

Exact Synergy

User Guide

Service Management

258

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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.

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.

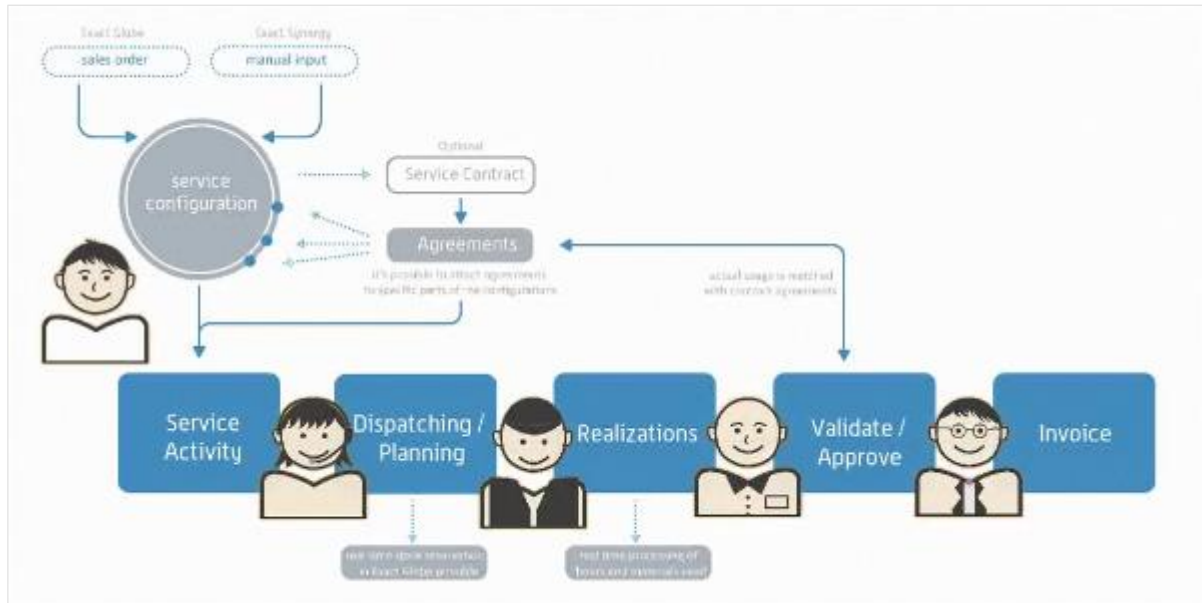
This will give the user a clear overview, and all the information required, with the possibility to work efficiently and quickly.

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.

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 *Prerequisites - Exact Integration*.

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.

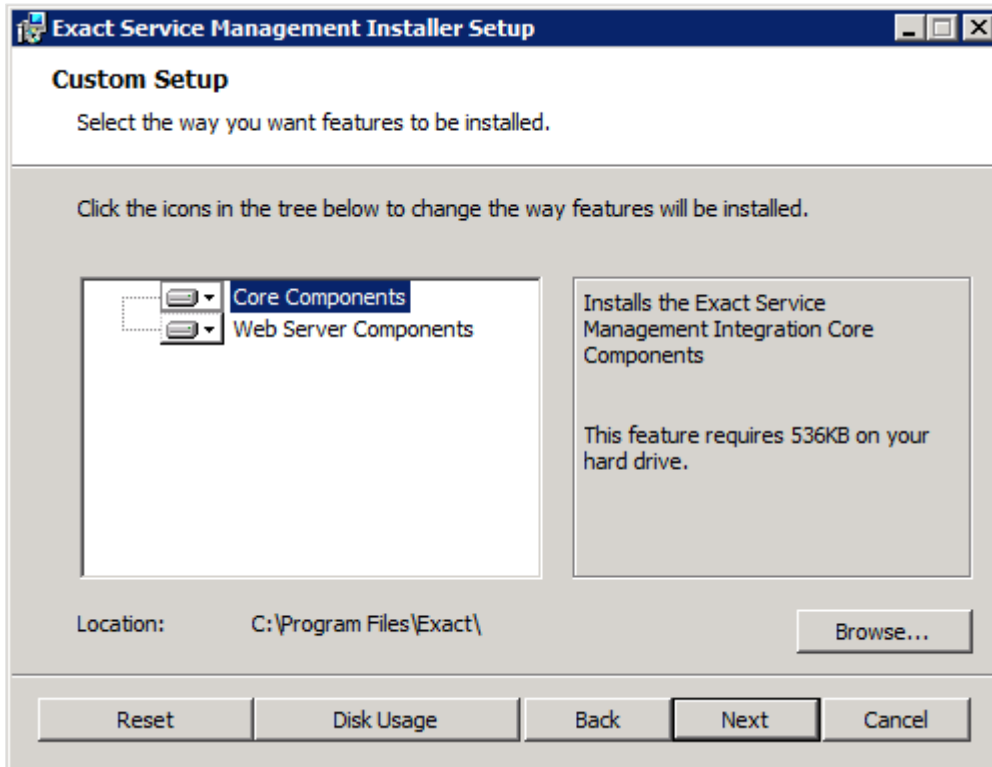
Note:

Select the required product update (preferably the latest) 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.



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

HRM: Division - 000, Exact Holding N.V. ★ ⓘ

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Modified by Mandy Chau Sook Mei 24-08-2015 10:21

<p>General</p> <p>Code 000 Name Exact Holding N.V. Country Netherlands Default <input type="checkbox"/> Tax number NL802511612B01 Website Start date / End date 03-02-1987 Cost center Currency Euro Security level 10</p> <p>Financial reporting</p> <p>Reporting entity <input checked="" type="checkbox"/> Presentation currency Euro CTA G/L 0100 - Goodwill</p> <p>Groups</p> <p>Group Other League Not Applicable Market Other Statutory Report Fiscal Unity External Reporting Unknown</p> <div style="display: flex; flex-wrap: wrap;"> <div style="width: 33%;"> <p>Cost centers</p> <p>Cost units</p> <p>People</p> <p>Reports</p> <p>Documents</p> <p>Projects</p> <p>Opportunities</p> </div> <div style="width: 33%;"> <p>Accounts</p> <p>Items</p> <p>Transactions</p> <p>Roles</p> <p>Payroll</p> <p>Schedule</p> </div> <div style="width: 33%;"> <p>Assets</p> <p>Shareholders</p> <p>Divisions</p> <p>Chart of accounts</p> <p>Public holidays</p> <p>Budgets</p> </div> </div>	<p>Address</p> <p>Account Exact Holding N.V. Address Poortweg 6</p> <p>Zip code / City 2612 PA Phone / Fax +31(0)15-2613714 Title / Contact DHR E-mail test@test.com Country / State Netherlands</p> <p>Delft +31(0)15-2625461 Rajesh Patel Zuid-Holland</p> <p>HRM</p> <p>Absence: Expiry date Log: Effective date <input checked="" type="checkbox"/></p> <p>Schedule</p> <p>Update: FTE <input type="checkbox"/> Generate: MRS <input type="checkbox"/></p> <p>Entitlement</p> <p>Calculation method In hours, based on calendar days</p> <p>Vacancy</p> <p>Request type</p> <p>Applicant</p> <p>Request type</p> <table border="1"> <tr> <td>Application phase</td> <td>1.</td> <td>2.</td> </tr> <tr> <td></td> <td>3.</td> <td>4.</td> </tr> <tr> <td></td> <td>5.</td> <td>6.</td> </tr> <tr> <td></td> <td>7.</td> <td>8.</td> </tr> <tr> <td></td> <td>9.</td> <td>10.</td> </tr> </table> <p>Back office</p> <p>Exchange: Mailbox User-defined mailbox server Server: Mailbox NL000MSX01 Type Exact Globe 2000/Exact Globe Next Database: IP Address (Server) NL000NT17 Database: Name 000</p>	Application phase	1.	2.		3.	4.		5.	6.		7.	8.		9.	10.
Application phase	1.	2.														
	3.	4.														
	5.	6.														
	7.	8.														
	9.	10.														

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

System: Back office connection 📄 🖨️ ★ ⓘ

[Close](#) [Save](#)

Setting

MAC address

Division	Description	Application server (Exact Globe Next)	Database path (Exact Globe Next)	Fixed backoffice credentials	Back office (User name)
000	Exact Holding N.V.	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
001	Exact Software Nederland B.V.	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>

10. Define the front office settings in Exact Globe Next at the **Web address** field via Modules → 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.

11. 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.

12. 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 Modules → 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

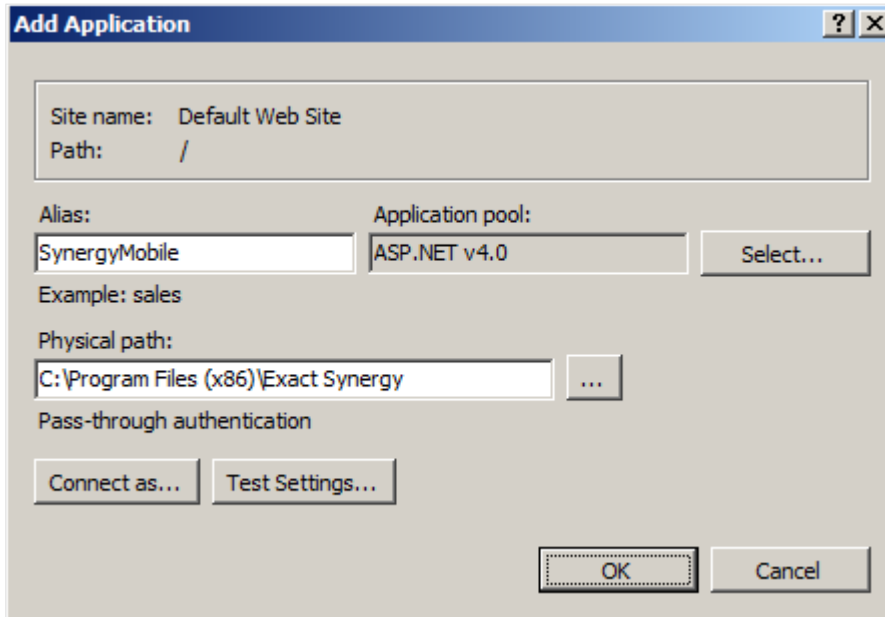
A second Exact Synergy Enterprise website in the internet information server must be created to split the internet related incoming traffic with basic authentication from the internal network traffic with NT authentication. However, if you already have a website with only the **Basic authentication**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

To create a basic authentication website:

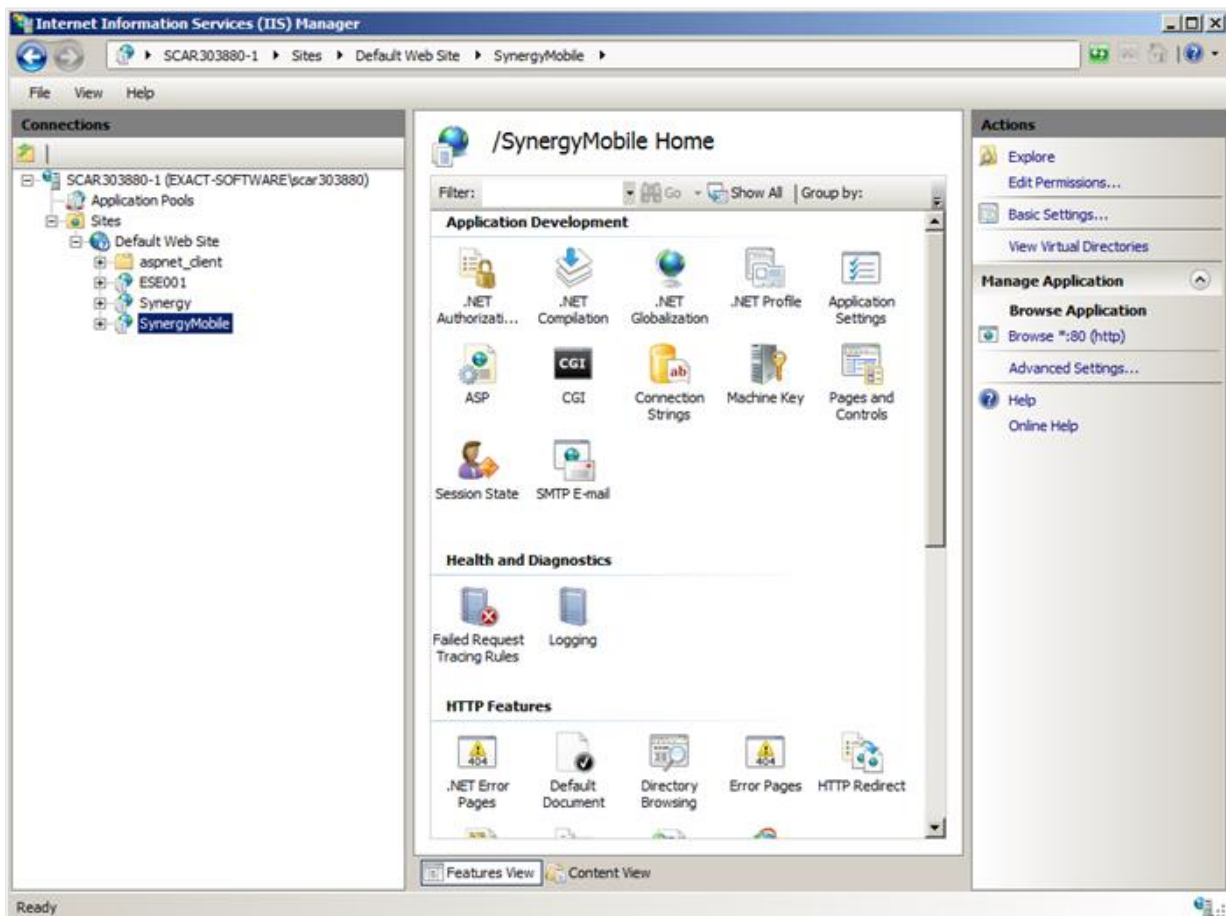
1. Go to the **Internet Information Services (IIS) Manager** screen in the server.
2. Select the current default website (or the website that the server is using).
3. Right-click the mouse.



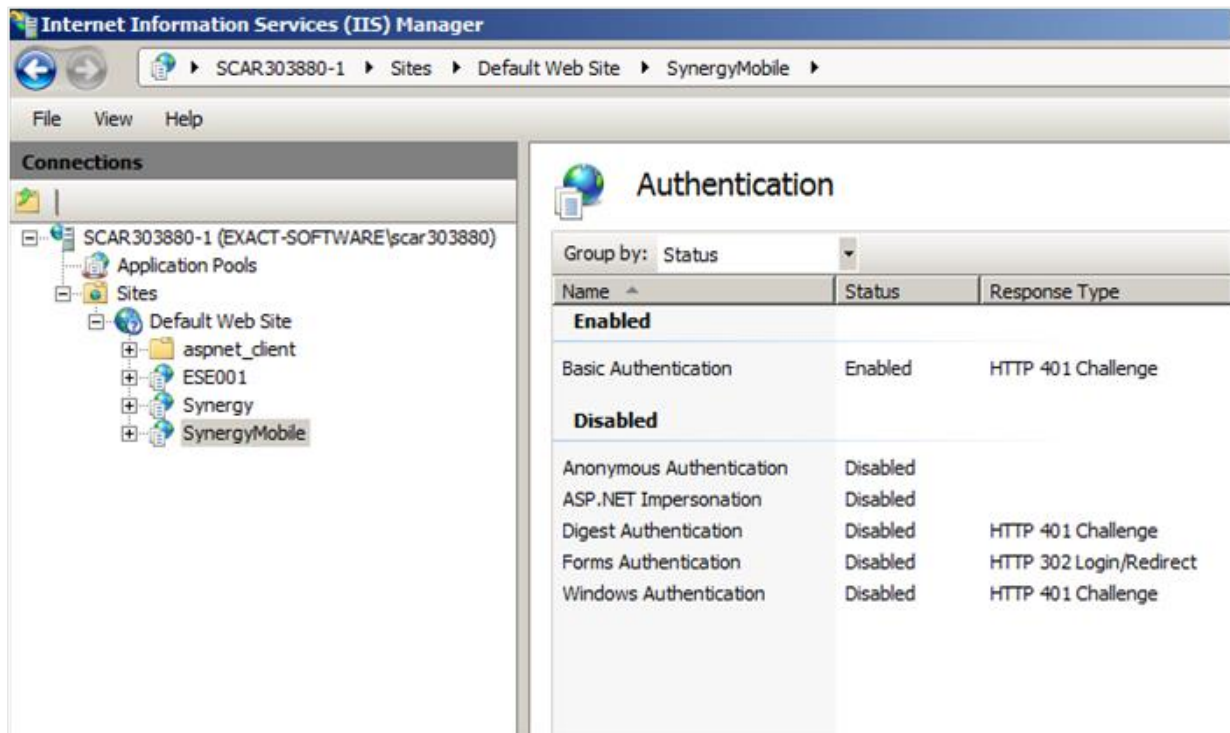
4. Select **Add Application**. The following screen will be displayed:



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**.



9. 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 Enterprise **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.

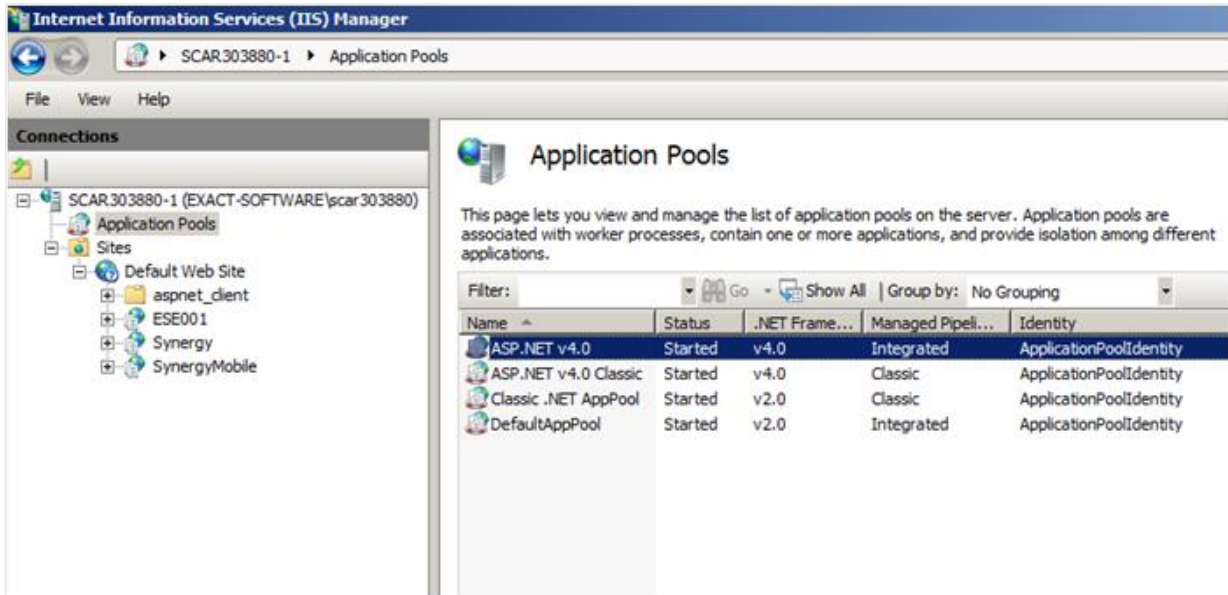
Installation of Windows Communication Foundation 5.0

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>.

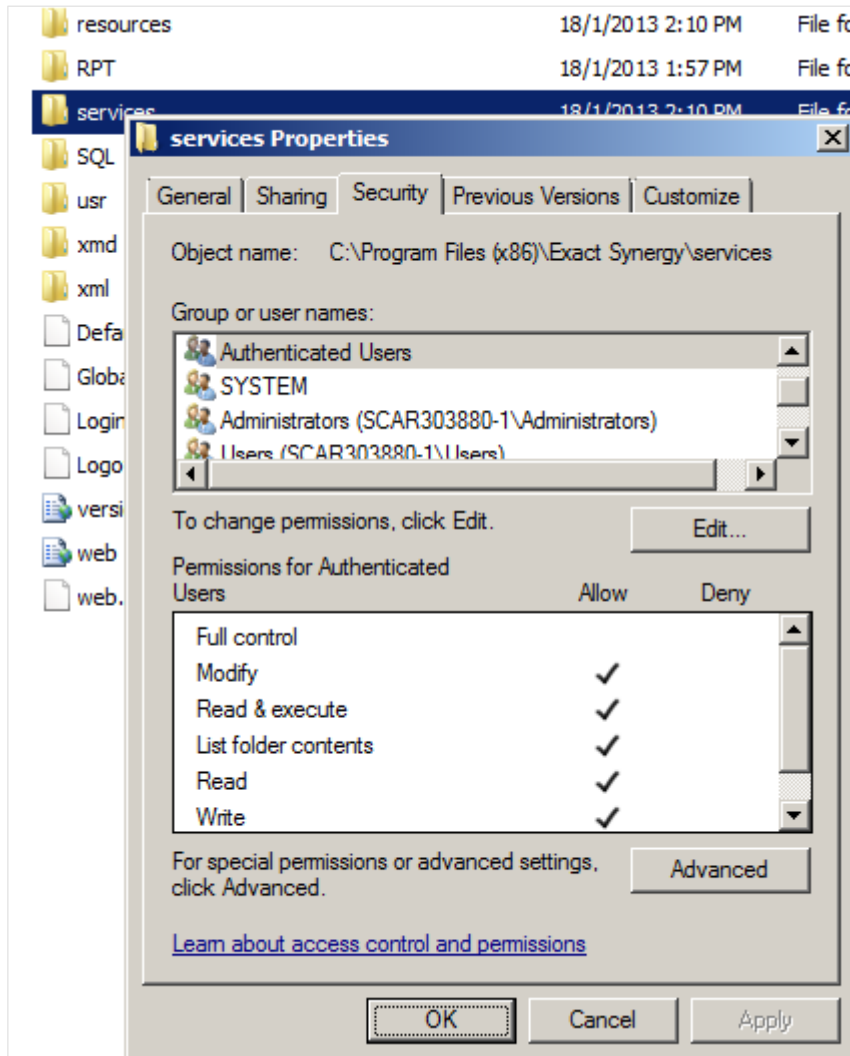
Ensure REST protocol is supported by the website

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.

