

USER GUIDE

Service Management

Exact Synergy



Exact Synergy

USER GUIDE SERVICE MANAGEMENT

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Chapter 1


Introduction

1. INTRODUCTION

After installing Exact Synergy Enterprise as instructed in the **Exact Synergy Enterprise Project Approach and Technical Implementation Manual**, the next step is to implement other functionalities offered by the software that caters to your business needs.

The objective of this manual is to help you implement the service management applications which are available in the **Service management** module. As the implementation instructions are presented in easy and quick steps, this manual is meant for consultants, as well as end-users. In general, the manual is created with the primary focus on helping everyone, including users with minimal service management knowledge, to implement the service management solution and subsequently run the processes involved.

Each chapter starts with a brief introduction explaining the objectives of the chapter and the time frame in which the objectives can be accomplished. The required time frame based on a certain condition is visualized by a picture of an hourglass.

Should you require more information about the applications, you can click  **Help** at the title bar to view the online help documents in Exact Synergy Enterprise.

We are confident that this manual will help your company get started with the **Service management** module in Exact Synergy Enterprise and we believe your organization will benefit from this product very quickly.

Chapter 2

What is Service management

2. WHAT IS SERVICE MANAGEMENT

Service management is part of Exact Synergy Enterprise, and this is used to help service companies to regulate their service-related businesses. Service management is not only an effective way to register and maintain the potential serviced items (by creating this automatically out of the Exact Globe Next sales process), but also to update the items when doing service activities on them.

Contracts containing agreements on one or more of the configuration items can be created, which can then be invoiced. These contracts can also influence the service activity process. Also, the total service activity process can be handled out of this solution, beginning with the call (or planned preventive maintenance) to the planning of the service engineers and the stock needed, as well as to realizing the used hours and stock, and creating and sending the invoice at the end of the process.

This will give the user a clear overview, and all the information required, with the possibility to work efficiently and quickly.

Providing extensive service during the lifetime of the product or product combinations can become a key differentiator for many wholesale and manufacturing companies. In some segments, service management is important due to the type of customers that are served, complexity of technology, and impact of downtime or failures in the customers' operational use of the products delivered. The service management solution supports wholesale and manufacturing companies that service the products they import, produce, and sell in a business-to-business environment.

The service management solution includes the following:

- Contract management
- Corrective service activities
- Preventive service activities
- Customer (self-service) portal (optional)
- Dispatching/Planning
- Material requirements planning
- Field service
- Registration of time and materials
- Contract and activity invoicing

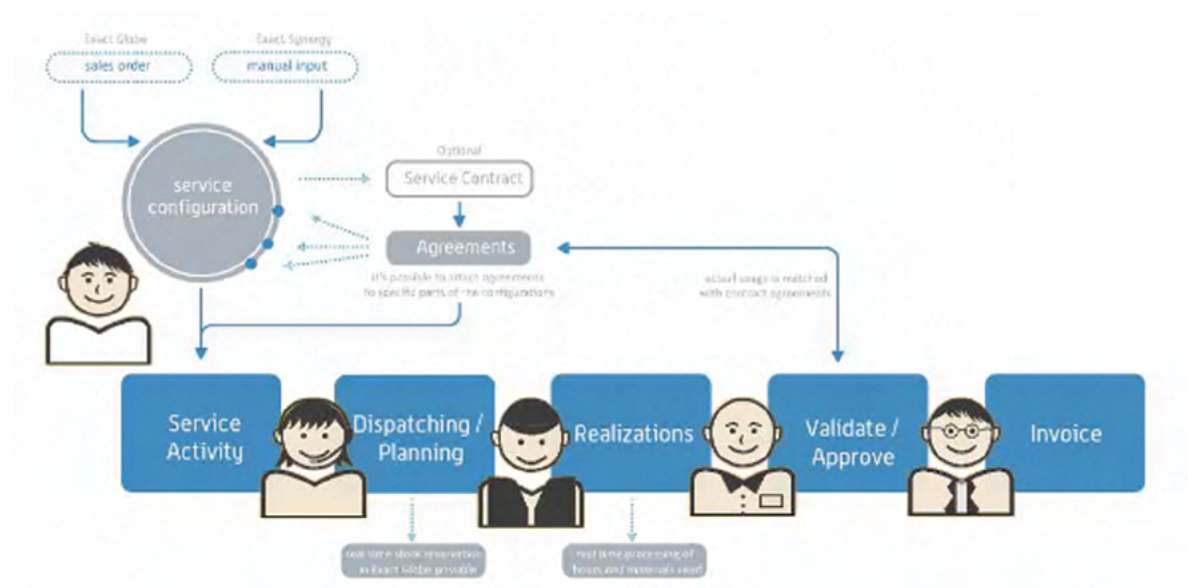
2.1 HOW DOES SERVICE MANAGEMENT WORK

This module includes Exact Synergy Enterprise and Exact Globe Next. Exact Globe Next is used to create the sales orders, which will be the base for the configuration. This will also contain the planned service material on which stock allocation can be done or purchase orders can be made, and the invoices are sent from Exact Globe Next.

The other processes are in Exact Synergy Enterprise, where the configurations can be viewed and changed. Contracts with agreements can be registered and service activity created, planned, and realized.

2.2 HOW TO USE SERVICE MANAGEMENT

This module can be divided into three parts that work closely together. It starts with the configuration, followed by the option for a contract, whereby both require the use of the service activity process, which is the core process of this module.





Chapter 3

System requirements

3. SYSTEM REQUIREMENTS

The Service management module is based on Exact Synergy Enterprise, Exact Globe Next, Exact Integration, Exact Event Manager (optional), and Microsoft SQL service reporting services.

For more information on the system requirements for Exact Synergy Enterprise, *see Hardware and software requirements for Exact Synergy Enterprise*. For more information on the system requirements for Exact Globe Next, *see Hardware and software requirements for Exact Globe Next*. Refer to *System requirements for Exact Event Manager* for the system requirements for Exact Event Manager, and *System requirements Reporting Services Integration for the Microsoft SQL service reporting services system requirements*. For more information on the system requirements for Exact Integration, *see Pre-requisites - Exact Integration*.

Chapter 4

Installation

4. INSTALLATION

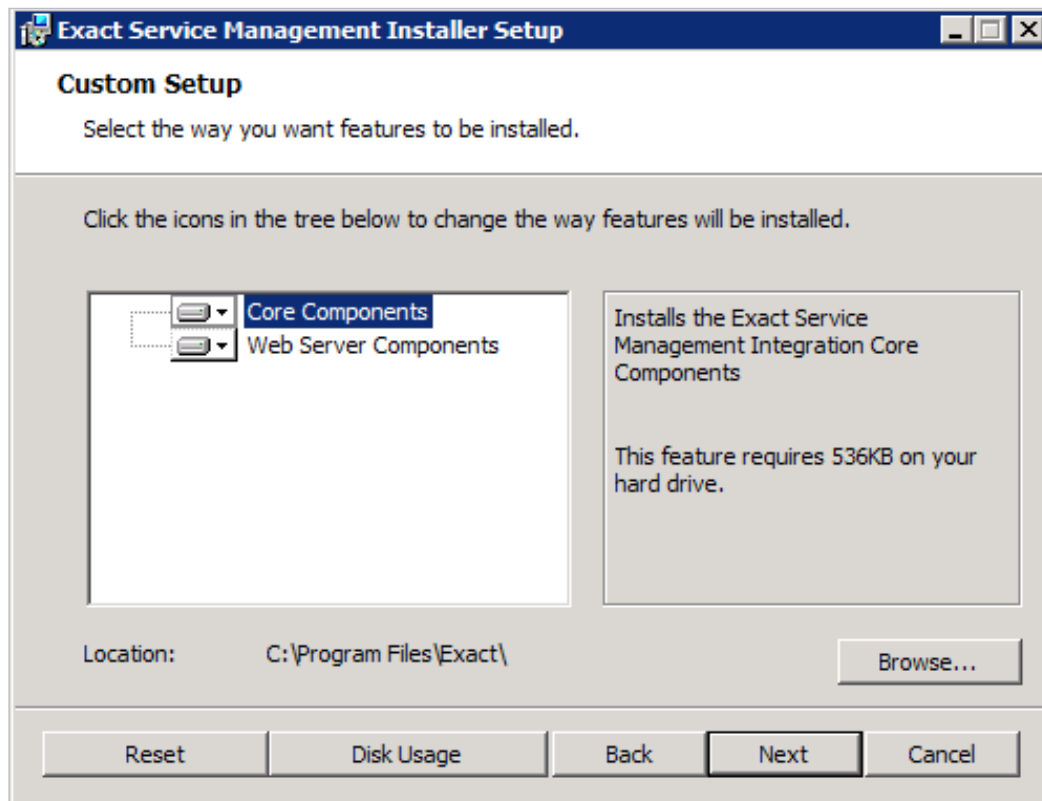
Several installations are required before the **Service management** module in Exact Synergy Enterprise and Exact Globe Next can be used.

4.1 INSTALLATIONS

1. Install Exact Synergy Enterprise. To install this product, see *Exact Synergy Enterprise - Implementation User Guide*.
Note: You will need a license that contains the **YA4510** role so that you are able to assign the **Service management** module to the **CRM** users.
2. Install Exact Globe Next. To install this product, see *Exact Globe Next - Getting Started*.
Note: Select product update 404 during downloading and installation. You will need the **SE4510 Service management** license to enable the **Service management** functionality in Exact Globe Next.
3. Install SQL Reporting Services, and then set up Exact Integration with Exact Synergy Enterprise. To perform these steps, see *Defining reporting services integration settings*. For more information on installing SQL server reporting services, refer to the Microsoft website.
4. To have a working **Exact Service Management** solution, you need to have the same master data for people, accounts, project, items, serial numbers, warehouse, and warehouse locations in both Exact Synergy Enterprise and Exact Globe Next systems.
For a 1:1 scenario, this can be done using Exact Integrator. To install Exact Integration, see *How-to: Installing Exact Integration*.
For more information, see *10 Working with multiple service divisions*.
5. Install the service management integration.msi file which can be found in the Exact Synergy Enterprise **CAB** folder. To install the msi file correctly, you have to give the user credentials with sufficient user access rights in both the systems including the domain name (your domain\username). However, you can use the same credentials defined when you first installed Exact Integrator.

Note:

The installation has two features. The first listed feature is the core components, which can be installed anywhere on your machine, and the second feature, which are the web server components must be installed in the Exact Synergy Enterprise installation folder.



The setup will ask you for your credentials to install the integration. These credentials will be used to connect to Exact Synergy Enterprise and Exact Globe Next. Therefore, the credentials that you have to define should be domain credentials with sufficient rights for both Exact Synergy Enterprise and Exact Globe Next.

Make sure you restart the machine after installing the integration components.

6. Install Exact Event Manager. This is optional. To install Exact Event Manager, see *Exact Event Manager Installation and Setup Manual*.
7. Set up the connectivity settings. Go to the divisional settings in Exact Synergy Enterprise, and define the back-office connections.

exact | Homepage | News | Explorer | Create | Favorites | History

HRM | Customers | Financial | Workflow | Documents | System | Service management | Logistics

My work | **HRM: Division - 602, MacBean Coffeeworld** | Created: 10-11-2010 10:37 | Modified: Ad Locusta 16-08-2011 16:00

General

Code: 602
 Name: MacBean Coffeeworld
 Country: Netherlands
 Default: ☒
 Tax number:
 Web site:
 Start date / End date: 10-11-2010
 Cost center:
 Currency: EUR
 Security level: 10

Address

Account: MacBean Coffeeworld
 Address: Fregatweg 151
 Zip code / City: 6222 NZ Maastricht
 Phone / Fax:
 Title / Contact: MR
 E-mail:
 Country / State: Netherlands

HRM

Absence: Expiry date:
 Log effective date: ☐

Schedule

Update FTE: ☐
 Generate MRS: ☐

Entitlement

Calculation method: in hours, based on working days

Vacancy

Request type:

Applicant

Request type:
 Application phase: 1 2 3 4 5 6 7 8 9 10

Performance review

Final rating:
 Calculation Method: Average
 Reviewer: Manager
 Request type:
 Request End date: Number of weeks: 1

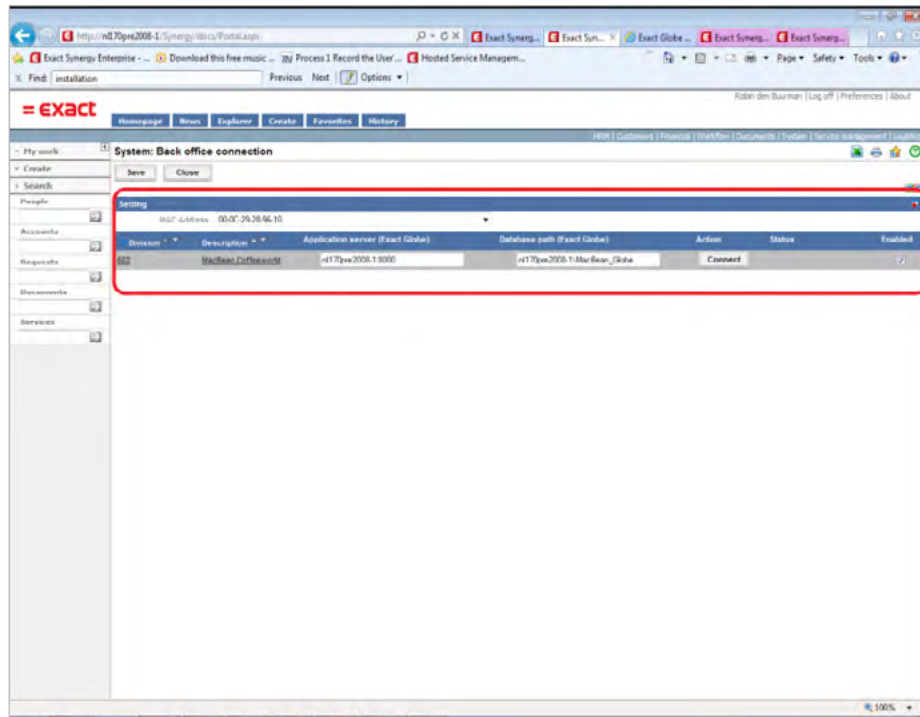
Target agreement

Request type:
 Request End date: Number of weeks: 1
 Number of targets: Minimum 1

Back office

Type: Exact Globe 2000/Exact Globe
 Database IP Address (Server): nl170pre2008-1
 Database Name: 602
 Type Payroll: New
 Show A/R: ☒ Reseller portal ☒ Customer portal
 Invoice code: 60
 Maintenance - CRM: Back office: ☐

Define the back-office settings in Exact Synergy Enterprise at System → Setup → Back office → Back office connection.



Define the front office settings in Exact Globe Next at the **Web address** field via System → Settings → General settings → XML server settings. This is to point to the Exact Synergy Enterprise installation front office. In Exact Globe Next, define the **Request type: Service activity** setting with the request type ID in Exact Synergy Enterprise which is created from the service job installation. This field will change to red if the request type is not **Service**, or the connection cannot be established.

Note:

The application server must point to the server where Exact Globe Next is installed and port 8000 must be selected.

8. Test the back and front office integration to ensure it works. Make sure Exact Integration works by creating an item in Exact Globe Next, and then make sure the item is available in Exact Synergy Enterprise. This can also be done with accounts or people.

Create a sales order in Exact Globe Next by defining the **Configuration** and **Parent item** columns in the sales order. Press the F2 key to ensure the browsers in the columns are working (the browsers might not contain any data), and there should not be any connectivity errors. Go to Exact Synergy Enterprise, and make sure the configuration for the customer is created at Service management → Reports → Configurations → Search.

4.2 INSTALLATION FOR MOBILE APPLICATIONS

The following procedures describe how you can install and enable Exact Synergy Enterprise on your iPad. To be able to use the Exact Synergy Enterprise **Service management** mobile application, the following steps are required:

- Create a basic authentication site (with only the **Basic Authentication** method enabled).
- Install Windows Communication Foundation version 5.0.
- Open the firewall to allow outside traffic to come in.
- Configure the users that can use the mobile **Service management** solution.
- Set the background job to remove the documents that have been temporarily created.
- Testing the mobile **Service management** solution.

4.2.1 Installation

Before installing the mobile applications, Exact Synergy Enterprise product update 250 or higher, and Exact Globe Next product update 405 or higher must be installed. However, the **Service management** iPad solution does not work with Exact Synergy Enterprise.

Note:

The latest version of the Field service mobile application, version 1.0, is able work with the latest Exact products. You can download it directly to your iPad from the Apple store website.

The following prerequisites are required to use the latest Field service mobile application:

- Exact Globe Next product update 407 with the latest update (available only after February 7, 2014), or higher is installed.
- Exact Synergy Enterprise product update 252 with the latest update (available only after February 7, 2014), or higher is installed.
- The Service management module is installed.
- The Field service mobile application version 1.0 is installed.
- You must have at least one of the **Professional, Service management, Service planner, or Service manager** role.

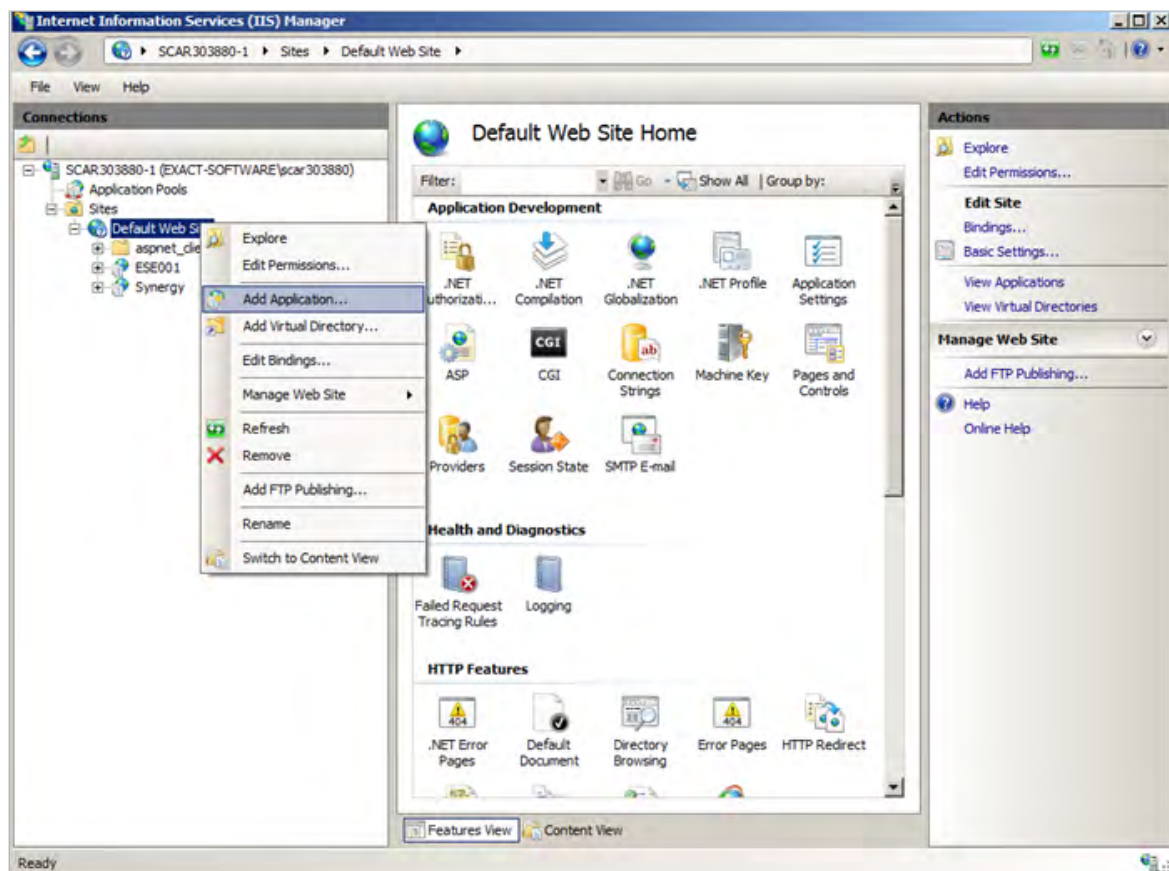
For more information, see *Getting started with Field Service App* (Doc ID: 24.779.435) in Exact Synergy Enterprise.

Creating a basic authentication website

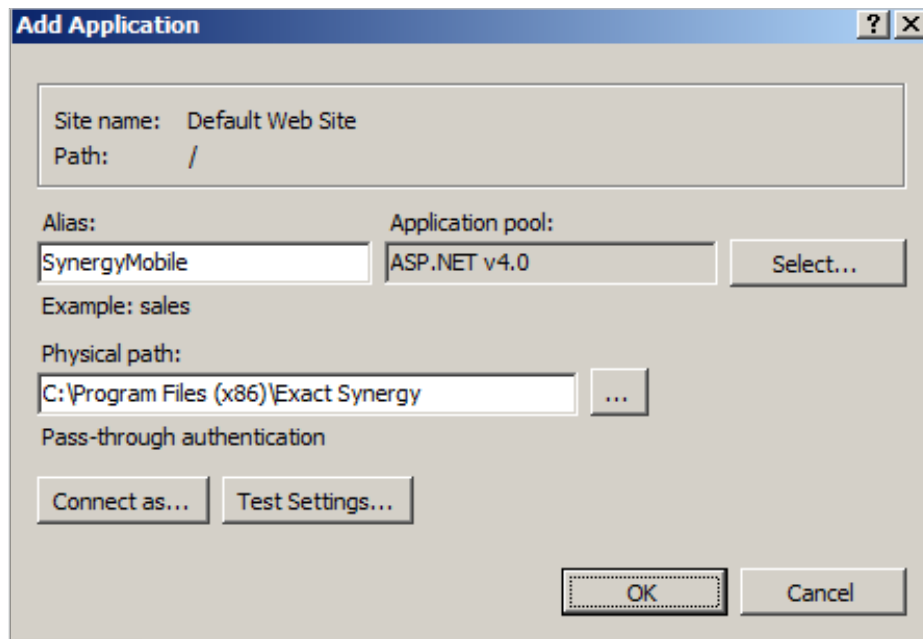
A second Exact Synergy Enterprise website in the internet information server must be created to split the internet related incoming traffic with basic authentication from the internal network traffic with NT authentication. However, if you already have a website with only the **Basic authentication** method enabled, this step can be skipped.

To create a basic authentication website:

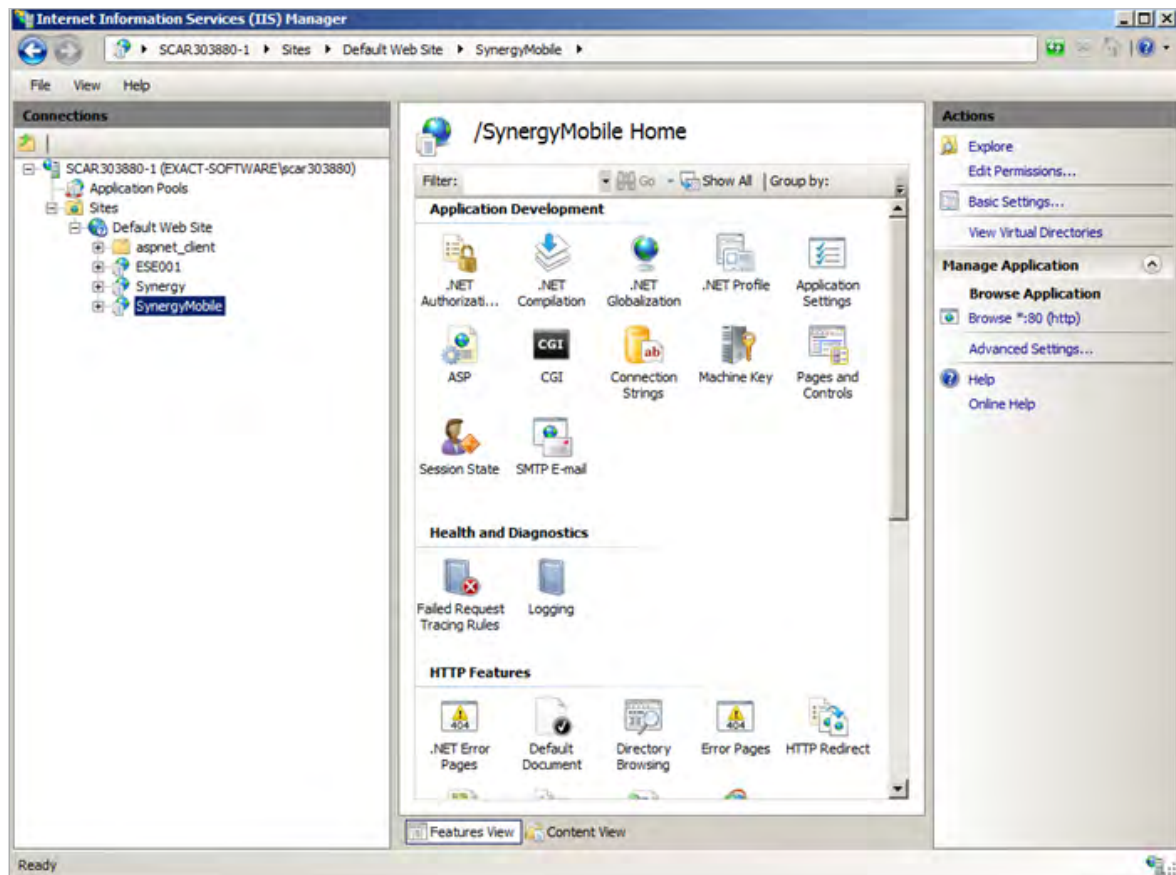
1. Go to the **Internet Information Services (IIS) Manager** screen in the server.
2. Select the current default website (or the website that the server is using).
3. Right-click the mouse.
4. Select **Add Application**. The following screen will be displayed:



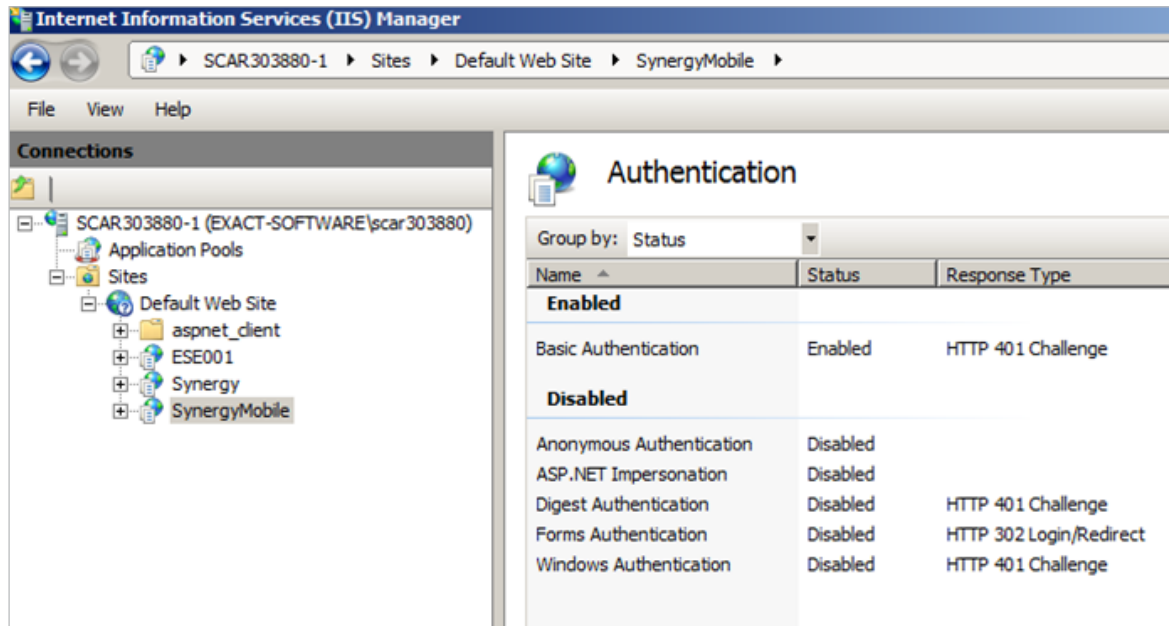
5. Define the alias at **Alias** for the new website. This alias will be used by the URL from the mobile device for the connection. For example, *http://yourserver.com/SynergyMobile*.



6. Ensure that "ASP.NET v4.0" is selected at **Application pool** because the website runs on ASP.NET 4.0.
7. At **Physical path**, select the physical path where Exact Synergy Enterprise is installed.
8. Click **OK**.



Once the application is created, you have to enable the Basic authentication method for the new website by selecting the IIS - authentication option, and disabling all the other authentication methods. Enable the Basic Authentication method.



