintenance according to planned Service Unit Service Unit Description
Click on the cell Service Unit No. with the value SU00001	Use Predictive Usage · · · · · · · · · · · · · · · · · · ·
	Manage Calculate Plan → Process Deferred Service Service Unit Service Unit Description 7 SU00001 : Skid Steer Loader SS-GENERAL
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.	Select Service Location(s) Select Service Customer(s) Select Maintenance Group(s) Select Service Unit(s)
	View Service Unit 🕅 View Service Template 🕞 Create Plannedntenance Ticket 📄 View Ureate Planned Maintenar Planned Maint Service Template Description Posting Date Trigger Trigger Date Trigger Usage
	L Skid Steer General Service 4/15/2019 Recurring U 30.00



ODT Service Help

Click on the button OK			Planned				
	on	Posting Date	Trigger Tr	rigger Date	Trigger Usage	Usage UOM	Meter Code
					00	MILES	REGULAR
	planned mai	intenance ticke	ts created.				
					- 8		
				0	ĸ		
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					_		
Click on the navigation menu item View Planned	ţ	Select S	ervice Location(s	;)	· · · · · · · · L		
		Select S	ervice Customer	(s) · · · · · · · · · ·			
		Select N	laintenance Gro	up(s) · · · · · · ·			
		Select S	ervice Unit(s)			5U00001	
		Sciect S	crvice orin(3)				
	Template	🗟 Create Pla	nnedntenance	Ticket 🗎 Vi	iew Planned N	Mantenance Tick	et Mo
		Planned				View Planned Ma	intenance Ticker
	Posting Date	Maint	Trigger Date	Trigger Usage	Urage UOM	A Mater Code	Current N
	1/15/2019	Recurring II	ingger Date	30.00	MILES	REGULAR	Kea 3
	4/15/2019	Recurring 0		30.00	IVITELS	REGULAR	

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	Use Predictive Usage · · · · · · · · · · · · · · · · · · ·						
		Mana	age り 🔢 Cal	culate Plan 🛛 🔊 F	Process Deferred	Service 🗎	View Service Uni
	ŀ	Servi No. 1 → <u>SUOC</u>	ce Unit	Service Unit Descript 2018 Bobcat S450	ion Skid-Steer Loa	Service Template No. REPLACEAIRF	Service Templat
Click on the link Create a planned maintenance			Select S	ervice Location(s)			
quote for the selected line.			Select S	ervice Customer(s) Naintenance Groupi	(s) · · · · · · · · · · · · · · · · · · ·		LIGHTTRUCK
			Select S	ervice Unit(s)			
						_	
	olate	Create Plar	nned Maintena	ance Ticket(s)	Create Planned	Maintenance	Quote(s) 🗎 V
	ing Date	Planned Maint Trigger	Trigger Date	Trigger Usage	Usage UOM	Meter Code	Current Meter Reading
	2/2021	Fixed Period	4/12/2021	0.00			0.00



Click on the button OK	emplate 🕞 Create Planned Maintenance Ticket(s) 📄 Create Planned Maintenance Quote(s)
	1 planned maintenance entries processed, 1 planned maintenance quotes created. M Meter Code Reac
	ОК
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	aintenance Ticket(s) 🕞 Create Planned Maintenance Quote(s) 🛅 View Planned Maintenance Quo
	Estimated Append to Created Ticket Is Defer Defer Until Service Unit Usage Ticket No. No. Quote Service Date Customer No
	0.00 PM00034 Yes 20000
Click on the navigation menu item View Planned Maintenance Quote/Ticket	cation(s)
	et(s) 🗟 Create Planned Maintenance Quote(s) 🛅 View Planned Maintenance Quote/Ticket
	ger Usage Usage UOM Meter Code Current Meter Reading Forecast Service Date Estimated Usage 10.00 Append to Usage 10.00 0.00 0.00 4/12/2021 0.00
When you are finished reviewing the quote, it can be converted into a Planned Maintenance Ticket.	Edit - Planned Maintenance Ticket Quote - PM00034 · Service T
	General
	Customer Name
	Description Service Ticket #PM00034 - Trey F
	Order Date
	Service Date 4/12/2021
	relen kay



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

\sim	One Ticket per Customer	
\sim		
	Select Service Location(s)	
	Select Service Customer(s)	
	Select Maintenance Group(s)	



Click on the toggle field **One Ticket per Customer**

	Sandbo
Ficket per Customer	
t Service Location(s)	
t Service Customer(s)	
t Maintenance Group(s)	

To demonstrate One Ticket Per Customer we must select two different Service Units.

Click on the lookup button Select Service Unit(s)	
	·····
	ket More options
	Current Meter Forecast Estimated Append to Created Ticket Defi er Code Reading Senira Date Urana Ticket No. No. Sen
Click on the link in cell Service Unit No. with the	je → <u>SU00001</u> : 2015 NISSAN Titan
value SU00007	Date 4/ SU00002 2016 NISSAN Titan
	4/ SU00003 2015 NISSAN Frontier SU00004 2016 NISSAN Frontier
	ecords only
	e Usage
	SU00007 2017 Bobcat S70 Skid-Steer
	SU00008 2017 Bobcat S450 Skid-Steer.
	SU00009 2018 Bobcat 5/0 Skid-Steer
	Service Unit Description
Click on the lookup button Select Service Unit(s)	
	SU00007
	ket More options T
	Current Meter Forecast Estimated Append to Created Ticket Defi er Code Reading Sensice Date Lleage Ticket No. No. Sen





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Click on the link in cell Service Unit No. with the value SU00008	Date 4/ SU00001 2016 NISSAN Titan 4/ SU00003 2015 NISSAN Frontier SU00004 2016 NISSAN Frontier SU00005 2015 Ford F150 e Usage SU00006 2016 Ford F150 SU00007 2017 Bobcat S70 Skid-Steer SU00008 : 2017 Bobcat S70 Skid-Steer SU00010 2018 Bobcat S70 Skid-Steer Su00010 2018 Bobcat S450 Skid-Steer Su00010 2018 Bobcat S450 Skid-Steer
Click on the navigation menu item Calculate Plan	4/0/2020
C C	Posting Date
	View open records only · · · · · · · · · · · · · · · · · · ·
	Use Predictive Usage · · · · · · · · · · · · · · · · · · ·
	Manage Calculate Plan 🕈 Process Deferred Service 🗎 View Service Uni
	Calculate planned maintenance according to planned maintenance shedu Service
	Service Unit Template No. No.↑ Service Unit Description ↑ Service Templat
	\rightarrow
I he 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 Service Unit Template No. No. † Service Unit Description † Service Templat
Ű	→ 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
Click on the cell Service Unit No. with the value SU00007	Use Predictive Usage
	Manage 📓 Calculate Plan 🍠 Process Deferred Service 🐘 View Service Uni
	Service Service Unit Template No. No.↑ \$ervice Unit Description ↑ Service Templat
	→ SU00007 2017 Bobcat S70 Skid-Steer Loader OILCHANGE-SS Oil Change
	SU0000 SU00007 2017 Bobcat S70 Skid-Steer Loader REPLACEAIRFI Replace Air Fi
	SU00008 2017 Bobcat S450 Skid-Steer Loa OILCHANGE-SS Oil Change
	2017 DOUGLI 3430 SKID-SLEET LOA KLEALEAIKEL KEPIALE AIF P




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Click on the row menu button	Use Predictive Usage						
	Manage 🛛 📓 Calculate Plan 🌒 Process Deferred Service 🛛 🐘 View Service						
	Service Service Unit No.↑ Service Unit Description ↑ Service Tem						
	→ SU00007 : 2017 Bobcat S70 Skid-Steer Loader OILCHANGE-SS Oil Change						
	SU00007 Show more options kid-Steer Loader REPLACEAIRFI Replace Ai						
	SU00008 2017 Bobcat S450 Skid-Steer Loa OILCHANGE-SS Oil Change						
	SU00008 2017 Bobcat S450 Skid-Steer Loa REPLACEAIRFI Replace Ai						
Click on the menu item Select More	Service Service Unit Template No. No. ↑ Service Unit Description ↑ Service Tem						
	→ SU00007 : 2017 Bobcat S70 Skid-Steer Loader OILCHANGE-SS Oil Change						
	2017 Bobcat S70 Skid-Steer Loader REPLACEAIRFI Replace Ai						
	2017 Bobcat S450 Skid-Steer Loa OILCHANGE-SS Oil Change						
	Delete Line 2017 Bobcat S450 Skid-Steer Loa REPLACEAIRFI Replace Ai						
	Select More						
Select the service line for Oil Change for both units.	Manage I Calculate Plan I Process Deferred Service Revice Service						
	O No. ↑ Service Unit Description ↑ Service						
	→ SU00007 🔛 2017 Bobcat S70 Skid-Steer Loader OILCHANGE-SS Oil C						
	SU00007 2017 Bobcat S70 Skid-Steer Loader REPLACEAIRFI Repl						
	U00008 2017 Bobcat S450 Skid-Steer Loa OILCHANGE-SS Oil C						
	SU00008 2017 Bobcat S450 Skid-Steer Loa REPLACEAIRFI Repl						
Click on the navigation menu item Create Planned	Select Service Location(s)						
Maintenance Ticket(s)	Select Service Customer(s)						
()	Select Maintenance Group						
	Select Service Unit(s)						
	🗟 View Service Unit 🛛 🕅 View Service Template 🔹 Create Plannedance Ticket(s)						
	Create Planned Maintenance						
	late No. Maint						
	Service Template Description Posting Date Trigger Trigger Date Trigger						
	HANGE-SS Oil Change 4/6/2020 Recurring U 4/6/2020						
	ALCAIKH Replace Air Hiter 4/6/2020 Hixed Period 4/6/2020						





Notice that only 1 ticket has been created after selecting both lines.	Select Maintenance Group(s) · · · · Select Service Unit(s) · · · · ·
	ew Service Unit 🛛 🗮 View Service Template 🛛 🗟 Create Plannedance Ticket(s) 🛛 🛅 View Plannec
	Io. Service Template Des GE-SS Oil Change VIRFI Replace Air Filter GE-SS Oil Change VIRFI Replace Air Filter
Click on the button OK	mplate 🔹 Create Plannedance Ticket(s) 🚡 View Planned Menance Ticket More option
	planned maintenance entries processed, 1 planned naintenance tickets created. UR HOUR
	OK HOUR
	Select Service Location(s)
Click on the navigation menu item View Planned Maintenance Ticket	Select Service Customer(s)
	Select Maintenance Group(s)
	Select Service Unit(s) SU00007
	ce Template 🔓 Create Plannedance Ticket(s) 🛅 View Planned Menance Ticket More
	View Planned Maintenance Ticket. View th
	Maint Posting Date Trigger Trigger Date Trigger Usage Usage UOM Meter Code
	4/6/2020 Recurring U., 4/6/2020 50.00 HOUR HOUR
	4/6/2020 Fixed Period 4/6/2020 0.00
Notice that the ticket that was created now has lines	
for both of the selected Service Units.	Service Date
	Ticket Units/Lines Manage More options
	ODT Service Defer Task Type Unit No. Serial No. Description Serv
	→ Heading : SU00007 2017 Bobcat S70 Skid-Steer □
	Posting SU00007 Oil Change
	Posting SU00008 Oil Change
	(Ticket Details
	licket Details

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							
	DEFAULT						
	Select Service Location(s)						
	Den the date picker Customer(s)						
	Select Maintenance Group(s) · · · · · · · · · · · · · · · · · · ·						
Change the date to April 16, 2019.	DEFAULT						
	at Date · · · · · · 4/15/2019						
	te · · · · April 2019						
	records only · · · · · · · · · · · · · · · · · · ·						
	tive Usage						
	Calculate Plan Process Defer Image: Calculate Plan Image: Process Defer Today Done						
	t Template No.						
	Service Unit Description Service Template Description Postin Skid Stear Loader (15/1) Skid Stear Concert Service (1/15/1)						
lick on the toggle field Use Predictive Usage	Batch No.						
	FILTERS						
	Service as at Date						
	Posting Date						
	View open records only · · · · · · · · · · · · · · · · · · ·						
	Use Predictive Usage						
	Manage 🛛 📓 Calculate Plan 🔊 Process Deferred Service 🔹 View Service Unit 🗮 View Ser						
	Service Unit Service Unit Template No. No. ↑ Service Unit Description ↑ Service Template Description						
Click on the paying tion many item Calculate Blan	CLIDDOO1 : Chid Char Londer CC CENIEDAL Chid Char Consel Conice TIETEINS						
Sick of the havigation menu item Calculate Flat	Service as at Date 4/16/2019						
	Posting Date						
	View open records only · · · · · · · · · · · · · · · · · · ·						
	Use Predictive Usage · · · · · · · · · · · · · · · · · · ·						
	Manage ☐ Calculate Plan → Process Deferred Service						
	Calculate planned maintenance according to planne Service Service Unit Template No.						
	No. † Service Unit Description †						
	→ SU00001 : Skid Steer Loader SS-GENERAL						



ODT Service Help

In addition to the entry from the previous example, a				oserreur	cuve osage					
second entry now appears for Skid Steer General Service. Predictive Usage has determined that this				Manage	Calci	ulate Plan	Proces	ss Deferred	Service	🕞 Vi
will trigger during the specified time period.				Service Ur No. ↑	nit	Service Unit De	scription		Service Template № ↑	0.
			\rightarrow	SU00001		Skid Steer Loa	der		SS-GENER	AL
				SU00003		Skid Steer Loa	der S450		SS-GENER	AL
					SU0000	3				
Trigger usage displays the amount of usage required to trigger the Service Meter. In this example, the amount is 30 hours.	Service	Template	Screate	Planned	.ntenance	Ticket 🛅	View Plant	ned Mante	enance Tick	et
			Planned							
		Posting Date	Trigger	Trig	ger Date	Trigger Usag	ie Usage	UOM	Meter Code	
		4/15/2019	Recurrin	ng U	_	30.0	0 MILES	5	REGULAR	
		4/15/2019	Recurrin	ng U		30.0		5 1	REGULAR	
							30.00			
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	ed Ma	.ntenance Tick	ket	More op	tions		Ŷ	1		
the time period.	UOM	Meter Code	Curr	rent Meter Reading	Forecast Service Da	Es	timated Usage	Created 1 No.		
		REGULAR		30.00	4/15/201	9	0.00	PM0000		
		REGULAR		20.00	4/16/2019	9	20.00			
							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.