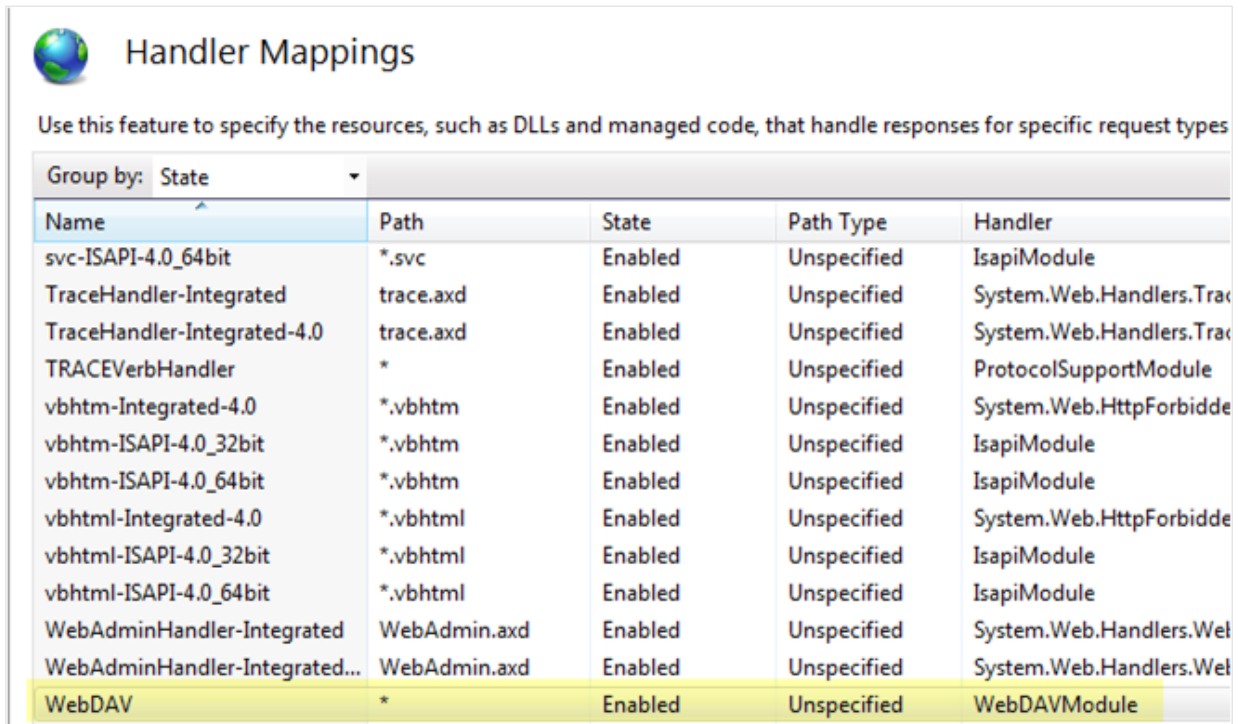
The Exact Synergy Enterprise server must be verified if the employees are going to use the field service solution, especially the field service iPad application. The application pool that the website is running on must either have the **NetworkService** identity, **ApplicationPoolIdentity**, or a specific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



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

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
WebAdminHandler-Integrated	WebAdmin.axd	Enabled	Unspecified	System.Web.Handlers.WebAdminHandler
WebAdminHandler-Integrated...	WebAdmin.axd	Enabled	Unspecified	System.Web.Handlers.WebAdminHandler
WebDAV	*	Enabled	Unspecified	WebDAVModule

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

Close Edit Create letter Create email vCard

Created by Coert Hagestein 06-03-2000 15:10
Modified by Felicia Teo Poh Eng 19-12-2013 10:12

Out of office

Gerben Talsma - 54

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Accounts Calendar Documents
Documents (Recent) Items Planning
Projects Dossier Transactions
Workflow Quotations Reports

General

Status Active (25 Years 4 Months), 1.00 FTE
Time 29-10-2015 07:10
Action: Last 18-02-2014 11:37 (618 Days)
Physical location Zwolle - Netherlands
Contractual location Zwolle - Netherlands
Room
Outlook Web Access Outlook Web Access

Organization

Manager 2893 — Ronald Everts
Assistant
Subordinates
Security level 12
Job group Support
Job activity Customer Support
Group delft

Personal

Nationality / Language Netherlands NL — Dutch
First name / Initials Gerben G.
Middle name
Last name Talsma
Maiden name
Place of birth
Date of birth 01-01-1970
Marital status Single
Marital status date
Address / Number Map Route
Address 2
City / State Overijssel
Country Netherlands
Home phone
Mobile
Home e-mail

Roles

Role	Level
Customer manager	Division
Hour entry	Division
Project manager	Division
Professional	Corporate
Enabling add-on solutions	Corporate
Project administration	Project
Hour planning	Division
Support	Group
Sales View opportunity cards	Group

Add

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.

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 (Doc ID: 15.419.265)* and *Overview of roles (Doc ID: 15.112.603)* 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 Modules → Service management → Setup → Settings → Settings. The following page will be displayed:

Service: Settings

Criteria

Division [Exact Asia Development](#)

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
- Detailed planning
- Compressed planning
- Service contract
- Invoice details attachment
- Mobile service report
- Mobile service report with signature

Document printing: Create Document Type

- Service slip [Service slip](#)
- Detailed planning [Service Planning](#)
- Compressed planning [Service Planning](#)
- Service contract [Service contract](#)
- Service details attachment [Service Invoicing](#)

Invoice items for agreement types

- Parent [AS T&B 1 — AS T&B Item 1](#)
- Text [AS T&B 1 — AS T&B Item 1](#)
- Response time [AS T&B 1 — AS T&B Item 1](#)
- Preventive maintenance [AS T&B 1 — AS T&B Item 1](#)
- Additional part / hour [AS T&B 1 — AS T&B Item 1](#)
- Parts / Hours [AS T&B 1 — AS T&B Item 1](#)
- Discount [AS T&B 1 — AS T&B Item 1](#)
- Discount on agreement [AS T&B 1 — AS T&B Item 1](#)

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.
- **Mobile service report** — This report is used for the mobile services.
- **Mobile service report with signature** — This report is used for the mobile services with signature whereby this report is used in the **Field Service** offline application to enable service engineers to sign off from work in the offline mode and have the report generated on the Exact Synergy Enterprise server that will include the signature on the report.

Document printing: Create Document Type 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 fractals.

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.

Contract settings section

This section allows you to define the settings for the contract such as:

- **Mandatory selection code** — This field allows you to specify whether you want the selection code to be mandatory at **Selection code** on the **Service: Contracts** page.
- **Show agreement link tree by filter** — This field allows you to specify whether you want the search criteria to be displayed on the **Agreement links** page. If **Yes** is selected, the **Items** and **Serial number** fields, and **Show: Selected** check box will be displayed.

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 indexation 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.

Templates section

This section contains the template that allows you to search for specific items.

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 Modules → Service management → Setup → General → Problem codes. The following page will be displayed:

Service: Problem codes

Close Refresh New Delete

Criteria

Division 092 Exact Software Deutschland GmbH (merged)

Page size 15 Show

Code	Description
P001	Fix machine
P002	Broken pump

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

Service: Problem codes - New

Close Save Save + New

Created by Jo-Anna Goh Li Ping 29-10-2015 14:17

General

Division 092 - Exact Software Deutschland GmbH (merged)

Code [Warning icon]

Description [Warning icon]

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

Service: Problem codes - P001, Fix machine Edit

Created by Jo-Anna Goh Li Ping 22-01-2013 16:04
Modified by Jo-Anna Goh Li Ping 22-01-2013 16:04

Close Save Delete

General

Division 092 — Exact Software Deutschland GmbH (merged)
Code P001
Description Fix machine

Remarks

Timestamp Full screen

Linked solutions Add

Code	Description
SL001	Change filter

3. Make the necessary changes. On this page, you can also add solutions that you have created at Modules → 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 **X**.
4. Click **Save**.

Note:

The **Code** field cannot be edited.

To delete problem codes:

1. Go to Modules → 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**.

To delete problem codes in bulk:

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

Service: Problem codes

Close Refresh New Delete

Criteria

Division 092 — Exact Software Deutschland GmbH (merged)

Page size 15 Show

Code	Description
<input type="checkbox"/> P001	Fix machine
<input type="checkbox"/> P002	Broken pump

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**.

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 Modules → 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 Modules → Service management → Setup → General → Solution codes. The following page will be displayed:

2. Select a solution code 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 problems that you have created at Modules → 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 Modules → 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 Modules → 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 Modules → Service management → Setup → General → Activity types.
2. Click **New**. The following page will be displayed:

The screenshot shows the 'Service: Activity types - New' form. The 'General' section contains the following fields:

- Division: 092 -- Exact Software Deutschland GmbH (merged)
- Code: [input field with warning icon]
- Description: [input field with warning icon]
- Defaults: Hour planning
 - Hours required: [input field]
 - Hour item: [input field with search icon]
 - Resource: [input field with search icon]

The 'Remarks' section is a large text area. At the bottom right of the form are 'Timestamp' and 'Full screen' buttons.

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 Modules → Service management → Setup → General → Activity types. The following page will be displayed:

Service: Activity types

Close Refresh New Delete

Criteria

Division 092 Exact Software Deutschland GmbH (merged)

Page size 15 Show

Code	Description
AT003	Water holder

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 Modules → 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 Modules → 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 Modules → Service management → Setup → Contracts → Response time defaults.
2. Click **New**. The following page will be displayed:

Service: Response time defaults - New

Close Save Save + New

General

Division 092 — Exact Software Deutschland GmbH (merged)

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 Modules → Service management → Setup → Contracts → Response time defaults. The following page will be displayed:

Service: Response time defaults

Close Refresh New Delete

Criteria

Division 092 x Exact Software Deutschland GmbH (merged)

Page size 15 Show

<input type="checkbox"/>	Time ▲▼	Unit ▼
<input type="checkbox"/>	2	Hours

2. Select a response time that you want to edit under the **Time** column.
3. Make the necessary change(s).
4. Click **Save**.

To delete response time:

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

Service: Contract types - New

Close Save Save + New

General

Division 092 — Exact Software Deutschland GmbH (merged)

Type ⚠

Description ⚠

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 edit contract types:

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

2. Select a contract type that you want to edit under the **Type** column.
3. Make the change(s).
4. Click **Save**.

Note:

The code of the contract type at **Type** cannot be edited.

To delete contract types:

1. Go to Modules → 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 Modules → 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 - AG001, Service

Close
Save
Delete

★
?

Created by Jo-Anna Goh Li Ping 22-01-2013 16:08
Modified by Jo-Anna Goh Li Ping 22-01-2013 16:08

General

Division: 092 — Exact Software Deutschland GmbH (merged)
 Code: AG001
 Description: ×
 Active:
 Maintenance type:

Invoicing

Cost center: 🔍
 Cost unit: 🔍
 Invoice:
 Invoice rate:

Indexation

Indexation status:
 Indexation month:
 Indexation: Type:
 Indexation: Percentage: %

Agreements Add

Line order	Agreement type	Description	Linked agreements
1	Text	Service agreement	
2	Discount	Service agreement discount	

To create agreement sets:

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

Service: Agreement sets - New ☆ ⓘ
 Created by Jo-Anna Goh Li Ping 29-10-2015 14:36

[Close](#) [Save](#) [Save + New](#)

General

Division: 092 — Exact Software Deutschland GmbH (merged)

Code: ⚠

Description: ⚠

Active:

Maintenance type:

Invoicing

Cost center: 🔍

Cost unit: 🔍

Invoice:

Invoice rate:

Indexation

Indexation status:

Indexation month:

Indexation: Type:

Indexation: Percentage: %

Agreements

Line order	Agreement type	Description	Linked agreements
------------	----------------	-------------	-------------------

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 Modules → Service management → Setup → Contracts → Agreement sets. The following page will be displayed:

2. Select an agreement set 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 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 Modules → 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 Modules → 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 Modules → Service management → Setup → Contracts → Contract templates.
2. Click **New**. The following page will be displayed:

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:

All fields with the "!" icon are mandatory.