The mobile landing site can now be used. Make sure you can browse the new website using Internet Explorer.

Note:

- You might have to add the new website to the Exact Synergy db.config file:

```
<database
virtualdirectory="SynergyMobile">
<server>yourserver</server>
<database>yoursynergydatabase</
database>
</database>
```
- It is advisable to secure the communication between the mobile device and the server. To do this, you have to install a certificate (the certificate can be purchased from the official certificate providers, such as Verisign, Digicert, and others) on the web server and configure the website to communicate over "https", and supply the certificate that will be used for the encryption.

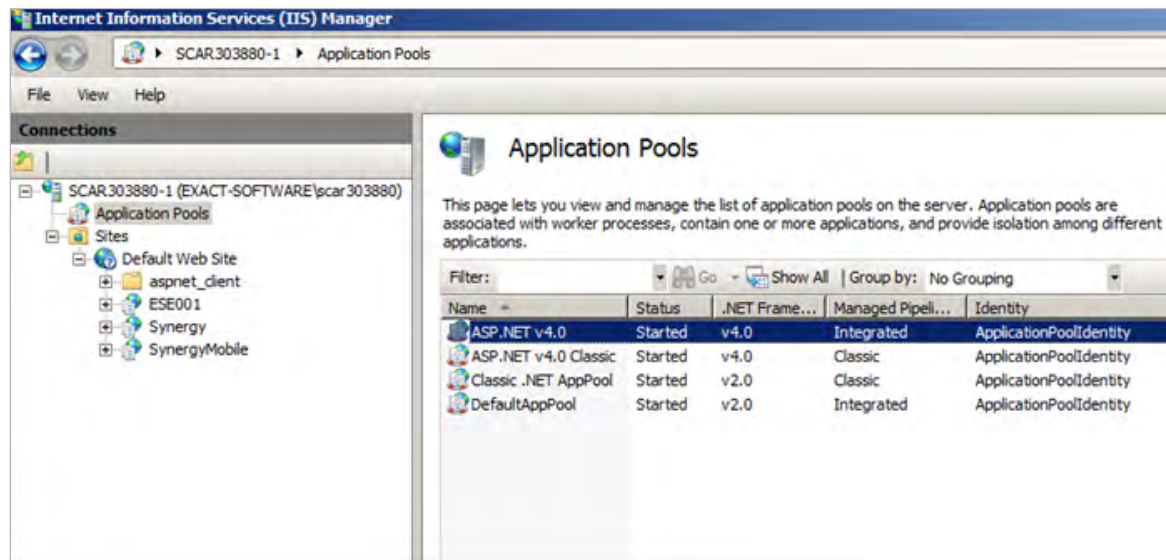
Installation of Windows Communication Foundation 5.0

On the internet information server that runs the newly created internet site with basic authentication, you have to run and install WCF 5.0. You can download WCF 5.0 from <http://www.microsoft.com/en-us/download/details.aspx?id=29306>.

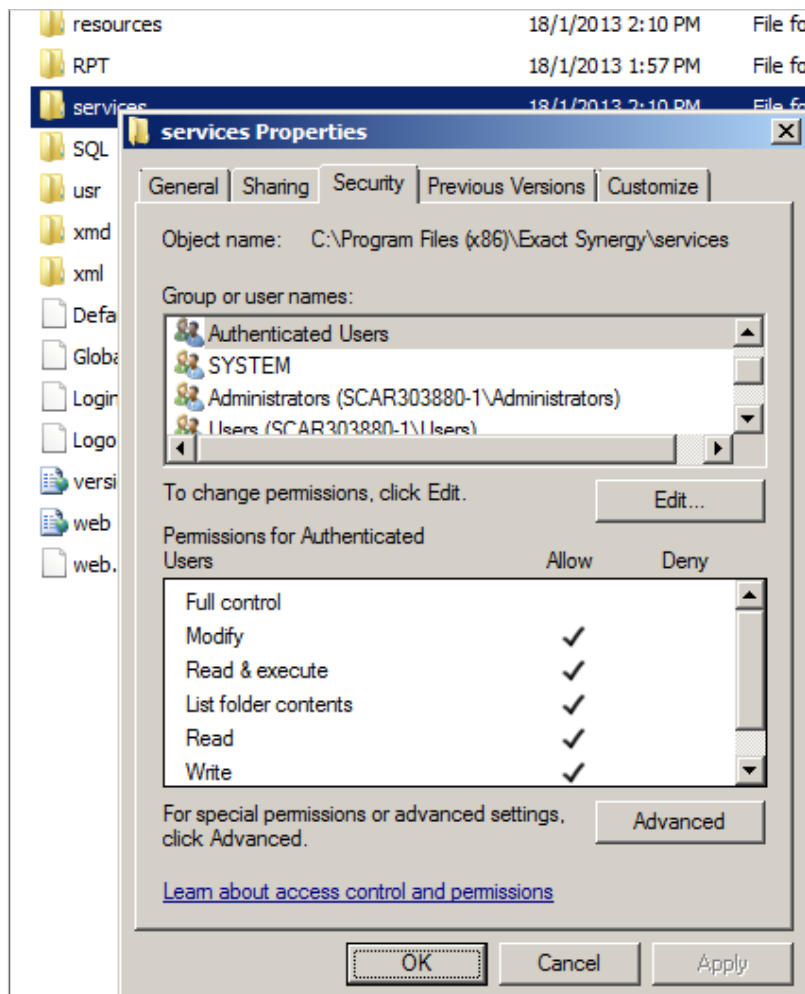
Ensure REST protocol is supported by the website

The field service application uses the oData and REST protocols for retrieving, updating, and deleting data in the Exact Synergy Enterprise environment. However, updating and deleting of data can cause problems if the protocol is not configured correctly in the Exact Synergy Enterprise server.


The Exact Synergy Enterprise server must be verified if the employees are going to use the field service solution, especially the field service iPad application. The application pool that the website is running on must either have the **NetworkService** identity, **ApplicationPoolIdentity**, or a specific identity with the correct rights.



Ensure the **services** folder of the Exact Synergy Enterprise installation contains the **Authenticated Users** in the **Group or user names** section under the **Security** tab in the **services Properties** screen. Furthermore, ensure the user has rights to modify, read and execute, and read and write data.



Ensure the **WebDAV** module is not enabled for the website because the **WebDAV** module has its own implementation of the DELETE and PUT processes which can interfere with the DELETE and PUT processes of the oData or REST protocol. In the **Handler Mappings** screen of the website in IIS, remove the **WebDAV** module.



Handler Mappings

Use this feature to specify the resources, such as DLLs and managed code, that handle responses for specific request types

Group by: State ▼

Name	Path	State	Path Type	Handler
svc-ISAPI-4.0_64bit	*.svc	Enabled	Unspecified	IsapiModule
TraceHandler-Integrated	trace.axd	Enabled	Unspecified	System.Web.Handlers.TraceHandler
TraceHandler-Integrated-4.0	trace.axd	Enabled	Unspecified	System.Web.Handlers.TraceHandler
TRACEVerbHandler	*	Enabled	Unspecified	ProtocolSupportModule
vbhtml-Integrated-4.0	*.vbhtml	Enabled	Unspecified	System.Web.HttpForbiddenHandler
vbhtml-ISAPI-4.0_32bit	*.vbhtml	Enabled	Unspecified	IsapiModule
vbhtml-ISAPI-4.0_64bit	*.vbhtml	Enabled	Unspecified	IsapiModule
vbhtml-Integrated-4.0	*.vbhtml	Enabled	Unspecified	System.Web.HttpForbiddenHandler
vbhtml-ISAPI-4.0_32bit	*.vbhtml	Enabled	Unspecified	IsapiModule
vbhtml-ISAPI-4.0_64bit	*.vbhtml	Enabled	Unspecified	IsapiModule

Opening network for internet traffic

To allow incoming traffic from the internet [iPad] to the corporate network, the network port 443 on the firewall for bi-directional communication must be opened.

Configuring the users that can use the mobile Service management solution

To be able to use the **Service management** iPad application, ensure the user has the appropriate rights for **Service management** and Exact Synergy Enterprise. The following rights are required:

- **Professional** or **CRM** user role
- **Service management** role
- **Service engineer** role or roles with higher rights

HRM Person - 1013, Robin den Burman

Created: [Account Home](#) 11/11/2013 11:11

Modified: [Account Home](#) 11/11/2013 11:11

Buttons: [Edit](#) [Mail merge](#) [vCard](#) [Activities & material](#) [Personal rates](#) [Hours & expense entry](#) [Offline hours import](#) [Close](#)

Out of office

Contact

Name: **Robin den Burman**

Job title: **Sales Manager**

Office phone / Extension: **+31 20 264 7000**

Mobile: **+31 611 408 057**

Fax: **+31 20 264 7001**

E-mail: **robin.den.burman@exact.com**

Connected location: **Van Oort Huisvest - Netherlands**

Physical location / Region: **Van Oort Huisvest - Netherlands**

Competence profile / Performance review profile: **Business profile**

Monitor

[Accounts](#) [Calendar](#) [Documents](#) [Documents \(Recent\)](#)

[Notes](#) [Planners](#) [Projects](#) [Receives](#)

[Schedule](#) [Connections](#) [Archives](#) [Reverts](#)

Roles

Role	Level
Administrative	Corporate
Service management	Corporate
Professional	Corporate
Service engineer	Corporate

Personal

Personality / Language: **Netherlands**

First name / Initial: **Robin**

Initials: **den Burman**

Work name / Last name: **den Burman**

Work name: **den Burman**

Place of birth / Date of birth: **Zwolle**

Marital status / Marital status date: **Single**

Address / Number: **Wijk 10a 101**

City / State: **Enschede**

Country: **Netherlands**

Home phone / Mobile: **045-2110900**

Home e-mail: **robin@exact.com**

Employment

Type of contract: **Employee**

Start date / PTO: **2011-01-01**

Position / Position: **1013**

Contract end date / End date: **2013-11-11**

Setting up of background job to delete documents that have been temporarily created

Every service delivery note that the service engineers request from the mobile application will be generated as a document in Exact Synergy Enterprise. If the engineer does not have the delivery note signed and returned to Exact Synergy Enterprise (digital signature), the document will remain in Exact Synergy Enterprise for eight hours. The document will be deleted after eight hours.

Set up the bdscheduler to automatically remove the unsigned delivery notes. For more information, see `Exact.Jobs.Documents` in Exact Synergy Enterprise.

Testing the mobile Service management application

Restart the server where the internet information server is running. If this is not possible due to other websites or processes that are running on the server, you can manually restart the two Exact Synergy Enterprise websites.

On the iPad, type the URL of the created website with basic authentication. Provide the domain username (for example, `<domain>/<username>`) and password, and then click Save. The mobile application will try to connect to the server environment. If the connection fails, that means either the server cannot be reached, or the credentials provided on the mobile device are incorrect. If the connection is successful, you will be redirected to the main menu on the mobile device.



Chapter 5

Setting Up

5. SETTING UP

After the installations are completed, various settings are required before service contracts can be created. For example, setting up problem codes, solution codes, activity types, and other settings.

5.1 ACCESS RIGHTS

To enable users to have access to the **Service management** solution, the following predefined roles can be assigned:

- **Service desk** – For service desk employees that are offering support.
- **Service engineer** – For service engineers that are performing service activities.
- **Service manager** – For managers of the service employees.
- **Service planner** – For employees that are planning service activities.

If the service engineers want to use the mobile application, ensure the role assigned to the service engineers include function right **1002 - Service Management Mobile Access**. For more information, see *Overview of function rights* and *Overview of roles* in Exact Synergy Enterprise.

Note:

From product update 252 onwards, you will require sufficient rights to the warehouses you use to define the hour type (hour item) in the resource lines, and the warehouses, materials, and item serial numbers in the material lines for the service activity requests. For more information on service activities, see Chapter 8 Service Activities. For more information on warehouses and access rights, see *Creating and maintaining warehouses* (Doc ID: 18.773.498) in Exact Synergy Enterprise.

5.2 SETTINGS

The **Service: Settings** page allows you to define the settings for the **Service management** module.

5.2.1 Editing settings

To edit settings:

1. Go to Service management → Setup → Settings → Settings. The following page will be displayed:

Service: Settings

Edit Close

Criteria Division: 602 MarBean CoffeeWorld

Agreements

Parts / Hours priority

- 1 Item group (Exclude)
- 2 Assortment (exclude)
- 3 Item group
- 4 Assortment
- 5 Price list
- 6 All

Document printing: Defaults - Reports

Service slip [Service Slip](#)

Detailed planning [Service Detailed Planning](#)

Compressed planning [Service Compressed Planning](#)

Service contract [Service Contract](#)

Invoice details attachment [Service Invoice Specification](#)

Mobile service report

Document printing: Create Document Type

Service slip [Service slip](#)

Detailed planning [Activity / Development plan](#)

Compressed planning [Activity / Development plan](#)

Service contract [Contracts](#)

Service details attachment [Sales invoice](#)

Invoice items for agreement types

Parent [SMS_PARENT - Service Management Parent agreement invoice items](#)

Text [SMS_TEXT - Service Management Text agreement invoice items](#)

Response time [SMS_RCTIME - Service Response Times](#)

Preventive maintenance [SMS_PREV_MAINT - Service Preventive Maintenance](#)

Additional part / hour [SMS_ADD-T&M - Service Additional Part / Hour](#)

Parts / Hours [SMS_PARTS / HRS - Service Parts / Hour](#)

Discount [SMS_DISCOUNT - Service Discounts](#)

Invoice item for activities

Service activity [SM - Service Machines](#)

Back office settings

Selection code 40

Invoice code 40

Preventive maintenance default settings

Request type 112 - Preventive maintenance

Contracts Indexing and Prolongation

Contract lock timeout (minutes) 60

Email address

Service email address (from) Service@exact.com

Engineers availability setting

Allow engineers from other division No

2. Click **Edit**.
3. Make the necessary change(s).
4. Click **Save**.

Note:

You can click the hyperlinks on the page to view the detailed information of the settings.

Agreements section

This section indicates how contract agreements relate to each other. Service contracts can have multiple agreements which can be in conflict. For example, there are two service agreements on a service configuration of type part or hour. Both the agreements entitle the customer for a discount on the spare parts. The first agreement entitles a 20% discount on the spare parts, which includes all the items used while providing the service. The second agreement entitles a 50% discount on the spare parts that are in the service price list in Exact Globe Next. The settings in this section will indicate the priority of the agreements that will be used. Based on the example above, the customer will get 50% discount since the price list is of a higher priority in the list on the **Service: Settings** page compared to the **All** option.

Document printing: Defaults – Reports section

This section displays the SSRS reports that the service management solution will use. The reports can be customized and modified based on your requirements. Any information available in Exact Synergy Enterprise can be displayed in the reports. The reports can also be subscribed whereby you will receive a copy of the reports once in a while. This section contains the following fields:

- **Service slip** —This report is displayed and printed when the **Service slip** button is clicked on the **Service activities** search page. For more information, see *8.2 Viewing Service Activities*.
- **Detailed planning** —This report is displayed and printed when the **Detailed planning** button is clicked on the **Service activities** search page. For more information, see *8.2 Viewing Service Activities*.
- **Compressed planning** —This report is displayed and printed when the **Compressed planning** button is clicked on the **Service activities** search page. For more information, see *8.2 Viewing Service Activities*.
- **Service contract** —This report is displayed and printed when the **Contract document** button is clicked on the **Service Contracts** page. For more information, see *7.2 Viewing Contracts*. If the invoice proposal is sent to Exact Globe Next, the PDF copy of the report can be attached to the invoice that will be printed or emailed once the final invoice is printed in Exact Globe Next.

- **Invoice details attachment** —This report will be generated when the invoice proposal is sent to Exact Globe Next. The PDF copy of the report will be attached to the invoice in Exact Globe Next, and printed or emailed once the final invoice is printed in Exact Globe Next. The PDF copy of the report will also be saved as a document in Exact Synergy Enterprise and attached to the invoiced account. Once the invoice proposal is in Exact Globe Next, the security level of the PDF copy of the document will be changed to **Customer specific**, and it will be available in the customer portal for the customers to view if it is configured.

Document printing: Create Document section

The SSRS reports can be saved as Exact Synergy Enterprise documents with PDF attachments. The system will use the settings defined in this section to determine the document types that will be used when the documents are created.

When defining the document types, the system will only predefine the subject, division, and account fields. If the document types are defined with other mandatory fields, the PDF files will not be saved to Exact Synergy Enterprise. This prevents Exact Globe Next from printing the attached documents with the invoice.

Invoice items for agreement types section

The service management solution uses items to relate the operational changes to financial facts. The agreement types in the service contracts can be invoiced although the amounts are in the contract agreements. The items used are configured in the settings. Invoice items will be linked to the agreement types that are to be invoiced. If a response time agreement has to be invoiced, the item will be passed to Exact Globe Next when the invoice is created. However, there is an exception for the item agreement type whereby the item that is passed to Exact Globe Next will be defined in the service agreement.

The items that will be used for invoicing should have the **Sales** and **Divisible** attributes since the invoiced amount is calculated and can have fractions.

In Exact Globe Next, the items will be used to determine the general ledger accounts to register the costs and revenues. However, the cost prices and sales prices of these items will not be used in Exact Globe Next.

Invoice item for activities section

When invoicing service activities, an item is required to determine what has to be invoiced. The invoice item for the activity will be used. Item properties, such as general ledger accounts, costs, and sales prices, will not be used.

Back office settings section

This section contains the following fields:

- **Selection code** —The service management solution will create service orders in Exact Globe Next for every service activity planned in Exact Synergy Enterprise. A service order in Exact Globe Next is similar to a sales order with a specific selection code. To be able to generate the correct service order in the back-office, this setting must be the same as the **Selection code** defined in Exact Globe Next under **Order settings**. If the selection code selected is not for service, incorrect financial results will be generated.
- **Invoice code** —Once an invoice proposal is generated, the invoice proposal will be available in Exact Globe Next as an invoice. The invoice code and proposal will determine the sales journal that will be used in Exact Globe Next. You can also choose to use a specific service sales journal.

Preventive maintenance default settings section

If a service contract contains agreements for the scheduled preventive maintenance, the preventive maintenance generator will generate the service requests. This setting determines the preventive maintenance service requests that will be generated.

The selected request must be a service request type and only the account field will be mandatory if the request is open. The other mandatory fields with this status will block the generator from creating the request.

Contracts Indexing and Prolongation section

If the indexing or prolongation process of the contracts takes too long, the system will lock the contracts that are being processed. The other users from the same division that want to process the contracts will get a message from the system whereby they will have to postpone their actions until the current user has completed the process. This avoids multiple updates of the same contracts.

However, if the user has logged out and cannot be reached, there will not be any options to abort the process. This setting will determine the maximum time the contracts will be locked from other users during the indexing or prolongation process.

Email address section

This section contains the **Service email address (from)** field that allows the email address of the division to be defined for sending emails from Exact Synergy Enterprise to the mobile application.

Service request configurations section

This section contains the **Show configurations tree by filter** field that allows the configurations tree to be displayed according to the item codes and serial numbers defined at **Items** and **Serial numbers** under the **Service configurations** section in the service request if **Yes** is selected. The **Show serial number description** field displays the description of the serial number under the **Serial no.** column and **Extra information** section under the **Service configurations** section in the service request if **Yes** is selected.

Engineers availability setting section

This section contains the **Allow engineers from other division** field that allows engineers to be displayed from the other divisions in the service activity or service planning.

Invoicing documents section

This section contains the **Automatically attach documents to invoice** field that allows documents to be attached to the invoice.

Assortments section

This section allows you to define the labor hours and materials for the assortment.

Service Activities Documents section

This section contains the **Automatically save a copy to Synergy when printing** field that allows you to automatically save the service activity documents in Exact Synergy Enterprise when you print the service activity documents.

5.3 GENERAL SETTINGS

This section allows you to create the general settings for the **Service management** module, such as creating problem codes, solution codes, and activity types.

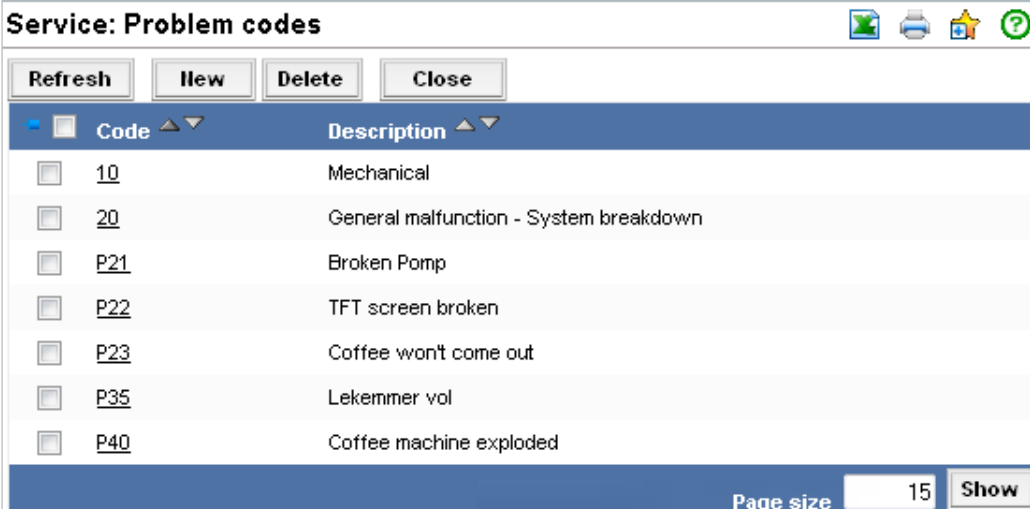
5.3.1 Problem codes

Problem codes can be used for many purposes, such as when selecting the right service engineer during planning and generating reports or statistics on the type of problems that have been reported and solved. To be able to select the pre-defined problems for the service activities, it is necessary to create a master data for problem codes. Many solution codes can be linked to the problem code because a problem might have many possible solutions.

The problem code is a unique code for the division that can be defined. The **Description** field describes the problem and the **Remarks** field describes the problem in detail.

To create problem codes:

1. Go to Service management → Setup → General → Problem codes. The following page will be displayed:





The screenshot shows a web application window titled "Service: Problem codes". At the top right are icons for a new record, print, favorite, and help. Below the title bar are four buttons: "Refresh", "New", "Delete", and "Close". The main area contains a table with two columns: "Code" and "Description". Each row has a checkbox in the "Code" column. The table lists seven problem codes: 10 (Mechanical), 20 (General malfunction - System breakdown), P21 (Broken Pump), P22 (TFT screen broken), P23 (Coffee won't come out), P35 (Lekemmer vol), and P40 (Coffee machine exploded). At the bottom right, there is a "Page size" dropdown set to "15" and a "Show" button.

Code	Description
<input type="checkbox"/> 10	Mechanical
<input type="checkbox"/> 20	General malfunction - System breakdown
<input type="checkbox"/> P21	Broken Pump
<input type="checkbox"/> P22	TFT screen broken
<input type="checkbox"/> P23	Coffee won't come out
<input type="checkbox"/> P35	Lekemmer vol
<input type="checkbox"/> P40	Coffee machine exploded

Page size: 15 Show


2. Click **New**. The following page will be displayed:


Service: Problem codes - New  

Created: SMS Administrator 29-09-2011 10:27 Modified:

Save **Save + New** **Close**

General

Code 

Description 

Remarks

Timestamp **Full screen**



3. In the **General** section, type the problem code at **Code**. This cannot be edited once you have clicked **Save**
4. Type the description of the problem at **Description**.
5. Click **Save**.

Note:

All fields with the "!" icon are mandatory.

To edit problem codes:



1. Go to Service management → Setup → General → Problem codes.
2. Select a problem code under the **Code** column.
The following page will be displayed:


Service: Problem codes - 10, MechanicalEdit  

Created: SMS Administrator 22-09-2011 09:31 Modified: SMS Administrator 22-09-2011 09:33

General	Remarks
Code 10 Description <input type="text" value="Mechanical"/>	Remarks related to Mechanical problem code!
<input type="button" value="Timestamp"/> <input type="button" value="Full screen"/>	

Linked solutions

Code	Description	
O21	Pomp vernieuwen	
O22	TFT scherm vervangen	

3. Make the necessary changes. On this page, you can also add solutions that you have created at Service management → Setup → General → Solution codes to the selected problem by clicking **Add** in the **Linked solutions** section. The **Linked solutions** section also allows you to delete the solutions that are linked to the problem by clicking .
4. Click **Save**.

Note:

The Code field cannot be edited.

To delete problem codes:

1. Go to Service management → Setup → General → Problem codes.
2. Select a problem code under the **Code** column.
3. Click **Delete**.
4. A message "Are you sure that you want to delete this record?" will be displayed.
5. Click **OK**.

2. Select the check boxes of the problem codes that you want to delete.
3. Click **Delete**.
4. A message "Are you sure you sure that you want to delete this record?" will be displayed.
5. Click **OK**.

To delete problem codes in bulk:

1. Go to Service management → Setup → General → Problem codes. The following page will be displayed:

Service: Problem codes

Refresh New Delete Close

<input type="checkbox"/> Code	Description
<input type="checkbox"/> 10	Mechanical
<input type="checkbox"/> 20	General malfunction - System breakdown
<input type="checkbox"/> P21	Broken Pump
<input type="checkbox"/> P22	TFT screen broken
<input type="checkbox"/> P23	Coffee won't come out
<input type="checkbox"/> P35	Lekemmer vol
<input type="checkbox"/> P40	Coffee machine exploded

Page size 15 Show

5.3.2 Solution codes

The pre-defined solution codes can be used for the service activities. The codes can be used for various purposes, such as planning for the service engineers, and generating reports or statistics for the problems that have been reported and how the problems were solved. To be able to select the pre-defined solutions in the service orders, it is necessary to create a master data for the solution codes. A solution can be linked to one or more problem codes.

A solution code is a unique code for the division. The **Description** field describes the solution and the **Remarks** field describes the solution in detail.

To create solution codes:

1. Go to Service management → Setup → General → Solution codes.
2. Click **New**. The following page will be displayed:

3. In the **General** section, type the solution code at **Code**. This cannot be edited once you have clicked **Save**.
4. Type the description of the solution at **Description**.
5. Click **Save**.

Note:

All fields with the "!" icon are mandatory.

To edit solution codes:

1. Go to Service management → Setup → General
→ Solution codes. The following page will be displayed:

Service: Solution codes

Refresh New Delete Close

Code	Description
<input type="checkbox"/> Q21	Pomp vernieuwen
<input type="checkbox"/> Q22	TFT scherm vervangen
<input type="checkbox"/> Q23	Slangen doorspoelen

Page size 15 Show

2. Select a solution code that you want to edit under the **Code** column. The following page will be displayed:

Service: Solution codes - Q21, Pomp vernieuwen

Created: SMS Administrator 27-06-2011 16:03 Modified: SMS Administrator 27-06-2011 16:04

Save Delete Close

General	Remarks
Code Q21 Description <input type="text" value="Pomp vernieuwen"/>	<div></div>

Timestamp Full screen

Linked problems Add

Code	Description	
10	Mechanical	✗
P21	Broken Pomp	✗

3. Make the necessary change(s). On this page, you can also add problems that you have created at Service management → Setup → General → Problem codes to the selected solution by clicking **Add** in the **Linked problems** section. The **Linked problems** section also allows you to delete the problems that are linked to the solution by clicking **X**.
4. Click **Save**.

Note:
The Code field cannot be edited.

To delete solution codes:

1. Go to Service management → Setup → General → Solution codes.
2. Select a solution code that you want to delete under the **Code** column.
3. Click **Delete**.
4. A message "Are you sure that you want to delete this record?" will be displayed.
5. Click **OK**.

To delete solution codes in bulk:

1. Go to Service management → Setup → General → Solution codes.
2. Select the check boxes of the solution codes that you want to delete under the **Code** column.
3. Click **Delete**.
4. A message "Are you sure that you want to delete this record?" will be displayed.
5. Click **OK**.

5.3.3 Activity types

You can create and maintain service activity types. An activity type describes the basic resource usage and financial cost representation (item) that corresponds with Exact Globe Next. With activity types, it is easier to create service activities since the item and hours required will be pre-filled in the service activity once the activity type is selected in the service activity. Examples of service activities are installations and repairs. Activity types can be defined. If the service activity is converted to financial, logistics, or planning in Exact Globe Next, the item will be used. However, the item must be of type **Divisible** or **Sales**. Items with type **Material** cannot be used.

By default, the code "9999" is stored for the activity types. If a sales order is created in Exact Globe Next and an installation service activity is created in Exact Synergy Enterprise, by default, this code will be used and it cannot be configured.