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Click on the cell Service Unit No. with the value	
SU00003	Manage 🔚 Calculate Plan 🕘 Process Deferred Service 🖡
	Service Service Unit Template No. No.† † Service Template Description
	→ SU00001 SS-GENERAL Skid Steer General Service
	SU00003 SU00003 Skid Steer General Service
Click on the cell Defer Service with the value Until Date Next Service	View Planned Mantenance Ticket More options
	r Forecast Estimated Created Ticket Defer Defer Until Service Date Usage No. Service Date
	0 4/15/2019 0.00 PM00001
	0 4/16/2019 20.00
Click on the item Until Date in the list	
	r Forecast Estimated Created Ticket Defer Defer Until) Service Date Usage No. Service Date
	0 4/15/2019 0.00 PM00001
	0 4/16/2019 20.00
Click on the cell Defer Until Date	
	ed Mantenance Ticket More options Y
	Estimated Created Ticket Defer Defer Until e Usage No. Service Date
	20,00 PM00001 Until Date 1
	lype the date in the format M/d/yyyy



Solact the date to April 23, 2010	
Select the date to April 23, 2019) 0.00 PM00001
	April 2019
	7 8 9 10 11 12 13 14 15 16 17 18 19 20
	21 23 24 25 26 27
	28 29 30
	Today Done
Click on the navigation menu item Process Deferred	
Service	Service as at Date 4/16/2019
	Posting Date
	View open records only · · · · · · · · · · · · · · · · · · ·
	Use Predictive Usage · · · · · · · · · · · · · · · · · · ·
	Manage 🔢 Calculate Plan 🍠 Process Deferred Service 🖺 View Service
	Process deterred service lines according
	Planned Service Unit Maint
	No.↑ Service Template Description Posting Date Trigger
	SU00001 Skid Steer General Service 4/15/2019 Recurring U.
After clicking Process Deferred Service, the selected	and the second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second s
entry is removed from the current batch.	
,	Service Unit No. ↑ Service Template Description Posting Date
	→ SU00001 : Skid Steer General Service 4/15/2019
To view the deferred entry, simply change the Service	
Date to the date of deferal.	
Click on the field Service as at Date	EWORKSHEET WORK DATE: 4/15/2019
	DEFAULT
	····· 4/16/2019 🛅 S
	4/15/2019



Click on the link Open the date picker	
	DEFAULT
	Select Service Location(s)
	Open the date picker Serect Service Customer(s)
	Select Maintenance Group(s) · · · · · ·
	Select Service Unit(s)
Change the date to April 23, 2010	
Change the date to April 23, 2019	at Date
	te · · · · · · · · · · · · · · · · · · ·
	records only · · · · · · · · · · · · ·
	tive Usage · · · · · · · · · · · · · · · · · · ·
	Galculate Plan → Process Deferred Service 🎼 View Service Unit 🕅 View Service Templ
	Planned
	t Maint Service Template Description Posting Date Trigger Trigger Date Trigger Usage
	Skid Steer General Service 4/15/2019 Recurring U 30.00
Click on the link Calculate planned maintenance	Service as at Date
according to planned maintenance shedules that	Posting Date
nave been set up.	View open records only · · · · · · · · · · · · ·
	Use Predictive Usage · · · · · · · · · · · · · · · · · · ·
	Manage 🔚 Calculate Plan 🕘 Process Deferred Service 🕞 Vi
	Calculate planned maintenance according to planned
	Service Unit N No. † Service Template Description Posting Date T
	→ SU00001 : Skid Steer General Service 4/15/2019 R
Since the service date has been changed, Calculate	Ose fredicine osage
Plan will now display the deferred entry.	Manage 📓 Calculate Plan 🔿 Process Deferred Service 🖺 Vi
	Service Unit No.↑ Service Template Description Posting Date
	CLI00001 Chief Stees Conserved Consister 4/1E/2010 D
	SU00001 : Skid Steer General Service 4/15/2019 R
	SU00001 : Skid steer General Service 4/15/2019 R SU00003 : Skid Steer General Service 4/15/2019 R SU00003
	SU00003 SU00003 Skill Steer General Service 4/15/2019 R SU00003
	SU00003 Skill Steer General Service 4/15/2019 R SU00003 SU00003

4.2.7. How to View the Planned Maintenance Entry Archive Business Manager Profile



Click on the navigation menu item popup Planned Maintenance	IONS Service Ticket Quote + Sales Order > Service Management > Reports Service Ticket + Sales Invoice > Service > Setup Service Unit + Purchase Quote > Planned Maintenance >> Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: Image: I
Click on the navigation menu item Planned Maintenance Entry Archive	+ Service Template + Purchase Planned Maintenance Worksheet + Sales Quote + Purchase Planned Maintenance Quotes Planned Maintenance Tickets Service Units
	Completed Planned Maintenance Tickets Planned Maintenance Entry Archive Cpcrr die planned maintenan View Planned Miantenance Ticket UP Searcn
The archive will display a list of all tickets that have been processed using the Planned Maintenance Worksheet.	ment (preview) Batch No. Service Unit No. Service Unit Description Templat DEFAULT SU00003 Skid Steer Loader S450 SS-GET Ct, bc
Click on the cell Defer Until Date with the value 4/23/2019	VORK DATE: 4/15/2019 e Ticket ID Open in Excel ID Oper ID Defer Defer Until Def Date Defer Defer Until Serv ODT_KYLE Until Date 4/23/2019 1 ger ter



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.

ice, Inc. Servic		INED MAII	NTEN	IANCE ENTRY	ARCHIVE WORK DATE: 4/15/2019
dors Items Bank	م	Search	Βv	ïew Planned I	Mantenance Ticket
ox environment (preview)			-		View Planned Waimenance Ticket. \
T MONTH	Batch	n No.		Service Unit No.	Service Unit Description
on curt	DEF	AULT	÷	SU00003	Skid Steer Loader S450
op cusic					
e Art, bo					

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	Purchasing ~	Setup & E	Extensions ~	Intelligent Cloud Insights \vee	=
	Ticket Quote Ticket Unit Template uote rder	+ Sales Invoi + Purchase (+ Purchase (+ Purchase I > Service Ma > Service	ice Quote Order Invoice anagement	 > Planned Maintenance ~ > New > Payments > Reports > Setup Excel Reports 	l
Click on the navigation menu item Planned Maintenance Quotes	ACTIONS + Service Ticke + Service Unit + Service Temp + Sales Quote + Sales Order	et Quote + et + plate + > >	Sales Invoice Purchase Quote Purchase Order Purchase Invoi <mark>c</mark> Service Manage Service	 > Planned Mainten Planned Maintenance Workshold Planned Maintenance Quotes Planned Maintenance Quotes Planned Maintenance Hockets Service Units Completed Planned Maintenance Planned Maintenance Entry Art 	ance eet nance quotes where nce Tickets chive

Open Door Technology Inc. kyle@opendoorer p.com March 17, 2025 298/369 **ODT Service Help** Click on the navigation menu item New PLANNED MAINTENANCE TICKET QUOTES | WORK DATE: 4/15/2019 ice, Inc. Servic \leftarrow dors Items Bank 🔎 Search + New Manage Process Report ox environment (preview Create a new entry. Planned Ticket Quote Description Order Date op custo (There is nothing e Art, bo Click on the lookup button Customer No. Ficket Quote Service Date Look up value Scrince Ticket Type Assigned Technician Default Service Unit No Click on the link in cell No. with the value 10000 Report More options ocess Select the applicable customer eneral stomer No stomer Nar No.1 scriptio 10000 Adatum Corporation 31 cord "10000" ch der Date 2000 Select re 61 30000 37 School of Fine Art 40000 Alpine Ski House 31 50000 Relectoud 31 ket Units/Lines Manage More opti + New ODT Service Unit Click on the field Description More options You may specify a description for the ticket. If no description is given, a description using the ticket number will be automatically created. 10000 Sei Adatum Corporation Sei Acc 4/15/2019 Def Manage More options





Click on the field Service Ticket Type This field is optional	
	Show more
	4/15/2019
	·····
	Look up value
	······
	R
Click on the field Assigned Technician This field is optional.	
	Show more
	····· 4/15/2019 🛗
	······
	Look up value
	E
Click on the field Default Service Unit No.	Show more
service ticket, a message will be displayed to indicate	4/15/2019
this and confirm if you want to proceed.	
	······
	Budget (Total Cost) Actual (Total Cost) Billable (Total Price) Price)
Click on the link in cell Service Unit No. with the	ce Ticket Type
value SU00001 Select the applicable Service Unit. The selected	ned Technician
Service Unit will be automatically added to the ticket	ult Service Unit No.
	Service Unit No. ↑ Description
	→ SU00001 Skid Steer Loader
	End Date Budget (Total Cost) 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.

endoor	Open Door	rechnology inc.	kyle@opendoorei p.com Morob 17, 2025		
TECHNOLOGY	ODT Se	ervice Help	March 17, 2025 300/369		
Click on the navigation menu item	popup Process	Dynamics 365 Business Cer	ntral		
		e e pl	LANNED MAINTENANCE TICKET QUOTE WORK DATE: 4/15/2019		
		F	200002°		
		Pr	rocess Report More options		
		G	ieneral		
		CL	ustomer No		
		CL	Adatum Corporatio		
Click on the navigation menu item Template	Add Service		ANNED MAINTENANCE TICKET QUOTE WORK DATE: 4/15/2019 >MOOOOO2 'ocess Report More options Make Ticket ¥ Add Service Template X Cancel Ticket Idd Service Template ustomer No. 10000 ustomer Name Adatum Corporatio		
Click on the link in cell Template N SS-GENERAL SERVICE	lo. with the value	planned maintenance ticket	OUOTE WO Search + New Manage Den in Ex		
		Process Report More	options Template No. Template Type Descript → <u>SS-GENERAL S</u> : All Skid St Select record "SS-GENERAL SERVICE"		
		Customer No.			
		Customer Name			

kyle@opendoorer

How to Manually Add a Line to a Planned Maintenance 4.3.4. Quote

The following demonstrates manually entering a ticket line on a Planned Maintenance Quote.