To edit contract templates:

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

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 Modules → Service management → Setup → Contracts → Agreement sets by clicking **Add** in the **Agreement sets** section.
4. Click **Save**.

To delete contract templates:

1. Go to Modules → 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 Modules → 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**.

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.

Service: Configuration: CONFIG001 - Imported coffee
🔧 ☆ ?

Close Edit

General

Division [036 — Exact Asia Development](#)
 Code [CONFIG001](#)
 Description [Imported coffee](#)
 Blocked
 Location [Malaysia](#)
 Engineer [Joelle Chong](#)
 Project

Account

Account [1582009033243 — 1213 CL 54](#)
 Service address [Delivery — Bouwbedrijf Abco](#)

Remarks

📁 Documents
📊 Reports
📄 Service contracts

☰ Service activities

Free fields

Start date

Service configuration items Add

Item code	Description	Quantity	Serial number	Start date	End date
COFF	Coffee	10		27-07-2012	

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.

Service: Configurations - Part: COFF - Coffee ?

Created by Jo-Anna Goh Li Ping 27-07-2012 15:36 Configuration header: CONFIG001 - Imported coffee
 Modified by Jo-Anna Goh Li Ping 27-07-2012 15:36

Parent

Item [COFF — Coffee](#)
 Serial number
 Quantity 10.00
 Start date 27-07-2012
 End date

Children

Item code	Description	Quantity	Serial number	Serial number Description	Start date	End date
COFF	Coffee	1			27-07-2012	

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

The screenshot shows the 'Service: Configuration' form. The 'General' section contains the following fields: Division (036), Code, Description, Blocked (checkbox), Location, Engineer, and Project. The 'Account' section contains Account and Service address fields. A 'Remarks' text area is located below the Account section. Below the form is a table for 'Service configuration items' with columns for Item code, Description, Quantity, Serial number, Start date, and End date. The table currently shows 'No data found.'

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 Modules → 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.

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

Service: Search - Configurations

Close Search New

Division 036 — Exact Asia Development

Page size 15 Show

Configuration	Item	Part	Serial number	Start date	End date	Account
CONFIG001	Imported coffee					1213 CL 54
Config01	Configuration 1					8eyes.net Inc
CONFIG1	Configuration 1					AS Customer 1
CONFIG2	Configuration 2					AS Customer 1
MachineConfiguration	Machine configuration					"14014" Taxi Ruf Bremen

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

Service: Configuration: CONFIG001 - Imported coffee

Close Edit

General

Division 036 — Exact Asia Development
Code CONFIG001
Description Imported coffee
Blocked
Location Malaysia
Engineer Joelle Chong
Project

Account
Account 1582009033243 — 1213 CL 54
Service address Delivery — Bouwbedrijf Abco

Remarks

Documents Reports Service contracts
Service activities


Free fields
Start date

Service configuration items Add

Item code	Description	Quantity	Serial number	Start date	End date
COFF	Coffee	10		27-07-2012	

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 Modules → 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 Modules → 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**.

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

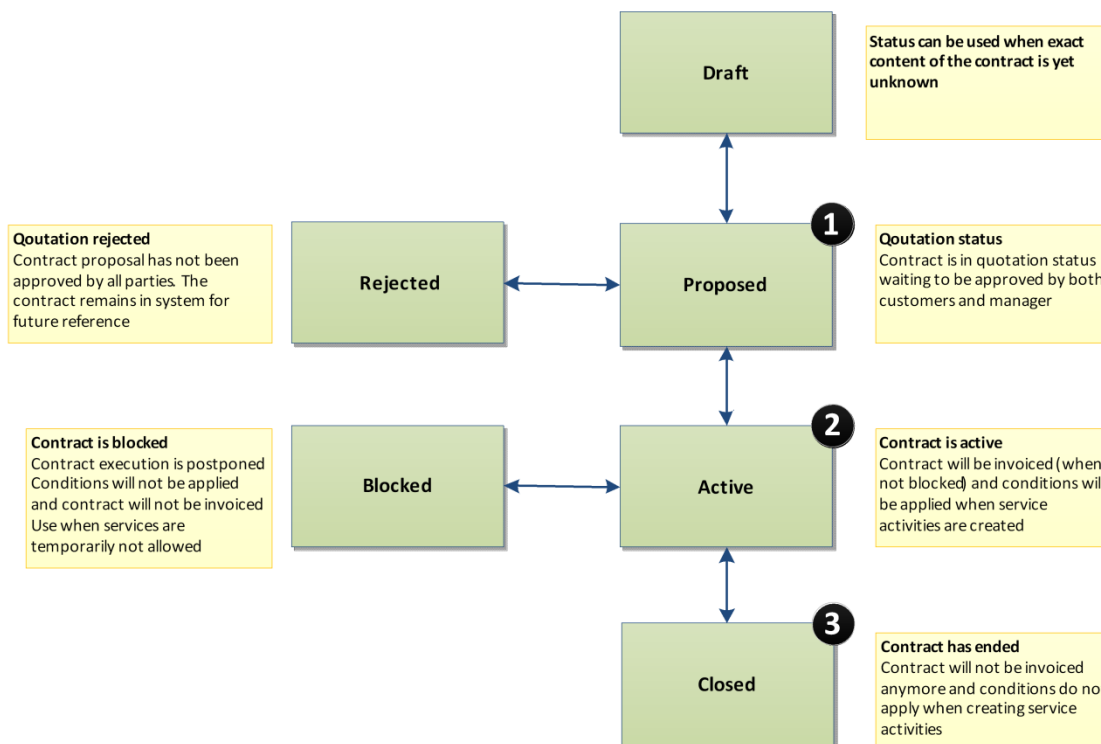
The account defined in this section is the legal entity that has signed the service contract. Since this account might be used for invoicing, the **Invoice account** field will be pre-filled with this account. Select a contact person for this account for future communications with this contact person 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.



Indexation section

The following fields can be defined in this section:

- **Indexation status** — The service contract can be indexed. If **Blocked** is selected, the service contract will not be indexed. Select **Not blocked** to index the service contract. By default, **Not blocked** is displayed.
- **Indexation month** — You can select a month for the indexation.
- **Indexation: Type** — The type of index can be selected for the service contract. Select **Index with percentage** or **Index with amount**. By default, **Index with percentage** is displayed.
- **Indexation: Percentage** — The percentage can be defined for the index. This field is mandatory.

Note:

This field is available only if **Index with percentage** is selected at **Indexation: Type**.

- **Indexation: Amount** — The amount can be defined for the index. This field is mandatory.
- **Note:** This field is available only if **Index with amount** is selected at **Indexation: Type**.
- **Last (Indexation date)** — The date the service contract was last indexed will be displayed. **Never** will be displayed if the service contract has never been indexed. However, if one service agreement is indexed, the indexation date will be displayed. If there are two or more service agreements with different indexation dates, the service agreement that was last indexed will be displayed. For example, service agreement A (first index) was indexed on March 3, 2015 and service agreement B (second index) was indexed on February 28, 2015. “28-02-2015” will be displayed on the service contract. This field cannot be edited.

Contract Invoicing section

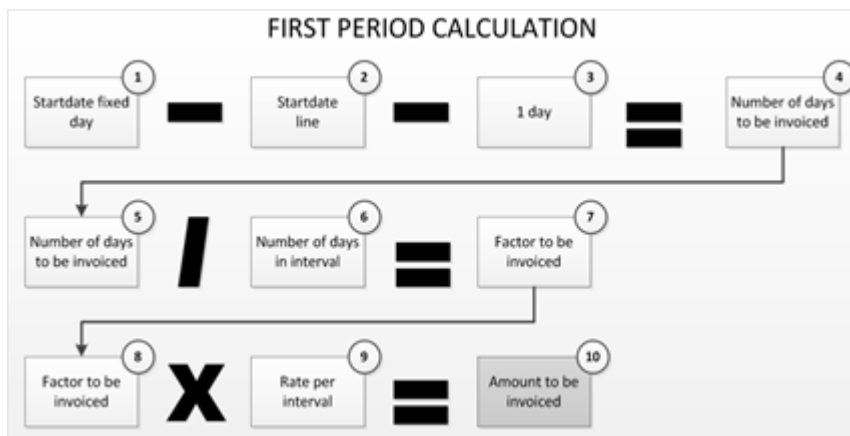
A contract will be invoiced if the status of the contract is active and invoice due date is within the start and end dates of the contract and the last invoice date is before the invoice due date, and the status of the invoice is not blocked. The following fields can be defined in this section:

- **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.
- **Payment condition** — You can define a payment condition for the service contract. The payment conditions are derived from Exact Globe Next at Modules → System → General → Countries → Payment conditions.
- **Selection code** — The selection code can be defined for the service contract. This field depends on the selection at Mandatory selection code on the Service: Settings page to determine whether the field is mandatory or not mandatory. The selection codes are displayed based on the contract division.
- **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.
- **Invoice line sorting** — Default sorting or According to line number can be selected for the service contract. If According to line number is selected, the sorting of the agreements will be based on the line number (the Line no. column under the Agreements section) when the invoice proposal is generated.

- **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.

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.

Expired agreements section

This section displays the agreements that have expired but invoiced (the end date of the agreement is after the current date but it has been invoiced).

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.

Agreement

Close
Save
Agreement links

Created by Jo-Anna Goh Li Ping 18-10-2012 15:43 Contract number: 1582009033294:0001 Contract status: Active
 Modified by Jo-Anna Goh Li Ping 05-05-2015 13:18

Agreement

Line no.

Description

Agreement type

Maintenance type

Start date

End date

Response time Hours

Parent agreement

Invoicing

Cost center

Cost unit

Invoiced until

Invoice

Invoice rate Malaysian Ringgit

Total invoice amount next period 0.00 Malaysian Ringgit / Yearly

Indexation

Indexation status

Indexation month

Indexation: Type

Indexation: Percentage %

Last (Indexation date) Never

Free fields

Start date

- **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

Close
Save
Agreement links

Created by Jo-Anna Goh Li Ping 18-10-2012 15:43 Contract number: 1582009033294:0001 Contract status: Active
 Modified by Jo-Anna Goh Li Ping 05-05-2015 13:18

☆
?

Agreement

Line no.

Description

Agreement type

Start date

End date

Parent agreement

Invoicing

Cost center

Cost unit

Invoice date

Invoiced

Invoice frequency

Invoice

Discount: Type

Discount: Amount Malaysian Ringgit

Total invoice amount next period

Indexation

Indexation status

Indexation month

Indexation: Type

Indexation: Percentage %

Last (Indexation date)

Free fields

Start date

- 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.

Agreement ☆ ?

Created by Jo-Anna Goh Li Ping 18-10-2012 15:43 Contract number: 1582009033294:0001 Contract status: Active
 Modified by Jo-Anna Goh Li Ping 05-05-2015 13:18

Agreement

Line no.
 Description
 Agreement type
 Start date
 End date
 Parent agreement
 PM type
 Time interval Days
 Activity start time
 Activity duration Hours
 Start next request

Invoicing

Cost center
 Cost unit
 Invoiced until
 Invoice
 Invoice rate Malaysian Ringgit
 Total invoice amount next period 0.00 Malaysian Ringgit / Yearly

Indexation

Indexation status
 Indexation month
 Indexation: Type
 Indexation: Percentage %
 Last (Indexation date) Never

Free fields

Start date

- 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 ☆ ?