To create activity types:

1. Go to Service management → Setup → General
→ Activity types.
2. Click **New**. The following page will be displayed:

Service: Activity types - New

Created: SMS Administrator 30-09-2011 04:56 Modified:

Save Save + New Close

General

Code !

Description !

Defaults: Hour planning

Hours required !

Hour item !

Remarks

Timestamp Full screen

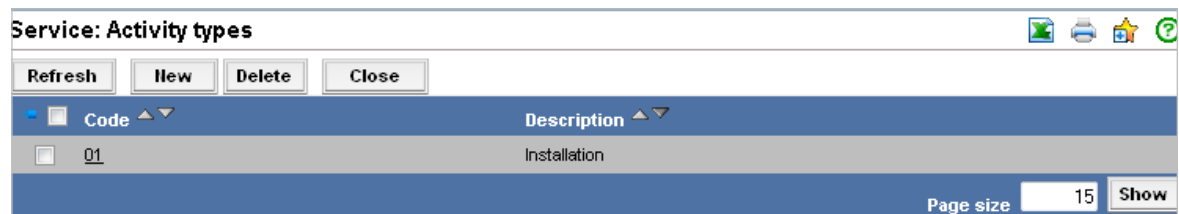
3. In the **General** section at **Code**, type the code for the activity type.
4. Type the description of the activity type at **Description**.
5. In the **Defaults: Hour planning** section, type the number of hours required for the activity at **Hours required**.
6. Type or select the service item for the activity type at **Hour item**.
7. Click **Save**.

Note:

All fields with the "!" icon are mandatory.

To edit activity types:

1. Go to Service management → Setup → General → Activity types. The following page will be displayed.
2. Select the activity code that you want to edit under the **Code** column.
3. Make the necessary change(s).
4. Click **Save**.

**To delete activity types:**

1. Go to Service management → Setup → General → Activity types.
2. Select an activity code that you want to delete under the **Code** column.
3. Click **Delete**.
4. A message "Are you sure that you want to delete this record?" will be displayed.
5. Click **OK**.

To delete activity types in bulk:

1. Go to Service management → Setup → General → Activity types.
2. Select the check boxes of the activity types that you want to delete under the **Code** column.
3. Click **Delete**.
4. A message "Are you sure that you want to delete this record?" will be displayed.
5. Click **OK**.

5.4 CONTRACT SETTINGS

This section allows you to create settings for the contracts such as response time, contract types, agreement sets, contract templates, and contract rates.



5.4.1 Response time

Response time can be linked to your service level agreements (SLA) in your contracts or agreement sets. The response time can be used with agreements with type **Response time**. The response time will be displayed in the service activity for the customer with a contract that includes maximum response time conditions, and for dispatching or planning for an engineer.

By default, the response time will be displayed in the contract agreement. However, you can deviate from the default.

To create response time:


1. Go to Service management → Setup → Contracts → Response time defaults.
2. Click **New**. The following page will be displayed.

Service: Response time defaults - New  

Created: SMS Administrator 30-09-2011 08:59 Modified:

Save **Save + New** **Close**

General

Response time  Hours ▼

3. In the **General** section at **Response time**, type the number of hours or days for when response will be given for the service, and then select **Hours** or **Days**.
4. Click **Save**.

Note:

All fields with the "!" icon are mandatory.

To edit response time:

1. Go to Service management → Setup → Contracts → Response time defaults. The following page will be displayed.
2. Select a response time that you want to edit under the **Time** column.
3. Make the necessary change(s).
4. Click **Save**.

Service: Response time defaults

Refresh New Delete Close

<input type="checkbox"/>	Time	Unit
<input type="checkbox"/>	10	Hours
<input type="checkbox"/>	20	Hours
<input type="checkbox"/>	24	Hours
<input type="checkbox"/>	48	Hours

Page size 15 Show

To delete response time:

1. Go to Service management → Setup → Contracts → Response time defaults.
2. Select a response time that you want to delete under the **Time** column.
3. Click **Delete**.
4. A message "Are you sure you want to delete this record?" will be displayed.
5. Click **OK**.

To delete response time in bulk:

1. Go to Service management → Setup → Contracts → Response time defaults.
2. Select the check boxes of the response time that you want to delete under the **Time** column.
3. Click **Delete**.
4. A message "Are you sure that you want to delete this record?" will be displayed.
5. Click **OK**.

5.4.2 Contract types

Contracts with the same characteristics can be grouped into various contract types. This can be used for selection or analysis purposes. Contract types can be linked to contract templates or individual service contracts.

Contract types are unique for every division and can be used to differentiate the types of contracts, such as maintenance, warranty, or customized items.

To create contract types:

1. Go to Service management → Setup → Contracts → Contract types.
2. Click **New**. The following page will be displayed:

3. In the **General** section, type the code for the contract type at **Type**. This code cannot be changed once you have saved the contract type.
4. Type the description of the contract type at **Description**.
5. Click **Save**.

Note:

All fields with the "!" icon are mandatory.

To delete contract types:

1. Go to Service management → Setup → Contracts → Contract types.
2. Select a contract type that you want to delete under the **Type** column.
3. Click **Delete**.
4. A message "Are you sure that you want to delete this record?" will be displayed.
5. Click **OK**.

To delete contract types in bulk:

1. Go to Service management → Setup → Contracts → Contract types.
2. Select the check boxes of the contract types that you want to delete under the **Type** column.
3. Click **Delete**.
4. A message "Are you sure that you want to delete this record?" will be displayed.
5. Click **OK**.

5.4.3 Agreement sets

An agreement set is a pre-defined and customizable set of agreements that can be used as a template that you can easily link to a service contract or contract template at one go. This saves time and increases the consistency of contract management. Agreement sets are optional.

Agreement sets must always be linked to a contract or contract template via a parent agreement type. By default, agreement sets will be used when the agreement sets are linked to the contracts. A copy of the agreement set will be created and individual changes, for example, to the rate or start date, can be made for the agreement set of a specific contract or configuration.

An agreement set can be invoiced based on the invoice rate defined for the agreement set. However, every agreement in the set can also have an invoice rate. The service management solution will invoice agreements or agreement sets for the service contracts that have the invoice rate defined and **Yes** is selected at **Invoice**.

The agreement set code is unique for every division. Agreement sets can be deactivated or deleted if the agreement sets are obsolete. However, from the reporting perspective, the original master data should not be deleted.

Service: Agreement sets - AGC01, Basic Clean / Inspection

Created: Aimee Swartz-Glancy 28-10-2011 19:25 Modified: Jaap Jan de Lange 13-12-2011 13:15

Save Delete Close

General

Code: AGC01

Description: Basic Clean / Inspection

Active: ☒

Invoicing

Invoice: Yes

Invoice rate: 350.00

Agreements Add

Line order	Agreement type	Description
1	Parts / Hours	10% Discount on Corrective Service Call-Outs
2	Response time	Response Time
3	Preventive maintenance	Clean water ports
4	Preventive maintenance	Inspect Boiler
5	Preventive maintenance	Clean internal filters
6	Preventive maintenance	Scale Removal
7	Text	Inspection Report

To create agreement sets:

1. Go to Service management → Setup → Contracts
→ Agreement Sets.
2. Click **New**. The following page will be displayed:

Service: Agreement sets - New

Created: Robin den Bijsman 14-06-2012 09:55 Modified:

Save Save + New Close

General

Code !

Description !

Active ☒

Invoicing

Invoice Yes ▾

Invoice rate

Agreements

Line order	Agreement type	Description
------------	----------------	-------------

3. In the **General** section, type the code of the agreement set at **Code**. This field cannot be edited once you have saved the agreement set.
4. Type the description of the agreement set at **Description**.
5. Click **Save**.

Note:

All fields with the "!" icon are mandatory.

To edit agreement sets:

1. Go to Service management → Setup → Contracts → Agreement sets. The following page will be displayed:

Service: Agreement sets

Refresh New Delete Close

Code	Description
GOLD LEVEL	Gold Level agreement

Page size: 15 Show

2. Select an agreement set that you want to edit under the **Code** column. The following page will be displayed:

Service: Agreement sets - AGC01, Basic Clean / Inspection

Created: Aimee Swartz-Giancy 28-10-2011 19:25 Modified: Jaap Jan de Lange 13-12-2011 13:15

Save Delete Close

General

Code: AGC01
Description: Basic Clean / Inspection
Active: ☒

Invoicing

Invoice: Yes
Invoice rate: 350.00

Agreements

Line order	Agreement type	Description
1	Parts / Hours	10% Discount on Corrective Service Call-Outs
2	Response time	Response Time
3	Preventive maintenance	Clean water ports
4	Preventive maintenance	Inspect Boiler
5	Preventive maintenance	Clean internal filters
6	Preventive maintenance	Scale Removal
7	Text	Inspection Report

Add

3. Make the necessary change(s). On this page, you can also add agreements to the agreement sets by clicking **Add** in the **Agreements** section.
4. Click **Save**.

Note:

The agreement set code defined at **Code** cannot be edited.

To delete agreement sets:

1. Go to Service management → Setup → Contracts → Agreement sets.
2. Select an agreement set under the **Code** column.
3. Click **Delete**.
4. A message "Are you sure that you want to delete this record?" will be displayed.
5. Click **OK**.

To delete agreement sets in bulk:

1. Go to Service management → Setup → Contracts → Agreement sets.
2. Select the check boxes of the agreement sets that you want to delete under the **Code** column.
3. Click **Delete**.
4. A message "Are you sure that you want to delete this record?" will be displayed.
5. Click **OK**.

5.4.4 Contract templates

Creating service contracts can be time consuming and in most cases, a lot of contracts are similar or identical. To speed up the process of creating service contracts, pre-defined service contract templates have been introduced to minimize entry errors. You can now create multiple templates to be used. When creating a service contract for a customer, just choose the correct template and all the fields will be defined automatically. It is even possible to have agreement lines in the template, so these can also be filled automatically in the new service contract after the contract is saved.

To create contract templates:

1. Go to Service management → Setup → Contracts → Contract templates.
2. Click **New**. The following page will be displayed:

Service: Contract templates - New

Created: Sumathi Karalasingam 03-10-2011 03:40 Modified:

Save Save + New Close

Template Code <input type="text"/> Description <input type="text"/> Active <input checked="" type="checkbox"/>	Contract Invoicing Invoice account: Origin <input type="text" value="Invoice account of contract account"/> Invoicing status <input type="text" value="Not blocked"/> Currency: Origin <input type="text" value="No default"/> Invoice line grouping <input type="text" value="No grouping"/>
Account Contract account <input type="text"/> Contact person: Origin <input type="text" value="Main contact person of contract account"/> Service address (Type) <input type="text" value="No default"/> Contact (Key): Origin <input type="text" value="No default"/>	Service Invoicing Invoice account 1: Origin <input type="text" value="Invoice account of contract account"/> Invoice account 2: Origin <input type="text" value="No default"/> Invoice account 3: Origin <input type="text" value="No default"/> Invoice account 4: Origin <input type="text" value="No default"/> Invoice account 5: Origin <input type="text" value="No default"/>
General Project: Origin <input type="text" value="No default"/> Division: Origin <input type="text" value="Contract account"/> Contract type <input type="text"/> Cost center: Origin <input type="text" value="Contract account"/> Cost unit <input type="text"/>	Line Defaults Invoicing type <input type="text" value="Startdate + invoicing interval (line)"/> Invoice frequency <input type="text" value="Yearly"/> Start date: Origin <input type="text" value="Current date"/> End date: Origin <input type="text" value="No default"/>

Agreement sets

Line order	Code	Description
------------	------	-------------

3. Type the code for the contract template at **Code** in the **Template** section. This cannot be edited once the contract template has been saved.
4. Type the description of the contract template at **Description**.
5. Click **Save**.

Note:

The agreement set code defined at **Code** cannot be edited.

To edit contract templates:

1. Go to Service management → Setup → Contracts → Contract templates. The following page will be displayed:

Service: Contract templates

Refresh New Delete Close

Code	Description
<input type="checkbox"/> ALL4ONE	Setup
<input type="checkbox"/> CSM123	Contract for the CSM123 Coffee Machine
<input type="checkbox"/> GOLDTEMP	Gold template

Page size 15 Show

2. Select a contract template that you want to edit under the **Code** column. The following page will be displayed:
3. Make the necessary change[s]. On this page, you can also add agreement sets to the contract template that you have created at Service management → Setup → Contracts → Agreement sets by clicking **Add** in the **Agreement sets** section.
4. Click **Save**.

Service: Contract templates - GOLDTEMP, Gold template

Created: Arthur van der Pol 20-07-2011 11:46 Modified: SMS Administrator 30-09-2011 13:57

Save **Delete** **Close**

<p>Template</p> <p>Code: GOLDTEMP</p> <p>Description: Gold template</p> <p>Active: <input checked="" type="checkbox"/></p>	<p>Contract Invoicing</p> <p>Invoice account: Origin: Invoice account of contract account</p> <p>Invoicing status: Not blocked</p> <p>Currency: Origin: No default</p> <p>Invoice line grouping: By agreement</p>									
<p>Account</p> <p>Contract account: [field]</p> <p>Contact person: Origin: Main contact person of contract account</p> <p>Service address (Type): Delivery</p> <p>Contact (Key): Origin: Main contact person of contract account</p>	<p>Service Invoicing</p> <p>Invoice account 1: Origin: Invoice account of contract account</p> <p>Invoice account 2: Origin: Contract account</p> <p>Invoice account 3: Origin: Contract account</p> <p>Invoice account 4: Origin: Contract account</p> <p>Invoice account 5: Origin: No default</p>									
<p>General</p> <p>Project: Origin: New project</p> <p>Division: Origin: Contract account</p> <p>Contract type: CT01 High Service Contract</p> <p>Cost center: Origin: Contract account</p> <p>Cost unit: [field]</p>	<p>Line Defaults</p> <p>Invoicing type: Startdate + invoicing interval (line)</p> <p>Invoice frequency: Yearly</p> <p>Start date: Origin: Current date</p> <p>End date: Origin: No default</p>									
<p>Agreement sets Add</p> <table border="1"> <thead> <tr> <th>Line order</th> <th>Code</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>4</td> <td></td> <td></td> </tr> <tr> <td>5</td> <td></td> <td></td> </tr> </tbody> </table>		Line order	Code	Description	4			5		
Line order	Code	Description								
4										
5										

To delete contract templates:

1. Go to Service management → Setup → Contracts → Contract templates.
2. Select a contract template that you want to delete under the **Code** column.
3. Click **Delete**.
4. A message "Are you sure that you want to delete this record?" will be displayed.
5. Click **OK**.

To delete contract templates in bulk:

1. Go to Service management → Setup → Contracts → Contract templates.
2. Select the check boxes of the contract templates that you want to delete under the **Code** column.
3. Click **Delete**.
4. A message "Are you sure that you want to delete this record?" will be displayed.
5. Click **OK**.

Chapter 6

Service Configurations

6. SERVICE CONFIGURATIONS

Service configurations are created for the customers' items that can be serviced. If the items are sold via Exact Globe Next, the configurations will be created automatically. Otherwise, the configurations must be manually created. The physical location, extra information, and build up structure of the items with or without serial numbers can also be defined, and service activities for the configurations can be created and planned. Configurations can be changed if more items are purchased by the customers or the services have changed. This can be registered in the historical overview.

Configurations are mandatory for service management. Revenues and costs are grouped and registered in the configurations, and operational information is linked to the configurations or configuration parts. A configuration can consist of one machine or many with many levels of components. However, only the components and parts of the machine that are serviced should be registered to ensure the service information is clear and understandable.

Homepage | News | Explorer | Create | Favorites | History

H01 | Customers | Financial | Workflow | Documents | Service management | System | Logistics | Projects

Service: Configuration: Kitchen Atrium Exact - Kitchen

Edit Close

General

Code: Kitchen Atrium Exact
 Description: Kitchen
 Blocked: ☐
 Location: Coffee corners
 Engineer: 1004 — Bas de Weal
 Project: 20003 — Installation - 1 Coffeemachine (Zeven Heuvels)

Monitor

Workflow Reports

Free fields

Installed by us: ☒

Account

Account: 991076 — AGG Industries
 Service address: Service — Wijnhaven 21

Remarks

Service configuration items Add

Item code	Description	Quantity	Serial number	Start date	End date
CM000JJ	Coffee machine SUPERIOR 03	1		06-06-2012	
CM007MD	Stnd Coffee Machine 007MD	1		06-06-2012	
CO00003	Capp. Cool promotion package & glasses	1		26-06-2012	
DIV0004	Filters B5 (basket filter 5 litre)	2		26-06-2012	

General section

In this section, the basic information, such as the configuration code and description can be defined. These fields are mainly used for displaying and searching configurations. A configuration can also be set to **Blocked** and the location can be defined to indicate where exactly at the specified address in the account information, can this configuration be found. An engineer can also be linked to the configuration. By default, the service activities created will be serviced by the selected engineer. A project can be used to group configurations to a specific project, for example, when a configuration is part of a large group of configurations. The project will also be synchronized to Exact Globe Next via the contract invoice.

Account section

In this section, the location and address of the configuration can be defined. The address will enable the engineer to know where to go to if repair or maintenance is required for the service configuration.

Free fields section

In this section, the free fields for the configuration can be defined in the service management settings. You can use the free fields, for example, to include additional information for the configuration.

Service configuration items section

A service configuration does not only consist of a machine but also several machines or several machines with many serviceable parts. The parts can be replaced or moved within the configuration. The serial numbers for the more expensive parts can be defined on the parts maintenance page.

Service configurations can always be maintained because the parts that are linked to the service configurations will not be deleted. It will only be inactive. This occurs automatically if the parts are replaced whereby the new parts will be displayed in the configurations instead of the existing parts, and the existing parts will be inactive.

The **Service Configurations** page only displays the parts that are active. The **End date** is optional. If the **End date** of the parts is not defined, the parts can always be used but these can still be replaced. If this occurs, the **End date** will be automatically pre-filled with the replacement date.

Homepage News Explorer Create Favorites History						
HRM Customers Financial Workflow Documents Service management System Logistics Projects						
Service: Configurations - Part: COO0003 - Capp. Cool promotion package & glasses						
Configuration header: Klischen Altium Exact - Klischen						
Created: Robin den Buurman 26-06-2012 15:54 Modified: Robin den Buurman 26-06-2012 15:54						
<div> <div>Edit</div> <div>Replace</div> <div>Move</div> <div>Serial numbers</div> <div>Add part</div> <div>Close</div> </div>						
Part						
<div> <div>Item</div> <div>COO0003 - Capp. Cool promotion package & glasses</div> </div>						
<div> <div>Serial number</div> <div></div> </div>						
<div> <div>Quantity</div> <div>1.00</div> </div>						
<div> <div>Start date</div> <div>26-06-2012</div> </div>						
<div> <div>End date</div> <div></div> </div>						
Children						
Item code	Description	Quantity	Serial number	Serial number Description	Start date	End date
No data found.						

6.1 CREATING SERVICE CONFIGURATIONS

Service configurations determine the individual and unique objects that can be serviced. These objects can be individual products or a combination of products that can be serviced. Service configurations can also include the related parts of the product. This makes it possible to identify a simple piece of equipment to a complex group of machines with many serviceable parts within the machines.

Service configurations can be used to specify service contracts, and for identification purposes during planning and realizing of service activities. If only one piece of equipment is linked, the configuration code will often be the same as the serial number of the related item. It can also be a separate service number. Items that are attached to a service configuration can have an optional serial number. It is possible to add, remove, or replace items in the configuration over time.

To create service configurations:

1. Go to Service management → Entry → Configurations → Configurations (New). The following page will be displayed:

2. Type a code for the configuration at **Code** in the **General** section.
3. Type a description for the configuration at **Description**.
4. Type or select an account at **Account** in the **Account** section. You can create the account by clicking **New** on the **Contract Account** pop-up box, or at Customers → Entry → Entry → Account.
5. Type or select an address at **Service address**. Once you have selected the account at **Account**, the delivery address of the account will be automatically defined.
6. Click **Save**.

Note:

All fields with the "!" icon are mandatory.

Service: Configuration

Save Close

General

Code !

Description !

Blocked ☐

Location

Engineer

Project

Account

Account !

Service address !

Remarks

Timestamp Full screen

Service configuration items

Item code	Quantity	Serial number	Start date	End date
No records to display.				

6.2 VIEWING SERVICE CONFIGURATIONS

Once the service configuration is created, besides viewing the details of the service configuration, you can also view the service activities, create service documents, and view the report of the service configuration. Furthermore, service configuration items can also be added to the service configuration.

To view service configurations:

1. Go to Service management → Reports → Configurations → Search.
2. Define the search criteria.
3. Click **Show**. The following page will be displayed:

Service: Search - Configurations

Search New Close

Configuration	Item	Serial number	Start date	End date	Account
Bridgeport GX 400 APC Bridgeport Vertical Machining Center w/ integrated automatic pallet changing	BEK0004 Vending Sup 180 cs (B3AL)		09-00-2011		Boston Manufacturing Company
EXCLUDE R.P. Supremo beans	BON0001 R.P. Supremo beans		09-09-2011		Lunchroom de Orka
BRS R.P. Supremo beans	BON0001 R.P. Supremo beans		13-09-2011		Lunchroom de Orka
BRM R.P. Supremo beans	BON0001 R.P. Supremo beans		13-09-2011		Lunchroom de Orka
CMTEST3 R.P. Supremo beans	BON0001 R.P. Supremo beans		09-09-2011		Lunchroom de Orka
CMTEST2 Coffee Machine CSM 123	BON0001 R.P. Supremo beans		09-09-2011		Lunchroom de Orka
CMTEST2 Coffee Machine CSM 123	BON0001 R.P. Supremo beans		09-09-2011		Lunchroom de Orka
BR3 R.P. Supremo beans	BON0001 R.P. Supremo beans		13-09-2011		Lunchroom de Orka
BON001 001 R.P. Supremo beans	BON0001 R.P. Supremo beans		09-09-2011		Restaurant Enkhuizen
Bridgeport GX 480 APC Bridgeport Vertical Machining Center w/ integrated automatic pallet changing	BON0001 R.P. Supremo beans		10-08-2011		Doston Manufacturing Company
BR2 R.P. Supremo beans	BON0001 R.P. Supremo beans		13-09-2011		Lunchroom de Orka
EXCLUDE R.P. Supremo beans	BON0001 R.P. Supremo beans		09-09-2011		Lunchroom de Orka
BON001 001 R.P. Supremo beans	BON0001 R.P. Supremo beans		09-09-2011		Restaurant Enkhuizen
BON0001 R.P. Supremo beans	BON0001 R.P. Supremo beans		09-09-2011		Restaurant Enkhuizen
CMTEST3 R.P. Supremo beans	BON0001 R.P. Supremo beans		09-09-2011		Lunchroom de Orka

<< < > >> 1 2 Page size: 15 Show

4. Select a service configuration that you want to view under the **Configuration** column. The following page will be displayed:

Service: Configuration: 20068 - Schaerer Coffee Celebration BCL 2 MILLS

Edit **Close**

General Division: 802 — Maclean CoffeeWorld Code: 20068 Description: Schaerer Coffee Celebration BCL 2 MILLS Blocked: <input type="checkbox"/> Location: Engineer: Project:	Account Account: 80090 — Luchmann Orla Service address: Delivery — H. Baanplein 33 Remarks
---	---

Monitor

[Documents](#)
[Reports](#)
[Service contracts](#)

Free fields


Installed by us: ☐
test

Service configuration items **Add**

Item code	Description	Quantity	Serial number	Start date	End date
CM003JJ	Coffee machine SUPERIOR 03	1	11223344	05-12-2011	

5. Click **Close** to exit.

Note:

Click  **Customize** at the title bar to customize the fields or sections. You can add or remove existing criteria based on your preferences by selecting or clearing the relevant check boxes. Click **Save** to save the settings, **Reset** to clear the selections, **Advanced** to define more settings, or **Close** to exit without saving.

6.3 EDITING SERVICE CONFIGURATIONS

Service configurations can be edited.

To edit service configurations:

1. Go to Service management → Reports → Configurations → Search.
2. Define the search criteria.
3. Click **Show**.
4. Select the service configuration that you want to edit under the **Configuration** column.
5. Click **Edit**.
6. Make the change(s).
7. Click **Save**.

6.4 DELETING SERVICE CONFIGURATIONS

Service configurations can be deleted.

To delete service configurations:

1. Go to Service management → Reports → Configurations → Search.
2. Define the search criteria.
3. Click **Show**.
4. Select the service configuration that you want to delete under the **Configuration** column.
5. Click **Edit**.
6. Click **Delete**.
7. A message "Are you sure that you want to delete this record?" will be displayed.
8. Click **OK**.



Chapter 7

Service Contracts

7. SERVICE CONTRACTS

The service contract is optional but can be used to register the agreements made with the customer. For an easy and uniform contract entry, it is possible to create agreement sets containing different agreements, which can be added to a contract as a set. Templates can be created with pre-filled contract information. This means you only have to select the configuration. It is optional to select which agreement applies to which configuration item or part.

Service contracts can be divided into three sections. The general section displays the invoicing details, the **Configurations** section displays the configurations of the service contract, and the **Agreements** section displays the agreements made with the customer.

Account section

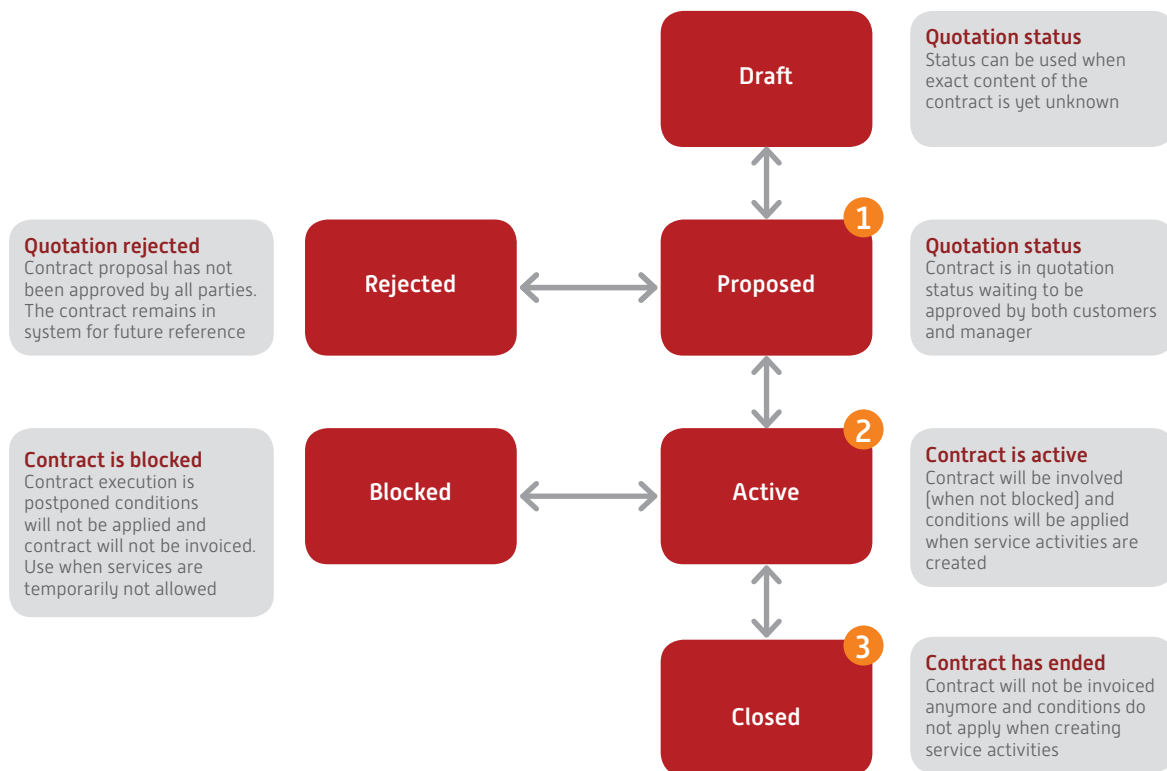
The account defined in this section is the legal entity that has signed the service contract. Since this account might be used for invoicing, the **Invoice account** field will be pre-filled with this account. Select a contact person for this account for future communications with this contact person about the contract. The **Service address** field allows you to define the additional address if you have to send written information about the service. The key contact person can be defined at **Contact person: Key** and this is the person whom you will need to contact if the service facility is closed and the service configuration cannot be reached at the time of the required service.

A contract is always owned by a single division. This division is used to check the user rights within the solution and also to determine to which Exact Globe Next administration the financial results are communicated. All the master data that can be browsed or selected within the contract depends on the division. For example, only the projects that are created for the division can be selected for the contract.