Click on the cell Description

tal	SU00001		-
	3000001	Skid Steer General Service	_
	SU00001	Labor - Lube	4/1
	SU00001	Oil Change for Skid Steers	4/
	SU00001	Air Filter for Skid Steers	4/1
	SU00001	Income - Shop Supplies	4/
1	SU00001	Skid Steer General Service	_



kyle@opendoorer p.com March 17, 2025 301/369

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.	tal	SU	00001		Skid Steer	r Loader		_
When creating a new line, Task Type will automatically default to Posting, and Service Unit No. will automatically default to the current Service Unit.	cai	20	000001			Concerned Conciliant		
automatically default to Posting, and Service Unit No. will automatically default to the current Service Unit.		511	00001		labor Jul	be		-
will automatically default to the current Service Unit.		SU	00001		Cil Change	o for Skid Stears		4/
,		50	00001		Air Filtor fo	e for Skid Steers		4/
		50	00001		All Filler IC	Chap Supplies		
		50	00001		Chiel Change	Concernal Service		- 4/
		30	00001		skid steer	General Service		- 1
					А			
	s							
Click on the link in the cell Pudget (Tetal Cent)								
Click of 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	-	
			-10/2013	4/13/2013		74.01	-	
			-	-		74.01	-	
		-					1	
						open record		1
Note that the field Line Type defaults to Time and Materials, and Type defaults to Resource. These ralues may be changed if necessary. The following example uses the Resource Type.	ew CET DET Job O084	Edit TAILS Task No.	List Dele T Service Uni No.	ete 🕀 Item Ava it Service Template No.	ilability By Loca Line Type ▼ Time and N Time a	Type Mat Resource and Materials	in Excel	More Desc
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.	W CET DEI Job T OO84	Edit TAILS Task No. 0000	List i Dela t Service Uni No.	ete 🕀 Item Ava it Service Template No.	ilability By Loca	Type Mat Resource Mat Resource More options	in Excel	Des-
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.	W CET DEI Job T OO84	Evitem Evitem Evitem Evitem Service Templat	List i Dela T Service Uni No. Availability By e No. T	ete 🕀 Item Ava it Service Template No.	ilability By Loca Line Type ▼ Time and N Time a	Type Mat Resource More options	in Excel	Des-
Note that the field Line Type defaults to Time and Vaterials, and Type defaults to Resource. These values may be changed if necessary. The following example uses the Resource Type.	W CET DEI Job T OO84	Edit TAILS Task No. 0000	List i Dela T Service Uni No. Availability By e No. I Time Time Cost 7	ete 🕀 Item Ava it Service Template No.	ilability By Loca	Type Mat Resource Mat Resource More options	in Excel	Des
Note that the field Line Type defaults to Time and Waterials, and Type defaults to Resource. These values may be changed if necessary. The following example uses the Resource Type.	w KET DET Job ♥ 0088	Edit TAILS Task No. 00000	List Dele 1 Service Uni No.	ete 🚭 Item Ava it Service Template No.	ilability By Loca Line Type Time and M Time a	Type Mat Resource and Materials	In Excel	De



Click on the link in cell No. with the value LABOR	1≣ 88 ∠′
	Service Line Type
	Template No. Type No. Description
	No. † Name
	→ LABOR Labor - Oil Change
	MARK Mark Hanson
	MARY Mary A. Dempsey
	TIMOTHY Timothy Sneath
	+ New
Click on the cell Description with the value Labor - Oil Change	O Search 🕂 New 👿 Edit List 📋 Delete 🤀 Item Availability By Location 💶 Open in Ex
Description will be automatically filled based on the Resource card selected. This value can be overriden to more accurately describe the task being performed	DIT - SERVICE TICKET DETAILS
	Job No. ↑ ▼ Type No. Description Serv Q
	PM00002 : Resource LABOR V Labor - Oil Change
Enter the text additional Labor.	
	Search Treew ex conclust in Delete i tem Availability by Location i i ben be
	DIT - SERVICE TICKET DETAILS
	Defer
	Job No. 1 Type No. Description Serv Q PM00002 : Recource LAROR Ad
Click on the cell O wentity	
Click on the cell Quantity	Delete 🤀 Item Availability By Location 🗳 Open in Excel More options
	Defer Unit of Description Serv. Quantity Massure Code Unit Cost
	Additional Labor



Enter the text 1							
	Delete	🗊 Item Availa	ability By Location		pen in Excel	More option	IS
		Description		Defer Serv	Quantity	Unit of Measure Code	Unit Cost
		Additional Labo	r			1 HOUR	22.25
Click on the button Close			TIOOK		22.23		Shi
Click on the button Close			HOOK		22:23		Sho
Click on the button Close			Inton		<i>EE;EJ</i>		Sh
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Click on the button Close			THOOK		<i>LL.LJ</i>		Sh
Click on the button Close			IIIIOOK	[Close		Sh
Click on the button Close			IIIIOOK	[Close		Shi
Click on the button Close				[Close		Sh
Click on the button Close	End D	Pate	Budget (Total Cost)	Actu	Close	Billable (Total Pric	Shi Billable (Inv e)

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	Dynamics 365 Business Central				
	(\leftarrow	PLANNED MAINTENANCE TICKET QUOTE WORK DATE: 4/15/2019		
			PM00002		
			General		
			Customer No		
			Customer Name Adatum Corporation		
Click on the navigation menu item Print		4	PLANNED MAINTENANCE TICKET QUOTE LWORK DATE: 4/15/2019		
	· ·		PM00002		
			Process Report More options		
			Prepare to print the document. A report request window for the docume		
			Customer No		
			Customer Name Adatum Corporation		
			Description		



Cancel

Preview

ODT Service Help

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	Send to Print

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	Purchasing \	✓ Setup & Extensions ✓	Intelligent Cloud Insights \lor ert \equiv
	Ticket Quote Ticket Unit Template uote rder	+ Sales Invoice + Purchase Quote + Purchase Order + Purchase Invoice > Service Management > Service	 > Planned Maintenance ~ > New > Payments > Reports > Setup Excel Reports
Click on the navigation menu item Planned Maintenance Tickets	ACTIONS		
	+ Service Tick	et Quote + Sales Invoice	> Planned Maintenance
	+ Service Tick + Service Tick + Service Unit	et Quote + Sales Invoice et + Purchase Quo + Purchase Orde	> Planned Maintenance
	+ Service Tick + Service Tick + Service Unit + Service Tem	et Quote + Sales Invoice et + Purchase Quo + Purchase Orde plate + Purchase Invo	Planned Maintenance Planned Maintenance Worksheet Pr Planned Maintenance Quotes
	+ Service Tick + Service Tick + Service Unit + Service Tem + Sales Quote + Sales Order	et Quote + Sales Invoice et + Purchase Quo plate + Purchase Orde plate + Purchase Invo > Service Manag > Service	Planned Maintenance Planned Maintenance Worksheet Planned Maintenance Quotes Planned Maintenance Tickets Onen the list of planned maintenance Tickets
	+ Service Tick + Service Tick + Service Unit + Service Tem + Sales Quote + Sales Order	et Quote + Sales Invoice et + Purchase Quo - + Purchase Orde plate + Purchase Invo - > Service Manag > Service	Planned Maintenance Planned Maintenance Worksheet Pr Planned Maintenance Quotes Planned Maintenance Tickets Planned Maintenance Tickets Planned Maintenance Tickets Planned Maintenance Tickets Planned Maintenance Tickets
	+ Service Tick + Service Tick + Service Unit + Service Tem + Sales Quote + Sales Order	et Quote + Sales Invoice et + Purchase Quo : + Purchase Orde plate + Purchase Invo e > Service Manag > Service	Planned Maintenance Planned Maintenance Worksheet Planned Maintenance Quotes Planned Maintenance Tickets Service Units Open the list of planned mai Completed Planned Maintenance Tickets Planned Maintenance Tickets

Open Door Technology Inc. kyle@opendoorer p.com March 17, 2025 305/369 **ODT Service Help** Click on the navigation menu item New PLANNED MAINTENANCE TICKETS | WORK DATE: 4/15/2019 ice, Inc. Servio \leftarrow dors Items Bank 🔎 Search + New Manage Report 💶 Open in Exce ox environment (preview Create a new entry. Planned Maintena LAST THREE MONTHS Ticket No. 1 Description Order Date PM00001 Service Ticket #PM00001 - Ada... 4/15/2019 osed 16 same Click on the lookup button Customer No. anned Maintenance Ticket ess Report More options eral Service Date mer No. Look up value Ticket Type mer Name Assigned Technician iption Default Service Unit .. Ħ Date Click on the link in cell No. with the value 10000 Report More options Process Select the applicable customer. Servio General Service Date Customer No. Customer Name 71 Description 10000 Adatum Corporation 31 Order Date 2000 Select record "10000" Ch 61 30000 School of Fine Art 37 40000 Alpine Ski House 31 50000 Relectoud 31 Ticket Units/Lines + New 0 Click on the field **Description** Process Report More options You may specify a description for the ticket. If no : Servic description is given, a description using the ticket General number will be automatically created. Customer No. 10000 Service Da Adatum Corporation Customer Name Service Tic Description Assigned Order Date Default Se Ticket Units/Lines Manage More options



Click on the field Service Ticket Type This field is optional.	
	Show more
	✓ Service Date · · · · · · · 4/15/2019
	ation Service Ticket Type
	PM00003 - Adatu Assigned Technician
	Default Service Unit V
	e ontions F1
Click on the field Assigned Technician This field is optional.	Show more
	ation Service Ticket Type
	PM00003 - Adatu Assigned Technician
	Default Service Unit
	e options
Click on the field Default Service Unit No	
If the selected service unit is already on another open	Show more
If the selected service unit is already on another open service ticket, a message will be displayed to indicate	Show more Show 2/15/2019
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.	Show more Show more Source Date
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.	Show more Show more Solution Service Date ····· 4/15/2019 Service Ticket Type ···· PM00003 - Adatu Assigned Technician ···
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.	Show more Show more Service Date ······ 4/15/2019 ation Service Ticket Type ···· PM00003 - Adatu Assigned Technician ··· Default Service Unit
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.	Show more Service Date 4/15/2019 ation Service Ticket Type PM00003 - Adatu Assigned Technician Default Service Unit V
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.	Show more Show more Service Date ······ 4/15/2019 ation Service Ticket Type ···· PM00003 - Adatu Assigned Technician ··· Default Service Unit
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.	Show more Service Date ation Service Ticket Type PM00003 - Adatu Assigned Technician Default Service Unit Default Service Unit Control Default Service Unit Default Service Unit Service Default Service Unit Service
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.	Show more Show more Service Date ······ 4/15/2019 ation Service Ticket Type ···· PM00003 - Adatu Assigned Technician ··· Default Service Unit Default Service Unit Perprise Compared Technician Defer Service Ticket Type ···· Start Date End Date
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.	Show more Service Date ation Service Ticket Type PM00003 - Adatu Assigned Technician Default Service Unit Default Service Unit Portions Service Ticket Type Service Unit Service Ticket Type
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.	Show more Show more Solution Service Date ······ A/15/2019 Service Ticket Type ···· PM00003 - Adatu Assigned Technician ··· Default Service Unit Perform Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· 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.	Show more Show more Solution Service Date ······ 4/15/2019 Service Ticket Type ···· PM00003 - Adatu Assigned Technician ··· Default Service Unit Default Service Unit Default Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Default Service Unit Person Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service Ticket Type ···· Service
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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

TECHNOLOGY	Open Door Technology Inc. ODT Service Help				
Click on the navigation menu item p	popup Process	PLANNED MAINTENANCE T	NANCE TICKET I WORK DATE: 4/15/2019 PM000003 · Service Corporation Process Report More options General Customer No. 10000 Customer Name Adatum Corporation		
Click on the navigation menu item A Template	Add Service		PM00003 · Service Corporation Process Report More options Add Service Template View Job Journal Customer Name Add Service Template Planned. Customer Name Addum Corporation Description Service Ticket #PM0000		
Click on the link in cell Template N SS-GENERAL SERVICE	o. with the value CROP Custor X T INSIGH YC IN	PLANNED MAINTENANCE T Search + New Planned Maintenan Ticket No. 1 Descript PM00001 É Service	Search + New Manage Open in Exc SERVICE TEMPLATES Template No. Template Type Descriptic SS-GENERAL S All Skid Ste		

A Service Template can also be added from the ticket lines.

Click on the navigation menu item popup Manage

Cusi	tomer ivo.		10000		Scrvice
Cust	tomer Name		Adatum Co	orporation	Service
Des	cription · · · ·		Service Tic	ket #PM00003 - Adat	u Assigne
Ord	er Date		4/15/2019	1	1 Default
Tick	et Units/Lines		Manage	More options	
			ODT Service		
	Task Type		Unit No.	Serial No.	Description
\rightarrow	Task Type Heading	÷	Unit No. SU00001	Serial No.	Description Skid Steer Load
\rightarrow	Task Type Heading Begin-Total	:	Unit No. SU00001 SU00001	Serial No.	Description Skid Steer Load Skid Steer Gener





Click on the navigation menu item Add Service Template			D	escription · · ·	Service Tick	 (et #PM00003 - Ac	datu As
			т	icket Units/Li	nes Manage	More options	
				➡** New Line ➡> Delete Line	* Add Service Te	emplate 🔍 Vie	w Service Tick
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	in						

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**

Click on the cell Description		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
	al -	SU00001	Skid Steer General Service	_
		SU00001	Oil Change for Skid Steers	4/1
Enter the text Additional Labor	tal	SU00001	Skid Steer General Service	
Enter the text Additional Labor	tal	SU00001	Skid Steer General Service	
When creating a new line. Task Type will	1	SU00001	Labor - Lube	4/1
automatically default to Posting, and Service Unit No.	3	SU00001	Oil Change for Skid Steers	4/1
will externationally default to the surrant Carvice Unit No.)	SU00001	Air Filter for Skid Steers	4/1
will automatically default to the current Service Unit.	3	SU00001	Income - Shop Supplies	4/1
	al	SU00001	Skid Steer General Service	_
		SU00001	Oil Change for Skid Steers	4/1
			A	
	le			



kyle@opendoorer p.com March 17, 2025 309/369

ODT Service Help

Slick on the link in cell Budget (Total Cost). Image: Cost of the link in cell Budget (Total Cost). Image: Cost of the link in cell No. Image: Cost of the link in cell No. Image: Cost of the link in cell No. Image: Cost of the link in cell No. Image: Cost of the link in cell No. Image: Cost of the link in cell No. Image: Cost of the link in cell No. Image: Cost of the link in cell No. Image: Cost of the link in cell No. Image: Cost of the link in cell No. Image: Cost of the link in cell No. Image: Cost of the link in cell No. Image: Cost of the link in cell No. Image: Cost of the link in cell No. Image: Cost of the link in cell No. Image: Cost of the link in cell No. Image: Cost of the link in cell No. Image: Cost of the link in cell No. Image: Cost of the link in cell No. Image: Cost of the link in cell No. Image: Cost of the link in cell No. Image: Cost of the link in cell No. Image: Cost of the link in cell No. Image: Cost of the link in cell No. Image: Cost of the link in cell No. Image: Cost of the link in cell No. Image: Cost of the link in cell No. Image: Cost of the link in cell No. Image: Cost of the link in cell No. Image: Cost of the link in cell No. Image: Cost of the link in cell No.	Click on the link in cell Rudget (Tetal Cest)								
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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 overriden to more accurately describe the task being performed.	- New Edit List Delete Item Availability By Location Gen in Excel Mc IICKET DETAILS Line Type Type No. Description Defer Serv Q Time and Mat Resource LABOR Labor - Oil Change
Enter the text additional Labor .	- New B Edit List Delete 🚭 Item Availability By Location 🔀 Open in Excel Mc
	Line Type Type No. Description Defer Serv Q
Click on the cell Quantity	Item Availability By Location III Open in Excel More options
	Defer Unit of Description Serv Quantity Measure Code L Additional Labor HOUR
Enter the text 1.	Item Availability By Location I Open in Excel More options
	Description Defer Quantity Measure Code L