Created by Jo-Anna Goh Li Ping 18-10-2012 15:43 Contract number: 1582009033294:0001 Contract status: Active
 Modified by Jo-Anna Goh Li Ping 05-05-2015 13:18

Agreement

Line no.
 Description
 Agreement type
 Maintenance type
 Start date
 End date
 Parent agreement
 Type
 Part / Hour
 Quantity

Invoicing

Cost center
 Cost unit
 Invoiced until
 Invoice
 Invoice rate Malaysian Ringgit
 Total invoice amount next period 0.00 Malaysian Ringgit / Yearly

Indexation

Indexation status
 Indexation month
 Indexation: Type
 Indexation: Percentage %
 Last (Indexation date) Never

Free fields

Start date

- 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

★ ⓘ

Close Save Agreement links

Created by Jo-Anna Goh Li Ping 18-10-2012 15:43 Contract number: 1582009033294:0001 Contract status: Active
 Modified by Jo-Anna Goh Li Ping 05-05-2015 13:18

Agreement

Line no.

Description

Agreement type

Maintenance type

Start date

End date

Selection

Parent agreement

Include / Exclude

Discount percentage

Invoicing

Cost center

Cost unit

Invoiced until

Invoice

Invoice rate Malaysian Ringgit

Total invoice amount next period 0.00 Malaysian Ringgit / Yearly

Indexation

Indexation status

Indexation month

Indexation: Type

Indexation: Percentage %

Last (Indexation date) Never

Free fields

Start date

- Discount** – This agreement type allows you to define the discount for the agreement. The discount can be given based on a fixed amount or percentage.

Agreement

☆ ?

Close Save Agreement links

Created by Jo-Anna Goh Li Ping 18-10-2012 15:43 Contract number: 1582009033294:0001 Contract status: Active
 Modified by Jo-Anna Goh Li Ping 05-05-2015 13:18

Agreement

Line no.

Description

Agreement type

Start date

End date

Parent agreement

Invoicing

Cost center

Cost unit

Invoice date

Invoiced

Invoice frequency

Invoice

Discount Type

Discount Amount Malaysian Ringgit

Total invoice amount next period

Indexation

Indexation status

Indexation month

Indexation Type

Indexation Percentage %

Last (Indexation date)

Free fields

Start date

- **Discount on agreement** — This agreement allows you to define the discount for a particular agreement. All the agreements created can be selected except for the agreements created with **Agreement set**, **Discount**, and **Discount on agreement**. A discount on agreement can only have an agreement. The calculations are as follows:
 - Discount on agreement calculation
When generating invoice proposals, the system will always deduct the amount of the agreement that is linked to the **Discount on agreement** agreement type. After that, the overall amount with the **Discount on agreement** type will be deducted.
 - More than one discount on agreement linked to the agreement
When generating invoice proposals, if an agreement is linked to two or more discounts on agreement, the system will deduct the lowest percentage amount or fixed amount followed by the higher amount.

There are various combinations for the **Discount on agreement** type, such as the following:

 - Invoice frequency: Contract
Discount type: Fixed amount
 - Invoice frequency: Contract
Discount type: Percentage
 - Invoice frequency: Once-only
Discount type: Fixed amount
 - Invoice frequency: Once-only
Discount type: Percentage

Agreement

☆ ?

Close Save Agreement links

Created by Jo-Anna Goh Li Ping 18-10-2012 15:43 Contract number: 1582009033294:0001 Contract status: Active
 Modified by Jo-Anna Goh Li Ping 05-05-2015 13:18

Agreement

Line no.

Description

Agreement type

Start date

End date

Parent agreement

Invoicing

Cost center

Cost unit

Discount on agreement

Invoice date

Invoiced

Invoice frequency

Invoice

Discount: Type

Discount: Amount Malaysian Ringgit

Total invoice amount next period

Indexation

Indexation status

Indexation month

Indexation: Type

Indexation: Percentage %

Last (Indexation date) Never

Free fields

Start date

- 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.

Agreement

☆ ?

Close Save Agreement links

Created by Jo-Anna Goh Li Ping 18-10-2012 15:43 Contract number: 1582009033294:0001 Contract status: Active
 Modified by Jo-Anna Goh Li Ping 05-05-2015 13:18

Agreement

Line no.

Description

Agreement type

Maintenance type

Start date

End date

Document

Short description

Timestamp Full screen

Parent agreement

Invoicing

Cost center

Cost unit

Invoiced until

Invoice

Invoice rate Malaysian Ringgit

Total invoice amount next period 0.00 Malaysian Ringgit / Yearly

Indexation

Indexation status

Indexation month

Indexation: Type

Indexation: Percentage %

Last (Indexation date) Never

- **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

☆ ?

Close Save Agreement links

Created by Jo-Anna Goh Li Ping 18-10-2012 15:43 Contract number: 1582009033294-0001 Contract status: Active
 Modified by Jo-Anna Goh Li Ping 05-05-2015 13:18

Agreement

Line no.

Description

Agreement type ▼

Item 🔍 ⚠️

Quantity

Start date 📅

End date 📅

Short description

Price list

Parent agreement 🔍

Invoicing

Cost center 🔍

Cost unit 🔍

Invoiced until

Invoice

Invoice rate Malaysian Ringgit

Total invoice amount next period 0.00 Malaysian Ringgit / Yearly

Indexation

Indexation status

Indexation month

Indexation: Type

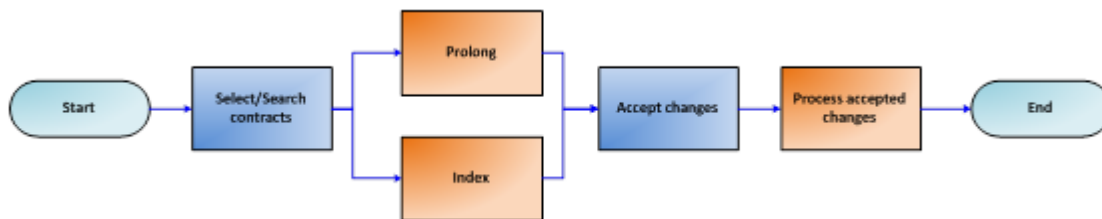
Indexation: Percentage %

Last (Indexation date) Never

Free fields

Start date

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.

Index: Service contracts

Close Show Reset Count Default

Criteria Division: 036 Exact Asia Development

Templates Private Save

Contract

Number Project Start date End date Type Template

Indexation month

Account Contract account Contact person

Invoicing Account (Contract) Account (Service activity)

Configurations Configuration

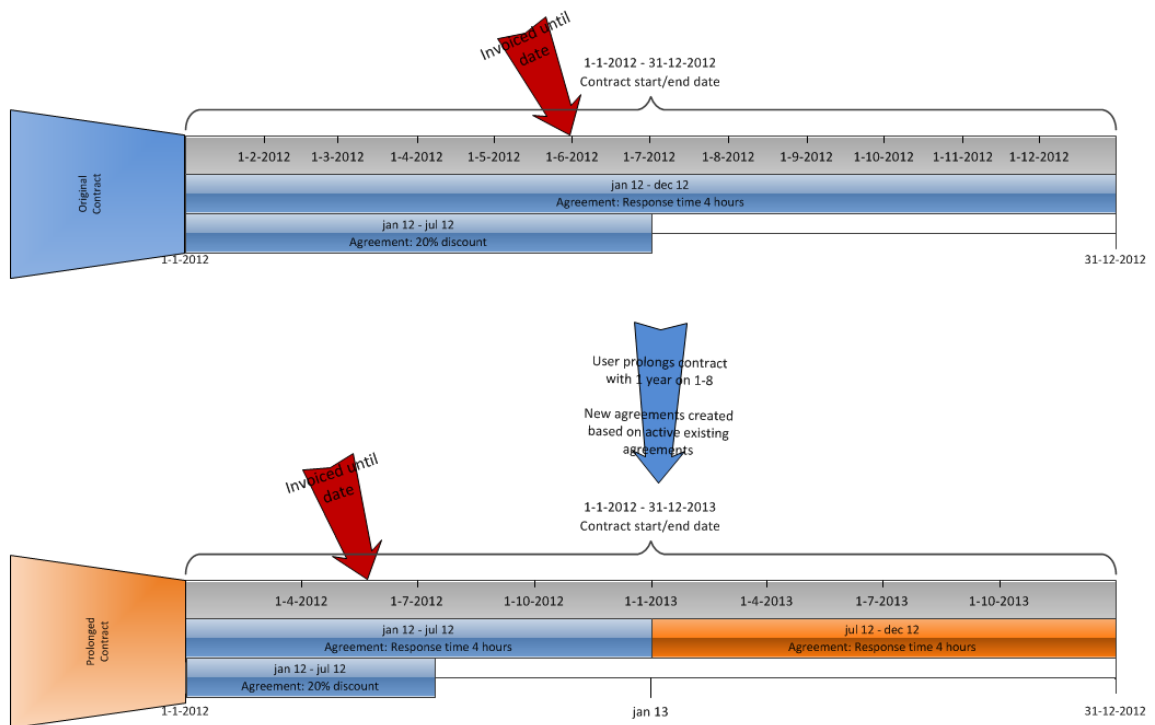
Free fields (Contract)

Agreement

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

Items Assortments

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.

Prolong: Service contracts

[Close](#) [Show](#) [Reset](#) [Count](#) [Default](#)

[Templates](#)
Private [Save](#)

Criteria
Division: 036 [Exact Asia Development](#)

Contract
Number: [Link](#) Type: [Link](#)
Project: [Link](#) Template: [Link](#)
Start date: -- -- -- -- [Calendar](#) End date: -- -- -- -- [Calendar](#)
Indexation month: [Dropdown](#) Last (Indexation date): -- -- -- -- [Calendar](#)
Currency: [Link](#)

Account
Contract account: [Link](#) Contact person: [Link](#)

Invoicing
Account (Contract): [Link](#) Account (Service activity): [Link](#)

Configurations
Configuration: [Link](#)

Agreement
Types: Discount Parent Text Response time Preventive maintenance Additional part / hour Parts / Hours Item Discount on agreement
Items: [Link](#) - [Link](#) Assortments: [Link](#) - [Link](#)

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

Service: Contracts - New, Proposed

Close Save Created by Jo-Anna Goh Li Ping 29-10-2015 15:14

Account

Division: 036 Exact Asia Development

Contract account: [Field]

Contact person: [Field]

Service address: [Field]

Contact person Key: [Field]

Contract Invoicing

Invoice account: [Field]

Invoicing status: Not blocked

Currency: EUR - Euro

Payment condition: [Field]

Selection code: [Field]

Invoice line grouping: No grouping

Invoice line sorting: Default sorting

Invoicing type: Start date (+) (invoicing interval (line))

Invoice frequency: Yearly

Invoiced until: [Field]

General

Template: [Field]

Contract number: [Field]

Project: [Field]

Contract type: [Field]

Cost center: [Field]

Cost unit: [Field]

Status: Proposed

Start date: 29-10-2015

End date: 28-10-2016

Last (Prolongation date): Never

Indexation

Start date: --

Indexation status: Not blocked

End Date: --

Indexation month: [Field]