General section

The following fields can be defined in this section:

- **Template** – If a template is selected when a contract is created, by default, all the fields defined in the contract template will be displayed on the new contract. Once the contract is saved, the service agreements from the template will be added to the new contract.
- **Contract number** – This number is unique for the contract and it will be generated by the system. The contract number can be changed when a contract is created. However, once the contract is saved, the contract number cannot be edited.
- **Project** – The project can be automatically defined if a template is selected. The project will be used by the contract invoice and synchronized to Exact Globe Next. This project can be used to accumulate the costs and revenues for the contracts.
- **Contract type** – Contract types can be selected to distinguish the types of contracts in the reports and overviews.
- **Cost center** – The selected cost center will be used to register the revenue of the contract in Exact Globe Next.
- **Status** – The contract status can be used to indicate the phase of the contract in the sales and operational service conditions within the organization. The contract is invoiced and the service conditions will apply only if the contract is active.
- **Start date and End date** – The start and end dates determines the validity of the contract. The duration of the contract should be long enough and in which the service configurations and agreements are still active. A contract without an end date will always be active.



Contract Invoicing section

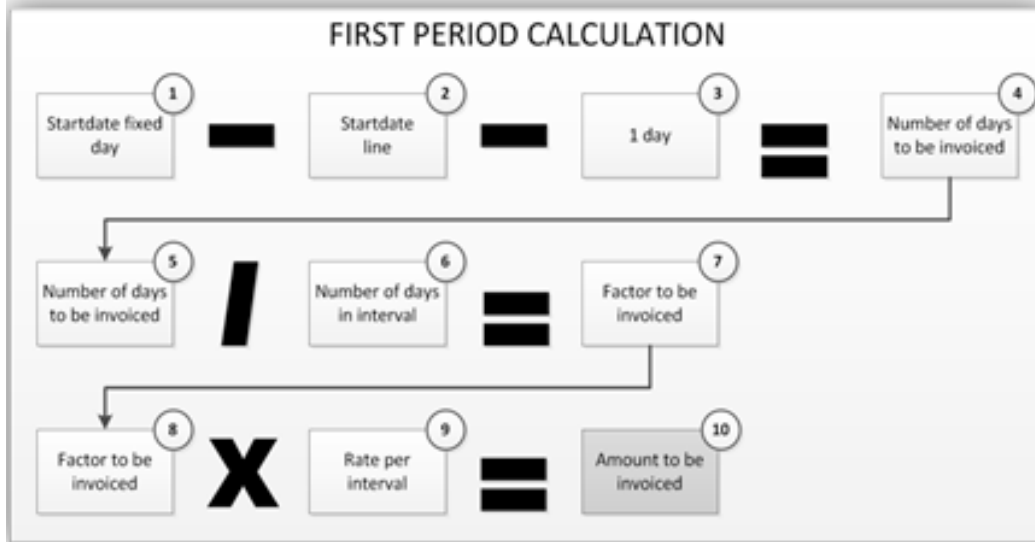
A contract will be invoiced if the status of the contract is active and invoice due date is within the start and end dates of the contract and the last invoice date is before the invoice due date, and the status of the invoice is not blocked. The following fields can be defined in this section:

- **Invoice account** – This account is used to create the invoice for the debtor in Exact Globe Next. A different debtor can be invoiced instead of the contract owner. For example, to invoice the headquarters of the organization but the contract is owned by one of the subsidiaries.
- **Invoicing status** – If you want to temporarily block the invoicing of the contract but do not want to make the service conditions inactive, the invoicing status can be changed to **Blocked**.
- **Currency** – This currency will be used for contract invoicing. The currency must be activated for the division of the contract in the Exact Globe Next administration.
- **Invoice line grouping** – **By agreement** or **No grouping** can be selected for the service contract. The selection will affect the invoice (proposal) lines that are created.

- **Invoicing type** – There are two methods of forward invoicing in service management, such as the fixed day interval and start date interval. The start date interval starts from the start date of the contract and the invoices are created based on the frequency depending on whether the invoice due date (in the invoice proposal generator) is after the last invoice date. This is the simplest way of invoicing.

The second method is the fixed day interval whereby the invoice is sent on a fixed time period. For example, on the 15th of the month. Thus, the initial time interval between the start of the contract and date of the first fixed day is invoiced based on the ratio.

The last interval for both the invoicing types is also based on the ratio. If the fixed day interval is selected, the month and date can be selected. For example, with the monthly invoicing, the day of the month to be invoiced can be selected. However, if the month does not have the specific date, the first available date will be selected during the invoice proposal generation.



- **Invoice frequency** – The frequency of the invoices to be generated for a contract can be defined. This depends on the invoice type selected for the contract. For example, if **Start date (+) (invoicing interval (line))** is selected at **Invoicing type**, **Once-only**, **Weekly**, **4-weekly**, **Monthly**, **Quarterly**, **Half-yearly**, or **Yearly** can be selected. The forward invoicing method still applies but you can determine how often the contract is generated by the invoice proposal generator. The invoice generator should be executed as often as possible so that the invoice with the shortest frequency will be generated immediately for the new invoice period.
- **Invoiced until** – This field displays the date the contract was last invoiced. It is used to determine the start date of the next invoice, if any. If changes are made to the contract before the last invoice date, the changes will not be allowed, and the contract will not be invoiced.
- **Last (indexation date)** – This field displays the date the contract was last indexed.

Service Invoicing section

Alternative invoice accounts can be defined for the service activities that are under the terms and conditions of the contract. The alternative invoice accounts will be displayed in the service activity on the resource lines pop-up page for the Service Planner or Service Manager to select. The invoice of the specific resource line will be available for the account or debtor selected in the resource line.

Configurations section

Multiple configurations can be added to the contract. The agreements of the contract can be used for the configurations or part of the configurations depending on the active date of the configurations and agreements of the contract.

If a part is removed from a configuration, the conditions of the configuration will not be applicable to the removed configuration part. If an agreement has ended (based on the start and end dates of the agreement), the agreement will not be applicable even if the configuration is still available and active.

Agreements section

Agreements can be added for non-active contracts by clicking **Add**. Agreement sets are added via the parent agreements. If new agreements are added, links will not be created but the agreements will apply to all the configurations and parts in the contract when the contract is activated. However, this can be changed on the **Agreement** page.

Every agreement has a date range to determine whether the agreement is still active and the service can be processed. The date range can be specified by defining the **Start date** and **End date** fields. The dates must be within the date range of the contract. The agreement will not end if the **End date** field is not defined. The agreement will end when the contract has ended.

There is also an **Invoicing** section on the **Agreement** page. This section allows you to define the amount to be invoiced for the agreement. The amount will be invoiced once if the agreement is not linked to a configuration item or based on the number of configuration items. You can also choose not to invoice the agreement by selecting **No at Invoice**.

The agreements can also be linked to a parent. The parent can be invoiced by defining the amount to be invoiced for the agreement set on the parent account and selecting **No at Invoice** of the child agreement. This will invoice the agreement set as a single amount.

7.1 AGREEMENT TYPES

The service management solution uses several different agreement types with different behaviors. However, all the agreement types have an invoice section to determine how they are invoiced. The following agreement types are available:

- **Maintenance type** – This agreement type allows you to select the type of maintenance, such as preventive maintenance and/or corrective maintenance.
- **Response time** – This agreement type determines how fast your service organization can respond to a service for the contract. A default response time that was defined for the division can be selected in the settings, or the response time that was agreed with the customer can be defined manually.

The screenshot shows a software interface for managing agreements. At the top, there's a header bar with the title "Agreement" and a green checkmark icon. Below the header, there's a sub-header with "Contract number: 60000-0001" and "Contract status: Proposed". The main content area is divided into two sections: "Agreement" and "Invoicing".

Agreement Section:

- Line number:** 3
- Description:** (empty field with a red error icon)
- Agreement type:** Response time (dropdown menu)
- Start date:** 09-01-2012 (calendar icon)
- End date:** 31-01-2013 (calendar icon with a red error icon)
- Response time:** Hours (dropdown menu)
- Parent agreement:** (empty field with a red error icon)

Invoicing Section:

- Invoiced until:** (empty field)
- Invoice:** Yes (dropdown menu)
- Invoice rate:** 0.00 Euro
- Total invoice amount next period:** 0.00 Euro / Monthly

- **Discount** – This agreement type allows you to give a one-time net amount discount or percentage discount for the invoice of the first service contract. The discount is deducted from the total invoice amount once the first period of the contract is invoiced. For the once-only frequency with fixed amount and once-only frequency with percentage discount, the discount is applied only when the invoice date in the agreement is included in the invoicing period.

For the contract frequency with fixed amount discount, the agreement with the contract frequency will be applied only if it is included in the invoicing period (starts before the invoice due date), and has non-discount agreements that have been invoiced. If the contract frequency is with a percentage, the discount agreement with invoice frequency **Contract** and discount type **Percentage** will be applied for each invoicing interval if the agreement is included in the invoicing period, and there are non-discount agreements that have been invoiced.

Agreement

Contract number: 60000-0001 Contract status: Processed
 Created: Joanna Documentation 27-03-2012 05:00 Modified:

Save Save + New Agreement links Close

Agreement

Line number: 3
 Description:
 Agreement type: Discount
 Start date: 09-01-2012
 End date: 31-01-2013
 Parent agreement:

Invoicing

Invoice date: 27-08-2012
 Invoiced:
 Invoiced: Yes
 Discount Amount: 0.00 Euro
 Total invoice amount next period:

- Preventive maintenance** – This agreement allows you to define the recurring preventive maintenance. The commitments from the service organization towards your customers can be automatically defined in the service activities using the preventive maintenance generator. The preventive maintenance type must be defined and it can be selected from the preventive maintenance type master data for the division. The preventive maintenance types contain schedules and activity types. Thus, the default values of the agreement will be displayed based on the preventive maintenance type selected for

the agreement. The **Time interval**, **Activity start time**, and **Activity duration** fields can be defined manually. The **Start next request** field determines the exact schedule of the maintenance. **Previous request** or **Fixed schedule** can be selected. The **Fixed schedule** maintenance will be based on the time interval from the start date of the contract regardless of whether the previous preventive maintenance job has been realized. The **Previous request** option will schedule the next maintenance service job for the time interval after the previous request has been planned from the start date of the contract.

The screenshot shows the SAP 'Agreement' configuration screen. At the top, it displays 'Contract number: 800990001' and 'Contract status: Proposed'. Below this, there are buttons for 'Save', 'Save + New', 'Agreement links', and 'Close'. The main section is titled 'Agreement' and contains the following fields:

- Line number: 3
- Description: (empty field with a red error icon)
- Agreement type: Preventive maintenance (dropdown menu)
- Start date: 09-01-2012 (calendar icon)
- End date: 31-01-2013 (calendar icon with a red error icon)
- Parent agreement: (empty field with a calendar icon)
- PM type: (empty field with a red error icon)
- Time interval: (empty field with a red error icon and a dropdown menu set to 'Days')
- Activity start time: (empty field)
- Activity duration: (empty field with a red error icon and a dropdown menu set to 'Hours')
- Start next request: Previous request (dropdown menu)

The bottom section is titled 'Invoicing' and contains the following fields:

- Invoiced until: (empty field)
- Invoice: Yes (dropdown menu)
- Invoice rate: 0.00 Euro
- Total invoice amount next period: 0.00 Euro / Monthly

- **Additional part / hour** – This agreement type allows you to add the default resource or material lines to the service activities. This agreement type also allows you to charge the setup cost to the service activity. The item defined (depending on the type, material, or resource) will be added to the service activity resource or material lines once the activity is saved.

Agreement	
Contract number: 00090.0001	
Created: Jo-anna Documentation 27-08-2012 05:16	Contract status: Proposed
Modified:	
<input type="button" value="Save"/> <input type="button" value="Save + New"/> <input type="button" value="Agreement links"/> <input type="button" value="Close"/>	
Agreement	
Line number	3
Description	
Agreement type	Additional part / hour
Start date	09-01-2012
End date	31-01-2013
Parent agreement	
Part / Hour	
Type	Hour
Quantity	1.00
Invoicing	
Invoiced until	
Invoice	Yes
Invoice rate	0.00 Euro
Total invoice amount next period: 0.00 Euro / Monthly	

- Parts / Hours** – This agreement type allows you to define the discount on the specific items that are used in the service activity. For example, there could be an agreement whereby the customer was given 50% discount on the materials that were used during the service work. By default, this discount given will be defined in the resource and material lines of the service activity once the service activity is saved. This agreement consists of several options that allow you to define the discounts for the items. You can define the discount that will apply to all the items, all the items within the specific Exact Synergy Enterprise assortment, or all the items within the specific Exact Globe Next price list. If the item is in the assortment or price list in Exact Globe Next, the discount will apply. If the include or exclude option is used, you can exclude specific items in the second assortment or price list for the discount.

Agreement

Contract number: 60080-0001 Contract status: Proposed
 Created: Je.anna Documentation 27.08.2012 05:45 Modified:

Save Save + New Agreement links Close

Agreement

Line number: 3

Description:

Agreement type: Parts / Hours

Start date: 09-01-2012

End date: 31-01-2013

Selection: All

Parent agreement:

Include / Exclude: Include

Discount percentage:

Invoicing

Invoiced until:

Invoice: Yes

Invoice rate: 0.00 Euro

Total invoice amount next period: 0.00 Euro / Monthly

- **Text** – This agreement allows you to charge an amount for each invoice frequency for the agreement. This agreement does not have any functional behavior or influence on the service activity processes except the invoice of the service contract.

The screenshot displays a software interface for managing service contracts. At the top, the 'Agreement' section is active, showing contract details: 'Contract number: 60090-0001', 'Contract status: Proposed', 'Created: Jo-anna Documentation 27-08-2012 08:06', and 'Modified:'. Below this are buttons for 'Save', 'Save + New', 'Agreement links', and 'Close'. The main area contains a form for the agreement with fields for 'Line number' (3), 'Description', 'Agreement type' (Text), 'Start date' (09-01-2012), 'End date' (31-01-2013), 'Document', and 'Short description'. There are also 'Timestamp' and 'Full screen' buttons. The 'Invoicing' section is visible below, showing 'Invoiced until', 'Invoice' (Yes), 'Invoice rate' (0.00 Euro), and 'Total invoice amount next period' (0.00 Euro / Monthly).

Agreement

Contract number: 60090-0001 Contract status: Proposed
Created: Jo-anna Documentation 27-08-2012 08:06 Modified:

Save Save + New Agreement links Close

Agreement

Line number: 3
Description:
Agreement type: Text
Start date: 09-01-2012
End date: 31-01-2013
Document:
Short description:
Timestamp Full screen
Parent agreement:

Invoicing

Invoiced until:
Invoice: Yes
Invoice rate: 0.00 Euro
Total invoice amount next period: 0.00 Euro / Monthly

- **Item** – This agreement allows you to invoice a specific maintenance item for a specific price based on the price list in Exact Globe Next. This allows you to create a maintenance item for each configuration item. The maintenance fee can be registered for the maintenance item and can be invoiced with the contract invoice.

Agreement

Contract number: 80090.0001 Contract status: Proposed
 Created: Jo-anna Documentation 27-05-2012 08:06 Modified:

Save Save + New Agreement links Close

Agreement

Line number: 3

Description:

Agreement type: Item

Item:

Quantity:

Start date: 09-01-2012

End date: 31-01-2013

Short description:

Price list:

Cost center:

Parent agreement:

Invoicing

Invoiced until:

Invoice: Yes

Invoice rate: Euro

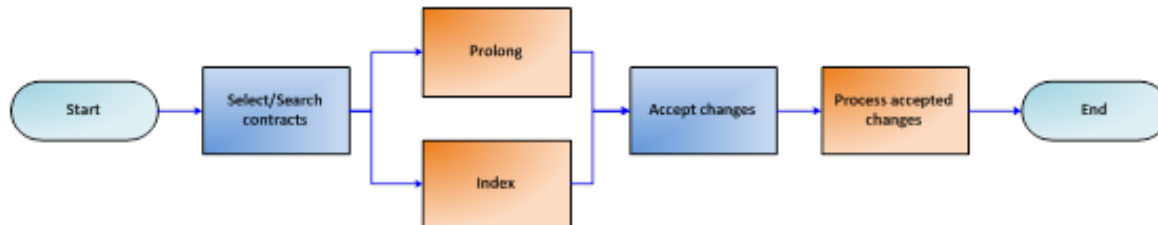
Total invoice amount next period: 0.00 Euro / Monthly

7.2 CONTRACT INDEXATION AND PROLONGATION

The image above describes the process of the indexing and prolongation of contracts. The process starts by selecting the contracts that are eligible for indexing and prolongation, and the proposed changes to the contracts and agreements will be displayed. You will then have to select the changes before the system updates the contracts and agreements. Once the changes are confirmed, the system will start to update the contracts and agreements in the background. Depending on the number of contracts to be updated, this can be a lengthy process but you do not have to wait for the system to finish. Other functionalities in the system can be used. However, the contracts that will be updated by the system will be locked for editing, and you will get an error

message if you edit a contract that is being updated. Initiating another indexation or prolongation process for the same division is also not possible until the system has completed the current indexation or prolongation process.

For indexation, the indexation date will be the same as the date of the new invoice rate. The agreements that start on the day of the indexation will be terminated and have a lifespan of 0. Furthermore, the invoice will contain the time for the start and end dates whereby if the start and end dates are the same, the service agreements will not exist.



Contract indexation

On the **Index: Service contracts** page, contracts that fit the specified criteria with an amount or percentage can be indexed. To do this, you have to specify the contracts that are eligible for indexation by defining the search criteria. Information of the contracts, such as the status and attached accounts can be selected. Configurations or specific agreements that must be in the contract can also be selected. However, the **Method** and **Indexation date** fields under the **Action** section must be defined. The **Indexation date** value determines the time the contract price will be indexed and invoice rate of the contract agreements that will be changed. The contracts can be indexed with an amount or percentage by defining the **Indexing Type** field under the **Action** section. If **Index with percentage** is selected at **Indexing Type**,

the **Percentage** field will be displayed and you are required to define the percentage. However, if **Index with amount** is selected at **Indexing Type**, an amount must be defined. When indexing contract agreements, the current agreements in the contracts will end by the indexation date, and new agreements starting from the indexation date until the original end date of the agreements will be created. The invoice rate of the original agreements will be used and indexed with either the amount or percentage. Since the system will calculate the new invoice rate, the new invoice rate might have many decimals which might not be required. With the rounding method, you can determine how the newly calculated invoice rate is rounded and how many decimals the system should use to do the rounding.

Homepage | News | Explorer | Create | Favorites | History

IRM | Customers | Financial | Workflow | Documents | Service management | System | Logistics | Projects

Index: Service contracts

Show Reset Count Default Close

General

Status ☐ Draft ☐ Proposed ☐ Active ☐ Closed ☐ Rejected ☐ Blocked

Contract

Number Division 502 Project Maclean CoffeeWorld

Account

Contract account Contact person

Invoicing

Account (Contract) Account (Service activity)

Configurations

Configuration

Agreement

Types ☐ Discount ☐ Parent ☐ Text ☐ Response time ☐ Preventive maintenance ☐ Additional part / hour ☐ Parts / Hours ☐ Item

View

Sort by Contract number (+)

Include: Lines ☐ Contract items ☐ Agreements ☐ Agreement details

Action

Method Indexing

Indexing Type Index with percentage

Method Round upwards

Indexation date 17-03-2011

Percentage

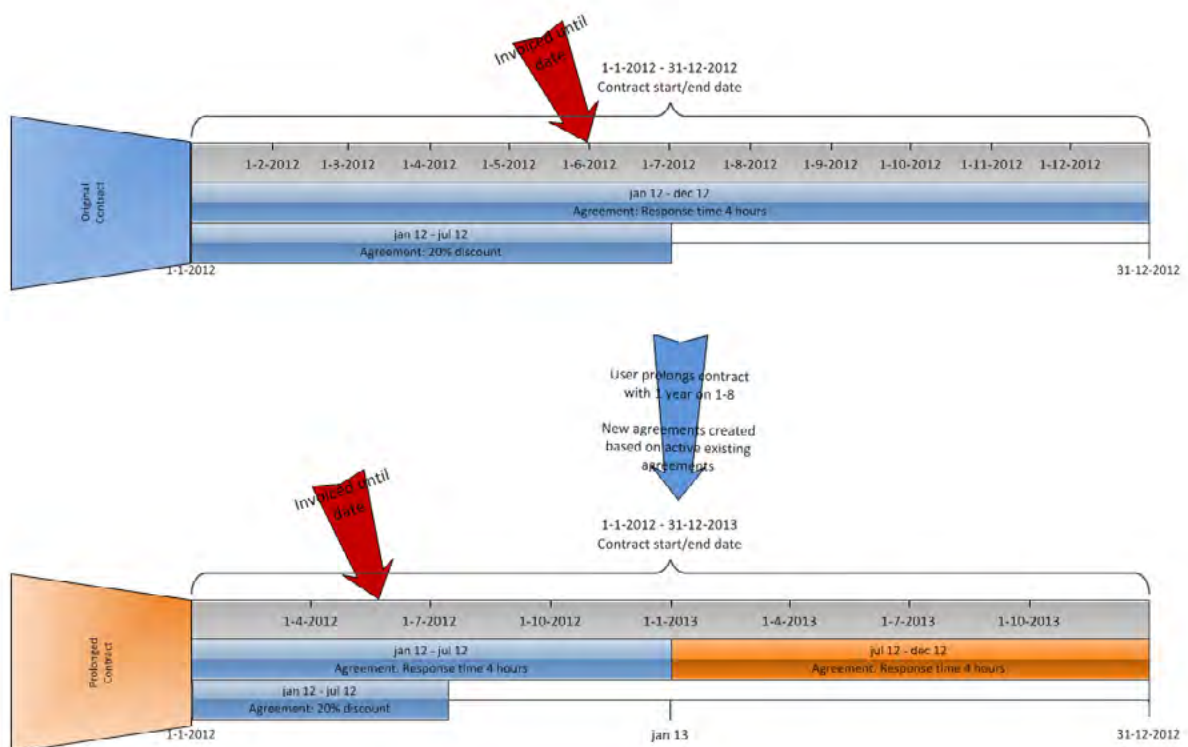
Round off to 0.001

Columns

Contract - old end date	Contract - new end date	Agreement type	Description	Old start date	Old end date	Old next amount	New start date	New end date	New next amount	Difference
-------------------------	-------------------------	----------------	-------------	----------------	--------------	-----------------	----------------	--------------	-----------------	------------

Contract prolongation

Prolongation of contracts is similar to the indexation of contracts except the invoice rates of the contracts are not adjusted but the end dates of the contracts are adjusted, and new agreements are created based on the original active agreements with the original end date of the contracts. The newly created agreements will be active until the new end date of the contracts.



Homepage | News | Explorer | Create | Favorites | History

IRM | Customers | Financial | Workflow | Documents | Service management | System | Logistics | Projects

Prolong: Service contracts

Show Reset Count Default Close

General

Status ☐ Draft ☐ Proposed ☐ Active ☐ Closed ☐ Rejected ☐ Blocked

Contract

Number Division 502 Maclean CoffeeWorld
 Type Project

Account

Contract account Contact person

Invoicing

Account (Contract) Account (Service activity)

Configurations

Configuration

Agreement

Types ☐ Discount ☐ Parent ☐ Text ☐ Response time ☐ Preventive maintenance ☐ Additional part / hour ☐ Parts / Hours ☐ Item

View

Sort by Contract number (+)
 Include Lines ☐ Contract items ☐ Agreements ☐ Agreement details

Action

Method Prolongation
 Prolong with 12 Months

Columns

Contract – old end date	Contract – new end date	Agreement type	Description	Old start date	Old end date	Old next amount	New start date	New end date	New next amount	Difference
-------------------------	-------------------------	----------------	-------------	----------------	--------------	-----------------	----------------	--------------	-----------------	------------

Templates

Private
 Save

To prolong contracts, select the prolongation method and define the number of months the existing contracts will be extended.

7.3 CREATING CONTRACTS

Service contracts are optional but are currently a common practice. Contracts mean continuity. It is not only for the customer, but also for the service organization, and can be an important feature for your customers. In service management, a contract can be used for additional services, and you can also include specific agreements for the individual or multiple service configurations. This can be preventive maintenance, as well as special discounts on services performed or spare parts used, and maximum response time. Service management also offers the option for you to define the preferred templates to create contracts easily and consistently.

To create contracts:

1. Go to Service management → Entry → Contracts → Contracts (New). The following page will be displayed:

Service: Contracts - New, Proposed

Account:
 Created: *Jo-Anna Documentation* 04-10-2011 05:01 Modified:

<p>Account</p> <p>Contract account <input type="text"/></p> <p>Contact person <input type="text"/></p> <p>Service address <input type="text"/></p> <p>Contact person: Key <input type="text"/></p> <p>General</p> <p>Template <input type="text"/></p> <p>Contract number <input type="text"/></p> <p>Project <input type="text"/></p> <p>Revision <input type="text"/></p> <p>Contract type <input type="text"/></p> <p>Cust center <input type="text"/></p> <p>Cost unit <input type="text"/></p> <p>Status: Proposed</p> <p>Start date: 04-10-2011</p> <p>End date: 31-10-2012</p> <p>Configurations</p> <table border="1"> <thead> <tr> <th>Configuration item</th> <th>Active agreement</th> <th>Quantity</th> <th>Serial number</th> </tr> </thead> <tbody> <tr> <td colspan="4">No records to display.</td> </tr> </tbody> </table> <p>Agreements</p> <table border="1"> <thead> <tr> <th>Description</th> <th>Type</th> <th>Start date</th> <th>End date</th> </tr> </thead> <tbody> <tr> <td colspan="4">No records to display.</td> </tr> </tbody> </table>	Configuration item	Active agreement	Quantity	Serial number	No records to display.				Description	Type	Start date	End date	No records to display.				<p>Contract Invoicing</p> <p>Invoice account <input type="text"/></p> <p>Invoicing status: Not blocked</p> <p>Currency: EUR — Euro</p> <p>Invoice line grouping: No grouping</p> <p>Service Invoicing</p> <p>Invoice account 1 <input type="text"/></p> <p>Invoice account 2 <input type="text"/></p> <p>Invoice account 3 <input type="text"/></p> <p>Invoice account 4 <input type="text"/></p> <p>Invoice account 5 <input type="text"/></p> <p>Line: Defaults</p> <p>Invoicing type: Statdate + invoicing interval (line)</p> <p>Invoice frequency: Yearly</p>
Configuration item	Active agreement	Quantity	Serial number														
No records to display.																	
Description	Type	Start date	End date														
No records to display.																	

2. Type or select an account at **Contract account** in the **Account** section. This cannot be edited once you have clicked **Save**. The account can be created by clicking **New** in the **Contract Account** pop-up box, or at Customers → Entry → Entry → Account.
3. Type or select a contact person for the contract at **Contact person**.
4. Type or select an address at **Service address**.
5. Type the contract number for the contract at **Contract number** in the **General** section.
6. Type or select an account for the contract invoice at **Invoice account** in the **Contract Invoicing** section.
7. Type or select an account for the service invoice at **Invoice account 1** in the **Service Invoicing** section.
8. Click **Save**.

Note:

All fields with the "!" icon are mandatory. Once you have selected an account at Contract account in the Account section, the other fields will be automatically defined.

7.4 VIEWING CONTRACTS

Once you have created the service contracts, the service contracts can be viewed. You can also add configuration items and agreements to the service contracts from other divisions.

To view service contracts:

1. Go to Service management → Reports → Contracts → Search.
2. Define the search criteria.
3. Click **Show**. The following page will be displayed:

Contract number	Contract account	Contract status
25:0001 Adi USA	Exact USA	Proposed
25:0002	Exact USA	Closed
25:0003	Exact USA	Proposed
25:0004	Apple Head Office	Proposed
25:0005	Exact USA	Proposed
25:0006	Exact USA	Proposed
60093:0001	Restaurant Enkhuizen	Proposed
60093:0002	Cafe Hout	Proposed
60093:0003	Cafe Hout	Proposed
60093:0004	Cafe Hout	Proposed
60093:0005	Cafe Hout	Blocked
60093:0006	Cafe Hout	Proposed
60093:0007	Herberg van Lou	Proposed
60093:0008	Herberg van Lou	Active

- Select a contract that you want to view under the **Contract number** column. The following page will be displayed:

Service: Contracts - 1000001:0002, Active

Created: Nico Cremers 30-01-2013 12:47 Modified: Tjone de Man 06-02-2013 16:54

File **Agreement links** **Rates** **Contract documents** **Close**

Account Division <u>602 — MacBean CoffeeWorld</u> Contract account <u>1000001 — Boeser Enterprise B.V. test</u> Contract person <u>124 — Thijs Boeser</u> Service address <u>490 — Street 1</u> Contact person: Key	Contract Invoicing Invoice account <u>1000001 — Boeser Enterprise B.V. test</u> Invoicing status <u>Not blocked</u> Currency <u>EUR — Euro</u> Invoice line grouping <u>No grouping</u> Invoicing type <u>Start date (+) (invoicing interval (line))</u> Invoice frequency <u>Yearly</u> Invoiced until Last (indexation date) <u>Never</u>
General Template Project <u>PROJECT1 — Project</u> Contract type Cost centre <u>LOGIST — Logistics</u> Cost unit Status <u>Active</u> Start date <u>30-01-2013</u> End date <u>29-01-2014</u> Last (Prolongation date) <u>Never</u>	Monitor Documents Reports Service configuration Service activities
Service Invoicing Your reference Invoice account 1 <u>1000001 — Boeser Enterprise B.V. test</u> Invoice account 2 Invoice account 3 Invoice account 4 Invoice account 5	

Configurations Add

Configuration item	Active agreement	Quantity	Serial number
Configuratie1 - Configuratie1			

Agreements Add

- Click **Close** to exit.