ODT Service Help

Click on	the	button	Close
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Prie	Billable (Total Price)	al Cost)	Actual (et (Total Cost)	Bud	End Date
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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	Dynamics 365 B	usiness	Central			
	÷	\leftarrow	PLANNED MAIN	TENANCE TICKET WO	RK DATE:	4/15/2019
			PM00	003 · Ser	vice	e Ticket #
			Process <u>Repo</u>	Actions	Navigate	Fewer options
			General			
			Customer No.			10000
			Customer Name			Adatum Corporation
Click on the navigation menu item Print			- · ·			
-	÷	\leftarrow	PLANNED MAIN	TENANCE TICKET WO	RK DATE:	4/15/2019
	100 000		PM00	003 · Ser	vice	e Ticket #
			Process Repo	Actions	Navigate	Fewer options
			Print	e to print the document.	A report req	uest window for the docum
			Customer No.			10000
			Customer Name			Adatum Corporation
			Description · · ·			Service Ticket #PM00
	× Job Task No.				~	
The standard Microsoft Dynamics 365 Business Central, printing options are available to select from.	+ Filter					Total Cost) Actu
In this example Preview will be used to view the ticket.	e e					 11.13
Click on the button Preview	foi	Send t	o Print	Preview	Cancel	37.50
	100 Supplies		4/15/2019	4/15/2019		10.00
	Seneral Service			.,		74.01
	for Skid Steers		4/15/2019	4/15/2019		37.50
	Labor		4/15/2019	4/15/2019		22.25

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.



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	Dynamics 365 Business Central			
		~	PLANNED MAINTENANCE TICKET WORK DATE: 4/15/2019	
			PM00003 · Service Ticket #	
			Process Report Actions Navigate Fewer options	
			General	
			Customer No	
			Customer Name Adatum Corporation	
Click on the link Confirm actuals to post usage for				
the current planned maintenance ticket.	\leftarrow	\leftarrow	PLANNED MAINTENANCE TICKET WORK DATE: 4/15/2019	
			PM00003 · Service Ticket #PM	
			Process Report Actions Navigate Fewer options	
			Y Add Service Template Confirm Actuals View Job Journal Image: Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals Confirm Actuals	
			Confirm actuals to post usage for the currer Customer No. 10000	
			Customer Name Adatum Corporation	
			Description Service Ticket #PM00003 - Ad	

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

ET WORK DAT	Manage P	rocess	Prepare	Post/Print	Job Line	More opti	ons
Servic	Servic						
ions Naviga	Batch Name					KYLE	
	Line Type		Posting Date	Document No.	Job No.	Job Task No.	Ту
-	→ Both Budg	• :	4/15/2019	DOCPM000	PM00003	0030000	Re
	Both Budge		4/15/2019	DOCPM000	PM00003	0040000	Re
	Both Budge		4/15/2019	DOCPM000	PM00003	0040000	lte
	Both Budge		4/15/2019	DOCPM000	PM00003	0040000	lte



Click on the navigation menu item Post	s Central
	PLANNED MAINTENANCE TICKET WORK DAT Manage Process Prepare Post/Print
	DN 400002 Course Post and Print
	PIVIUUUU3 · SerVIC Finalize the document or journal by posting the
	Batch Name Process Report Actions Naviga
	General Line Type Posting Date No.
	→ Both Budget : : 4/15/2019 DOCPM000
	Both Budge 4/15/2019 DOCPM000 Both Budge 4/15/2019 DOCPM000
	Customer Name Both Budge 4/15/2019 DOCPM000
Click on the button Yes	DOCPM000 PM00003 0050000 Item 1004 Air Filter for Skid
	DOCPM000 PM00003 0060000 G/L Account 40150 Income - Shop Su
	DOCPM000 PM00003 0080000 Resource LABOR Labor - Oil Chang
	Do you want to post the journal lines?
	Aobile Oil 5W30
	dditional Labor
	Yes No
	JOB DESCRIPTION ACCOUNT NAME
	Service Ticket #PM00003 - Adatum Corpo Labor - Oil Change
Click on the button OK	PM00003 0050000 Item 1004 Air Filter for Skid Steer
	PM00003 0060000 G/L Account 40150 Income - Shop Supplies
	PMUUUUUS UUBUUUU Resource LABOR Labor - Oli Change
	he journal lines were successfully posted.
	Abile Oil 5W30
	dditional Labor
	ок
	Service Tribut #0400002 Addeture Cares Labor Of Charge
	Service ficket #FM00005 - Adatom Colpo Labor - On Change
Click on the button Close	
	Close
	End Date Budget (Total Cost) Advest (Total Cost) Billishia (Total Drive)
	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	Dynamics 365 Business Central	
	C C PLANNED MAINTENANCE TICKET WORK DATE: 4/15/2019	
	PM00003 · Service Tick	ket #
	Process Report Actions Navigate Fewer of	otions
	🌮 Add Service Template 🛛 🖓 Confirm Actuals 📓 Vi	ew Jop Jou
	Customer No	
	Customer Name Adatum C	orporation
Click on the navigation menu item popup Process	Dynamics 365 Business Central	
	C PLANNED MAINTENANCE TICKET WORK DATE: 4/15/2019	
	PM00003 · Service Tick	ket #
	Process Report Actions Navigate Fewer of	otions
	General	
	Customer No	
	Customer Name Adatum C	orporation
Click on the navigation menu item Create Planned Maintenance Sales Invoice	= TICKET WORK DATE: 4/15/2019	+
Click on the navigation menu item Create Planned Maintenance Sales Invoice	• Service Ticket #PM00003 - Adat	+ um (
Click on the navigation menu item Create Planned Maintenance Sales Invoice	• Service Ticket #PM00003 - Adat Actions Navigate Fewer options	+ um (
Click on the navigation menu item Create Planned Maintenance Sales Invoice	TICKET I WORK DATE: 4/15/2019 · Service Ticket #PM00003 - Adat Actions Navigate Fewer options te acconfirm Actuals a View Job Journal Create Plannede Sales Invoice	+ um (
Click on the navigation menu item Create Planned Maintenance Sales Invoice		+ UM (@ Mark (@ Planned Ma Servi
Click on the navigation menu item Create Planned Maintenance Sales Invoice		+ UM (Planned Ma Servi Servi
Click on the navigation menu item Create Planned Maintenance Sales Invoice	ETICKET I WORK DATE: 4/15/2019 Service Ticket #PM00003 - Adat Actions Navigate Fewer options te a Confirm Actuals View Job Journal Create Plannede Sales Invoice Create Plannede Sales Invoice Create Plannede Sales Invoice Create Plannede Sales Invoice Service Ticket #PM00003 - Adatum Corporation	+ UM (Planned Ma Servi Servi Assig
Click on the navigation menu item Create Planned Maintenance Sales Invoice	TICKET I WORK DATE: 4/15/2019 Service Ticket #PM00003 - Adat Actions Navigate Fewer options e Create Plannede Sales Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice Invoice I	+ UM (Planned Ma Servi Servi Assic
Click on the navigation menu item Create Planned Maintenance Sales Invoice	TICKET I WORK DATE: 4/15/2019 Service Ticket #PM00003 - Adat Actions Navigate Fewer options e Confirm Actuals i View Job Journal Create Plannede Sales Invoice I 0000 Adatum Corporation Service Ticket #PM00003 - Adatum Corporation JOB CREATE SALES INVOICE	+ UM (Planned Mi Servi Servi Asssig
Click on the navigation menu item Create Planned Maintenance Sales Invoice	TICKET I WORK DATE: 4/15/2019 Service Ticket #PM00003 - Adat Actions Navigate Fewer options Create Plannede Sales Invoice Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Interference Inte	+ UM (Planned Ma Servi Servi Assig
Click on the navigation menu item Create Planned Maintenance Sales Invoice	TICKET I WORK DATE: 4/15/2019 Service Ticket #PM00003 - Adat Actions Navigate Fewer options Create Plannede Sales Invoice Creat 10000 Adatum Corporation Service Ticket #PM00003 - Adatum Corporation JOB CREATE SALES INVOICE Options Posting Date Adatum Carporate Posting Date Posting Date Adatum Carporate Posting Date Adatum Carporate Posting Date osting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Date Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting Posting P	+ UM (Planned Ma Servi Servi Assig
Click on the navigation menu item Create Planned Maintenance Sales Invoice	TICKET I WORK DATE: 4/15/2019 Service Ticket #PM00003 - Adat Actions Navigate Fewer options	+ UM (Mark (Planned Me Servi Assig
Click on the navigation menu item Create Planned Maintenance Sales Invoice	ETICKET I WORK DATE: 4/15/2019 • Service Ticket #PM00003 - Adat Actions Navigate Fewer options te Confirm Actuals View Job Journal Create Plannede Sales Invoice 10000 Adatum Corporation Service Ticket #PM00003 - Adatum Corporation JOB CREATE SALES INVOICE Options Posting Date Posting Date Greate Invoice per Job Filter: Job Task	+ UM (Mark (Planned Mk Servi Assig





Click on the navigation menu item Post	s Central					
	PLANN	ED MAINTENANCE TICKET WORK DAT	Manage <u>Posting</u> F	repare	Invoice Rele	
	PN	100003 · Servic	Post Drest and Finalize the docum	d New nent or jou	inal by post and Se	
	Process	Report Actions Naviga	General			
		Report Actions Naviga	Customer Name	Ada	atum Corporation	
	Gener	al	Contact	Roh	pert Townes	
	Custom	er No	Condet	100		
	custom					
	Custom	er Name	Lines Manage	More o	ptions	
Click on the button Yes	ABOR	Labor - Lube		0.5 H	IOUR	
	ABOR	Labor - Oil Change		1 H	IOUR	
	001	Oil Filter		1 P	CS	
	20	Do you want to post the invoice?		P	CS	
	00 💙	bo you want to post the invoice.		P	CS	
	ΑB			H	IOUR	
	00 01		Yes No	P	CS	
	АB			Н	IOUR	
	001	Oil Filter		1 P	CS	
	002	Oil Gasket		1 P	CS	
	003	Mobile Oil 5W30		5 P	CS	
	ABOR	Additional Labor		1 H	IOUR	
After the posting is finished you will be given the	4ROK	Labor - Lube		0.5 H	IOUR	
ontion to view the posted invoice	ABOR	Labor - Oil Change		1 H	IOUR	
option to view the posted involce.	00			P	CS	
This system is will as is at Man and view the master d	20 ?	The invoice is posted as number PS-I Posted Sales Invoices window. Do yo	NV103216 and moved to the want to open the posted	ne P	CS	
	00	invoice?	a nancio open nie postea	P	CS	
INVOICE.	7B			н	IOUR	
Click on the button Yes	24				CS	
	AB		Yes No		IOUR	
		OFFICE		P	CS	
	002	Oil Gasket		1 P	CS	
	003	Mobile Oil 5W30		5 P	CS	
	ABOR	Additional Labor		1 H	IOUR	

The following demonstrates how to print the posted invoice.