Indexation Type: Index with percentage

Indexation Percentage: 0.00%

Last (Indexation date): Never

Documents

Reports

Service Invoicing

Your reference: [Field]

Invoice comments: [Field]

Invoice account 1: [Field]

Invoice account 2: [Field]

Invoice account 3: [Field]

Invoice account 4: [Field]

Invoice account 5: [Field]

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

Service contracts: Results

Close Search

Division 036 — Exact Asia Development
Status Draft, Proposed, Active, Closed, Rejected, Blocked

Contract number	Contract account	Contract status	Cost center	Cost unit	Template	Last (Prolongation date)	Contact person: Key	Invoice account 2	Invoice account 3	Invoice account
1582009033294:0001	AS Customer 1	Active	Management & Secretariat							

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

Service: Contracts - 1582009033294:0001, Active

Close Edit Agreement links Rates Contract documents

Created by Jo-Anna Goh Li Ping 18-10-2012 11:01
Modified by Christie Yap 05-05-2015 16:11

Account

Division 036 — Exact Asia Development
Contract account 1582009033294 — AS Customer 1
Contact person 2861161 — --
Service address 4756954 — 123
Contact person: Key

General

Template
Project
Contract type
Cost center 036GM010 — Management & Secretariat
Cost unit
Status Active
Start date 18-10-2012
End date 31-10-2070
Last (Prolongation date) Never

Indexation

Indexation status Not blocked
Indexation month
Indexation: Type Index with percentage
Indexation: Percentage 0.00 %
Last (Indexation date) Never

Configurations

Configuration item	Active agreement	Quantity	Serial number
CONFIG1 - Configuration 1			
CONFIG2 - Configuration 2			

Agreements

Line no.	Description	Agreement type	Linked agreements	Start date	End date
1	Agreement 1	Text		18-10-2012	17-10-2013

Contract Invoicing

Invoice account 1582009033294 — AS Customer 1
Invoicing status Not blocked
Currency MYR — Malaysian Ringgit
Payment condition
Selection code
Invoice line grouping No grouping
Invoice line sorting Default sorting
Invoicing type Start date (+) (invoicing interval (line))
Invoice frequency Yearly
Invoiced until

Documents Reports Service configuration
Service activities

Service Invoicing

Your reference
Invoice comments
Invoice account 1 1582009033294 — AS Customer 1
Invoice account 2
Invoice account 3
Invoice account 4
Invoice account 5

Add

5. Click **Close** to exit.

7.5 EDITING CONTRACTS

Service contracts can be edited.

To edit service contracts:

1. Go to Modules → 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 - 1582009033294:0001, Active 🔧 ☆ ⓘ

Created by Jo-Anna Goh Li Ping 18-10-2012 11:01
Modified by Christie Yap 05-05-2015 16:11

[Close](#) [Save](#)

Account	Contract Invoicing								
Division 036 — Exact Asia Development Contract account 1582009033294 — AS Customer 1 Contact person <input type="text" value="2861161"/> ↗ Service address <input type="text" value="4756954"/> ↗ 123 Contact person: <input type="text"/> ↗ Key <input type="text"/> ↗	Invoice account 1582009033294 — AS Customer 1 Invoicing status Not blocked ▼ Currency MYR — Malaysian Ringgit Payment condition <input type="text"/> ↗ Selection code <input type="text"/> ↗ Invoice line grouping No grouping ▼ Invoice line sorting Default sorting ▼ Invoicing type Start date (+) (invoicing interval (line)) ▼ Invoice frequency Yearly ▼ Invoiced until <input type="text"/>								
General Template <input type="text"/> Project <input type="text"/> Contract type <input type="text"/> Cost center 036GM010 — Management & Secretariat Cost unit <input type="text"/> Status Active ▼ Start date <input type="text" value="18-10-2012"/> 📅 End date <input type="text" value="31-10-2070"/> 📅 Last (Prolongation date) Never	<div style="display: flex; justify-content: space-between;"> Documents Reports Service configuration </div> <div style="display: flex; justify-content: space-between;"> Service activities </div>								
Indexation Indexation status Not blocked ▼ Indexation month <input type="text"/> ▼ Indexation: Type Index with percentage ▼ Indexation: Percentage <input type="text" value="0.00"/> % Last (Indexation date) Never	Service Invoicing Your reference <input type="text"/> Invoice comments <input type="text"/> Invoice account 1 1582009033294 — AS Customer 1 Invoice account 2 <input type="text"/> Invoice account 3 <input type="text"/> Invoice account 4 <input type="text"/> Invoice account 5 <input type="text"/>								
Configurations <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><input type="checkbox"/> CONFIG1 - Configuration 1</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>		Configuration item	Active agreement	Quantity	Serial number	<input type="checkbox"/> CONFIG1 - Configuration 1			
Configuration item	Active agreement	Quantity	Serial number						
<input type="checkbox"/> CONFIG1 - Configuration 1									

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 configurations or parts, and the invoicing will stop once the configuration part has ended.

Agreement links

Close
Show
Reset
Save

Items
Serial numbers
Show: Selected

		Agreement 1 Text
▶ CONFIG2	<input type="checkbox"/>	<input type="checkbox"/>
▶ CONFIG1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Page size

Show

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 invoice 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.

8. SERVICE ACTIVITIES

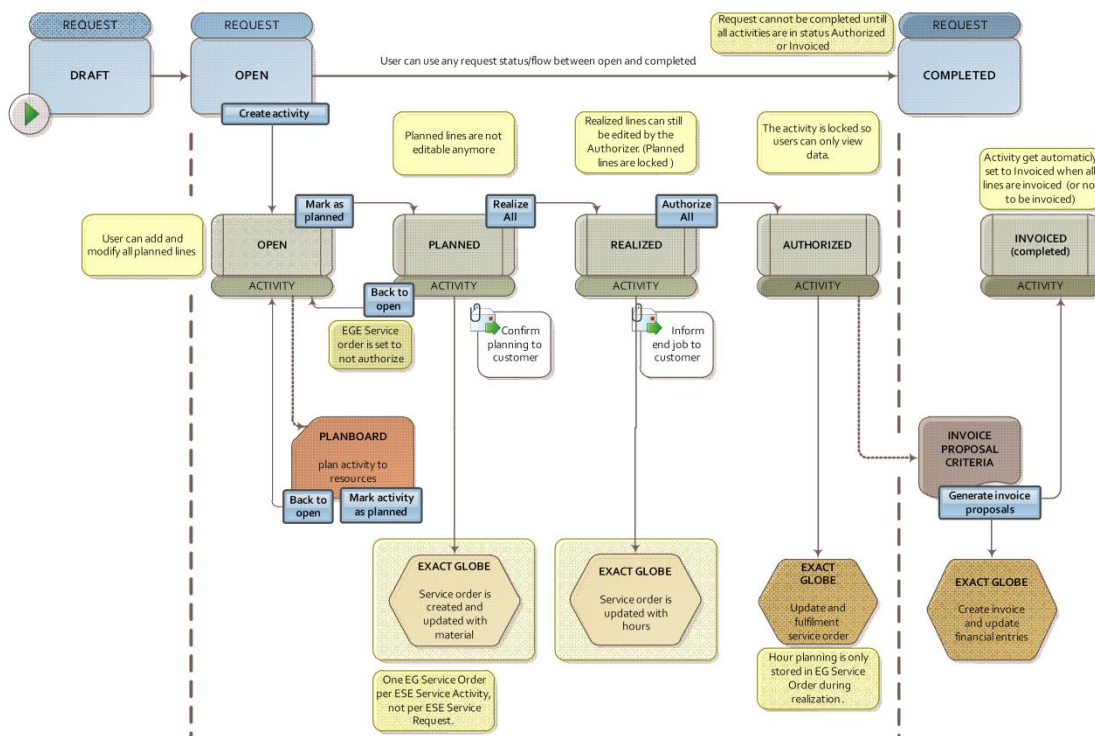
The service activity is used to register the whole process from entering the request until the invoicing. The service activity is an Exact Synergy Enterprise request with extra options. You can view the configurations of a customer, and choose the service that is required. In addition, you can create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

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 Modules → Workflow → Setup → Requests → Request types and click **New**).

The screenshot shows the 'Workflow: New - Request type' form. At the top, there are buttons for 'Close', 'Save', 'Save + New', and 'Copy'. The form is organized into tabs: 'General', 'Fields', 'Flow', 'Actions', 'Allocate', and 'Validation'. The 'General' tab is selected. Under 'General', there are fields for 'ID' (9071), 'Description', 'Color', and 'Manager'. To the right, there is a 'Category' dropdown set to 'Absence', and checkboxes for 'Active' (checked), 'Hide', and 'Back office'. Below these are 'Policy' and 'Use timestamp' (checked). Under the 'Entry' section, there is a 'Multiple' field set to '0' Rows and a 'Week' checkbox. At the bottom left, there is an 'Allow merging' checkbox.

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.

Service request - New

Close Create Edit Draft Status: New

Create Approve
 Jo-Anna Goh Li Ping 29-10-2015 16:07 Manager: Person

Default section | Configurations | Service activities

Person:

Description: ⚠

Security level:

Start date:

End date:

Hours:

Remarks: Request

Attachments

Total attachments size allowed: 1 MB

Account:

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 Modules → 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 **Contract number** 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.

Service request - 23.988.459

Close Save Refresh Delete Copy Reject Print report

Status: Open
Modified by Jo-Anna Goh Li Ping 22-01-2013 15:46

Create Approve

Judy Cheong Mei Yin 25-07-2011 18:48
Gilbert Chin Kok Kein
Manager: Person

Default section Configurations Service activities

Service configurations

Show: Selected | Show: Filters | Show: Search Create: Configuration

<input checked="" type="checkbox"/> Name	Serial no.	Qty.	Contract number	Address
<input checked="" type="checkbox"/> MachineConfiguration				
<input checked="" type="checkbox"/> 123123 - Sample 123		1		

Extra information

Code MachineConfiguration

Description Machine configuration

Location -

Account "14014" Taxi Ruf
Bremen

Address Jakobistraße 20 28195
BREMEN Germany 0421-
14636

Engineer -

[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.