7.5 EDITING CONTRACTS

Service contracts can be edited.

To edit service contracts:

1. Go to Service management → Reports → Contracts → Search.
2. Define the search criteria.
3. Click **Show**.
4. Select a service contract that you want to edit under the **Contract number** column.
5. Click **Edit**. The following page will be displayed:

Service: Contracts - 60095:0001 VB, Proposed

Account: Herberg van Loo
 Created: SMS Administrator 01-07-2011 12:09 Modified: Adi Lopulisa 26-07-2011 15:06

Save **Close**

Account	Contract Invoicing
Contract account: <u>60095 — Herberg van Loo</u>	Invoice account: <u>60095</u> <u>Herberg van Loo</u>
Contact person: <u>14</u> <u>Loo</u>	Invoicing status: <u>Not blocked</u>
Service address: <u>Delivery</u>	Currency: <u>EUR — Euro</u>
Contact person: Key	Invoice line grouping: <u>By agreement</u>

General	Service Invoicing
Template:	Invoice account 1: <u>60095</u> <u>Herberg van Loo</u>
Project:	Invoice account 2:
Division: <u>602</u> <u>MacBean Coffeeworld</u>	Invoice account 3:
Contract type: <u>CT01</u> <u>High Service Contract</u>	Invoice account 4:
Cost center:	Invoice account 5:
Cost unit:	
Status: <u>Proposed</u>	
Start date: <u>01-07-2011</u>	
End date: <u>31-07-2012</u>	

Line Defaults

Invoicing type: Startdate + invoicing interval (line)
 Invoice frequency: Yearly

Configurations

Configuration item	Active agreement	Quantity	Serial number
<u>I1ER2</u>			

Agreements

Description	Type	Start date	End date
<u>Gold Level agreement</u>		<u>01-01-2011</u>	<u>31-12-2011</u>
<u>Factuur</u>	<u>Text</u>	<u>01-07-2011</u>	<u>31-07-2012</u>

6. Make the change(s).
7. Click **Save**.

Note:

The account defined at Contract account in the Account section cannot be edited.

7.6 AGREEMENT LINKS

When agreements are added to the contracts, all the configurations and parts will also be linked to the contracts, and the invoicing will not stop. However, you can define the specific agreements or agreement sets that should only apply to specific configurations or configuration parts. For example, you want to offer a 4-hour response time on a specific coffee machine located at the reception area for the customer but you do not want to offer this condition for all the coffee machines sold to this customer. Agreement links enable agreements to be linked to specific links enable agreements to be linked to specific configurations or parts, and the invoicing will stop once the configuration part has ended.

Homepage News Explorer Create Favorites History					
IRM Customers Financial Workflow Documents Service management System Logistics Projects					
Agreement links					
Save Close		20% discount on spareparts Parts / Hours	Response time 4 hours Response time	Bronze Fees Parent	Monthly Maintenance Preventive maintenance
MAC002-XXX02	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MAC002 Red Pelican Carima 1 11/08/2011 00:00:00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Max0007-10Nov2011ese	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

7.7 CONTRACT CANCELATIONS

The cancelation of an active contract requires some things to be taken into account and actions to be done before the contract can be closed.

Firstly, the end date of the contract must be defined, so it is registered when the contract will end. Before the contract has reached the end date, service activities can be planned and realized. Agreements will be applied and invoices will be generated.

Service activities should not be planned for a configuration after the end date of the contract that refers to the configuration. If a new contract refers to the configuration, make sure the service activity is linked to the contract.

Invoice proposals can and will be generated for service activities and agreements until the contract status is changed. Before changing the status of the contract, make sure all the invoices proposals have been processed.

When a contract is closed, invoice proposals will not be generated for the contract. Furthermore, when a contract is closed, all the agreements related to the contract will end.

7.8 CONTRACT RATES

The **Service: Contract rates overview** page allows you to view the contracts that are invoiced. Each individual agreement or agreement link is displayed. The invoice rate for each agreement in the overview and invoice rates for the agreement links can be adjusted.

7.9 CONTRACT DOCUMENTS

Contract documents can be viewed by clicking **Contract documents** on the **Service: Contracts** page and clicking the **Preview** tab on the **Service contract documents** page.

Chapter 8

Service Activities

8. SERVICE ACTIVITIES

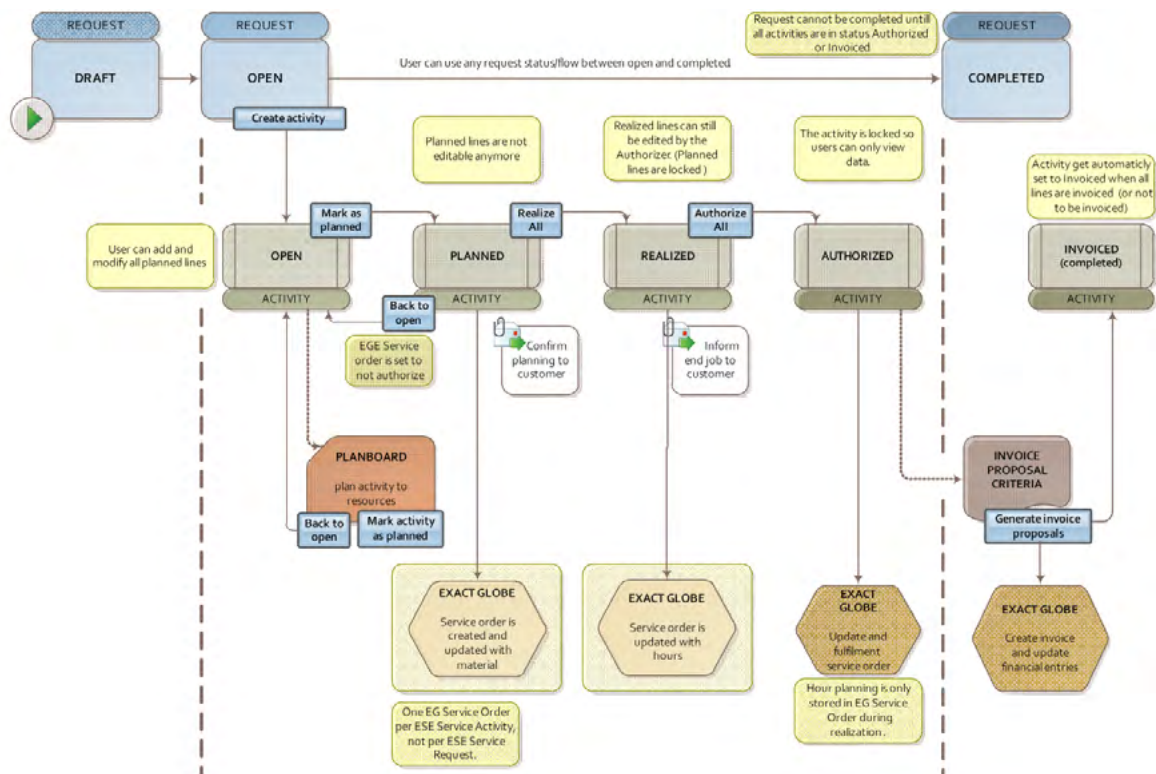
The service activity is used to register the whole process from entering the request until the invoicing. The service activity is an Exact Synergy Enterprise request with extra options. You can view the configurations of a customer, and choose the service that is required. In addition, you can create one service activity or multiple service activities.

In the service activity, you can register what needs to be done, including linking standard problems and standard solutions to help in the process. The service activity can be created automatically from the Exact Globe Next sales order screen, or by the preventive maintenance generator. It can also be created manually.

You have the option to select one engineer or more who will do the job, and when they will do it. However, it is more efficient to leave this blank, and use the dispatch board for the planning. On the dispatch board, you will have a bucket with all the to-be-planned service activities, and you can use the drag-and-drop feature to plan which engineer(s) will be working on that date. You will be able to view the relevant information, which you can customize, so planning for the right engineer at the right time will be faster and easier.

You can also plan for the items that are required for the service activity, which can be pre-filled from the contract. Discounts can be used for the contracts. When planning the items required, stock information from Exact Globe Next is visible, and the stock is automatically planned in Exact Globe Next so the purchase orders can be generated or available stock can be allocated.

The engineer can realize the hours and used items based on the planned activities. After authorization, the invoice can be created. When the invoice is sent from Exact Globe Next, the detailed documents from Exact Synergy Enterprise will be automatically printed or emailed. This will all be in the Exact Synergy Enterprise software, and integrated in all the relevant master data and menu paths.

**Note:**

From product update 252 onwards, you will require sufficient rights for creating and maintaining service activity requests. The information such as the hour type (hour item) under the **Resource planning** section, and the warehouses, materials, and item serial numbers under the **Configuration and material planning** section that you have defined for the configuration items in the service activity requests derive from Exact Globe Next. This information, displayed as available options in the respective browser of the service activity requests, will be validated according to the access rights granted to the users via the **Rights** tab in the **Maintain warehouses** screen in Exact Globe Next. For more information, see *Chapter 8 Service Activities and Creating and maintaining warehouses* (Doc ID: 18.773.498) in Exact Synergy Enterprise.

Workflow: Request type - Service order

Created: Janica Yonder 02-02-2012 12:52 Modified: Robin den Biurman 12-04-2012 15:33

Save Delete Copy Close

General Fields Flow Actions

General

ID: 9009

Description: Service order

Color: [Color Picker]

Manager: [User Icon]

Category: Absence

Active: ☒ Hide: ☒ Back office: ☒ Policy: [Policy Icon]

Entry

Multiple: 0 Rows Week: ☒

Service

Service: ☒

Request types

Any request type can be used for service management. However, the service management functionality must be activated by selecting the **Service** check box under the **Service** section in the **General** tab on the **Workflow: Request type** page (go to Workflow → Setup → Requests → Request types and click **New**).

If the **Service** check box under the **Service** section on the **Workflow: Request type** page is selected, the request will be changed to the tab view and two extra tabs for configuration and service activities will be automatically added. For service requests, the **Account** field is mandatory.

The **Your reference** field in the requests can be used to register your reference number and the number will be automatically displayed in the invoice and service order in Exact Globe Next.

It is advisable to use separate request types for installations, repairs, and preventive maintenance. With separate request types, the Service planner can distinguish the different type of service jobs.

Only the **Account** field can be defined as a mandatory field for the process flow for the preventive maintenance request type because the requests are generated automatically by the preventive maintenance engine.

Request types can be customized whereby fields can be added to the tabs and the flow of the request can be customized. However, some fields are used differently in service management, such as the following:

- **Account** – This field is used to determine the conditions of the service and communicate with Exact Globe Next. Once the account is selected, the **Configurations** tab will display all the available or contracted configurations for the account.
- **Start date** and **Start time** – These fields are used as incident report dates. The response time calculations are based on these fields. Thus, a default value should be defined in these fields.
- **Your reference** – This field is used to communicate with Exact Globe Next and to display your reference number in the final invoice and service order in Exact Globe Next.
- **Early invoicing** – This field is used to define if the service activity can be invoiced after the service activity has been authorized even though the service request has not been realized.

Tip:

By default, the fields in the service requests are grouped and displayed in tabs. You can turn the tab control setting off by clearing the **Show section as tab** check box under the **Display** section in the field section header for the request type of the request. For more information, see *Customizing request type section headers* (Doc ID: 16.085.389) in Exact Synergy Enterprise.

Although the request flow is can be customized, there are some restrictions on the following request flow in the **Service activities** tab:

- **Create** – There are no restrictions for this request flow. Service activities can be created once the account is defined.
- **Edit** – There are no restrictions for this request flow. Service activities can be created and modified once the account is defined.
- **Approve** – There are no restrictions for this request flow. Service activities can be created and modified once the account is defined.
- **Realize** – There are no restrictions for this request flow. Service activities can be created and modified once the account is defined.
- **Process** – The request must be processed before the service activities can be invoiced. This is to avoid early invoicing.
- **Reject** – Requests cannot be rejected once the service activities are realized. This is to avoid losing revenue while retaining costs.
- **Delete** – Requests cannot be deleted once the service activities are realized. This is to avoid losing revenue while retaining costs.

The screenshot displays a web application interface for managing service calls. At the top, there is a navigation bar with tabs: Homepage, News, Explorer, Create, Favorites, and History. Below this, a breadcrumb trail shows the path: CRM > Customers > Financial > Workflow > Documents > Service management > System > Logistics > Projects.

The main header area shows the title "Service call - 00.001.594" and its status "Open". It also indicates the last modification by "Robin den Buurman" on "27-06-2012 09:52". A toolbar contains buttons for Save, Refresh, Delete, Copy, Plan, Reject, and Close.

The central part of the interface features a workflow diagram with three stages:

- Create**: A box containing "Robin den Buurman" and the timestamp "27-06-2012 09:42".
- Plan**: A box containing "Robin den Buurman" and the role "Creator". This box is highlighted with a green border.
- Process**: A box containing "Robin den Buurman" and the roles "Role: Service manager" and "Level: Division (Person)".

 Green arrows indicate the flow from Create to Plan, and from Plan to Process.

Below the workflow, there are tabs for "Call Information", "Details", "Configurations", and "Service activities". The "Details" tab is currently selected, showing the following information:

- Account**: 991075, associated with "ASG Industries — Netherlands — Customer —".
- Description**: "Coffee Machine Broken".
- Contact**: "R Duuthrop".

A "Remarks" section at the bottom contains a text entry: "[Robin den Buurman 27-06-2012 09:49 (GMT+02:00)] Richard stated the coffee machine leaks water and doesnt make full cups." At the very bottom, there are buttons for "Timestamp" and "Full screen".

Selecting service configurations for services

Once the **Service** check box under the **Service** section on the **Workflow: Request type** page is selected, two extra tabs will be displayed in the service request, such as the **Configurations** and **Service activities** tabs [go to Workflow → Entry → Requests → Requests: New, and then select a service request]. The **Configurations** tab displays all the configurations for the selected customer based on your user rights. When creating the request, select the configurations of the service that are confirmed will be performed because it is not always known as to which exact machine will be serviced during the initial service request. The configurations can be changed once you get more information.

The **Qty** column displays the number of parts that will be used for the service and the **Agreement** column displays the active contracts that have agreements for the parts. If there are several active contracts with the same time frame for the configuration part, the contract that will be used to execute the service can be selected.

The **Address** column displays the location of the configurations. The icons with the same letters will be located in the same location. Thus, those services can be combined. Configurations with different letters on the icons mean the location of the service is different.

MacBean

Homepage | News | Explorer | Create | Favorites | History

Status: Open Modified: Robin den Buurman 26-07-2012 11:49

Save Refresh Delete Copy Plan Reject Close

Create: Robin den Buurman 23-07-2012 10:50 Plan: Robin den Buurman Creator Process: Robin den Buurman Creator Role: Service manager Level: Division (Person)

Call information Details Configurations Service activities

Service configurations

Show Selected | Show Search Create Configuration

Name	Serial no.	Qty.	Agreement	Address
CM007MD 001				
CM007MD - 3rd Coffee Machine 007MD	CM007MD 001	1		
MAC0001-XXXX				
MAC0001 - Red Pelican MX3		1		
MAC0004-18NOV2011				
MAC0004 - Red Pelican Coffee Factory (with topping)		1		
MAC0007-10NOV2011				
MAC0007 - Red Pelican Omega F12LM		1		
MAC0008-XXXX				
MAC0008 - Red Pelican Omega F21LM	MAC0008-XXXX	1		

Extra information

Code: **MAC0001**

Description: **Red Pelican MX3**


Serial number: -

Quantity: **1**

Start date: **11/08/2011 00:00:00**

End date: -



[View History](#)



Creating service activities for services

The other additional tab that will be displayed in the service request if the **Service** check box under the **Service** section on the **Workflow: Request type** page is selected is the **Service activities** tab. This tab allows you to create service activities that have to be performed on the configurations.

The screenshot shows the 'Service request - 00.000.236' interface. At the top, there's a status bar indicating 'Status: Open' and 'Modified: Sady Ghera 19-11-2012 13:43'. Below this, there are several tabs: 'Save', 'Plan', 'Realize', 'Authorize', 'Copy: Activity', 'Dispatchboard', 'Service skip', 'Compressed planning', 'Detailed planning', and 'Close'. The 'Service skip' tab is currently selected. In the center, there's a flow diagram with three boxes: 'Create' (containing 'Sady Ghera 19-11-2012 13:43'), 'Approve' (containing 'Sady Ghera Person'), and 'Realize' (containing 'Person'). Arrows indicate a sequence from 'Create' to 'Approve' to 'Realize'. Below the flow diagram, there's a section for 'Service Activities' with a table. The table has columns: 'Description', 'Status', 'Type', 'Address', 'Resource planning', 'Configuration', 'Material', and 'Create'. The first row shows '002', 'Open', '002', 'Rondweg 25, 2613 DA, Delft, NL', and some icons. At the bottom, there's a 'Create' button.

Sometimes the execution of the service activities must be in a specific order. On the service request page, the order of the service activities can be changed by clicking  or . Service activities can be created by clicking **Create**.

The screenshot shows the 'Exact Synergy Enterprise - New activity' interface. At the top, there's a status bar indicating 'Status: Open'. Below this, there are several tabs: 'Save', 'Plan', 'Realize', 'Authorize', 'Copy: Activity', 'Dispatchboard', and 'Close'. The 'General' tab is currently selected. In the center, there's a form with fields for 'Division' (002 - MacBean CoffeeWorld), 'Activity type', 'Description', 'Address', 'Problem', 'Solution', and 'PM type'. To the right of the form, there's a 'Remarks/Notes' section. Below the form, there's a 'Documents' section with a table. The table has columns: 'ID', 'Subject', and 'File'. The first row shows 'No documents'. At the bottom, there's a 'Timestamp' and 'Full screen' button.

The screenshot shows the 'Exact Synergy Enterprise - 002' window. The title bar indicates the status is 'Open'. The interface includes a top navigation bar with buttons: Save, Plan, Reuse, Authorize, Copy Activity, Dispatchboard, Service slip, Compressed planning, Detailed planning, and Close. Below this is a tabbed interface with 'General', 'Configurations', 'Resources', and 'Material' tabs. The 'General' tab is active, displaying a form with the following fields:

- Division: 002 — Deltabike Netherlands
- Activity type: 002
- Description: 002
- Address: Delivery
- Problem:
- Solution:
- PM type: 002

Below the form is a 'Documents' section with an 'Add' button and a table with columns 'ID', 'Subject', and 'File'. The table currently shows 'No documents'. To the right of the form is a large 'Remarks/Notes' text area. At the bottom right, there are 'Timestamp' and 'Full screen' buttons.

Once the **Create** button is clicked, the **New activity** page will be displayed and you can define the service activities. Under the **General** tab on the **New activity** page, the **Division**, **Activity type**, **Description**, **Address**, **Problem**, **Solution**, and **PM type** fields can be defined. The **Division** and **Activity type** fields are mandatory. Once the **Activity type** has been defined, the **Description** will be automatically defined, and the proposed resource planning lines will be automatically defined later in the process. Once the service activity is saved, specific documents can be added to the service activity for the engineer to view or specific descriptions that the customer sent to you. The **Remarks/Notes** field allows you to provide extra information for the engineers and managers.

The **Configurations** tab ensures the correct configurations are selected for the service activity. Several configurations can be selected. The selected configurations will be used later to define the hour and material lines, and to report the detailed costs and revenues for the configurations, contracts, and individual items and parts.

The people who perform the service must also be defined by selecting the **Resources** tab on the **New activity** page, and then clicking the **Add new record** hyperlink. The hours of the engineers that are planned for the service activity can be defined. Several hour lines for each configuration or engineer can be added. Several engineers can also be added for the same configuration. This is useful if teamwork is involved.

The item that has to be selected will be reflected in the cost in the financial administration, and it comes with a cost and sales price. Only divisible items can be selected for the hour lines because you might have to register parts of the hours. If you have selected a configuration with a preferred engineer to perform the service, the system will propose the engineer in the resource lines. Since the service activity type has been selected in the **Configurations** tab, by default, the number of hours and hour type defined for the service activity will be displayed. The resource lines that have yet to be planned can be saved for later. However, if you already know when the service must be performed, the date and time of the hour lines can be defined. If you already know that services must be performed for warranty agreements of the configurations, select the **Warranty** check box. This ensures that the costs are moved to the appropriate general ledger accounts during invoicing. This check box also ensures the engineers are informed that a warranty related service is involved.

Exact Synergy Enterprise - New activity

New activity
Status: Open

Save Plan Replicate Authorize Copy Activity Dispatchboard Service slip Compressed planning Detailed planning Close

General Configurations Resources Material

Resource planning

Configuration	Hour type	Hours required	Person	Start date	End date	Warranty	Agreement	Status	Actions
OND0013 - Overpressure	SER	2	Richard Pen			<input checked="" type="checkbox"/>			

Max0007-10Nov2021Less

MAC0007 - Rad Pelican Omega F123M





OND0013 - Overpressure / check valve

SMSServiceActivityMaint.aspx?RequestID=7eb8d9df-223c-4928-a489-2485d4ef919b&ID=&PageMode=new&Tab=General

Spare parts, expendables, and replacement materials can be added to the service activities. Once the hour lines have been defined, the materials that might be required to perform the service can be defined in the **new record** tab. When the **Add material** hyperlink is clicked, the system will create blank material lines. The service configuration parts and material that are required must be selected. For some of the materials, a serial number must be defined to indicate the exact material to be used. The warehouse from where the material will be delivered to the customer will also have to be defined. Normally, this is the service van of the engineer. To link the warehouse to the engineer, go to the logistics settings in Exact Synergy Enterprise (at Logistics → Setup → General → Warehouses) and select the engineer as the main contact person of the warehouse.

When the engineer is using the mobile application to realize the activities, the engineer must be linked to the warehouses that the engineer can access in Exact Synergy Enterprise.

Note:

- From product update 252 onwards, you will require sufficient rights to the warehouses you use to define the hour type (hour item) in the resource lines, and the warehouses, materials, and item serial numbers in the material lines for the service activity requests. For more information on warehouses and access rights, see *Creating and maintaining warehouses* [Doc ID: 18.773.498] in Exact Synergy Enterprise.
- If **Process** is clicked for a single service order request or **Multiple** is clicked for a multiple service order request, the system will perform a rollback on the whole service order request if the lines cannot be fulfilled (for example, the stock is not enough for the item).
- If the service order line with  under the **Status** column is clicked, you will not be able to edit the service order line (applicable for both single and multiple service order requests). Also, the note or details under the **Actions** column will only display the details that were previously defined and it cannot be edited. If  is displayed under the **Status** column in the service order line, the service order line can be edited (applicable for both single and multiple requests). The details defined for the notes and details under the **Actions** column can be displayed and edited.
- Under the **Realise** column for the material lines, **Authorized** will be displayed if  is displayed in the **Status** column. You can select or clear the check boxes if  is displayed in the **Status** column. If the service order request has the **Authorizing** status, you will not be able to edit all the service order lines, the **Realise** column will not be available, and the **Add new record** hyperlink will not be displayed. However, if the service order request has the **Processed** or **Authorized** status, the status of the service order in Exact Globe Next will be **Realised**.

You also have to define the quantity of the material that will be used, and part type that determines whether the material is a replacement or expendable, or whether the material is added to an existing configuration (installation of service activity). This is only to indicate the materials that will be used. The system will not automatically use the defined information.

Once the material line is saved, the system will check the stock position of the item in Exact Globe Next (item and serial number if applicable) and display it in the **Stock** column. The stock position is based on the warehouse level.

- If the **Warehouse locations** check box under the **Fulfillment** section in **Inventory settings** in Exact Globe Next (for more information, *see Inventory settings*) is not selected, the system will get the stock quantity from the **Free stock** column in the warehouse (for more information, *see Creating and maintaining items – Inventory tab*). Thus, you select a warehouse and an item, Exact Globe Next will check the defined item code and take the stock quantity from the free stock in that warehouse. However, if the **Warehouse locations** check box under the **Fulfillment** section in **Inventory settings** in Exact Globe Next is selected, the system will get the stock quantity from the default warehouse location of the item. If a warehouse and an item is selected, Exact Globe Next will check the defined item code, compare the quantity of the item under the **Free stock** column and stock from the default location, and display only the lowest quantity for the stock. The **Stock** column in the service order request will display the lowest stock quantity.
- The service request cannot be authorized or processed if the start and end dates of the hour planning lines are after the current date. The hour planning line will remain as "Realized".

Exact Synergy Enterprise - Installation & configuration

Installation & configuration

Status: Open

General Resources **Material**

Configuration and material planning

Configuration	Warehouse	Material	Serial number	Quantity	Stock	Part Type	Warranty	Agreement	Status	Actions
USD Webcam	Service Van 1	70002		1.00	0.00 ! Usage		<input type="checkbox"/>			✗ 📄 📅

➕ Add new record

Exact Synergy Enterprise - Repair

Repair

Status: Realised

General Resources **Material**

Resource planning

select all:

Configuration	Hour type	Hours required	Person	Start date	End date	Warranty	Agreement	Status	Actions	Realise
Stnd Coffee Machine 007MD	SER	2	Richard Peters	16-05-2014 08:00	16-05-2014 10:00	<input type="checkbox"/>		✓	📄 📅	✓
Stnd Coffee Machine 007MD	SER	2	Bas de Waal	16-05-2014 00:00	16-05-2014 10:00	<input type="checkbox"/>		✓	📄 📅	✓
Stnd Coffee Machine 007MD	SER	2	Bas de Waal	16-05-2014 04:00	16-05-2014 06:00	<input type="checkbox"/>		✓	📄 📅	✓
Stnd Coffee Machine 007MD	SER	2	Bas de Waal	16-05-2014 04:00	16-05-2014 06:00	<input type="checkbox"/>		✓	📄 📅	✓
Stnd Coffee Machine 007MD	SER	2	Richard Peters	16-05-2014 08:00	16-05-2014 10:00	<input type="checkbox"/>			📄 📅	Planned


➕ Add new record

Planning service activities


Once all the resource and material lines for the service activity have been defined, as well as the start date, end date, and time, the service activity can be planned. This can be done by clicking **Plan** on the **New activity** page. Once the service activity is planned, a realization proposal will be created based on the planning. The realization proposal is used by the engineer to oversee the planned activities and the actual realization of the service activities. Thus, the planning and actual realization of service activities always co-exists within the system so that you can review the planned service activities with the realized service activities.

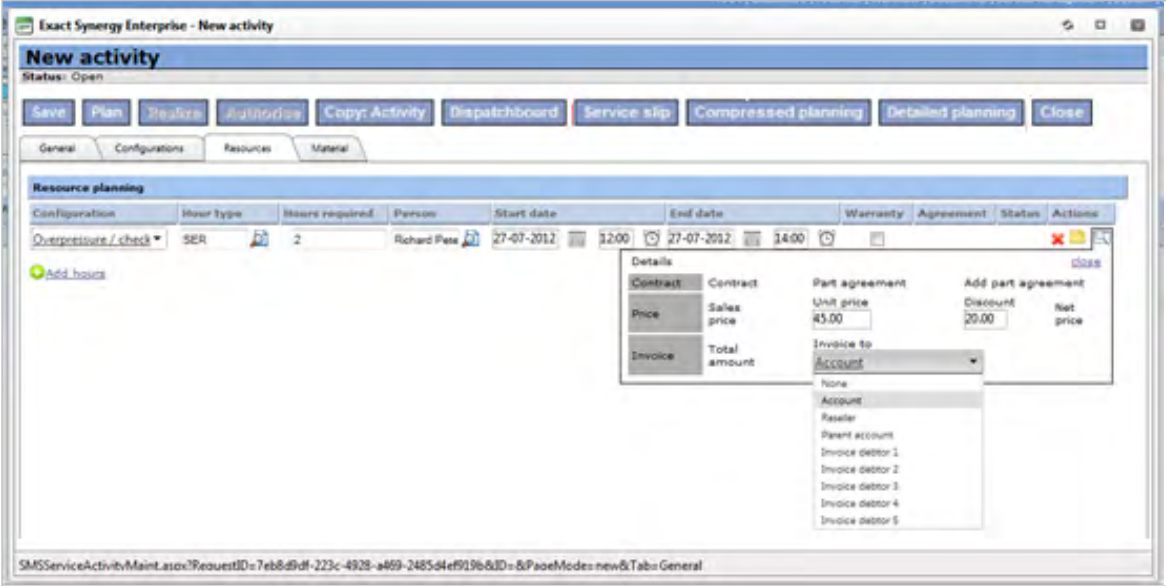
Once the service activity is planned, Exact Globe Next will be notified to reserve the materials for the service activity. This is done by creating a service order in Exact Globe Next for the materials. Exact Globe Next will consider the service order as a reservation (not allocation). With the standard demand and shortage reports provided by Exact Globe Next, the warehouse manager will be aware of the item requirements and/or shortages for the future. Once the service activity is realized, the hour lines will be created on the same service order in Exact Globe Next to cater for the

financial cost administration. The service order will be created using the **Your reference** and **Project** fields of the service request. The **Delivered to** field in the service order will display the selected account of the service request.