Click on the navigation menu item popup Print/Send

Dynamics 365 Busin	ess Cei	ntral				
← ← ←	PC	OSTED S	ALES INVO	ICE WORK DAT	E: 4/15/2019	
	F	PS-I	NV1	103216	· Ad	atum Co
	In	nvoice	Correct	Print/Send	Navigate	Electronic Document
	G	ieneral				
	N	0. • • • •			PS-INV1032	16
	Cu	ustomer			Adatum Cor	rporation



kyle@opendoorer p.com March 17, 2025 317/369

ODT Service Help

Click on the navigation menu item Print Service Invoice	POSTED SALES INVOICE WORK DATE: 4/15/2019 PS-INV103216 · Adatum Corporatio Invoice Correct Print/Send Navigate Electronic Document More option Send Print Print Service Invoice No. PS-INV103216 Customer Adatum Corporation Contact Robert Townes
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.	Changes to the options and filters below will be saved only to: 'Last used options and filters Use default values from: Last used options and filters Options Print Company Address Log Interaction Show Assembly Components Show Additional Fee Note
Click on the button Preview	ted 5 ,

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**

Dyr	Dynamics 365 Business Central							
	\leftarrow	Planned Maintenance Ticket Work Date: 4/12/2021 DN 400002 Convision Ticket #DN 400002						
		Process Report Ticket Actions Related Fewer options						
		General Customer Name Adatum Corporation						
		Description	Service Ticket #PM00002 - A					
		Order Date	4/12/2021					

endoor	Open Door Technology Inc.			k	kyle@opendoorer p.com March 17, 2025	
	ODT Set	rvice Hel	lp			318/369
Click on the navigation m	enu item Print Proforma	Dynamics	365 Business Central			
		÷	Planned Maintenance Ticket V PM00002 · Serv	vork Date: 4/12/202 vice Ticket	 #PM000	02 - Ad
			Process <u>Report</u> Ticket	Actions R	elated Fewer c	ptions
			Customer Name		Adatum Co	rporation
			Description · · · · · · · · · · · · · · · · · · ·		Service Tick	cet #PM00002 -
Click on the button Previ e	€¥	:er				37.50 11.13 59.76
		ced >				
			Send to Print	Preview	Cancel	
						-
The fellowing shows on a		Dynamics 365 Business Central				Sendox Q D @ ?
ne following shows an envoice.	xample of a printed proforma		The second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second secon	Service Pro	Iema Apr 1 Meter Meter Meter Meter	
			10	No. 1 0.0 1000 120 0000 120 0000 1000 120 0000 120 0000 1000 120 0000 120 0000 1000 120 0000 120 0000 1000 120 0000 120 0000 1000 120 0000 120 0000 1000 120 0000 120 0000 1000 1200 0000 120 0000		

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



Amount Sugar to See Tex. 102.01 Amount Samph Tex. See Tex. 5.00

Nester No.25 Instance: 0.00 Tractine for 11.00



Click	on the	navigation	menu item	Mark	Complete
CIICK		navigation	menu item	Wark	Complete

-		⊘ t #PM00003 - Adatu			+ 🖻		
	t #PN				ooration		
	S				-		
	>b Journal	🗟 Create Planned	e Sales Invoice	Mark Complete			
				Mar Service Date	< the current planned mair	ntenance	
	pration			Service Ticket	Гуре		
	#PM00003 - A	datum Corporatio	١	Assigned Tech	nician · · · · · · · · · · · ·		
Click on the button Yes					-		
	a.	Are you sure you w is completed?	ant to mark this p	lanned maintenance tic	ket Total Cost) 	Actua	
	er e			Yes	o – 11.13		
	for				37.50		
	Skid Steers		4/15/2019	4/15/2019	15.38		
	op Supplies		4/15/2019	4/15/2019	10.00		
	eneral Service		-	-	74.01		
	for Skid Steers		4/15/2019	4/15/2019	37.50		

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	: V Purchasing V Setu	tup & Extensions \vee Intelligent Cloud Insights \vee	
	IONS Service Ticket Quote + S Service Ticket + S Service Unit + P Service Template + P Sales Quote + P	Sales Order > Service Management > Reports Sales Invoice > Service > Setup Purchase Quote > Planned Maintenance I Excel Re Purchase Order > New Purchase Invoice > Payments	port
Click on the navigation menu item Service Units	ACTIONS + Service Ticket Q + Service Ticket + Service Unit + Service Templat + Sales Quote	Quote + Sales Order > Service Management + Sales Invoice > Service + Purchas Service Ticket Quotes ate + Purchas + Purcha Service Tickets + Purcha Service Units Comp Open the list of service units.	> > : =

Select a Service Unit record in the list.





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ODT Service Help

Click on the navigation menu item popup Navigate					
	NITS WORK DATE: 4/8/2019				
	h + New Manage 🖾 Open in Excel <u>Navigate</u> Fewer options				
	DESCRIPTION LINK TYPE NO. LINK DESCRIPTION				
	2015 NISSAN Titan				
	2016 NISSAN Titan				
	2015 NISSAN Frontier				
	2016 NISSAN Frontier				
Click on the navigation menu item Service Ledger Entries					
	S WORK DATE: 4/8/2019				
	+ New Manage I Open in Excel Navigate Fewer options				
	Init Meters 🛛 Statistics 🔨 Service History 🕞 Service Ledger Entries				
	DESCRIPTION LINK TYPE NO. View the service ledger entries for the selected rec				
	2015 NISSAN Titan				
	2016 NISSAN Titan				
	2015 NISSAN Frontier				
	2016 NISSAN Frontier				

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 Decument No , with the value PS						
	1	SU00002	2016 N	DOCST00	001 Resource	LABOR
INV 103217		SU00003	2015 1	DOCST00	001 Item	OILFILTER
)	SU00004	2016 1	DOCST00	001 Item	OILGASKET
	C	SU00005	2015 F	DOCST00	001 Item	MOBIL15W30
		SU00006	2016 F	DOCST00	001 Resource	LABOR
	VI1 	SU00007	2017 E	PS-INV10	3 E Resource	LABOR
	CE	SU00008	2017 E	PS-IN PS-IN	IV103217 Resource	LABOR
		SU00009	2018 E	PS-INV10	3 Item	OILFILTER
	t ΩTI	SU00010	2018 E	PS-INV10	3 Item	OILGASKET
				PS-INV10	3 Item	MOBIL15W30
Click on the navigation menu item popup Actions		SERVICE LEDGEF	R ENTRIES WOR	RK DATE: 4/8/201	9	
		✓ Search ▲	Open in Excel	Actions	Fewer options	
	CR	DOCUME NO.	TYPE	N0.	DESCRIPTION	C
	5 1	DOCST00001	Resource	LABOR	Labor - Lube	
	5 11	DOCST00001	Resource	LABOR	Labor - Oil Change	
	2 M 2 M	DOCST00001 DOCST00001	Resource Item	LABOR	Labor - Oil Change Filter, Oil	



Click on the navigation menu item View Document	al
	SERVICE UNITS WORK DA1 C SERVICE LEDGER ENTRIES WORK DATE: 4/8/2019
	or O Search + New O Search 🕼 Open in Excel Actions
	SH SERVICE
	UNIT NO. DESCR NO. Show details for the posted sales invoice.
	SU00001 2015 DOCST00001 Resource LABOR
	SU00002 2016 N DOCST00001 Resource LABOR
	SU00003 2015 N DOCST00001 Item OILFILIER
Click on the newigation many item papur Actions	
Click of the havigation ment tieff popup Actions	
	NORK DATE: 4/8/2019 🖉 🕂
	3217 · Adatum Corporation
	t/Send Navigate Electronic Document Actions Navigate Fewer options
	PS-INV103217 Due Date
	Adatum Corporation Quote No.
	•···•
Click on the navigation menu item Navigate	
Click on the navigation menu item Navigate	NVOICE WORK DATE: 4/8/2019
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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 Purchasing < Setup & Extensions < Intelligent Cloud Insights < IONS Service Ticket Quote + Sales Order Service Ticket + Sales Invoice > Service Management > Reports > Service \sim > Setup Service Unit + Purchase Quote > Planned Maintenance E Excel Report Service Template + Purchase Order > New + Purchase Invoice > Payments Sales Ouote Click on the navigation menu item Service Units ACTIONS + Service Ticket Quote + Sales Order > Service Management > + Service Ticket + Sales Invoice > Service > + Purchas 🖹 Service Ticket Quotes Ξ + Service Unit ntenance + Purchas + Service Template + Sales Quote Service Units Comp Open the list of service units.





kyle@opendoorer p.com March 17, 2025 324/369

ODT Service Help

Click on the link in cell Service Unit No . with the value SU00001	DNUS Inc Service Plan SERVICE UNITS I WORK DATE: 4/8/2019 omers Vendors Items Bank This is a sandbox environment (preview) Search + New Manage Open in SHT FROM LAST WEEK SERVICE DESCRIPTION SU00001 Image 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	Dynamics 365 Business Central
Click on the navigation menu item Service History	NIT CARD I WORK DATE: 4/8/2019 OOO1 Navigate ce Unit Meters Statistics Comments Service History Service Ledger Entries View the service history for the selected record. SU00001 2015 NISSAN Titan

Select the ticket record to be viewed.

Click on the navigation menu item popup Manage






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ODT Service Help

Click on	the	navigation	menu	item	View
-					-



The following demonstrates the opening of the Completed Service Ticket from the Service Ticket.





ODT Service Help

Click	on	the	back	button
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s Central			
SERVICE			RVICE HISTORY WORK DATE: 4/8/2019
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SU000	Descript		Ticket No. ST00001
SU000			

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**

	SERVICE HIST	ORY LIST	WORK DATE: 4	/8/2019		_	
	🔎 Search	Manage	🚺 Open in	Excel	Navigate	Fewer options	
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	SU00004		Description				
Click on the back button	is Central						
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	SU000	Serv	ice l		Gen	eral	
	SU000	Des	cript		Orde	r Date 4/8/2019	9





kyle@opendoorer p.com March 17, 2025 327/369

ODT Service Help

Click on the back button

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	SU00002		Service Unit No					
	SU00003		Description					
	SU00004		Description					

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	Actions + Service Ticket Quote + Sales Invoice > Planned Mair + Service Ticket + Purchase Quote > New + Service Unit + Purchase Order > Payments + Service Template + Purchase Invoice > Reports + Sales Quote > Service Management E Excel Reports + Sales Order > Service \
Click on the navigation menu item Service Quote Archive	+ Sales Order > Service Carlot Service Ticket Quotes Service Tickets Service Units Completed Service Tickets Service Quote Archive
Select the quote that you wish to view Click on the cell Service Ticket Quote No. with the value ST00001	ST00001 · Service Ticket #ST00001 - Adatu Process Report Quote Related Fewer options Service Ticket Quote Description → ST00001 Eservice Ticket #ST00001 - Adatum Corporation ST00002 Service Ticket #ST00002 - Adatum Corporation ST00003 Service Ticket #ST00003 - Adatum Corporation ST00005 Service Ticket #ST00005 - Adatum Corporation ST00005 Service Ticket #ST00006 - Trey Research ST00007 Service Ticket #ST00007 - Trey Research

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Click on the navigation menu item po	opup Process	Dynamics 365 Business Central	
		Cuote Archive ST00001 · Service Process Report Quote Service Ticket Quote	ce Ticket #ST00001 - Adat Related Fewer options
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Ţ		← Quote Archive STO0001 · Servic Process Report Quote B Show Document No. ↑ → ST00001	Ce Ticket #ST00001 - Adat Related Fewer options Description Service Ticket #ST00001 - Adatum Corporati
		ST00002 ST00003 ST00005	Service Ticket #ST00002 - Adatum Corporati Service Ticket #ST00003 - Adatum Corporati Service Ticket #ST00005 - Adatum Corporati
You can now view information about Service Ticket Quote.	the completed	Report Quote Relate General Service Ticket No. Customer No. Customer Name Customer Name Customer Name Description Order Date Customer Nate	ed Fewer options ST00001 ST0000 Adatum Corporation Service Ticket #ST00001 - Adatum Cor Ad12/2021 Ad12/2021 Ad12/2021
		Service Date	4/12/2021

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

IONS			
Service Ticket Quote	+ Sales Order	Service Management	> Reports
Service Ticket	+ Sales Invoice	> Service	> Setup
Service Unit	+ Purchase Quote	> Planned Maintenance \sim	Excel Repor
Service Template	+ Purchase Order	> New	•
Sales Quote	+ Purchase Invoice	> Payments	



ODT Service Help

Click on the navigation menu item Planned Maintenance Entry Archive	+ Service Template + Purchase + Sales Quote + Purchase Planned Maintenance Quotes Planned Maintenance Tickets Service Units Completed Planned Maintenance Tickets Planned Maintenance Entry Archive Open the planned monitenance
The archive will display a list of all tickets that have been processed using the Planned Maintenance Worksheet.	ment (preview) Batch No. Service Unit CUST(-t, bc
Click on the cell Defer Until Date with the value 4/23/2019	VORK DATE: 4/15/2019
	Date Defer Defer Util Def Completed User ID Service Date Han ODT\KYLE Until Date 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.	ice, Inc. Servic ← PLANNED MAINTENANCE ENTRY ARCHIVE WORK DATE: 4/15/2019 dors Items Bank ox environment (preview) T MONTH Batch No. No. Service Unit Description DEFAULT : SU00003 Skid Steer Loader S450

5.3.2. How to view Planned Mainternance Quote Archive

The following demonstrates how to view the Planned Maintenance Quote Archive.