Service request - 23.988.459

Close Save Refresh Delete Copy Reject Print report

Status: Open
Modified by Jo-Anna Goh Li Ping 22-01-2013 15:46



Create Approve

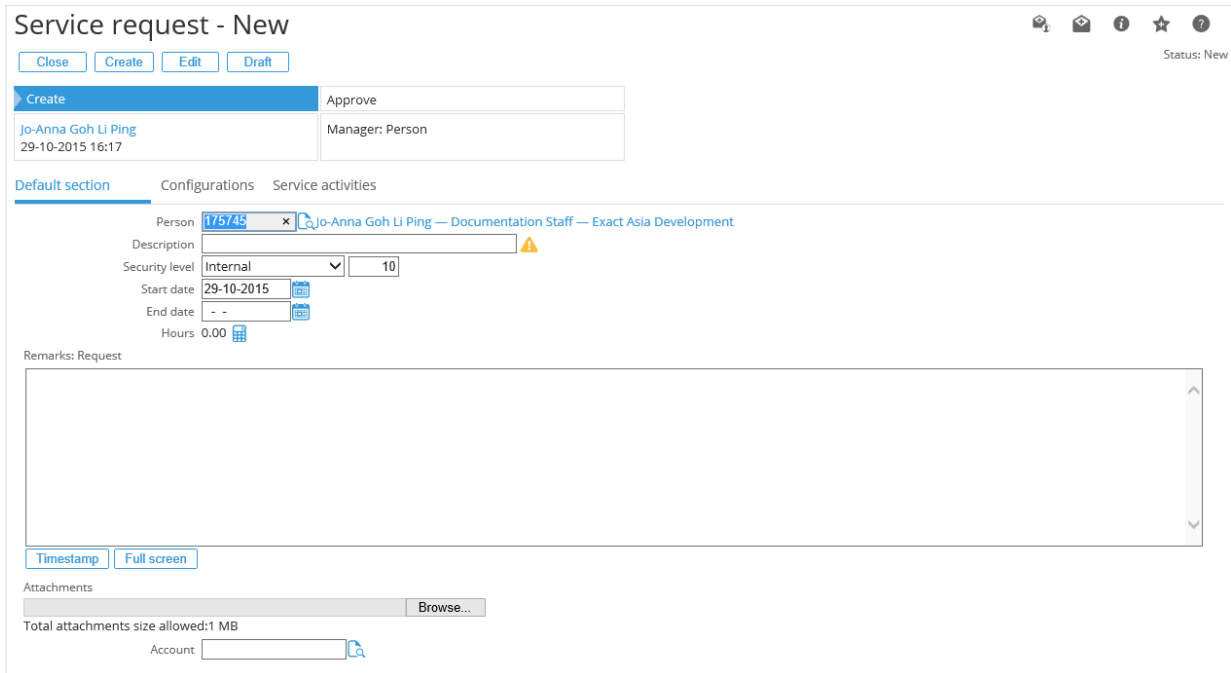
Judy Cheong Mei Yin 25-07-2011 18:48
Gilbert Chin Kok Kein
Manager: Person

Default section Configurations Service activities

→ Service Activities Create

Description	Status	Type	Address	Resource planning	Configuration	Material
Water holder	Planned	Water holder		2	1	1

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 'Service request - New' form. At the top, there are buttons for 'Close', 'Create', 'Edit', and 'Draft'. Below these is a 'Create' button and an 'Approve' button. The form is for a user named 'Jo-Anna Goh Li Ping' with a manager 'Person'. The 'Default section' is selected, showing fields for 'Person' (Jo-Anna Goh Li Ping), 'Description', 'Security level' (Internal), 'Start date' (29-10-2015), 'End date', and 'Hours' (0.00). There is a 'Remarks: Request' text area and an 'Attachments' section with a 'Browse...' button. The status is 'New'.

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.

The screenshot shows the 'Water holder' interface in Exact Synergy Enterprise. The status is 'Planned'. The interface includes a navigation bar with tabs for 'General', 'Configurations', 'Resources', and 'Material'. Below the tabs is a 'Resource planning' table with columns: Configuration, Hour type, Hours required, Person, Start date, End date, Warranty, Agreement, Status, Actions, and Realize. Two records are listed for 'Sample 123'. The first record has 'C0077' as the hour type, 2 hours required, and is assigned to Kerstin Beneke. The second record has 'C1860' as the hour type, 3 hours required, and is assigned to Sabine Christiansen. Each record has a 'Realize' checkbox and a set of action icons (delete, print, refresh).

Configuration	Hour type	Hours required	Person	Start date	End date	Warranty	Agreement	Status	Actions	Realize
Sample 123	C0077	2	Kerstin Beneke	23-01-2013 09:00	23-01-2013 11:00	<input type="checkbox"/>				<input checked="" type="checkbox"/>
Sample 123	C1860	3	Sabine Christiansen	24-01-2013 14:00	24-01-2013 17:00	<input type="checkbox"/>				<input type="checkbox"/>

+ Add new record



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 **Material** tab. When the **Add new record** 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 Modules → 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.

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.

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**.
- 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 - Water holder




Water holder

Status: Planned

Save Reopen Plan Realize Authorize Copy: Activity Dispatch board Print report Close

General Configurations Resources Material

Configuration and material planning select all: 

Configuration	Warehouse	Material	Serial number	Quantity	Stock	Part Type	Warranty	Agreement	Status	Actions	Realize
Sample 123	Magazia curenta	_MASKATT		1.00	0.00 !	Replacement	<input type="checkbox"/>			  	<input type="checkbox"/>

[+ Add new record](#)

The screenshot shows the 'Water holder' interface in Exact Synergy Enterprise. The status is 'Planned'. The interface includes a navigation bar with buttons: Save, Reopen, Plan, Realize, Authorize, Copy: Activity, Dispatch board, Print report, and Close. Below the navigation bar are tabs for General, Configurations, Resources, and Material. The 'Resource planning' section contains a table with the following data:

Configuration	Hour type	Hours required	Person	Start date	End date	Warranty	Agreement	Status	Actions	Realize
Sample 123	C0077	2	Kerstin Beneke	23-01-2013 09:00	23-01-2013 11:00	<input type="checkbox"/>				<input checked="" type="checkbox"/>
Sample 123	C1860	3	Sabine Christiansen	24-01-2013 14:00	24-01-2013 17:00	<input type="checkbox"/>				<input type="checkbox"/>

Below the table is a '+ Add new record' link. The 'select all:' dropdown is set to 'All'.


Planning service activities

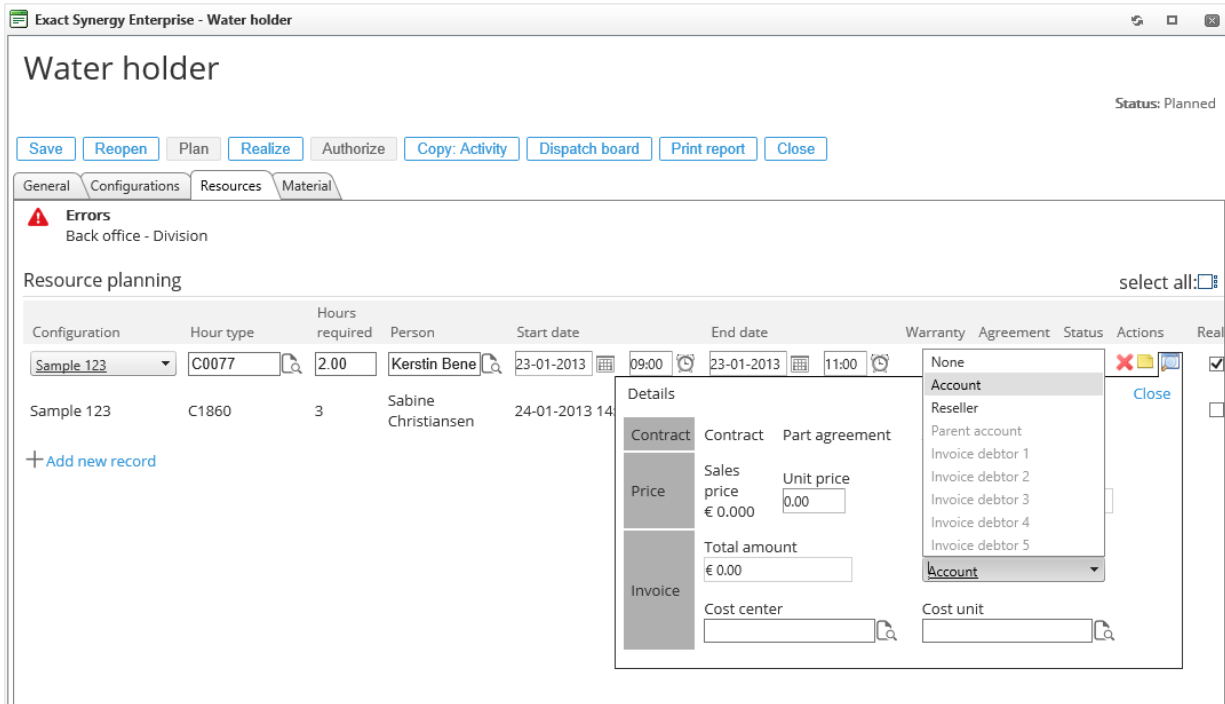
Once all the resource and material lines for the service activity have been defined, as well as the start date, end date, and time, the service activity can be planned. This can be done by clicking **Plan** on the **New activity** page. Once the service activity is planned, a realization proposal will 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.



The screenshot shows the 'Water holder' page in Exact Synergy Enterprise. The page has a status of 'Planned' and several action buttons: Save, Reopen, Plan, Realize, Authorize, Copy: Activity, Dispatch board, Print report, and Close. The 'Material' tab is selected, and an 'Errors' section shows 'Back office - Division'. The 'Resource planning' section contains a table with columns: Configuration, Hour type, Hours required, Person, Start date, End date, Warranty, Agreement, Status, Actions, and Real. A row for 'Sample 123' is selected, and a 'Details' pop-up is open over it. The pop-up shows fields for Contract (Contract, Part agreement), Price (Sales price, Unit price, € 0.000, 0.00), Invoice (Total amount, € 0.00, Cost center, Cost unit), and Account (Account, Reseller, Parent account, Invoice debtor 1-5). A 'Close' button is also visible in the pop-up.

Configuration	Hour type	Hours required	Person	Start date	End date	Warranty	Agreement	Status	Actions	Real
Sample 123	C0077	2.00	Kerstin Bene	23-01-2013	09:00 - 11:00			Planned	Details, Close, X, Y, Z	<input checked="" type="checkbox"/>
Sample 123	C1860	3	Sabine Christiansen	24-01-2013 14:00						<input type="checkbox"/>

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 Modules → 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.

Note:

Preventive maintenance requests will be generated only if the configuration item and service agreement are valid. The preventive maintenance request will be generated based on the start date of the preventive maintenance or configuration item, depending on whichever contains the latest start date. The child or part of the configuration item will follow the start and end dates of the configuration item, whereby the child or part of the configuration item will not start before the start date of the configuration item, and the end date will be before the end date of the configuration item. Preventive maintenance will still be generated even though the service configuration has expired (the configuration item is still active). Thus, when **Refresh** is clicked on the **Preventive maintenance generator** page, the start date of the preventive maintenance line will be generated according to the start date of the preventive maintenance agreement or configuration item.

To generate preventive maintenance:

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

2. Type or select a date at **Show until** in the **Criteria** section. This is mandatory.
3. Click **Refresh**.

Note:

The preventive maintenance is only generated when you have linked a configuration and preventive maintenance on the **Agreement link** page.

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 Modules → 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.

Note:

- The error message “Refreshing or generating preventive maintenance is in progress by <User name>. Please try again later.” will be displayed if the preventive maintenance is being refreshed or generated.
- If you click on any of the buttons while the preventive maintenance background job is running, the error message “Background job process is in progress. Please try again later” will be displayed.
- The error message “The current list will be overwritten for all users. Would you like to continue?” will be displayed if you refresh an existing preventive maintenance that has already been refreshed by another user. The error message will not be displayed if the previous user clicks the **Generate** button or refreshes the preventive maintenance again.
- The error message “The list has been refreshed by another user. The current list does not reflect the correct filtering. Would you like to continue?” will be displayed if you click the **Generate** button without refreshing the preventive maintenance which was previously refreshed by a user. The error message will not be displayed if the previous user clicks the **Generate** button.
- The preventive maintenance background job will be delayed if another user is refreshing or generating the preventive maintenance. The log status “Refreshing or generating preventive maintenance is in progress. Please try again later” will be displayed in the log file.
- If you refresh the preventive maintenance without performing other action(s) to the preventive maintenance, the background job will be activated, and the refreshed list will be overwritten by the background job.