When the service activity is moved to the planning stage, the service order will be created in Exact Globe Next and the **Status** column in the resource lines will display the  icon. The icon indicates the synchronization of the service activity to Exact Globe Next. This is a background process. You do not have to wait for the process to complete or keep the page open. Synchronization will continue even if the browser is closed.

Details page for service activities

All the resource and material lines contain the  **Details** icon under the **Actions** column. The **Details** pop-up page displays the sales price, discount, and invoice account used for the resource or material line. These details can be edited. The sales price is retrieved from Exact Globe Next for the item selected in the material line whereas the discount and invoice account are retrieved from the selected contract, if available.




Exact Synergy Enterprise - New activity

New activity
Status: Open

Save Plan Realize Autodes Copy Activity Dispatchboard Service slip Compressed planning Detailed planning Close

General Configurations Resources Material

Resource planning

Configuration	Hour type	Hours required	Person	Start date	End date	Warranty	Agreement	Status	Actions
Overpressure / check	SER	2	Richard Pitt	27-07-2012	12:00				

[Add hours](#)

Details

Contract	Contract	Part agreement	Add part agreement
Price	Sales price	Unit price	Discount
		45.00	20.00
Invoice	Total amount	Invoice to	Net price
		Account	
		None	
		Account	
		Reseller	
		Parent account	
		Invoice debtor 1	
		Invoice debtor 2	
		Invoice debtor 3	
		Invoice debtor 4	
		Invoice debtor 5	

SMSServiceActivityMaint.aspx?RequestID=7eb849df-223c-4928-a869-2485d4ef9196&ID=&PageMode=new&Tab=General

Realizing service activities

Once the service activity is planned, it will be displayed in the planning of the service engineer in Exact Synergy Enterprise and mobile application. Service slips can also be printed from the service activity search page [go to Service management → Reports → Service activities → Service activities, click **Show**, and then click **Service slips**] for the engineer.

Once the service engineer has realized the service activities, the resource lines under the **Resources** tab on the **New activity** page must be modified and realized by updating the hours and times, and selecting the **Realize** check box. If all the realized lines are selected, the service engineer can click **Realize** for the service activity or sign off the service activity in the mobile application. The service engineer can use the realize function several times before completing the actual service activity. Whenever the service activity changes, the service request will be marked as unread so that the person will know that the details in the service activity have changed.

During the realization of the service activity, the service engineer can add comments to the lines or request, and photos and/or documents can be attached to the service activity to illustrate the condition of the configuration. These documents can be sent with the invoice for the service activity as evidence.

Once **Realize** is clicked or initiated via the mobile application sign-off functionality, the hours will be synchronized to Exact Globe Next to prepare the financial entries for the service activity. The financial entries have not been created in the system. The entries will only be created once the service activity is authorized.

Authorizing service activities

Once the service engineer has completed the service activity, the service engineer has to authorize the service activity so that the financial entries will be created, and the service activity will be invoiced. The service engineer has to verify the realization and modify the realization, if required. The service activity will then be authorized by clicking **Authorize** on the **New activity** page. This will notify Exact Globe Next to deliver the service order and create the financial entries for the costs. Once the service activity is authorized, the service activity cannot be edited because financial entries are already created in Exact Globe Next, and the financial entries can only be modified by creating other financial entries.

Once the service request has been authorized and processed, the service activity can be invoiced. For more information, see *9 Invoice Proposals*.

8.1 GENERATING PREVENTIVE MAINTENANCE

Preventive maintenance of equipment is generated to prevent down time, and to expand its lifecycle. Preventive maintenance can differ for each service configuration, and period per service configuration. For example, a simple maintenance check, or complete revision of a machine. Preventive maintenance types can include details of how often preventive maintenance is required, whether preventive maintenance is included or excluded in a contract, and the details of the starting date and duration of the activity.

1. Type or select a date at **Show until** in the **Criteria** section.
2. Click **Refresh**.

Note:

The **Show until** field in the **Criteria** section is mandatory.

To generate preventive maintenance:

1. Go to Service management → Entry → Service activities → Preventive maintenance generator.
The following page will be displayed:

Status	Customer	Contract	Address	State	ZipCode	City	Configuration item	Engineer	Duration	Start date	End date	PM type	Activity type
<input type="checkbox"/>	00.001.535	ASG Industries	991075.0007	Wijnhaven 21	Delft	2611 CS	MAC0007 - Red Pelican Omega F12LM		4	21-03-2012 09:00	21-03-2012 13:00	PM01	Preventive Full Machine Service
<input type="checkbox"/>		ASG Industries	991075.0007	Wijnhaven 21	Delft	2611 CS	MAC0007 - Red Pelican Omega F12LM		4	28-03-2012 09:00	28-03-2012 13:00	PM01	Preventive Full Machine Service
<input type="checkbox"/>	Request deleted	Kaffee und Kuchen	80091.0001	Theodor Platz 96	49074	Osnabrück	BEK0001 - R.P. Take Away Cup ASOCC	Nico Cremers	0.5	02-04-2012 09:00	02-04-2012 09:30	PM01	Preventive Full Machine Service
<input type="checkbox"/>	00.001.520	Kaffee und Kuchen	80091.0001	Theodor Platz 96	49074	Osnabrück	BEK0001 - R.P. Take Away Cup ASOCC	Nico Cremers	0.5	02-07-2012 09:00	02-07-2012 09:30	PM01	Preventive Full Machine Service
<input type="checkbox"/>	00.001.521	Kaffee und Kuchen	80091.0001	Theodor Platz 96	49074	Osnabrück	BEK0001 - R.P. Take Away Cup ASOCC	Nico Cremers	0.5	02-10-2012 09:00	02-10-2012 09:30	PM01	Preventive Full Machine Service
<input type="checkbox"/>	00.001.522	Kaffee und Kuchen	80091.0001	Theodor Platz 96	49074	Osnabrück	BEK0001 - R.P. Take Away Cup ASOCC	Nico Cremers	0.5	02-01-2013 09:00	02-01-2013 09:30	PM01	Preventive Full Machine Service

Page size: 15 Show

Once **Refresh** is clicked, all the active contracts until the date defined at **Show until** will be displayed whereby preventive maintenance agreements will have to be proposed for the service activities. The proposed service activities (commitments) will be displayed in the overview grouped by customer. The **Group by** options under the **Criteria** section can be used to combine several commitments into a preventive maintenance request. Every commitment will contain a service activity for the generated request.

One or more commitments can be selected to generate preventive maintenance requests for the commitments. The request type that will be used is defined in the service management settings [at Service management → Setup → Settings → Settings].

You can also decide not to generate the commitments for the service requests and discard the commitments. Discarded commitments can be moved to the proposed stage again.

8.2 VIEWING SERVICE ACTIVITIES

Once the preventive maintenance is generated, service activities can be viewed, and service documents can be created.

To view service activities:

1. Go to Service management → Reports → Service activities → Service activities. The following page will be displayed:
2. Define the search criteria.
3. Click **Show**.

To create service documents:

1. Go to Service management → Reports → Service activities → Service activities.
2. Click **Create: Service document**.

Service activities

Buttons: Show, Reset, Close

Criteria

Division: 603 MacDean CoffeeWorld

Requests

Type: ID: Priority: Status: Account:

Contract items

Contract: Configuration header: Configuration: Service serial number: Problem: Solution: Postal code: City:

Resources & Material planning

Person: Empty Hours required: Type: Entry type: Item:

Sorting

Column	Field	Descending
Column: 1	Request ID	<input checked="" type="checkbox"/>
Column: 2		<input type="checkbox"/>
Column: 3		<input type="checkbox"/>
Column: 4		<input type="checkbox"/>
Column: 5		<input type="checkbox"/>

Refresh automatically

Refresh automatically: Seconds: Pause

8.3 VIEWING SERVICE MANAGEMENT PLAN BOARD

The Service management plan board provides an insight to the outstanding service activities, and the dispatching options in one graphical and interactive overview. It is also possible to select the right person by selecting the people based on their skills, regional presence, available tools, and others. You can also customize the views and important information that are required to make the right decision quickly. With the auto refresh option, the updated information will always be displayed on the plan board. The drag-and-drop function enables service activity details to be modified easily.

The dispatch board also displays all the people activities except for people requests with the **Rejected** status. When the people activity on the dispatch board is clicked, the details of the people activity will be displayed. The following colors (at the side of the request details) will display the status of the people activity request:

- Green — **Open** status
- Yellow — **Approved** status
- Red — **Processed** status
- Orange — **Realized** status

When the people request is clicked, the bottom part of the dispatch board will be blank, and the request type will be displayed in different colors depending on the **Color** selected in the **General** section under the **General** tab on the **Workflow: Request type** page (at Workflow → Setup → Requests → Request types). However, the people requests in the dispatch board cannot be dragged (to another day) or resized (change duration of the people request).

8.4 CUSTOMIZING THE DISPATCH BOARD

The **Dispatchboard service management: Customize** page (at Service management → Reports → Service activities → Dispatchboard) allows you to customize the dispatch board.

Dispatchboard service management: Customise - Jo-anna Documentation

Save Default Close

General

Default layout: Last used

Auto refresh: 30 seconds of inactivity

Minute interval: 30 * Only applies to Day view - time vertically and Week view - time vertically

Timeframe: 00:00 - 24:00 Hide time outside timeframe ☐ * Only applies to Day view - time vertically and Week view - time vertically

Retrieve Globe stock: ☒

Hide weekend: ☐ * Only applies to Week view - time vertically

To be planned items period: Last 6 months

To be planned

	Left	Right
Row 1	Activity: Description	SLA (time left)
Row 2	Request create date	
Row 3		

Calendar

Side colour: Activity: Status

Row 1	Activity: Description
Row 2	Customer: Name
Row 3	Address: City

* Depending on layout and available space, not all info may be visible.

Job tooltip

Row 1	Activity: Description
Row 2	Customer: Name
Row 3	Address: City
Row 4	
Row 5	

Planner

Plan: Activities planned by me

Display incomplete planning message: ☒

General section

This section contains the following fields and check box: **Default layout** – This field allows you to select the default layout for the dispatch board. Specific views can be selected, such as daily or weekly, and it can be set to display the layout that was last viewed.

- **Auto refresh** – This field allows you to define the time the dispatch board will be reloaded and refreshed. This is useful if there is more than one active planner in the organization so that the page will always display the latest results.
- **Minute interval** – This field allows you to select the minute interval for **Day view – time vertically** and **Week view – time vertically**.
- **Timeframe** – This field allows you to define the time range that is the most important to you. The dispatch board will automatically display the view for this time range.
- **Hide time outside timeframe** – Select this check box to display only the time defined at **Timeframe** on the planboard. However, the service planner will still be able to plan the time outside the time frame. This check box is applicable only for the **Day view – time vertically** and **Week view – time vertically** views.
- **Retrieve Globe stock** – Select this check box to get the stock information for the materials from the Exact Globe Next back-office. The plan board will retrieve the current stock information for the service activities from the Exact Globe Next warehouses. However, if this check box is selected, the performance will be slower because the dispatch board will take the stock information from Exact Globe Next on a regular basis.
- **Hide weekend** – Select this check box to hide Saturdays and Sundays on the planboard. This check box is applicable only for the **Week view – time vertically** view.
- **To be planned items period** – This field allows you to select the period that you want to plan for the items.

To be planned section

The text to be displayed for the **To be planned** (to-do list) section for the dispatch board can be customized. The items displayed in the **To be planned** list of the dispatch board have six positions (3 rows and 2 columns). For each position in the grid, the fields to be displayed can be defined.

Calendar section

In this section, you can define how the tasks on the dispatch board will look like if placed on the calendar. Three rows can be defined for each task. However, depending on the space available, only the top N positions will be displayed. The side color can be defined to display the different request types or process stages of the service activity lines.

Job tooltip section

If a task on the calendar layout of the dispatch board is clicked, a tooltip will be displayed which can be customized to display the information required. Five rows will always be displayed.

Planner section

This section allows you to plan the activities. You can choose the **Activities planned by me** option whereby only the activities planned by you will be planned or **All activities** whereby all the activities on the plan board will be planned. In this section, you can also select the **Print timesheet** check box if you want the timesheet to be printed.


Note:

If the **Activity: Status** field is placed on a row, a button will be displayed on the tooltip which will allow you to plan or re-open the resource lines.

8.5 DEFINING RESOURCE GROUPS

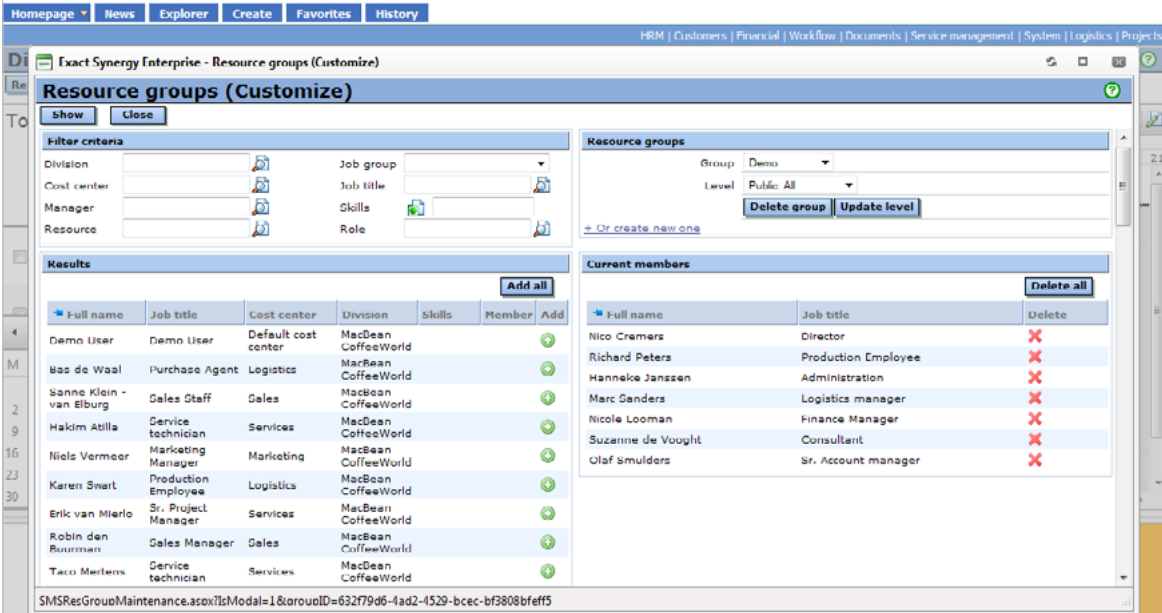
Resource groups allow a limited number and skilled set of people to be displayed on the dispatch board. For a better overview and faster performance, it is advisable to limit the number of people in the resource groups (preferably less than 10 people).

Groups can be defined for your personal use or for everyone in the division to use. A resource group is a pre-defined group of people that can perform certain service activities. For example, all the service engineers from a state or province, or your company might prefer to group the resources based on their skills, such as technical engineers. You can place all the technical engineers in a resource group.

To add people to the resource groups, search for the people under the **Filter criteria** section, and then click  to add the person to the current group.

To create a group, click the **+ Or create new one** hyperlink under the **Resource groups** section, type the name and define a level for the resource group, and then click **Save**. Once the resource group is created, people can be added to the resource group.

Depending on the level of the resource group, the resource group will be displayed on the dispatch board so it can be easily selected.



The screenshot displays the 'Exact Synergy Enterprise - Resource groups (Customize)' window. It features a top navigation bar with tabs: Homepage, News, Explorer, Create, Favorites, and History. The main content area is divided into several sections:


- Filter criteria:** Includes fields for Division, Cost center, Manager, Resource, Job group, Job title, Skills, and Role.
- Results:** A table listing search results with columns: Full name, Job title, Cost center, Division, Skills, Member, and Add. The table contains 10 entries, including Demo User, Bas de Waal, Sanne Klein-van Elburg, Hakim Abilla, Niels Vermeer, Karen Smart, Erik van Mierlo, Robin den Burman, and Taco Merbens.
- Resource groups:** A section for managing groups, including a 'Group' dropdown (set to 'Demo'), a 'Level' dropdown (set to 'Public: All'), and buttons for 'Delete group' and 'Update level'. A link '+ Or create new one' is also present.
- Current members:** A table listing current members with columns: Full name, Job title, and Delete. The table contains 6 entries, including Nico Cremers, Richard Peters, Hanneke Janssen, Marc Sanders, Nicole Looman, Suzanne de Vought, and Olaf Smulders.

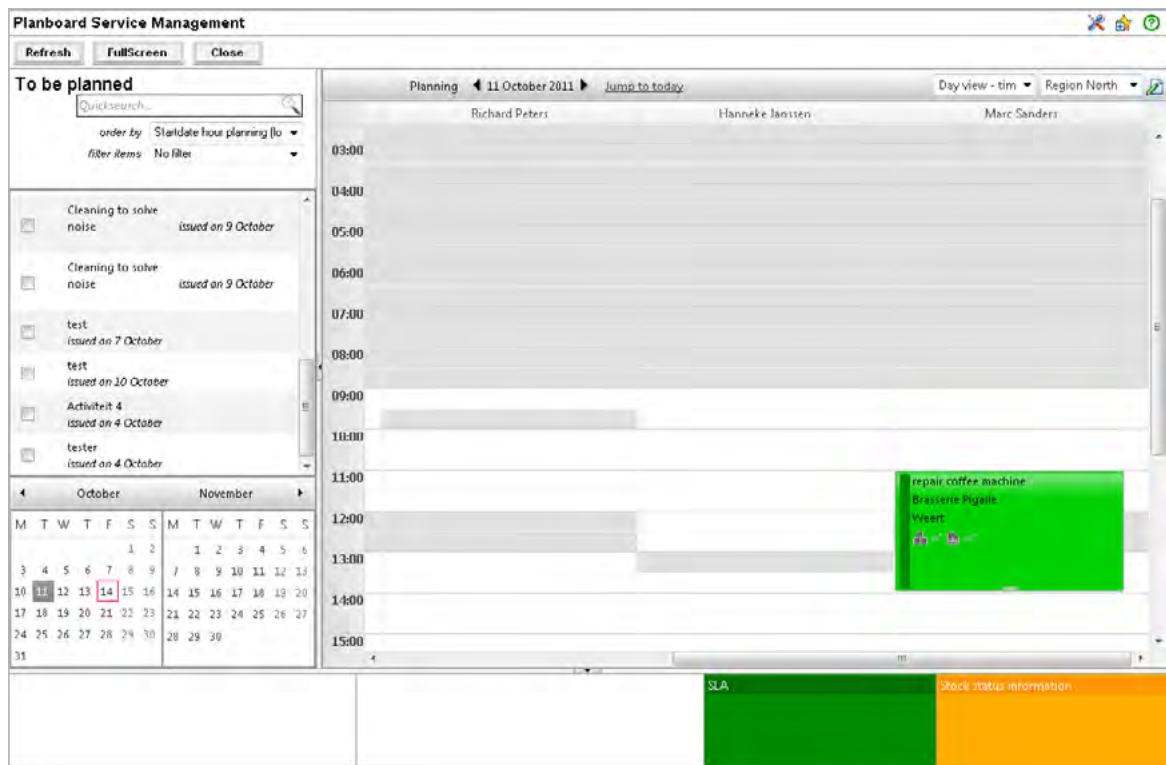
The URL at the bottom of the browser window is: `SMSResGroupMaintenance.aspx?IsModal=1&aroualID=632779d6-4ad2-4529-bcec-bf3808bfeff5`




To view dispatch boards:

1. Go to Service management → Reports → Service activities → Dispatchboard. The following page will be displayed:

Note:

You can customize the dispatch board by clicking  **Customize**.



2. To maintain the people group of the service activities, click . In the **Results** section, click  to add the person(s). You can also click **Add all** to add all the people. In the **Resource groups** section, select the group where the people belong to. You can create a group by clicking **+ Or create a new one**, or delete the selected group by clicking **Delete group**. To remove the people from the selected people group, click  in the **Current members** section. You can also remove all the people in the group by clicking **Delete all**.
3. Click **Show** to view the dispatch board.

Note:

To refresh the dispatch board, click **Refresh**.



Chapter 9

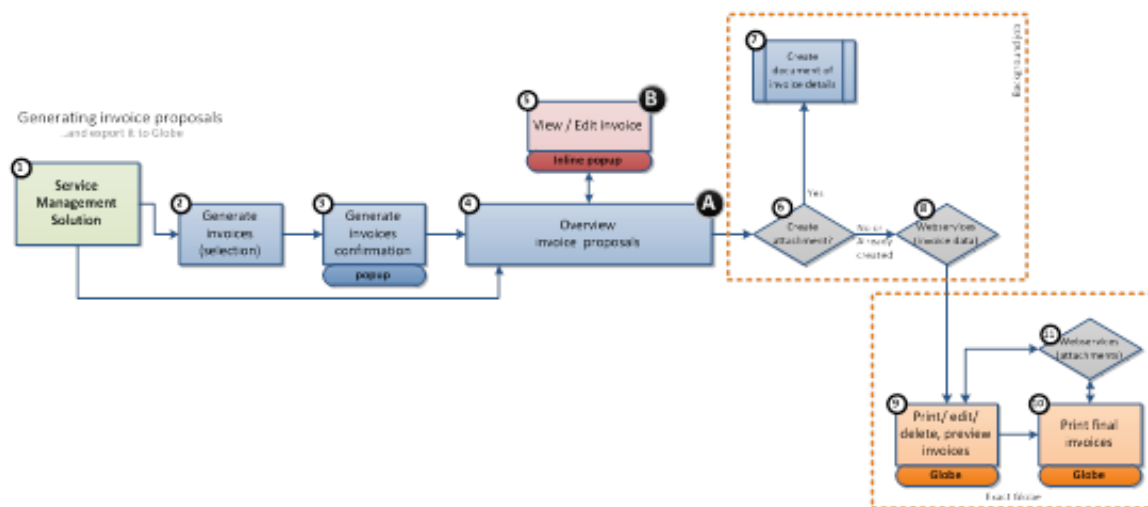
Invoice Proposals

9. INVOICE PROPOSALS

Invoice proposals can be generated for:

- Contract invoicing.
- Service activity based invoicing.

These proposals can be checked and adjusted when needed before actual invoices are created in Exact Globe Next.



9.1 GENERATING INVOICE PROPOSALS

Invoice proposals for services can be generated.

To generate invoice proposals:

1. Go to Service management → Entry → Invoices
→ Generate invoice proposals. The following page will be displayed:

Service: Generate Invoice proposals - Selection

Generate Reset Show Invoices Close

Criteria

Division: 502 MacBean CoffeeWorld

General

Invoice due date: 04-04-2012

Contract: [empty] [empty]

Service activity: [empty] [empty]

Account: [empty] [empty]

Contract type: [empty] [empty]

Cost centre: [empty] [empty]

Origin: ☐ Activity ☐ Contract

Invoice proposal options: Remove invoices

Show

Contracts: blocked for invoicing ☐

Contract lines: not selected for invoicing ☐

Contracts: not due for invoicing ☐

Contract status: quotation ☐

Contracts / Activities: no invoice rules ☐

Activities: Rejected ☐

Activities: Early Invoicing ☐

Invoice per

Division ☒

Currency ☒

Invoice account ☒

Origin ☐

Contract ☐

Service activity ☐

2. Type or select the invoice due date at **Invoice due date** in the **General** section. By default, the current date is displayed.
3. Click **Generate**.
4. A message "Confirm: Generate?" will be displayed
5. Click **OK**.

Invoices will be generated based on the following search criteria.

General section

For **Invoice due date**, only the contracts or service activities that are due for invoicing before or on this date can be invoiced. For example, on May 3, you want to invoice all the activities that are realized, and contract agreements that are due until April. The invoice due date should be April 30. All the activities and contracts that have not been invoiced until April 30 will be included in the generation of the invoice proposals.

Show section

Under this section, the following check boxes are displayed:

- **Contracts: blocked for invoicing** – If this check box is selected, you will be notified when the invoice generator encounters contracts that are to be invoiced but are blocked for invoicing.
- **Contract lines: not selected for invoicing** – If this check box is selected, you will be notified when the invoice generator encounters contract agreements that are to be invoiced but the invoice setting is not selected.
- **Contracts: not due for invoicing** – If this check box is selected, you will be notified when the invoice generator encounters contracts that are to be invoiced in the future.
- **Contract status: quotation** – If this check box is selected, you will be notified when the invoice generator encounters contracts that are to be invoiced but the status is set to quotation instead of active.
- **Contracts / Activities: no invoice rates** – If this check box is selected, you will be notified when the invoice generator encounters contracts or activities that are to be invoiced but zero amount is generated in the invoice.
- **Activities: Rejected** – If this check box is selected, you will be notified when the invoice generator encounters activities that are to be invoiced but have been rejected.

Note:

To allow invoices with zero amount, select this check box.

- **Activities: Early invoicing** – If this check box is selected, you will be notified when the invoice generator encounters activities that are to be invoiced in the future.

Invoice per section



This section allows you to select the areas for which the invoices will be created. The invoice generator determines all the contracts and service activities with the correct statuses and separates the invoices based on the selections in this section.

9.2 VIEWING INVOICE PROPOSALS

The invoice proposals of the accounts can be viewed. The problems encountered when the invoice proposals were generated will also be displayed under the **Problems** tab.

To view invoice proposals:

1. Go to Service management → Reports → Invoices → Invoice proposals. The following page will be displayed:

Invoice proposals			
Return to selection		Create invoices	Close
Selection			
		Invoice due date 04-10-2011	
Invoice proposals (16)		Problems (0)	
<input type="checkbox"/>	Customer	Total amount	Completed
>	Cafe The Green Lantern	€ 6,500.00	
>	Cafe The Green Lantern	€ 90.00	
>	Cafe The Green Lantern	€ 2,732.26	
>	Cafe The Green Lantern	€ 25.48	
>	Chinees restaurant 'De groene draak'	€ 30.00	
>	Customer Tuur	€ 550.00	
>	Exact USA	\$6,989,188.75	
>	Exact USA	\$80.75	
>	Exact USA	\$987,725.00	
>	Herberg van Inn	€ 400.00	
>	Joopies SnackCorner	€ 137.89	
>	Joopies SnackCorner	€ 355.41	
>	Robins Contract Company	€ 1,000.00	
>	<input type="checkbox"/> Robins Contract Company	€ 203.23	 
>	Robins Contract Company	€ 200.00	
>	Robins Contract Company	€ 150.00	

2. Select an invoice proposal that you want to view under the **Total amount** or **Completed** column. The following page will be displayed:
3. Click the **Invoice** tab to view the invoice, **Details** tab to view the transactions of the invoice, or **Documents** tab to view the documents that are attached to the invoice such as the service contract and service activity documents.
4. Click **Close** to exit.