Click on the navigation menu item popup Planned Maintenance	✓ Purchasing ✓ ≡
	ons Service Ticket Quote + Sales Order > Service Management > Reports Service Ticket + Sales Invoice > Service II Excel Report Service Unit + Purchase Quote > Planned Maintenance > Service Template + Purchase Order > New Sales Quote + Purchase Invoice > Payments
Click on the navigation menu item Planned Maintenance Quote Archive	Planned Maintenance Quotes Planned Maintenance Tickets Service Units Completed Planned Maintenance Tickets Planned Maintenance Entry Archive Planned Maintenance Quote Archive
Select the quote you wish to view. Click on the cell Service Ticket Quote No. with the value PM00001	PM00001 · Service Ticket #PM00001 - Adat Process Report Quote Related Fewer options
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Click on the navigation menu item popup Process	Dynamics 365 Business Central
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Click on the navigation menu item Show Document	Dynamics 365 Business Central
	Quote Archive
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	Process Report Quote Related Fewer options
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	No. ↑ Description
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	PM00002 Service Ticket #PM00002 - Trey Research
	PM00003 Service Ticket #PM00003 - test attach
	PM00004 Service Ticket #PM00004 - School of Fine A
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You can now view details of the complete Planned Maintenance Quote	Report Quote Related Fewer options General
You can now view details of the complete Planned Maintenance Quote	Report Quote Related Fewer options General Service Ticket No PM00001
You can now view details of the complete Planned Maintenance Quote	Report Quote Related Fewer options General Service Ticket No. PM00001 Customer No. 20000
You can now view details of the complete Planned Maintenance Quote	Report Quote Related Fewer options General
You can now view details of the complete Planned Maintenance Quote	Report Quote Related Fewer options General Service Ticket No. PM00001 Customer No. 20000 Customer Name Trey Research Description Service Ticket #PM00001 - Adatum Compared
You can now view details of the complete Planned Maintenance Quote	Report Quote Related Fewer options General
You can now view details of the complete Planned Maintenance Quote	Report Quote Related Fewer options General Service Ticket No. PM00001 Customer No. 20000 Customer Name Trey Research Description Service Ticket #PM00001 - Adatum Co Order Date 4/12/2021 Service Date 4/12/2021

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.

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Service Technician Tasks							
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Insights							
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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.



ODT Service Help

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.	Gen	Add Service Template	n Confirm A	ctuals 🐚 View Job Journal 🐚 Cre
	Custo	omer No.		0000
	Custo	omer Name	A	datum Corporation
	Descr	rintion		ervice Ticket #ST00016 - Adatum Corpora
	Orde	r Date		/11/2022
	Sonie	ro Date	-	/11/2022
	Sollat		4	/11/2022
	Addre	ess		92 Market Square
To release the ticket, the status must be changed to a		Starting Date		4/11/2022
status with the Released type		Ending Date		4/11/2022
		Location Code		
		Your Reference		
		Open PO Lines Exist		····· No
	~	Service Ticket Status		····· PENDING
	~	Apply Maintenance E	xpense · · · · ·	
		Salesperson · · · · ·		
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Click on the lookup button Service Ticket Status	4/11/2022			+ Warranty ~
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Click on the lookup button Service Ticket Status	4/11/2022 4/11/2022 No PENDING Apply Maintenance I Salesperson · · · · · ·	Expense · · · · · · · ·	Choose Choose Code COMPLET IN PROCE ON HOLD → PENDING	+ Warranty V Warranty Policy No. ↑ WRQ000.1 GENERAL GENERAL Comments Comments Complete SSS In Process O On Hold Pending Commands Commands Commands Commands Commands Comments Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete
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Click on the lookup button Service Ticket Status	4/11/2022 4/11/2022 Vo PENDING Apply Maintenance I Salesperson · · · · · ·	Expense	Choose Choose Choose Code COMPLET IN PROCE ON HOLD → PENDING RELEASED + New	+ Warranty Warranty Warranty Warranty Warranty Warranty Warranty Warranty Warranty Warranty Warranty Warranty Warranty Generation Comments Comments Description Complete SSS In Process O On Hold Pending O Release C
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Click on	the	button	Yes
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	Assigned Technician
	Starting Date
?	Service ticket status changed from pending to released. Do you want to update the lines?
	Yes No
	Service Ticket Status
\sim	Apply Maintenance Expense
	Salesperson

6.2.2. How to Process a Service Ticket Task

Service Tasks in the Technician role center are sorted based on their status.	+ Service Template Task + Service Manual Task + Create Serv
	Service Technician ^{Tasks}
	My Service Tasks
	Not Started Started On Hold Not Complete
	$\frac{1}{2}$ $\frac{1}{2}$ $\frac{1}{2}$ $\frac{1}{2}$ $\frac{1}{2}$ $\frac{1}{2}$
	Tickets
Click on the link Not Started	Actions
Click of the link Not Started	+ Service Template Task + Service Manual Task + Create
	Service Technician Tasks
	My Service Tasks
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	1 0 10 1
	Specifies the falle of the Service Ticket tasks - Keleased field.
A list of Service Tasks will be displayed	
Click on the link in cell ODT Service Unit No. with the	DNUS Inc Service V Kot Started
value SU00001	ce Tasks Service Units Items
	ns ODT Service ervice Template Task + Service M Unit No. Service Unit Description
	SU00001 2015 NISSAN Titan
	vice Technician
	ervice Tasks
	Started On



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.	End Date Outstanding Orders Defer Service Service Status Is Warrantable To you want to Clock In to Service Task for Unit SU00001 on Ticket ST00016? Yes No
If the unit has a Service Meter, you will prompted to update the meter reading.	
	Current meter reading: 20 (Kl Click here to enter new mete
Click on the textarea	
	Current meter reading: 20 (Kl Click here to enter new mete
Enter the text 50 .	



Click on the button OK	Que OK Cancel
The General Tab displays details about the Service Unit and Service Ticket the task is related to.	Add Service Template Service Unit Meters General ODT Service Unit No. Service Unit Description Service Unit Model No. TITAN Service Unit Model No. Template No. Template No. REPLACEAIRFILTER-LT Service Unit Manufacturer Code Job No.
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.	Tasks Parts/Items Lines Manage No. Description → AIREILIER Eabour Lines Manage
Click on the navigation menu item popup Manage	Service Unit Manufacturer Code



Click on the navigation menu item Add Parts/Item	Job	No	ST0	0009	
J. J. J. J. J. J. J. J. J. J. J. J. J. J	Star	t Date	4/1	1/2022	
	т	asks Parts/Items Line	s Manage		
	÷	* New Line 🛛 😽 Delete	Line 🕂 Add Pa	arts/Item 👎 Comments	
		AIRFILTER	: Filter Ai		
		A COLORED A			
Select the Part or Item you want to add to the task	Change Status	Automate \vee Few	ver options		
	Service Unit	Meters 🖹 Chec	•••••• 0	Neu	
			tems / >> V		
	SU	00001	No. T → 1801-S	Description	l) Ir
	20	15 NISSAN Titan	1900-S	PARIS Guest Chair, black	lr
		AN	1906-S	ATHENS Mobile Pedestal	ł
		-	1908-S	LONDON Swivel Chair, blue	lr
	RE	PLACEAIRFILTER-LT	1920-S	ANTWERP Conference Table	lr Ir
	Code · · · · · · _		1928-S	AMSTERDAM Lamp	
					<u> </u>
Click on the field Part\Item Qtv.	15 NISSAN Titan		UL	itstanding Urders	1
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Click on the field Part\Item Qty.	TS NISSAN TITAN	Task Update		itstanding Urders	Ir
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Click on the field Part\Item Qty.	TS NISSAN TITAN TAN PLACEAIRFILTER-LT	Task Update Parts/Items		itstanding Urders	ion
Click on the field Part\Item Qty.	TS NISSAN TITAN TAN PLACEAIRFILTER-LT 00009	Task Update Parts/Items Code Part\Item Qty.	1896-S	Locati	ion
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Click on the field Part\Item Qty .	TAN PLACEAIRFILTER-LT 00009 11/2022	Task Update Parts/Items Code Part\Item Qty.	1896-S	Locati	ion
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Click on the field Part\Item Qty .	TS NISSAN TRan FAN PLACEAIRFILTER-LT 00009 11/2022 TS NISSAN TRan FAN PLACEAIRFILTER-LT 00009	Task Update Parts/Items Code Part\Item Qty. Task Update Parts/Items Code Parts/Items Code Part\Item Qty.	UL 1896-S UL 1896-S UL	Itstanding Urders Locati 0.00 Locati Locati	ion
Click on the field Part\Item Qty . Enter the text 1 .	TS NISSAN TRan FAN PLACEAIRFILTER-LT 00009 11/2022 TS NISSAN TRan FAN PLACEAIRFILTER-LT 00009 11/2022	Task Update Parts/Items Code Part\Item Qty. Task Update Parts/Items Code Parts/Items Part\Item Qty. Parts/Items Code Parts/Items		Itstanding Urders Locati Utstanding Urders Locati	ion
Click on the field Part\Item Qty . Enter the text 1 .	TS NISSAN Han TAN PLACEAIRFILTER-LT 00009 11/2022 TS NISSAN Han TAN PLACEAIRFILTER-LT 00009 11/2022	Task Update Parts/Items Code Part\Item Qty. Task Update Parts/Items Code Part\Item Qty.		Itstanding Urders Locati Locati Locati 1	ion
Click on the field Part\Item Qty . Enter the text 1 .	TS NISSAN TRan FAN PLACEAIRFILTER-LT 00009 11/2022 TS NISSAN TRan FAN PLACEAIRFILTER-LT 00009 11/2022	Task Update Parts/Items Code Part\Item Qty. Task Update Parts/Items Code Part\Item Qty. Part\Item Qty.	01 1896-S 1896-S 1896-S	itstanding Urders Locati 0.00 Itstanding Urders Locati	ion



Click on the leakup butter Leastion	4/11/2022	
Click on the lookup button Location		0.00
	2	×
		Choose a value for Location
Click on the link in cell Code with the value EAST		
	Location	~
	1.00	Code↑ Name
		EAST East Warehouse
		MA Select record "EAST" Main Warehouse
		NORTH North Warehouse
		OUT. LOG. Outsourced Logistics
Click on the hutten OK		
	1.00	
	[OK Cancel
	L	
	1	0.00 PCS
Notice that the selected part or item has now been		·/ · · /
added to the task lines		
	Tasks Parts/Items Lines	Manage
	No	Description
	→ AIRFULTER	Filter, Air
	1896-S	ATHENS Desk
	Labour Lines Marrie	
	Labour Lines Manage	



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
Check on the cen Quantity Oscu with the value 1.00				r e
	Location Code	Estimated Quantity	Quantity Used	Unit of Measure Code
	FAST	1	1.00	PCS
	LAST		1.00	rc3
				<i>ie</i> 2
Enter the text 2.	Meter Reading			50.00
				12 E
	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 Bus	iness Central		
	Back	place Air Filter		
	Home	Time Tracking Chan	ge Status Automate	 Fewer options
	7 A	Add Service Template	Service Unit Meters	Checklist
	Templa	ate No.	REPLACEAIRFILT	ER-LT
	Service	e Unit Manufacturer Code		
	Job No),	ST00009	





If the status of the task has changed, you can update it when closing the task card.	4/11/2022	Task Update - Update Service Status
		Current Service Status · · · RELEASED Set Ser
	Air	
	NS Desk	
Click on the lookup button Set Service Status		
		2 ×
	ice Status	RELEASED
		Choose a value for Set Service Status
Click on the link in cell Code with the value IN		
PROCESS	Set	Service Status · · · · · RELEASED · ·
		Code Description
		PENDING Pending
		→ <u>RELEASED</u> Released IN PROCESS In Process
		ON HOLD On Hold
		+ New
	Estimated Quar	ntity Quantity Used Unit of Measure Code
Click on the button OK		
		OK Cancel
	Estimated Quanti	ty Quantity Used Unit of Measure Code



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

otal Cost)	Billable (Total Price)	Billable (Invoiced Price)	Service Status	ls War	Comments
-	-	-			0/0
_	1,079.80	-	IN PROCESS		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	Dynamics 365 Business Central			
lash	CRONUS INC. Service \lor \equiv			
	Service Tasks Completed Tasks Service Units Items Ti			
	Actions + Service Template Task + Service Manual Task + Create Create a new service task for service ticket. Service Technician Tasks			
	My Service Tasks			
The Task Creation Wizard will open and guide you through the steps to create a new task.	Not Started Started On Hold Not Com Inits Items Time Sneet Current Time Tracking			
	Task + Create Service Ticket from Template + Create Manual Service Ticket			
	Create Service Task Wizard			
First, select the Service Ticket that will include this				
task.	Create Service Task Wizard			
	Select the Ticket.			
	→			
	Not Complet :			



Click on the lookup button Review or update this value				
	Wizard		Review or update this va	lue
Click on No.	On Hold	Not Complete	Create Service Task V	Vizard
	<mark>0</mark> ,	<mark>)</mark>	No. 1 Description ST00004 Service Tic	B C N ket #ST00004 - Adat 1
	On Hold	Not Complete	+ New	
		Bac	k Next Finish	
	Serial No.	Template No	. Description	Service Ticket No.↑ S
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.	Not Complete	Create Service Select Service Unit. SU00002	e Task Wizard	