Exact Synergy Enterprise Invoice proposal details

Invoice

Invoice

Invoice proposal

Invoice customer

Exact USA
Mainstreet 103B
90120 New York
United States of America

Invoice

Description Service

Invoice lines		Quantity	Unit price	Discount %	Amount	Warranty
1. SMS TEKST	Contract: 25:0001.Adi USA	0	€ 0.00	0 %	€ 0.00	<input type="checkbox"/>
2. SMS TEKST	- Agreement: USA Charge	1	€ 0.00	0 %	€ 0.00	<input type="checkbox"/>
3. SMS TEKST	Coffee config. de Lantaarn	0	€ 0.00	0 %	€ 0.00	<input type="checkbox"/>
4. SMS TEKST	- - - MacBean Coffee Machine MB001	1	€ 75.00	0 %	€ 75.00	<input type="checkbox"/>
5. SMS TEKST	- - - MacBean Coffee Machine MD001	1	€ 5.75	0 %	€ 5.75	<input type="checkbox"/>

Totals

Total amount excl. VAT €100.75

Close

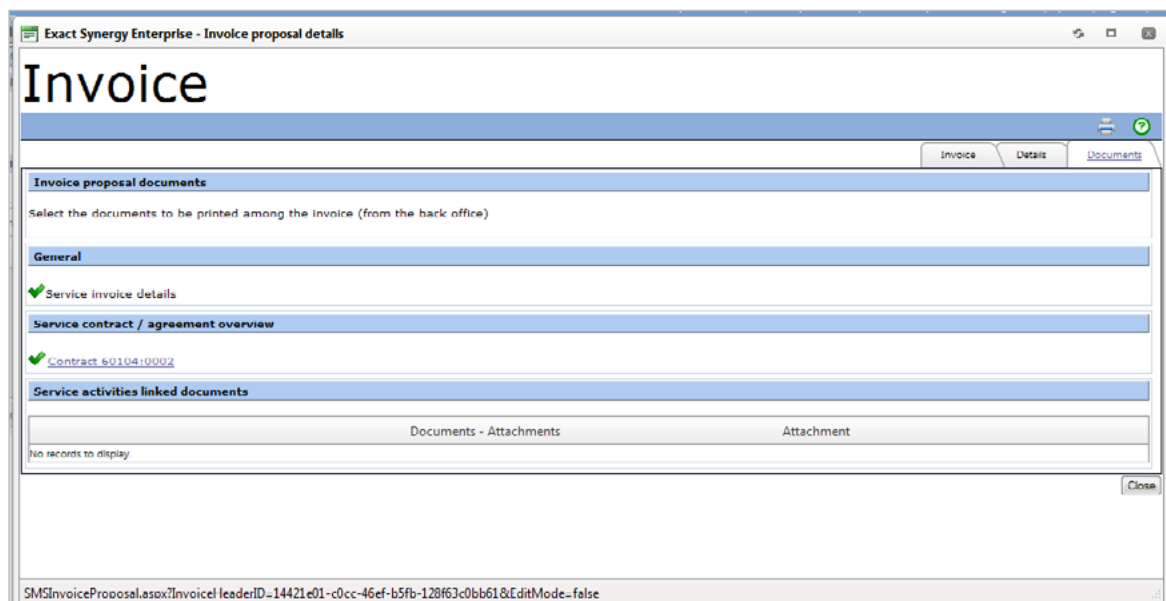
SMSInvoiceProposal.aspx?InvoiceHeaderID=d8fe2afc_78c5_4c34_a054_e3dec7106aba&EditMode=false

Details tab

This tab displays the invoice lines that are sent to Exact Globe Next. This tab differs from the **Invoice** tab if grouped options are selected.

Documents tab




This tab allows you to select the documents that are sent with the invoice to the customer. By default, the invoice specification and a copy of the contract document can be selected. If the service activities are invoiced, the documents that are attached to the service activities can be selected. Documents that are selected in this tab will be available in the customer portal if the security level of the document is set to "3".

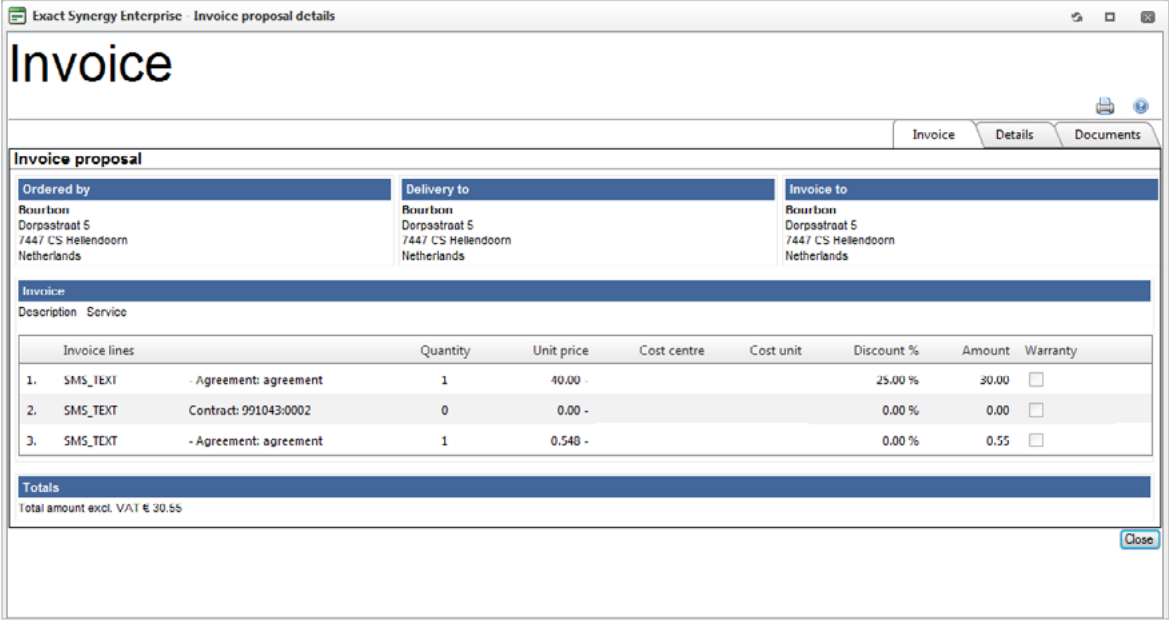


9.3 EDITING INVOICE PROPOSALS

Invoice lines in the invoice proposals can be edited, whereby you can add invoice lines to the invoice proposal. However, the invoice lines in the invoice proposal cannot be edited once the invoice has been generated for the invoice proposal.

To edit invoice proposals:

1. Go to Service management → Reports → Invoices → Invoice proposals.
2. Click the **Invoice proposals** tab. By default, this tab is selected.
3. Click  **Edit** in the overview. The following page will be displayed:
4. Make the change[s]. To add invoice lines to the invoice proposal, select the **Invoice** tab, define the invoice lines fields in the **Invoice** section, and then click  **Insert**. To delete the invoice lines, select the **Invoice** tab, and then click  **Delete**. A message "Are you sure you want to delete this record?" will be displayed. Click **OK**.
5. Click **Create invoice** to save the invoice line, and create the invoice for the invoice proposal.
6. Click **Close**.



Exact Synergy Enterprise - Invoice proposal details

Invoice

Invoice Details Documents

Invoice proposal

Ordered by	Delivery to	Invoice to
Bourbon Dorpsstraat 5 7447 CS Hellendoorn Netherlands	Bourbon Dorpsstraat 5 7447 CS Hellendoorn Netherlands	Bourbon Dorpsstraat 5 7447 CS Hellendoorn Netherlands

Invoice

Description Service

Invoice lines	Description	Service	Quantity	Unit price	Cost centre	Cost unit	Discount %	Amount	Warranty
1. SMS_TEXT	- Agreement: agreement		1	40.00 -			25.00 %	30.00	<input type="checkbox"/>
2. SMS_TEXT	Contract: 991043:0002		0	0.00 -			0.00 %	0.00	<input type="checkbox"/>
3. SMS_TEXT	- Agreement: agreement		1	0.548 -			0.00 %	0.55	<input type="checkbox"/>

Totals


Total amount excl. VAT € 30.55

Close



9.4 DELETING INVOICE PROPOSALS

Invoice proposals and/or invoice lines can be deleted. However, the invoice proposals and/or invoice lines cannot be deleted once the invoice has been generated for the invoice proposal.

To delete invoice proposals:

1. Go to Service management → Reports → Invoices → Invoice proposals.
2. Click the **Invoice proposals** tab. By default, this tab is selected.
3. Click  **Delete**.
4. A message "Are you sure you want to delete this record?" will be displayed.
5. Click **OK**.

To delete invoice lines:

1. Go to Service management → Reports → Invoices → Invoice proposals.
2. Click the **Invoice proposals** tab. By default, this tab is selected.
3. Click  **Edit**.
4. Select the **Invoice** tab. By default, this tab is selected.
5. Click  **Delete**.
6. A message "Are you sure you want to delete this record?" will be displayed.
7. Click **OK**.
8. Click **Create invoice** to save the change(s), and create the invoice for the invoice proposal.
9. Click **Close**.



Chapter 10

Working with multiple service divisions

10. WORKING WITH MULTIPLE SERVICE DIVISIONS

The following diagram explains how Exact Synergy Enterprise can provide service management process structure for different service organizations within a single Exact Synergy Enterprise environment. However, every division in Exact Synergy Enterprise is linked to the Exact Globe Next administration.

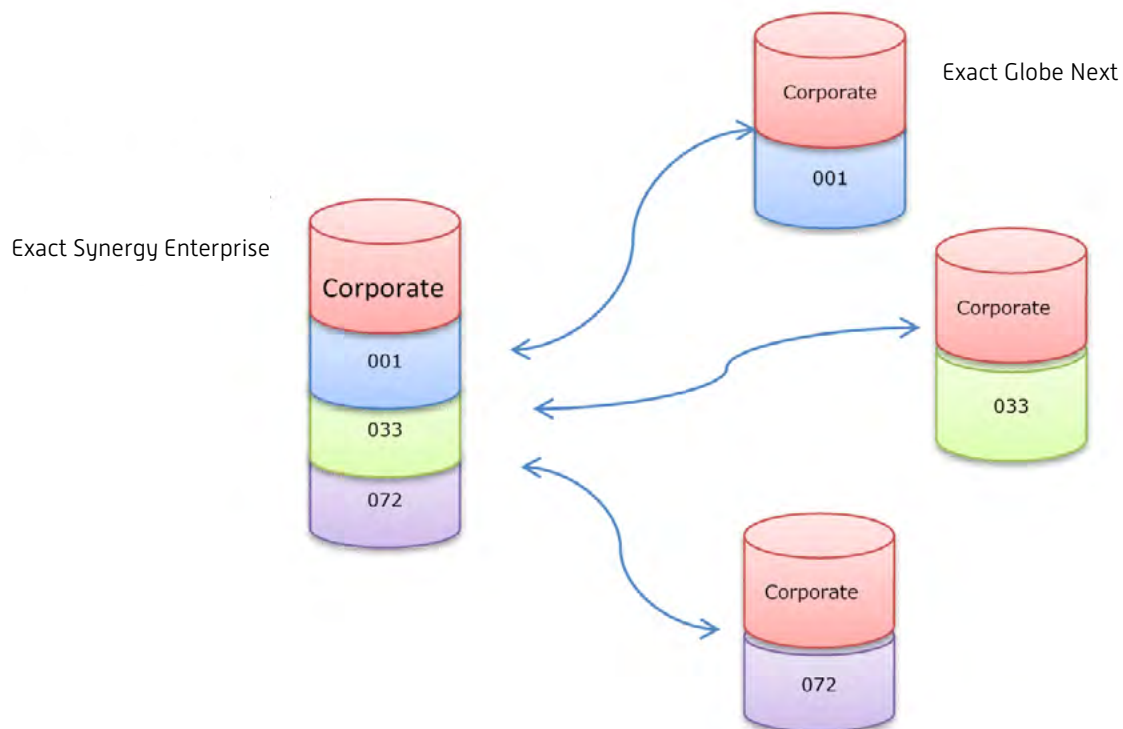
10.1 GENERAL MASTER DATA

The service management solution in Exact Synergy Enterprise is integrated with Exact Globe Next for the financial and logistics processes. To ensure the processes run smoothly, both the systems have to rely on the same logical keys for the master data. The master data entities that are involved are:

- Resource logical key: Resource ID
- Accounts logical key: Account code and division debtor code
- Items logical key: Item code and item division
- Serial numbers logical key: Serial number
- Projects logical key: Project code
- Address types logical key: Type
- Warehouses logical key: Code and division
- Warehouses location logical key: Location

The logical keys in the service management solution must be the same in both systems and all the databases since the systems will use the logical keys to get information when required.

There are several ways to ensure the logical keys are the same. It is possible to schedule the import and export of data between the Exact Globe Next database and Exact Synergy Enterprise or Exact Synergy Enterprise database. The **AsImport.exe** file that controls the import and export schedules the XML import between the databases. By using specific command line parameters, the import or export can be performed unattended. The tool is an Exact Globe Next tool. Thus, the Exact Globe Next workstation should be installed before setting up the job.



10.1.1 Scenario, One Exact Synergy Enterprise, and One Exact Globe Next administration

In this scenario, it is advisable to use Exact Integration since Exact Integration will synchronize the people, accounts, items, serial numbers, and projects.

The address types, warehouses, and warehouse locations are not supported, and should be replicated using the XML replication from the Exact Globe Next administration to the Exact Synergy Enterprise database. The replications of these entities are limited so these can be done manually. For the 1:n scenario, one Exact Synergy Enterprise, and multiple Exact Globe Next administrations, there are two possibilities to ensure the logical keys are the same, such as using the CMDM and XML replication, or the XML replication only.

10.1.2 Combination of CMDM and XML replication

The CMDM solution allows the central administration of the important entities, such as the people, accounts, and items entities. This ensures that the logical keys for these entities are replicated and similar. However, currently the CMDM solution does not support the serial numbers, projects, address types, warehouses, and warehouse locations entities. These entities should be replicated using the XML replication. Address types, warehouses, and warehouse locations change, thus, can be maintained manually.

10.1.3 XML replication only

Using only the XML replication allows the replication of people, accounts, items, serial numbers, projects, address types, warehouses, and warehouse locations. The replication is scheduled via a scheduling tool, such as Windows Task Scheduler or an SQL agent. Before setting up the environment, create, schedule, and list all the requirements on the source and destination. For example, ask yourself as to which system the customer will create and modify accounts on. Some replications are performed frequently so the entities are available in the destination system faster. Other replications can be performed at night.

10.2 SERVICE MASTER DATA AND SETTINGS

As of product update 250 [Exact Synergy Enterprise], every setting in **Service management** can be defined for the division. For example, problem codes can be defined for the division in Exact Synergy Enterprise.

Code	Description
P01	No Water
P02	Water Malfunction
P03	No Power
P04	Burning
P05	Display Malfunction

All the other settings also can be defined for the division, such as the back-office settings.

10.3 USER ACCESS RIGHTS FOR DIVISIONS

Although the service management processes are unique for each division, the people in the organization can manage and perform various processes if they have the rights. For example, a Service manager that monitors the service jobs for different divisions.

The divisions that a person has the right to access to depend on the service management function rights that are linked to the service management role, such as the following:

- Corporate level – The person on this level has access to all the service divisions depending on the function rights for this level.
- Group level – With this level, you can define the divisions that the person has the right to access to depending on the function rights the person has for the group level. The group layout for the divisions can be defined at HRM → Setup → Organization → Groups: Division.
- Division – The person at this level only has the right to the service processes for the division based on the service management function rights that the person has for this level.

Homepage News Explorer Create Favorites History																											
Office phone / extension		+31 26 264 7000	1030																								
Mobile		+31 554 627 719																									
Fax		+31 26 264 7001																									
E mail		evandijk@macleancoffee.world.com																									
Contractual location		Main Office Maastricht - Netherlands																									
Physical location / Room		Main Office Maastricht - Netherlands																									
Competence profiles / Performance review profiles		02-09-2011 No active profile																									
Monitor Accounts Calendar Documents Documents (Recent) Items Planning Projects Dossier Schedule Transactions Workflow Reports																											
Roles Add <table border="1"> <thead> <tr> <th>Role</th> <th>Level</th> </tr> </thead> <tbody> <tr> <td>Service management</td> <td>Corporate</td> </tr> <tr> <td>Service planner</td> <td>Group</td> </tr> <tr> <td>Professional</td> <td>Corporate</td> </tr> </tbody> </table>				Role	Level	Service management	Corporate	Service planner	Group	Professional	Corporate																
Role	Level																										
Service management	Corporate																										
Service planner	Group																										
Professional	Corporate																										
Resume Add <table border="1"> <thead> <tr> <th>Type</th> <th>Description</th> <th>Start date</th> <th>End date</th> </tr> </thead> <tbody> <tr> <td>Certification</td> <td>Project Management Certification</td> <td>01-09-2005</td> <td>01-09-2005</td> </tr> <tr> <td>Education</td> <td>Bachelor's Degree in Hospitality</td> <td>21-08-1986</td> <td>21-08-1990</td> </tr> <tr> <td>Languages</td> <td>Dutch, English, French, German</td> <td>01-09-2011</td> <td></td> </tr> <tr> <td>Work Experience</td> <td>Account Manager at Deringer's Hospitality Inc.</td> <td>02-07-1995</td> <td>01-07-2000</td> </tr> <tr> <td>Work Experience</td> <td>Service Manager at FJB Catering Equipment</td> <td>01-08-2000</td> <td></td> </tr> </tbody> </table>				Type	Description	Start date	End date	Certification	Project Management Certification	01-09-2005	01-09-2005	Education	Bachelor's Degree in Hospitality	21-08-1986	21-08-1990	Languages	Dutch, English, French, German	01-09-2011		Work Experience	Account Manager at Deringer's Hospitality Inc.	02-07-1995	01-07-2000	Work Experience	Service Manager at FJB Catering Equipment	01-08-2000	
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Work Experience	Service Manager at FJB Catering Equipment	01-08-2000																									
Organization Job group: Services Job activity: Delivery & Services Manager: 1000 - Nico Cremers Subordinates / Assistant: 15 Job level / Security level: 8 Division / Cost center: 602 - Maclean CoffeeWorld SERVICE - Services Time / Action: 01-08-2012 11:51 15-02-2011 20:11 (220 Days) Status: Active (1 Years), 1.00 FTE																											
Personal Nationality / Language: Netherlands EN - English First name / Initials: Elise Middle name / Last name: van Dijk Maiden name: Place of birth / Date of birth: Egypt 04-08-1987 Marital status / Marital status date: Married 01-08-1986 Address / Number: Rijksweg Map Route 16 City / state: Vroendaal Country: Netherlands Home phone / Mobile: +31 682 555 123 Home e-mail: evd@amailme.com																											
Employment Type / User name: Employee dljk31819 Start date / FTE: 01-08-2011 1.00 Inactive / Blocked: Contract end date / Purchase limit: 01-10-2011 € 0.00																											

10.4 MAKING ACCOUNTS AVAILABLE FOR DIFFERENT DIVISIONS

To do business with an account, a debtor code is required. If there is more than one division that does business with the account, several debtor codes are required (one debtor code per division). The debtor code must be available and similar in Exact Synergy Enterprise and Exact Globe Next.

To create debtor codes for other divisions:

1. Go to Customers → Reports → Accounts → Search.
2. Define the search criteria.
3. Click **Show**.
4. Select the required account under the **Account name** column. The following page will be displayed:

Customer: 991075, ASG Industries
 Created: [Alma Swartz-Clancy](#) 07-11-2011 19:11 Modified: [Robin den Buurman](#) 19-04-2012 21:14

Actions | **Mail merge** | **Customer rates** | **Label** | **Vacancy** | **Close**

Postcode / City: Delft 2611 CS
 Country / State: [Netherlands \(NL\)](#)
 Phone / Extension:
 Fax:
 E-mail:
 Web site:
Contacts [All](#) [Add](#)
 Mr. [B. Dunthorn](#) --

Monitor

Contracts	Workflow	Projects
Documents	Transactions	Sales orders
Sales Invoice	Opportunities	Quotations
Reports	Service configuration	Service contracts

Requests

✗ 00.001.570	30-07-2012 20:22	Open	Installation service order
Creator: Joan Neidhardt Person: Joan Neidhardt			
: [Joan Neidhardt 30-07-2012 20:23 (GMT +02:00)] ...			
✓ 00.001.569	30-07-2012 20:04	Processed	Installation service order
Creator: Joan Neidhardt Person: Joan Neidhardt			
: [Joan Neidhardt 30-07-2012 20:05 (GMT +02:00)] ...			
✗ 00.001.568	30-07-2012 17:48	Open	Installation service order

Financial

Type / Since	Customer	07-11-2011
Status / Since	Active	07-11-2011
Security level	10	
Classification / Rating	Company	Z
Source	Phone	
Sector	Unknown	
Subsector		
Size	Unknown	
Chamber of Commerce number		
D&B number		Buy D&B report
Document		
Exclude from merging	No	

Relations

Manager	Olaf Smulders (Employee)
Cost center	Sales
Reseller	60110 - MacBean CoffeeWorld
Parent account	
Subsidiaries	(0)

Activity

[Read - Recent](#)
[Join Application](#)

Financial

Division	MacBean CoffeeWorld	
Debtor code	991075	New
Currency	EUR - Euro	
A/R / Credit line	EUR 0.00	EUR 0.00
Discount / VAT number	0.00	
VAT code / Tax		N/A

- Click the **New** hyperlink under the **Financial** section. The following page will be displayed:

Homepage | News | Explorer | Create | Favorites | History

HRM | Customers | Financial | Workflow | Documents | Service management | System | Logistics | Projects | Assets

Accounts: New - Debtor code

Created: Robin den Buurman 01-08-2012 11:53 Modified:

Save Save + New Close

Account

Name ASG Industries
Type Customer
Status Active

Financial

Division
Main ☐
Debtor code 991075

Division

Division	Code	Main
602 - MacBean CoffeeWorld	991075	

- Type or select a division at **Division** under the **Financial** section. By default, the debtor code at **Debtor code** will be displayed. Make sure the debtor code is also in the Exact Globe Next administration for the same account.

Note:

All fields with the "!" icon are mandatory.

10.5 DEFINING SERVICE ACTIVITIES FOR A SPECIFIC DIVISION

If a new service activity is created for a customer that has more than one debtor code attached to different Exact Globe Next back-office administrations, you can select the division where the service job is executed, and where costs and revenues are booked. The contracts and configurations that are available for service will be changed based on the selected division.

The **Division** field on the **New activity** page can be edited if you are able to select more than one division.

Exact Synergy Enterprise - New activity

Status: Realized

Save Plan Realize Authorize Copy Activity Dispatchboard Close

General Configurations Resources Material

General

Division: 602 - Maclean CoffeeWorld

Activity type: A03 Repair

Description: Repair

Address: [icon]

Problem: [icon]

Solution: [icon]

PM type: [icon]

Documents Add

ID	Subject	File
No documents		

Remarks/Notes

Timestamp Full screen

SMSServiceActivityMaint.aspx?RequestID=40c5084a-849c-4ea5-9e55-b3bf89ad7364&ID=f3c0915b5-9013-4ca1-8c80-a33268b48b5f1&PageMode=Edit&Tab=General

10.6 INVOICING SPECIFIC DIVISIONS

Invoices are always generated for specific divisions. The division will be displayed at **Division** under the **General** section on the **Service: General invoice proposals - Selection** page (at Service management → Entry → Invoices → General invoice proposals).

Homepage | News | Explorer | Create | Favorites | History

HRM | Customers | Financial | Workflow | Documents | Service management | System | Logistics | Projects | App

Service: Generate invoice proposals - Selection

Generate Reset Close

General

Invoice due date: 14-04-2015

Division: 602 *MacBean CoffeeWorld*

Contract: —

Service activity: —

Account: —

Contract type: —

Cust center: —

Origin: ☒ Activity ☒ Contract

Show

Contracts: blocked for invoicing ☒

Contract lines: not selected for invoicing ☒

Contract status: quotation ☒

Contracts / Activities: no invoice rates ☒

Activities: Rejected ☒

Activities: Early invoicing ☒

Invoice per

Division: ☒

Currency: ☒

The division of the invoice (revenue) will be displayed under the **Division** column on the **Invoice proposals** page [at Service management → Reports → Invoices → Invoice proposals].

Invoice proposals				
Return to selection Create invoice Close				
Selection Invoice due date: 14-04-2015 Division: 602 - MacBean CoffeeWorld Origin: Activity, Contract				
Filter Status: Both				
Invoice proposals (29) Warnings				
Customer	Division	Total amount	Completed	
> Agreement test customer	602 - MacBean CoffeeWorld	€ 260.00	✓	
> Agreement test customer	602 - MacBean CoffeeWorld	€ 200.00	✓	
> ASG Industries	602 - MacBean CoffeeWorld	€ 255.00	✓	
> ASG Industries	602 - MacBean CoffeeWorld	€ 80.00	✓	
> ASG Industries	602 - MacBean CoffeeWorld	€ 180.00	✓	
> ASG Industries	602 - MacBean CoffeeWorld	€ 330.00	✓	
> ASG Industries	602 - MacBean CoffeeWorld	€ 1,345.21	✓	
> ASG Industries	602 - MacBean CoffeeWorld	€ 585.00	✓	
> ASG Industries	602 - MacBean CoffeeWorld	€ 220.36	✓	
> BizWhiz Insurance	602 - MacBean CoffeeWorld	€ 220.00	✓	
> BizWhiz Insurance	602 - MacBean CoffeeWorld	€ 118.44	✓	
> Bourbon	602 - MacBean CoffeeWorld	€ 40.00	✓	
> Bourbon	602 - MacBean CoffeeWorld	€ 30.55	?	
> Bourbon	602 - MacBean CoffeeWorld	€ 20,000,000,000.00	?	
> Brasserie Pigalle	602 - MacBean CoffeeWorld	€ 174.00	✓	

Chapter 11

Service Order Entries and Fulfillments in Exact Globe Next

11. SALES ORDER ENTRIES AND FULFILLMENTS IN EXACT GLOBE NEXT

During the initial sale of a product that has to be serviced, a service configuration and service request must be created. Thus, the product or set of products is known within the service organization and service activities can be planned for the product. It is possible to link one or multiple products to a service configuration. You can also link the product to an existing service configuration as a configuration item or as part of a configuration item on a deeper level. This is to facilitate the identification of more complex service objects like a set of related machinery or service related components within these machines. For more information, see *Chapter 2 Sales Order Management* in the *Sales Order User Manual*.

Note: These functions are available only if you have the license option **SE4510 Service Management Enterprise**. You will not be able to use this license option if you are using license option **SE4500 Service Management**.

11.1 LINKING SERVICE CONFIGURATIONS TO A SERVICE ORDER AND GENERATING SERVICE REQUESTS FROM A SERVICE ORDER

Service orders can be created based on the service activities that you have created in Exact Synergy Enterprise. You can link the service configurations of the service items that you created in Exact Synergy Enterprise to the service orders in Exact Globe Next. Once you have linked the service configurations of the service items to the service orders, service requests can be generated in Exact Synergy Enterprise. However, before you can create service orders for the service items, several settings must be defined.

To define settings for Service management:

1. Go to System → General → Settings.
2. Click **Order settings** on the left panel. The following screen will be displayed:
3. Type or select a service order code at **Service** in the **Selection codes** section. This code makes sure that the materials for service activities are identified for material requirement purposes. The selection code should be the same as the selection code selected in the **Service management** settings in Exact Synergy Enterprise.
4. Click **Save**.

The screenshot displays the 'Order settings' window in Exact Synergy Enterprise. The left sidebar lists various settings categories, with 'Order settings' selected. The main area is divided into several sections:

- Quotation:** Includes a dropdown for 'Discount / Extra charges' and a checkbox for 'Authorize quotations'.
- Entry:** Contains settings for 'Default warehouse' (Centraal magazijn), 'Shipping via' (TNT), 'Invoice method' (Time & Material), 'Invoice debtor' (Manually), 'Profit calculation' (Markup), 'Discount calculation' (Price list discount + Line discount), 'Credit line risk control' (Final invoices), 'Fulfillment date basis' (Working day), 'Stock check: To be received' (Exclusive), and 'Stock check: Backorders (Days)' (0).
- Authorize:** Includes checkboxes for 'Sales order', 'RMA order', 'Message if exceeded', 'Exceeding permitted', and 'Blanket order'.
- Confirm:** Includes a checkbox for 'Check credit line' and 'RMA order'.
- Fulfillment:** Includes checkboxes for 'Create cost price entry', 'Check credit line', 'Use enrichment', 'New line: Add to sales order', 'Hours', 'Use multiple layouts', 'Selection: Multiple', and 'Check stock'.
- Shipment:** Includes a checkbox for 'Generate tracking number'.
- Selection codes:** Includes a dropdown for 'Contract' with the value 41.

At the bottom right, there are buttons for 'Logbook', 'Save', and 'Close'.

To link service configurations to a service order and generate requests from a service order:

1. Go to Order → Entries → Sales orders.
2. Click **New**. The following screen will be displayed:

900 Sales orders - Exact

File Edit Help

Ordered by May not be blank Delivery to Invoice to

Sales order number Your reference Sales order date Person Price list: Debtor Conditions Warehouse, Shipping via Price list: Invoice debtor

	Item	Description	Wth.	Price list	Ordered	Unit	Fulfillment	Sales price	Net price	VAT	Amount	Person	S
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													
11													
12													
13													
14													
15													
16													
17													
18													
19													
20													
21													
22													
23													
24													
25													
26													

Quotation Ordered Authorize Confirm Fulfillment Shipment Print Invoice Payments

Skip 10/9/12


Net Taxes Specific Total

Power view Note Attachment Fulfilled Group MKP Returns Activity Item Linked charges New Close

3. At **Ordered by**, type or select the person who ordered the service item.
4. At **Delivery to**, type or select the person who will be receiving the service item.
5. At **Invoice to**, type or select a person who will receive the invoice for the service item.
6. At **Sales order number**, type the sales order number of the service item.
7. At **Sales order date**, type or select the date of the sales order.
8. At **Your reference**, type the reference number of the sales order.
9. At **Person**, type or select the person who created the sales order.
10. At **Warehouse**, type or select the warehouse of the service item.
11. At **Shipping via**, type or select the type of shipment for the service item.
12. In the **Item** column, type the service item. Define all the other columns.
13. In the **Service configuration** column, type the serial number of the service item.
14. In the **Parent item** column, type the parent item of the service item.
15. Click **Close** to save the sales order.
16. A pop-up screen with the message "Create service activities for service configurations?" will be displayed. In the pop-up screen, select one of the following options:
 - **Service activity for all configurations** – This option indicates that the service activity requests will be created in Exact Synergy Enterprise for all the service configurations.
 - **Service activity per configuration** – This option indicates that a service activity request will be created in Exact Synergy Enterprise for each service configuration.
 - **No service activity** – This option indicates that the service activity requests will not be created in Exact Synergy Enterprise.

Note: This pop-up screen will be displayed only if you have selected the **Ask user** option at the **Create service activities for service configurations?** field.

Note:

If the **Service configuration** and/or **Parent item** columns are not displayed in the sales order lines, click  **Columns**, and select the **Service configuration** and **Parent item** check boxes.

11.2 FULFILLING SERVICE ORDERS

Once you have created the service order for the service item, you can fulfill the service order.

To fulfill service orders:

1. Go to Order → Entries → Fulfillment. The following screen will be displayed:

2. Define the search criteria. In the **Selection** section, select the **Sales order** option.
3. Click **Refresh**.
4. Select a sales order in the overview.

The screenshot displays the 'Order / Entries / Fulfillment' window. At the top, the 'Warehouse' dropdown is set to 'All'. The 'Selection' section has radio buttons for 'Sales order' (selected), 'Production order', 'Internal use', 'Interbranch transfer', and 'RTV order'. Below this are input fields for 'Selection code', 'Person', 'Order', 'Customer', 'Item code', and 'Project code'. There are also checkboxes for 'Sort ascending' and 'Sort by warehouse location'. The 'Transaction date' and 'Fulfillment date' are both set to '14/09/2012'. A 'Simple' button is next to the 'Fulfillment date'. The main area is a table with the following columns: Sales order, Description, Your ref., Date, Person, Delivery debtor, Name, Project code, Fulfillment date, and Show. The table is currently empty. At the bottom, there is a toolbar with buttons: Refresh, Print labels, New returns, Complete, Process, Fulfillment..., Open, and Close.

5. Click **Fulfillment**. The following screen will be displayed:
6. Define the fields.
7. Click **Fulfillment**.

900 Fulfillment - Exact

File Edit View Help

Sales order: 20000126 Your reference: PO: 20000126 Kline & Smith Investments Sdn Bhd
 Debtor: 001 - Kline & Smith Investments Sr Representative: Linda Annette Harding Doctor Alan Smith
 Created: 30/3/2006 Shipping via: DHL 20th Floor, Menara MNI
 Description: Entry number: 12300001 20998 Kuala Lumpur
 Malaysia Address

Item	Description	Location	Ordered	Actuals	Unit	Serial/batch	Lot number
1	RAM:K512DS	Kingston 512MB ECC DDR S	1	1	Unit		
2	NB:V4000	Pronote V Series Model 4000	1	1	Set		
3	IPOD CHIP 20GB	iPod Chip 20GB	1	1	each		
4							
5							
6							
7							
8							
9							
10							
11							
12							

Warehouse: 01 - Shah Alam (Main) Total quantity: 3

Item

Sales order Set to zero Fulfillment List Picking list Fulfillment Cancel



Chapter 12

Financial Transactions

12. FINANCIAL TRANSACTIONS

Service related transactions, such as general ledgers can be created for service time and material costs, contract costs, and warranty costs in the **General ledger settings** screen. The settings for service request that are created via sales orders can be defined in the **Sales order settings** screen. The service selection code makes sure that the materials for service activities are identified for material requirement purposes. This selection code should be the same as the selection code from the **Service management** settings in Exact Synergy Enterprise

12.1 Time and Material Services

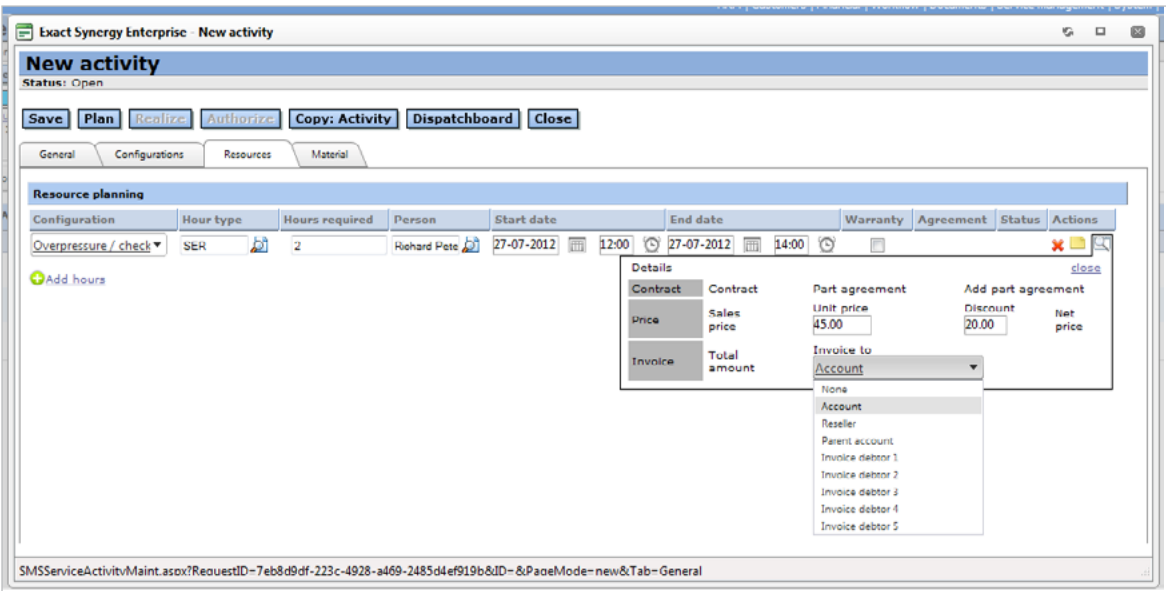
In the service management solution in Exact Synergy Enterprise, materials and hours are planned and realized based on the service activity requests.

For the materials, there should be ready stock. If the materials are out-of-stock, the materials have to be purchased. The stock is controlled in Exact Globe Next. Materials that are required for service activities

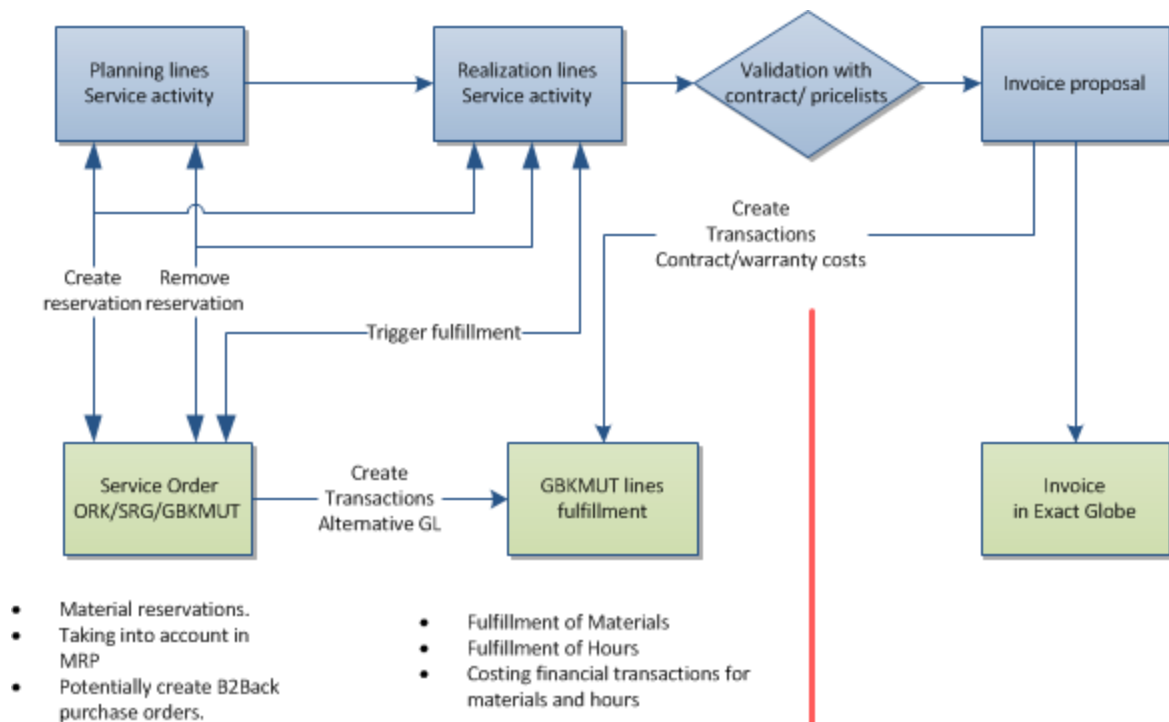
should be included in the general stock planning so the warehouse or purchase employee will know that stock is required for the materials for the service activities. The warehouse or purchase employee can use the Material Resource Planning (MRP) in Exact Globe Next to plan for the stock. With MRP, the stock will be reduced once materials are used.

Financial cost transactions should also be recorded in Exact Globe Next for the used materials and hours of service activities. When materials are defined in the service activities in Exact Synergy Enterprise, service orders will be created in Exact Globe Next with the required materials and hours in the service order lines. As a result, stock will be reserved or recorded, and cost will be recorded.

The service orders will not be invoiced because the invoicing of service activities will be performed in Exact Synergy Enterprise in the **Service management** module, whereby invoice proposals are generated and can be combined with contract invoices.



The process is as follows:



When a service order is created, the service order will be visible in the MRP planning. However, the details displayed in the MRP planning will be read-only.

2. Define the search criteria.
3. Click **Refresh**.

To view the MRP planning for service orders:

1. Go to Inventory → Item management → MRP.
The following screen will be displayed:

The screenshot displays the '900 Item management: Planning - Exact' application window. The interface includes a menu bar (File, Edit, View, Help) and a toolbar with buttons for 'Advanced', 'Warehouses', and 'View'. The main area features a table with columns for dates from 18/09/2012 to 5/10/2012 and rows for 'Items', 'Total quantity', 'Total costs', and 'Average'. A bottom toolbar contains buttons for 'Refresh', 'Details...', 'Source', 'Where-Used', 'Card', 'Transfer', 'Produce', 'PO', 'Item', 'Order', 'Change...', 'Export', and 'Close'.

12.2 SETTINGS FOR JOURNAL ENTRIES

When service activities are realized in Exact Synergy Enterprise, service orders will also be realized in Exact Globe Next. Thus, when service orders are realized, the stock will be deducted for the realized quantity, and journal entries will be created for the costs of the materials and hours in the service order lines. The settings that are available are:

- **Service: Time and material** – For unfulfilled service orders, the journal entry will depend on the values defined at the **Cost of goods sold** (in the item maintenance screen) and **Service: Time and material** (at **General ledger settings**) fields. For example, the value defined in both the **Cost of goods sold** and **Service: Time and material** fields is "7000". If you change the value at the **Service: Time and material** field to "7500", the journal entry of the unfulfilled service order will be changed to "7500". However, if you change the value at the **Cost of goods sold** field to "7600", the journal entry of the unfulfilled service order will not be changed to "7600". If the **Service: Time and material** field is empty, the journal entry will contain the value defined in the **Cost of goods sold** field.
- **Service: Contract costs**
- **Service: Warranty costs** – If service requests that contain resource or material lines with the **Warranty** check box selected are invoiced in Exact Synergy Enterprise, the costs of the resource or material lines will be moved from the original general ledger account to the general ledger account defined in this setting. The costs are moved but the invoice is sent from Exact Synergy Enterprise to Exact Globe Next.

To define the journal entry settings:

1. Go to System → General → Settings.
2. Click **General ledger settings** on the left panel.
3. In the **General ledger** section, type or select the time and material journal entry code at **Service: Time and material**.
4. Type or select a general ledger account for the contract cost at **Service: Contract costs**.
5. Click **Save**.



Chapter 13

Print Invoices in Exact Globe Next

13. PRINT INVOICES IN EXACT GLOBE NEXT

Invoicing of service related activities or agreements are handled in Exact Globe Next at Invoice → Entries → Print / Process. The invoice can be printed or emailed with other documents that are related to the invoice. These documents will include additional information or proof of servicing. For example, a service contract or signed off documents of the actual service activities that were performed at the customer's site. These documents can be printed or emailed to the customers based on their requests, and can be helpful in getting the payment for the invoice if more than one contact person is involved at the customer site.

13.1 PRINT INVOICES WITH ATTACHMENTS

Service invoices with attachments that are created in Exact Synergy Enterprise can be printed or emailed from Exact Globe Next. The service invoice attachments from Exact Synergy Enterprise can be printed or sent via email again with the historical service invoices from Exact Globe Next at Invoice → Reports → Invoice history.

The attachments that will be printed can be selected during the invoice proposal generation process in Exact Synergy Enterprise (at Service management → Entry → Invoices → Generate invoice proposals). The selected documents in the invoice proposal will be printed with the invoice.

To print or email invoices and invoice attachments:

1. Go to Invoice → Entries → Print / Process. The following screen will be displayed:

2. At **Process** under the **Process** section, select **Final**.
3. Define the other fields under the **Process** section.
4. Click the **General** tab.
5. Under the **Selection** section at **Selection method**, select **Invoice**.
6. Click **Search**.
7. Select the invoice[s] that you want to print in the overview. To select more than one invoice, press the CTRL key, and select the required invoices.
8. If you have selected **E-mail** at **Output** under the **Process** section, click the **E-mail** tab, and define the fields.
9. Click **Process**.

Note:

If you choose to have the invoice sent via email, and the **Print layout during email** check box at System → General → Settings → Invoice settings is selected, the attachment[s] will be emailed with the invoice but only the invoice will be printed.

To print or email historical service invoices:

1. Go to Invoice → Reports → Invoice history.
2. Define the search criteria. Under the **Type** section, select the **Sales invoice** check box.
3. Click **Search**.
4. Select the invoice[s] that you want to print in the overview. To select more than one invoice, press the CTRL key, and select the invoices.
5. Click **Print**. The following screen will be displayed:
6. Select **Invoice history** under the **Print** section.
7. At **Output**, select **Printer** to print the selected invoice[s] or **E-mail** if you want the selected invoice[s] to be emailed.
8. Define the other fields.
9. Click **Print**.

900 Invoice history

Print

Output: ☒ Based on account ☐ Printer ☐ E-mail

Change address: ☒

Compress:

Layout:

E-mail

E-mail address:

Subject: Include:

Subject:

Alternative descr.:

☐ eInvoice

Free text lines

Print free text lines: ☐

Free text line 1:

Free text line 2:

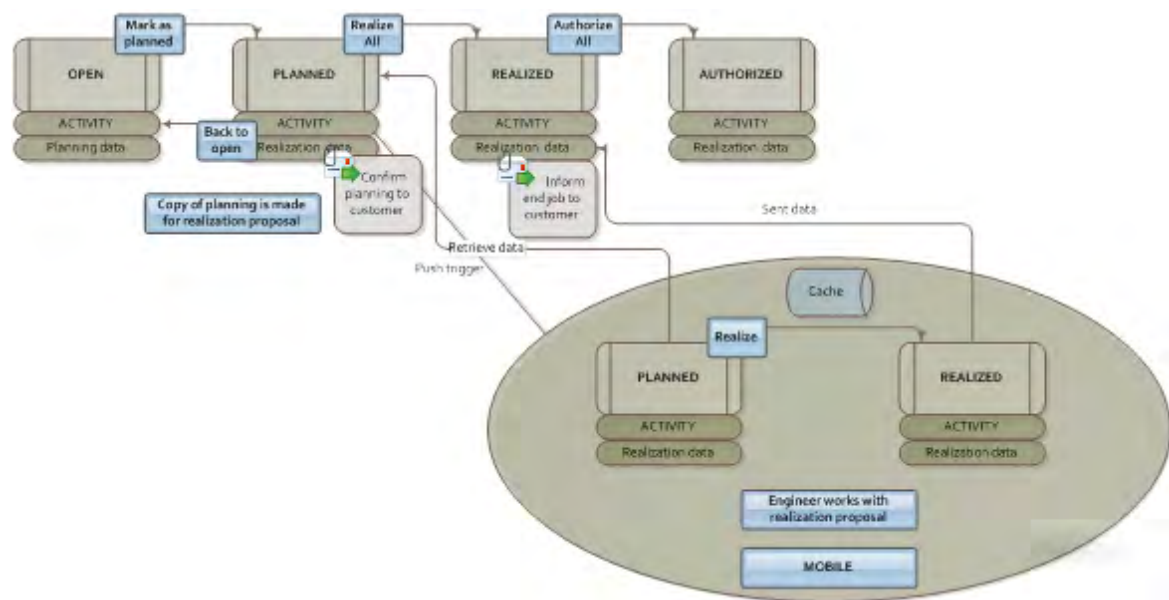
Free text line 3:

Chapter 14

Working with the mobile application

14. WORKING WITH THE MOBILE APPLICATION

Mobile applications, which are available in the Apple application store and the Android market place, can be used for service management. If the company decides to use the mobile application for service engineers, the realization process of the service activities is performed via the mobile application based on the following process flow:



The service management option in the main menu of the application will be displayed if the service engineer starts the Exact Synergy Enterprise mobile application and function right **1002 - Service Management Mobile Access** is available. Once the service management option is selected, the service activity to-do list will be displayed.

Menu		Todo list
Service call for the machine	ASG Industries Inc.	
Installatie (een machine)	Wijnhaven 21	
2012-06-19	Delft	
14:00 - 17:00	2611 CS	
Service call for the machine	ASG Industries Inc.	
Installatie (een machine)	Wijnhaven 21	
2012-06-19	Delft	
17:00 - 19:00	2611 CS	
Service call for the machine	ASG Industries Inc.	
Waterbehandeling service	Wijnhaven 21	
2012-08-17	Delft	
12:00 - 14:00	2611 CS	
Service call for the machine	ASG Industries Inc.	
Waterbehandeling service	Wijnhaven 21	
2012-08-17	Delft	
16:00 - 17:00	2611 CS	
Service call for the machine	ASG Industries Inc.	
Waterbehandeling service	Wijnhaven 21	
2012-08-20	Delft	
13:00 - 14:00	2611 CS	

All the previous service jobs and service jobs in the future that have to be realized will be displayed in the to-do list. The number of days for the future service jobs, determined by the application, is affected by the SMSNumberOfDays setting in Exact Synergy Enterprise.

When you are working on a service activity, you must select the correct service job from the list. Then, the main job card will be displayed.

The main job card displays all the relevant information required to perform the service job. The six buttons on the top of the screen displays the main information of the service job, such as the location, time, and type of service job. The detailed information of the service job will be displayed if the button is pressed.

If the first button on the screen (top left button) is pressed, the details of the customer will be displayed whereby the navigation software on the mobile device can be immediately used to start the navigation of the customer. The contact information of the customer is also displayed.

The second button on the screen (top middle button) displays the general information, activity, and estimated planned time of the service job.

Under the **Materials & Hours** section, the hour and material lines that are associated with the service job are displayed. If materials are used, they can be added to the items in the list.



If a material item under the **Materials & Hours** section is selected, a different material can be selected for the service job. However, the material items that can be selected depend on the warehouse selected by the Service manager for the current service job. To provide an indication on the usage of the service part, the **Part type** can be defined. The **Expendable** part type indicates that the service part was used for the repair. For example, oil. The **Replacement** part type indicates that the service part was used to replace an existing part for the configuration, and the **Child** part type indicates that the service part was added to the configuration on-site. For example, an additional part for the machine. The **Remove** part type indicates that the service part has been removed from the machine and it will not be considered as part of the configuration based on the realization date of the service job.

A screenshot of a mobile application interface titled 'Items' under 'Material'. It displays a list of material items with columns for 'Material', 'Items', and 'Date'. The list includes items like '14 grams filterbakje', '14D - 25%, 30D - 75%', '7-grams filterbakje', 'Additional Part / Hour', 'Algemeen - intern', 'Assemblage', 'ATV', 'Automatenbeker 150 cc (B2AL)', 'Automatenbeker 180 cc (B3AL)', 'Automatensuiker', 'Bag dark roast', 'Bag extra dark', 'Bag mild', 'Bag regular', 'Bart cacaomok 29cl.', 'Bart kop cappuccino 18cl.', 'Bart kop espresso 6,5cl.', 'Bart kop koffie 15cl.', 'Bart schotel cacaomok 15,3', 'Bart schotel espresso 11,1', 'Bart schotel koffie/cappuccino 13,4', and 'Beans Brazilian Dark'. A checkmark is visible next to 'Automatenbeker 180 cc (B3AL)'.

Material	Items	Date
CAV00000	14 grams filterbakje	
30D	14D - 25%, 30D - 75%	
CAV00002	7-grams filterbakje	
Additional Part / Hour		
Alj	Algemeen - intern	
Asm	Assemblage	
ATV	ATV	
BAV00001	Automatenbeker 150 cc (B2AL)	
BAV00002	Automatenbeker 180 cc (B3AL)	✓
BAV00003	Automatensuiker	
BAV00004	Bag dark roast	
BAV00005	Bag extra dark	
BAV00006	Bag mild	
BAV00007	Bag regular	
BAV00008	Bart cacaomok 29cl.	
BAV00009	Bart kop cappuccino 18cl.	
BAV00010	Bart kop espresso 6,5cl.	
BAV00011	Bart kop koffie 15cl.	
BAV00012	Bart schotel cacaomok 15,3	
BAV00013	Bart schotel espresso 11,1	
BAV00014	Bart schotel koffie/cappuccino 13,4	
BAV00015	Beans Brazilian Dark	

The **Warranty** indicator determines whether there is warranty for the part that was selected. This is usually set by the Service manager. If the item is warranted, the customer will not be invoiced for the item. The completed line for the service job can be deleted by pressing **Delete**.

By pressing the **Contracts** button under the **Extra information** section, an overview of all the available contracts with documents attached in Exact Synergy Enterprise will be displayed. This functionality can be used if the customer has questions about the contract or when you want to know of contracts that are currently active. The **History** button provides information on the service history of the configuration for the current service job. The documents that are attached to the item that will be used for the configuration in Exact Synergy Enterprise can be viewed by pressing **Documents**. Technical documents that will be viewed by the engineer can also be attached to the items.

Using the timer functionality

To easily realize the service time used, the **Start timer** button is available. If the button is pressed, the timer will start, and the start and end time and hours spent will be defined for the main hour line of the service job, or when the service job is realized by pressing the **Realize** button.

Realizing service jobs

Once the service job is completed, whereby the quantities have been updated, hour and material items in the individual lines have been defined, or new lines for the hours or materials have been added, the service job can be realized by pressing the **Realize** button.

The **Realize** button indicates that the lines are realized. You have the option to start working on the next service job for the configuration for the customer, or you can ask the customer to sign the service job by pressing the **Sign** button.

Once the **Sign** button is pressed, the realized service job[s] to be signed off can be selected. The selected service job[s] will be consolidated in a view whereby the customer can view and sign.

Back

Sign Service Slips

Description of the job 1

9:30 - 11:00

13-08-2012

Configuration + Location

Address

Postal code

City

Materials used:

2 x Material 1 FWJ44

6 x Material 2 JFLL44

1 x Material serialnumber GKKD333-2

Description of the job 2

11:30 - 13:00

13-08-2012

Configuration + Location

Address

Postal code

City

Materials used:

5 x Material 3 HGGG-35

2 x Material 4 KKJF456-1

Service remarks

Duis aliquet egestas purus in blandit. Curabitur vulputate, ligula lacinia scelerisque tempor, lacus lacus ornare ante, ac egestas

These are the same remarks found in the service slip 'Remarks > Service remarks'

Please sign here

Email

Send to office

The customer has to sign the service job on the **Sign Service Slips** screen (at the bottom of the screen). Comments can also be added at **Service remarks** which will be sent with the signed overview document to Exact Synergy Enterprise if the **Send to office** button is pressed. If the **Email** button is pressed, a copy of the signed overview document will be emailed to the customer once the signature document is stored in Exact Synergy Enterprise.

Note:

The latest version of the Field service mobile application, version 1.0, is able work with the latest Exact products. You can download it directly to your iPad from the Apple store website.

The following prerequisites are required to use the latest Field service mobile application:

- Exact Globe Next product update 407 with the latest update (available only after February 7, 2014), or higher is installed.
- Exact Synergy Enterprise product update 252 with the latest update (available only after February 7, 2014), or higher is installed.
- The Service management module is installed.
- The Field service mobile application version 1.0 is installed.
- You must have at least one of the Professional, Service management, Service planner, or Service manager role.

For more information, see Getting started with Field Service App [Doc ID: 24.779.435] in Exact Synergy Enterprise.

The screenshot shows the 'Service Management' screen of a mobile application. At the top, there is a blue header bar with a 'Back' button on the left, the title 'Service Management' in the center, and a 'Done (1)' button on the right. Below the header, a grey bar indicates 'Pending signature'. The main content area lists two service jobs, each with a circular status indicator and the address 'Hoofdstraat 45, 3496 HE, Amsterdam'.

Status	Service Job	Address
<input checked="" type="radio"/>	Coffee machine jammed	Hoofdstraat 45 3496 HE Amsterdam
<input type="radio"/>	Coffee taste is off	Hoofdstraat 45 3496 HE Amsterdam

Chapter 15

Migrating from Field Service to Service Management

15. MIGRATING FROM FIELD SERVICE TO SERVICE MANAGEMENT

15.1 MIGRATING MASTER DATA

Exact Synergy Enterprise will migrate all the data stored in the requests once the migration process is executed. However, since the field service solution is customized (customized-solution) and is not a part of the Exact Synergy Enterprise (ASP) product, the data stored in the contracts will not be automatically migrated.

In the Exact Synergy Enterprise service management solution, two XML import and export functionalities are available, such as ServiceContracts and ServiceConfigurations. These XML functionalities can be used to import data from the field service database, and service contracts and configurations can be created based on the existing field service contracts. However, before the data can be imported, an XML import file must be created based on the field service contracts. This is a complex, feature-dependent, and version-dependent process that requires an understanding of the underlying database structure and XML manipulation tools. The actual conversion is performed by the consultants.

Tip:

Contact the reseller or Exact for more information.

Using the field service history as an archive in the service management solution

The existing field service history can be retained and it can be used as a read-only history archive. However, customized reports are required for the existing data of the field service.

Tip:

Contact Exact for more information.

15.2 MIGRATING FROM THIRD PARTY SERVICE MANAGEMENT SOLUTION TO SERVICE MANAGEMENT

In the Exact Synergy Enterprise service management solution, there are three XML import and export functionalities, such as ServiceContracts, ServiceConfigurations, and Itemnumbers. These XML functionalities can be used to import data from any third party system, and service contracts, service configurations, and item serial numbers can be created based on the existing data in the third party system. Before the data can be imported, an XML import file on the third party system must be created. This is a complex, product-dependent, and version-dependent process that requires an understanding of the underlying database structure and XML manipulation tools. The actual conversion is performed by the consultants.

Tip:

Contact the reseller or Exact for more information.



Appendix A

Product Update Changes

APPENDIX A – PRODUCT UPDATE CHANGES

Product Update	Chapter
251	4.2, 4.2.1, 5.1, 5.2.1, 6.2, 7.1, 7.4, 7.6, 7.7, 8.0, 8.2, 9.1, 9.3, 11.0
252	5.2.1, 8.4, 9.1
253	4.1, 4.2.1, 5, 8, 8.2, 14
254	5.2.1, 8, 8.4

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