Not Co



ODT Service Help

Click on the button Next		
		_
	Back Next Finish	
		_
	Serial No. Template No. Description	Service Ticket No.↑ Sta
You may choose to select a Technician to be		
	Create Service Task Wizard	لا
	Select Service Technician (Optional).	
Click on the lookup button Review or update this	Not Complete	
value		
	vvizard 2 × P	
	ional).	
	ional).	ue
	ional). Review or update this val	ue
	ional). Review or update this val	ue
Click on No.	ional). Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or update this val Review or	ue VIZALU
Click on No.	ional). Review or update this value Review or update this value Create Ser Vice Task V On Hold On Hold Select Service Technician (Opti	ue VIZATU onal).
Click on No.	ional). Review or update this val Review or up	ue Vizaru onal).
Click on No.	ional). Review or update this val Review or up	ue VIZAI U onal).
Click on No .	ional). Review or update this val Review or up	ve vizaru onal). <u>IE HULL</u> "KATHERINE" send
Click on No .	Image: Construction of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the set of the	ue onal). IE HULL "KATHERINE" send rst



Click on the button Next		
		Back Next Finish
	Serial No.	Service Ticket Template No. Description No.↑ Sta
Select the Service Template you want to use to create the task.		
	_	Create Service Task Wizard
	Not Complete	Service Ticket Line
	0	Select Service Template (Required).
	>	Select Service Template (Required).
Click on the lookup button Review or update this		
value	Wizard	2° ×
	iired).	
		Review or update this value
Click on Tomplato No		Service Templates
		Service remplates / /
	Technician	
	e Technician	Template No. Template ↑ Type ▼ Description → 20KSERVICE : All 20.000 KM Se
	e Technician te Tasks ted Started	On Hold Template No. ↑ Template Type ▼ Description On Hold → 20KSERVICE ÷ All 20,000 KM Se 40KSERVICE All 40,000 KM Se Second KM Se
	ted Started	On Hold Template No. Template On Hold → 20KSERVICE I D 20KSERVICE All 20.000 KM Se 40KSERVICE All 50 point inspe OILCHANGE I All Oil Change
	ted Started	On Hold Template No. Template O the second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second
	ted Started	On Hold Template No. Template O Template No. Template D ZOKSERVICE All 20,000 KM Se 40KSERVICE All 40,000 KM Se 50POINTINS All 50 point inspe OILCHANGE III Oil Change REPLAC Select record "OILCHANGE-LT" Replace Air Fi ROTATETIRES All Rotate Tires



Click on the button Next	
	Back Next Finish
	Service Ticket Serial No. Template No. Description No. † Sta
The Task Description will default from the selected Service Template. You will be given the option to change the description if you wish.	Create Service Task Wizard
	Enter a Task Description (Required).
	Oil Change Not Complete
Click on the button Finish	
	Back Next Finish
	Service Ticket Template No. Description No. † Start Date
When the wizard is finished the new task will now be displayed in the Service Task Cue	e Manual Task + Create Service Ticket from Template + Create Manual Service Ticket
	All Service Tasks
	On Hold Not Complete Not Started Started On Hold O O O O O > > Specifies the value of the Service Ticket Tasks - Rele



ODT Service Help

Click on ODT Service Unit No.	÷	Not Started				
		✓ Search	Manage	Add Service Temple	ate 🔀 Time Trackin	g Autor
		ODT Service Unit No.	Se	rvice Unit Description	Service Unit Model No.	Serial No.
		<u>SU00002</u>	: 20	16 NISSAN Titan	TITAN	
		<u>SU00002</u>	: 20	16 NISSAN Titan	TITAN	
		O	pen record "S	U00002"		
Notice that the new task has all the details that were specified in the creation wizard		🧚 Add Ser	vice Templa	ate 🛛 🗟 Service Unit Me	eters 🖹 Checklist	🖗 Comme
		General				
		ODT Service U	Unit No. \cdots	SU000	002	
		Service Unit E	Description	2016 1	NISSAN Titan	
		Service Unit N	Vodel No.	TITAN	l	
		Serial No. 🕠				
		Template No.		OILCH	ANGE-LT	
		Service Unit N	Manufacture	er Code · · · · · · · _		

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**

Ticket from Template	US INC. Service \lor \equiv
	Tasks Completed Tasks Service Units Items Time Sheet Current Time Tracking
	ce Template Task + Service Manual Task + Create Service Ticket from Template + Create Service Ticket from Template
	e Technician
	ce Tasks All Service Tasks rted Started On Hold Not Complete Not Started
This will open the Service Ticket Create Wizard	nits items lime-sneet Current lime-iracking
	Task + Create Service Ticket from Template + Create Manual Service Ticket
	Service Ticket Create Wizard
	Not Complet Service Ticket Header
	Select a Sell-To Customer for the Service Ticket.



You must first select the Sell-To Customer for this Service Ticket	Not Complete O Service Ticket Create Wizard Service Ticket Header Select a Sell-To Customer for the Service Ticket.
Click on the lookup button Review or update this value	e Wizard
	the Service Ticket.
	Review or undate this value
	Reversion appare this value
	2
Click on No.	Selvice Ticket Reader
	No. 1 Name ZIF 10000 Adatum Corporation 31
	On Hold Not Complete 2000 Select record "10000" h 61 30000 School of Fine Art 37
	0 0 40000 Alpine Ski House 31 50000 Pelocloud 31
Click on the button Next	
	Back Next Finish
	Service Ticket



Select the Service Date to be used for the ticket	
	Not Complete Service Ticket Create Wizard v O Service Ticket Header Select Service Date 4/10 Select Service Date
Click on the link Open the date picker	e Wizard
Click on a date in the calendar	On Hold Not Complete 0 0 > >
Click on the button Next	Back Next Finish Serial No. Template No. Description No. 1 Str



Select the Service Unit that will be used to perform	
	Service Ticket Create Wizard
	Select Service Unit.
	Select Service Unit.
	Not Complete
Click on the lookup button Review or update this value	e Wizard
	Review or update this value
	•
Olish an Osmiss Unit No	Select Senire Unit
Click on Service Unit No.	Select Service Offic.
	Service Unit No. T Description SU00001 2015 NISSAN Titan
	On Hold Not Complete SU00002 2016 NISSAN Titan
	SU00 Select record "SU00003" NISSAN Frontier
	SU00005 2015 Ford F150
	+ New
Click on the button Next	
	Dack Next Hinish
	Sanira Tirkat



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.	Not Complete O Finter a Service Ticket Description. Service Ticket #ST00005 Enter a Service Ticket Description. Not Complete
Click on the button Next	Back Next Finish
You may select a Technician to be assigned to this ticket.	Service Ticket Serial No. Template No. Description No.† Str
	Not Complete O Service Ticket Create Wizard Service Ticket Header Select Service Technician (Optional). Select Service Technician (Optional).
Click on the lookup button Review or update this value	P Wizard

endoor	Open Door Technology	/ Inc.	kyle@opendoore p.com
TECHNOLOGY	ODT Service Help		March 17, 2029 350/369
Click on No .	On Hold	Not Complete	Service Technician (Optional). o.
Click on the button Next			
		Back	Next Finish
	Serial No.	Template No. Des	sription Service Ticket No.↑
rou may select a Location (Occe for this ticket.	Service Ticket Creat Service Ticket Header Select Location Code (Option	:e Wizard
	>		Select Location Code (Optional).

O TECHNOLOGY	pen Door Technology Inc. ODT Service Help	kyle@opendoorer p.com March 17, 2025 351/369
Click on East	$-\left \begin{array}{c} 0 \\ \hline \end{array} \right \left \begin{array}{c} 0 \\ \hline \end{array} \right \left \begin{array}{c} 0 \\ \hline \end{array} \right $	Service Ticket Header Select Location Code (Optional).
	$- \begin{array}{ c c } & On Hold & \\ & O \\ \hline & \\ & \\ & \\ & \\ & \\ & \\ & \\ & \\ & \\$	Code 1 Name EAST East Warehouse MAI Select record "EAST" ain Warehouse NORTH North Warehouse OUT. LOG. Outsourced Logistics OWN LOG. Own Logistics + New
Click on the button Next		Back Next Finish
You may select a Service Ticket Type	Serial No. Tem	service Ticket No. Description No. † Sta
	Not Complete O Service Tick Select Service	Ticket Create Wizard et Header et Header ce Ticket Type (Optional).
Click on the lookup button Review or up	Not Complete	
value	> Wizard	

endoor	Open Door Technology In	c. kyle@opendoorer p.com
TECHNOLOGY	ODT Service Help	March 17, 2025 352/369
Click on Code	- 0	Select Service Ticket Type (Optional).
	$-\left \begin{array}{c} On \ Hold \\ \hline \\ \hline \\ \hline \\ \end{array} \right $	Not Complete O + New
Click on the button Next		
		Back Next Finish
	Serial No.	Service Ticket Template No. Description No.† Sta
Next, select the Service Templat the ticket	te that will be used for	Service Ticket Create Wizard &
	Not Complete	
Click on the lookup button Revie value	ew or update this ∍ Wizard	2 × 2
		Review or update this value



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.



		Report Service Items as	Parts
By default, time tracking only allows a user to be		Report Non-Inventory Items as	Parts
clocking in to multiple tasks at the same time, this can		Report non internety items us	
be enabled in Service Management Setup		As the service development of the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the service to the se	
ů i		Archive quotes when the user runs action Make II	
	~	Show Completed Task Queue	
	~	Allow Multiple Clocking	
	~	Auto Assign User on Clock In	
	~	Prompt to Clock In/Out on Task	Always
	~	Prompt to Change Status	Always
By default, users will need to be assigned to tasks		Report Non-Inventory Items as	Parts
manually. This toggle will enable users to be	~	Restrict closing service ticket if open PO lines exist.	
automatically assigned to a task upon Clocking In to	\sim	Archive quotes when the user runs action "Make Ti	
the Task Card.	~	Show Completed Task Queue	
	~	Allow Multiple Clocking	
	~	Auto Assign User on Clock In	
	~	Prompt to Clock In/Out on Task	Always
	~	Prompt to Change Status	Always
		·····	
When energing and design a Task Cord, a propertie		Restrict closing service ticket if open PO lines exist.	(•)
When opening and closing a Task Card, a prompt is	 	Restrict closing service ticket if open PO lines exist.	
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	 	Restrict closing service ticket if open PO lines exist. Archive quotes when the user runs action "Make Ti Show Completed Task Queue	
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. Archive quotes when the user runs action "Make Ti Show Completed Task Queue	•
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. Archive quotes when the user runs action "Make Ti Show Completed Task Queue Allow Multiple Clocking	•
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.	
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. Archive quotes when the user runs action "Make Ti Show Completed Task Queue Allow Multiple Clocking Auto Assign User on Clock In Prompt to Clock In/Out on Task	 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. Archive quotes when the user runs action "Make Ti Show Completed Task Queue Allow Multiple Clocking Auto Assign User on Clock In Prompt to Clock In/Out on Task Prompt to Change Status	
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. · · · Archive quotes when the user runs action "Make Ti Show Completed Task Queue · · · · · · · · · · · · · · · · · ·	Always Always
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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. 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.		Restrict closing service ticket if open PO lines exist. Archive quotes when the user runs action "Make Ti Show Completed Task Queue Allow Multiple Clocking Auto Assign User on Clock In Prompt to Clock In/Out on Task Prompt to Change Status Archive quotes when the user runs action "Make Ti Show Completed Task Queue Allow Multiple Clocking Auto Assign User on Clock In	 Always Always
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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.	 Always Always Always On Open Task On Close Task Never	 On Ope
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.	Report Service Items as P Report Non-Inventory Items as P Restrict closing service ticket if open PO lines exist. Image: Closing Service ticket if open PO lines exist. Archive quotes when the user runs action "Make Ti Image: Closing Service ticket if open PO lines exist. Show Completed Task Queue Image: Clocking Service ticket if open PO lines exist. Allow Multiple Clocking Image: Clock In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service ticket In Service t	arts

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	approvals Ser	rvice 🗸 📔 🧲	Started	
	ce Tasks Service Unit	s Items	⊖ Search M	lanage 🏾 🌹 Add Service Template
	ns ervice Template Task -	+ Service M	ODT Service Unit No.	Service Unit Description 2015 NISSAN Titan
	vice Technician		Open rec	ord "SU00001"
	ervice Tasks			
	Started Started	On		
When opening the Service Ticket Task, you will be		End Date		-
prompted to Clock In.		Outstanding	Orders	
		Defer Servio	e	
		Service Stat	ıs	
	[Do you wa Ticket STOC	nt to Clock In to Serv 009?	rice Task for Unit SU00001 on
				Yes No



Click on the button Yes	Service Status
	Is Warrantable
	Do you want to Clock In to Service Task for Unit SU00001 on
	Ticket ST00009?
	Yes No
	nments Location Code Estimated Quantity Quantity Used Unit of Measu
The Time Tracking tab on the Task Card will display the list of time tracking entries	
	Time Tracking
	UserID ↓ Start Date-Time
	→ <u>ODT\TEST01</u> : 4/11/2022 1:56 PM
Click on the back button	Dynamics 365 Business Central
Click on the back button	Dynamics 365 Business Central
Click on the back button	Dynamics 365 Business Central
Click on the back button	Dynamics 365 Business Central
Click on the back button	Dynamics 365 Business Central Service Task Card Back Peplace Air Filter Home Time Tracking Change Status Automate V Fewer options
Click on the back button	Dynamics 365 Business Central Service Task Card Back Peplace Air Filter Home Time Tracking Change Status Automate V Fewer options * Add Service Template & Service Unit Meters & Checklist
Click on the back button	Dynamics 365 Business Central Service Task Card Back Peplace Air Filter Home Time Tracking Change Status Automate Fewer options Add Service Template Service Unit Meters Checklist
Click on the back button	Dynamics 365 Business Central Service Task Card Back Place Air Filter Home Time Tracking Change Status Automate Fewer options Add Service Template Service Unit Meters Checklist
Click on the back button	Dynamics 365 Business Central Service Task Card Back Peplace Air Filter Home Time Tracking Change Status Automate Fewer options Add Service Template Service Unit Meters Checklist Tasks Parts/Items Lines Manage
Click on the back button	Dynamics 365 Business Central Service Task Card Back Place Air Filter Home Time Tracking Change Status Automate ~ Fewer options * Add Service Template Service Unit Meters Tasks Parts/Items Lines Manage
Click on the back button	Dynamics 365 Business Central Service Task Card Back Place Air Filter Home Time Tracking Change Status Automate ∨ Fewer options Image Add Service Template Service Unit Meters Image Tasks Parts/Items Lines Manage
Click on the back button	Dynamics 365 Business Central Service Task Card Back Eplace Air Filter Home Time Tracking Change Status Automate ~ Fewer options * Add Service Template Service Unit Meters E Checklist Tasks Parts/Items Lines Manage Comments Location Code Estimated Quantity Quant
Click on the back button When closing the Task Card, you will be prompted if you want to Clock Out.	Dynamics 365 Business Central Service Task Card Back Exceplace Air Filter Home Time Tracking Change Status Automate ~ Fewer options [*] Add Service Template [®] Service Unit Meters [®] Checklist Tasks Parts/Items Lines Manage Tasks Quantity Quant No 2
Click on the back button	Dynamics 365 Business Central Service Task Card Back Poplace Air Filter Home Time Tracking Change Status Automate ~ Fewer options Add Service Template Service Unit Meters Tasks Parts/Items Lines Manage Comments Location Code Estimated Quantity Quant No 2 No EAST
Click on the back button	Dynamics 365 Business Central Image: Service Task Card Back Paper Time Tracking Change Status Automate ∨ Fewer options Image Image Comments Location Code Estimated Quantity Quant No 2 No EAST Image 1
Click on the back button When closing the Task Card, you will be prompted if you want to Clock Out.	Dynamics 365 Business Central Service Task Card Back Exceplace Air Filter Home Time Tracking Change Status Automate ~ Fewer options [*] Add Service Template [©] Service Unit Meters [©] Checklist Tasks Parts/Items Lines Manage Comments Location Code Estimated Quantity Quant No EAST 1 Or you want to Clock Out of Service Task for Unit SU00001 on Ticket ST00009?
Click on the back button	Dynamics 365 Business Central Service Task Card Back Poplace Air Filter Home Time Tracking Change Status Automate ~ Fewer options Add Service Template Service Unit Meters Tasks Parts/Items Lines Manage Comments Location Code Estimated Quantity Quant No EAST 1 Ticket ST00009?
Click on the back button	Dynamics 365 Business Central Service Task Card Back Poplace Air Filter Home Time Tracking Change Status Automate ~ Fewer options * Add Service Template Service Unit Meters Tasks Parts/Items Lines Manage Comments Location Code No EAST No EAST To you want to Clock Out of Service Task for Unit SU00001 on Ticket ST00009? Yes No



Click on the button Yes	EAST		2	2.00	PCS
	Do you Ticket S	want to Clock Out of Serv T00009? view)	ice Task for Unit SU	00001 on No Uni	t of Measure C
When clocking out, you will be given the option to adjust the time that is recorded.	ption . Air NS Desk	Task Update Resource			
	Description	Adjust Time	48 minutes 1	5 seconds 248 millisec	Additic Labor (Quanti
You will also be given the option to record any additional labor, if necessary. Click on the lookup button Labor Code			2 X		
	nal Labor and quanity ode	,	0.00 Choose a vi	alue for Labor Code	
Click on the link in cell No. with the value LABOR	Ad	ditional Labor and quani	ty		
	s 248 millisec La	bor Code	No. 1 KATHERINE LABOR LINA MARTY TERRY + New	Name KATHERINE HULL Labor Lina Townsend Marty Horst Terry Dodds	



6.3.3. How to use Time Sheet Integration

The following demonstrates how to use the Time Sheet Integration feature.



To use Time Sheet Integration, it must first be enabled in Service Management Setup. Click on the navigation menu item popup Service Management	Purchasing ~ Shopify ~ =			
	ons Service Ticket Quote Service Ticket Service Unit Service Template Sales Quote	+ Sales Order + Sales Invoice + Purchase Quote + Purchase Order + Purchase Invoice	 > Service Management > Service > Planned Maintenance > Warranty > Find entries 	 > Search in data > New > Payments > Reports Excel Report
Click on the navigation menu item Service Management Setup	Purchasing ~ Sho	pify~ =		
	ons Service Ticket Quote Service Ticket Service Unit Service Template Sales Quote	+ Sales Order + Sales Invoice + Purchase Quote + Purchase Order + Purchase Invoice	Service Management Service Management Setup Service Ticket View or edit Mintenance Groups Service Templates	> Search in d > New settings for Service Manu > Reports E Excel Repor
Click on the toggle field Integrate with Time Sheets		Report service nems as Report Non-Inventory Restrict closing servic Archive quotes when Show Completed Task Integrate with Time S Allow Multiple Clocking	Parts	× ▼
You must also ensure you have a Resource of type Person set up to use standard BC Time Sheets		Privacy Blocked · · · · · · · Last Date Modified · · · · Use Time Sheet · · · · · · Time Sheet Owner User Time Sheet Approver Us Warranty Type · · · · · · ·		



Click on the button Yes	Is Warrantable
	Apply Maintenance Expense
	Do you want to Clock In to Service Task for Unit SU00001 on Ticket ST00001?
	Yes No
	ments Location Code Estimated Quantity Quantity Used Unit of Measu
Notice that a Time Tracking line has been started for the user that has Clocked In	
	Time Tracking
	IlearD J. Start Data-Time
	→ <u>ODT\TEST01</u> : 4/11/2022 2:06 PM
Click on the back button	Duramies 265 Business Central
	Service Task Card
	Oli Change
	Home Time Tracking Change Status
	Start Date 4/11/2022
	Tasks Parts/Items Lines Manage
Click on the button Yes	1 0.00 PCS
	5 0.00 PCS
	O you want to Clock Out of Service Task for Unit SU00001 on Ticket ST00001?
	Yes No
	is nothing to show in this view)


You will be given an option to adjust the recorded time.	Task Update
	Recource
	Adjust Time
	Recorded Time
Click on the field Recorded Time	
	Task Update ···· 2* ×
	Resource
	Adjust Time
	Recorded Time
	· · · · · · · · · · · · · · · · · · ·
Enter the text 1 hour .	
	Task Update ···· 2 ×
	Resource
	Adjust Time
	Recorded Time 1
	· · · · · · · · · · · · · · · · · · ·
Click on the button OK	Time · · · · · · 1 hour
	of Measure Code
	OK Cancel



You will be given the option to update the task status if needed.	ption . Oil	Task Update - Update Service Status
	et, Oil	Service Status
	1150050	
		Current Service Status · · · RELEASED Set Ser
	Description	
Click on the button OK		
		OK Cancel
		E1
	Actual	Time Recorded Time
	, recourt	
When viewing the standard BC timesheet, notice that an entry has been created for the service performed.		Resource No. · · · · · · · · · · · · · · · · TEST01
		Lines Manage Line Fewer options
		Type Status Description
		→ Job Open Oil Change
		Unit of Measure HOUR
Click on the navigation menu item popup Line		ổ Reopen 🛛 🔁 Submit 👎 Comments
		General
		Resource No. TEST01
		Lines Manage Line Fewer options
		T New Line T Delete Line
		→ Job Copen Oil Change



Click on the navigation menu item Submit	General
	Resource No TEST01
	Lines Manage Line Fewer options
	Submit Submit Ime Sheet Allocation Activity Details Submit the time sheet line for approval. (F9) → Job
Click on the button OK	11 Mon
	Selected line(s) only
	OK Cancel

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	Dynamics 365 Business Central									
		← Servi	ce Ticket							
		ST	0000)1 · S	ervi	ice Tic	ket #ST	00001	- A	datu
		Hom	e Rep	port 1	licket	🔥 Manag	e Time Sheet	Actions	\sim	Fewer op
		7	Add Serv	vice Tem	plate	ang Confirm	n Act Manage t	ime sheet for t	he service	ticket re
		Gen	ieral							
		Custo	omer No.				10000			
		Custo	omer Nar	me			Adatum Corr	noration		
Notice that there is an entry for the time that was										
recorded on the timesheet, as well as options to approve or deny.		10000			Descrip	otion				11 Mc
		Adatum Cor	rp <mark>c</mark> i	\rightarrow	<u>Oil Ch</u>	lange			÷	
		Service Tick	et							
		4/11/2022								
		4/11/2022								
		192 Market	Sq.							



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

ynamics 3	65 Business Central
~	Service Ticket
	ST00001 · Service Ticket #ST00001 - Adatu
	Home Report Ticket Ranage Time Sheet Actions V Fewer op
	Y Add Service Template Image: Confirm Actuals Image: Confirm Actuals<
	General Confirm actuals to post usage for the curre
	Customer No
	Customer Name ····· Adatum Corporation



Notice that in addition to entries related to the service performed, there is an entry for the time that was approved.

			· • • • • • • • • • • • • • • • • • • •				
\rightarrow	Both Budy	÷	4/11/2022	ST00001	ST00001	0020000	
	Both Budg		4/11/2022	ST00001	ST00001	0020000	
	Both Budg		4/11/2022	ST00001	ST00001	0020000	
	Both Budg		4/11/2022	ST00001	ST00001	0020000	
			4/11/2022	DOCST00001	ST00001	0020000	

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	e∨ ≡ iks Service Units Service Manual Task	Items Time Sheet + Create Service Ticl	Current Time Tracking View current tim ket from Template + C	e tracking information.
The Time Tracking Menu will display a list of users who are Clocked In and information on the task they	On Hold	Not Complete Current Time Tracking:	All Service Tasks Not Started All V O Search	Started C ODT Service Unit
		ODT\TEST01	: 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.



V2.0.0.0

Click on the link Forums

ODT Service Help



Scroll down to locate the forum on ODT Service.

Click on the link Release Notes



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:

3/17/2025





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	· Purchasing V	Setup & Extensions \	 Intelligent Cloud Insights 	~
	IONS Service Ticket Quote Service Ticket Service Unit Service Template Sales Quote	+ Sales Order + Sales Invoice + Purchase Quote + Purchase Order + Purchase Invoice	 > Service Management > > Service > Planned Maintenance > New > Payments 	> Reports > Setup E Excel Report
Click on the navigation menu item ODT Service Online Help	ales Quote	+ Purchase Invoice	Maintenance Groups Service Templates Service Units Manufacturers	
			ODT Service Online Help Show ODT Service	online help.

The following provides information on the ODT Service help site.

The picture provided here is the initial wondow for the ODT Service Online Help.

There are various categories which group the help to aide users in locating the help needed. In additon 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.



Introduction to ODT Service
VUL Jerrive Permissions
ODT Service Setups
Service Setup Overview
ODT Service Setup Overview
Financial Setups for ODT Service
How to Setur Service Management Setur
How to Satura an Internal Distormer for Sandrian
Towns - r Jac Weiney Hans 16 Salaho Paning A Takat Tanan
non to deally derived have rights
monitories of object study. Study
Tom is Jean memorial strays
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now to setup service tempares
wanuracurers setup
How to setup manufacturers
woors seep
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
Findedang Gorielau
OUI Service Processing Overview
Service rickets Overview
Service licest 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
Dispared Maintenance
Fiamed waintenance
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
Deviewing Service
To structuring used into a
Nerviewing with two transmissions and the second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second
now to review service hashing
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

opendoor			Search	Q			
ODT Service 365 Online He	Ip > ODT Service Setup	S					
*	\sim		8	*			*
Service Setup Overview	Financial Setups for ODT Service	Ticket Type Setup	Maintenance Groups Setup	Service Templates Setup	Manufacturers Setup	Models Setup	Service Units Setup
X							
Service Planned Maintenance Setup							
			소 Downle	oad full portal			
© 2019 Open Door Technology Inc.			~ C	ontent			

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.

opendoor	Search	Q
ODT Service 365 Online Help > ODT Service Setups > Service Units Setup		
\$		
How to Setup Service Units		
	± Download ful	I portal

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

Videos 3	^
Show Me	
Try Me	
🗢 Test Me	
Downloads 3	^
PDF	
Word	
PowerPoint	
Assist	^
Bow to Setup Service Units	

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.