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 Modules → Service management → Reports → Service activities → Service activities. The following page will be displayed:

The screenshot shows the 'Service activities' search criteria form. It includes sections for Criteria, Requests, Contract items, Resources & Material planning, Sorting, Refresh automatically, and Service activity. The form is pre-filled with '03C' for Division and 'Exact Asia Development' for the account. The 'Descending' checkbox is checked for the first column.

Service activities ☆ ⓘ ⚙

[Close](#) [Show](#) [Reset](#)

Criteria > [Templates](#)

Division: [Exact Asia Development](#) Private

Requests

Type: [🔍](#) ID:
 Priority: Status:
 Account: [🔍](#)

Contract items

Contract: [🔍](#) Configuration header: [🔍](#)
 Configuration: [🔍](#) Service serial number: [🔍](#)
 Problem: [🔍](#) Solution: [🔍](#)
 Zip code: City:

Resources & Material planning

Person: [🔍](#) Empty Hours required: -
 Type: Entry type:
 Item: [🔍](#)

Sorting

Column: 1: Descending
 Column: 2: Descending
 Column: 3: Descending
 Column: 4: Descending
 Column: 5: Descending

Refresh automatically

Refresh automatically: Seconds Pause

Service activity

EG Communication Status:

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

To create service documents:

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

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

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

When the person's 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 Modules → Workflow → Setup → Requests → Request types). However, the requests of the people in the dispatch board cannot be dragged (to another day) or resized (change duration of the requests).

8.4 CUSTOMIZING THE DISPATCH BOARD

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

Dispatch board service management: Customize - Jo-Anna Goh Li Ping

Close
Save
Default

General

Default layout: Day view - Horizontal ▼

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: All ▼

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

Calendar

Side color: 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.

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.


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.

8.5 DEFINING RESOURCE GROUPS

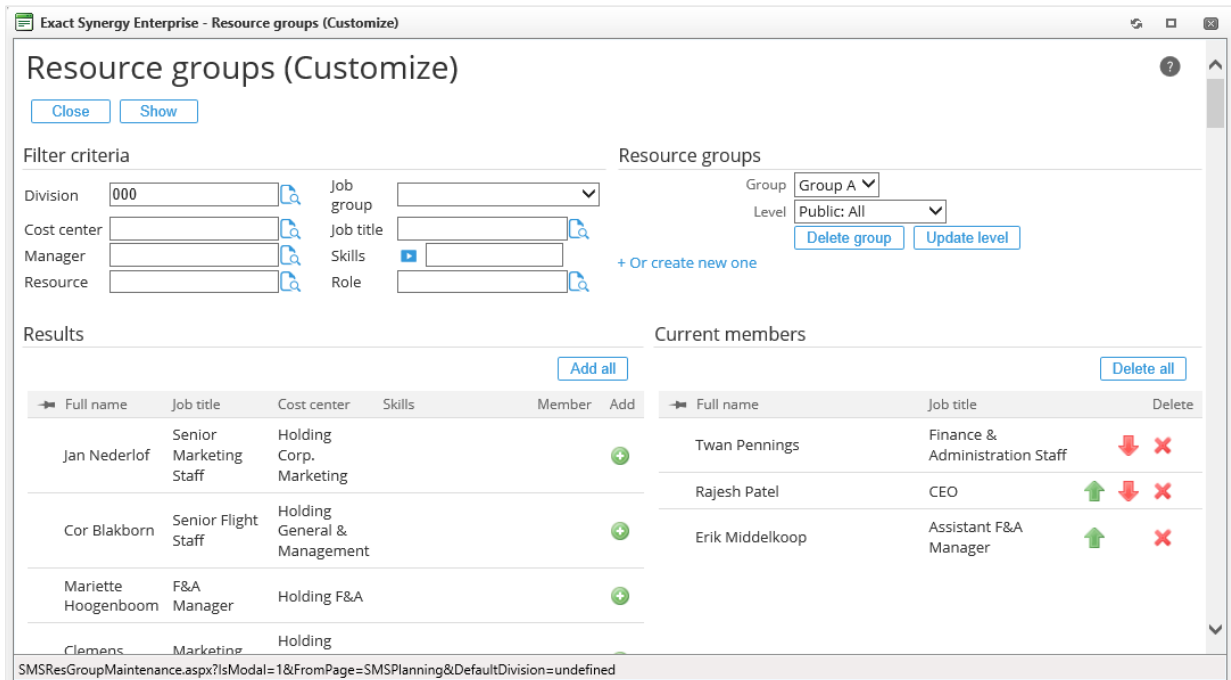
Resource groups allow a limited number of people with specific skill sets to be displayed on the dispatch board. For a better overview and faster performance, it is advisable to limit the number of people in the resource groups (preferably less than 10 people).

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 people 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 relevant 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 shows the 'Resource groups (Customize)' window. It is divided into several sections:

- Filter criteria:** Includes fields for Division (000), Cost center, Manager, Resource, Job group, Job title, Skills, and Role.
- Resource groups:** Shows a dropdown for 'Group A' and 'Level: Public: All'. There are buttons for 'Delete group' and 'Update level', and a '+ Or create new one' link.
- Results:** A table listing potential members with columns for Full name, Job title, Cost center, Skills, Member, and Add.
- Current members:** A table listing current members with columns for Full name, Job title, and Delete.

The URL at the bottom of the window is: `SMSResGroupMaintenance.aspx?IsModal=1&FromPage=SMSPlanning&DefaultDivision=undefined`

Full name	Job title	Cost center	Skills	Member	Add
Jan Nederlof	Senior Marketing Staff	Holding Corp. Marketing			
Cor Blakborn	Senior Flight Staff	Holding General & Management			
Mariette Hoogenboom	F&A Manager	Holding F&A			
Clemens	Marketing	Holding			

Full name	Job title	Delete
Twan Pennings	Finance & Administration Staff	
Rajesh Patel	CEO	
Erik Middelkoop	Assistant F&A Manager	




To view dispatch boards:

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

The screenshot displays the 'Dispatch board service management' interface. At the top, there are navigation buttons: 'Close', 'Refresh', 'Fullscreen', and 'Plan'. Below these, a search bar is labeled 'To be planned'. To the right, the main planning area is titled 'Planning' for '29 October 2015'. It features a time-based grid from 00:00 to 15:00. Resources listed on the left include 'Unplanned', 'Twan Pennings', 'Rajesh Patel', and 'Erik Middelkoop'. A calendar at the bottom left shows the current date, 29 October. A 'Stock status information' bar is located at the bottom right of the interface.

Note:

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

2. To maintain the group of people for 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 to which the people belong. 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 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**.

8.6 VIEWING DISPATCH BOARD SCHEDULE VIEW

The Service management dispatch board schedule view 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 for the job 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 dispatch board schedule view. The drag-and-drop function enables service activity details to be modified easily.

The dispatch board schedule view also displays all the activities of the people except for the requests of the people with the **Rejected** status. When a person's activity on the dispatch board schedule view is clicked, the details of the person's activity will be displayed. If the person is not working or it is a public holiday, grey will be displayed on the grid. The HR requests, such as the **Absence**, **Person**, and **Out of office** requests that have been defined in the **Planning** section under the **Actions** tab on the **Workflow: Request type** page (at Modules → Workflow → Setup → Requests → Request types) will also be displayed on the dispatch board schedule view. The HR requests will be displayed in colors on the dispatch board schedule view based on the color selected (for each type of request) at **Color** in the **General** section under the **General** tab on the **Workflow: Request type** page.

The dispatch board schedule view displays the people based on the people selected at the resource group and division. If a person has an appointment, the personal card of the person can be viewed by clicking the name of the person.

To view dispatch board schedule view:





1. Go to Modules → Service management → Reports → Service activities → Dispatch board schedule view. The following page will be displayed:

The screenshot displays the 'Dispatch board schedule view' interface. At the top, there are navigation buttons: 'Close', 'Refresh', 'Fullscreen', and 'Plan'. Below these are filters: 'View' set to '2 Days', 'Range' from '06-09-2016' to '07-09-2016', 'Scale' set to '10 minutes', 'Division' set to '036', and 'Development' mode. The main area is a grid for '06 Sep 2016 Tuesday'. The columns represent time slots from 01:00 to 07:00, with sub-columns for 30, 40, 50, 00, 10, 20, 30, 40, 50, 00, 10, 20, 30, 40, 50, 00, 10, 20, 30, 40, 50, 00, 10, 20, 30, 40, 50, 00, 10, 20. The rows are labeled 'Unplanned', 'Qi Hao Hong', and 'Chun Sing Hau'. The 'Chun Sing Hau' row is filled with blue bars, indicating active service activities.

Note:

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

2. Type the number of days at **View**. By default, **7** will be displayed.

- Type or select the date range to view the appointments for the selected date(s). By default, the date range will display the current date as the starting date and the end date will be 7 days later. The date range will display a period of 5 days if the **Hide weekend** check box under the **General** section on the **Dispatch board service management: Customize** page has been selected.
- Select 10 minutes, 15 minutes, 30 minutes, 1 hour, or 1 day at Scale.
- To maintain the group of people for 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 to which the people belong. 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 group, click  in the **Current members** section. You can also remove all the people in the group by clicking **Delete all**.
- To move the appointments, drag and drop the appointments to another date and/or time, and the information in the related service activity requests will be changed.
- The appointments can be deleted from the dispatch board schedule view by clicking  on the appointments. However, only appointments with the “Open” status can be deleted.
- To view the personal card of the person, click the name of the person. However, the personal card will be displayed only if the person has an appointment.
- Click **Show** to view the dispatch board schedule view.

Note:

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

8.6.1 Customizing the dispatch board schedule view

The dispatch board schedule view customize page (at Modules → Service management → Reports → Service activities → Dispatch board schedule view) allows you to customize the dispatch board schedule view.

Dispatch board service management: Customize - Jo-Anna Goh Li Ping ?

Close Save Default

General

Auto refresh minutes of inactivity

Cell width minutes px

Cell width hour px

Cell width day px

Timeframe -

Hide weekend

To be planned items period

Plan

Scheduler height px

To be planned height px

Activity

Layout

Side color

Row 1

Row 2

Row 3

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

To be planned

Activity: Status	
Activity: Description	

General section

This section contains the following fields and check box:

- **Auto refresh** – Select this check box to automatically refresh the dispatch board schedule view based on the defined number of minutes.
- **Cell width minutes** – This field allows you to define the width of the cells in the dispatch board schedule view if **10 minutes**, **15 minutes**, or **30 minutes** is selected at **Scale** on the dispatch board schedule view. The minimum cell width is 5 pixels and the maximum cell width is 999 pixels.
- **Cell width hour** – This field allows you to define the width of the cells in the dispatch board schedule view if **1 hour** is selected at **Scale** on the dispatch board schedule view. The minimum cell width is 30 pixels and maximum cell width is 999 pixels.
- **Cell width day** – This field allows you to define the width of the cells in the dispatch board schedule view if **1 day** is selected at **Scale** on the dispatch board schedule view. The minimum cell width is 60 pixels and maximum cell width is 999 pixels.
- **Timeframe** – This field allows you to define the time range that is the most important to you. The dispatch board schedule view will automatically display the view for this time range.
- **Hide weekend** — Select this check box to hide Saturdays and Sundays on the dispatch board schedule view.
- **To be planned items period** — This field allows you to select the period that you want to plan for the items.
- **Plan** — This field allows you to select the type of plan to be displayed on the dispatch board schedule view.
- **Scheduler height** – This field allows you to define the height of the dispatch board schedule view. By default, **550** is displayed. The minimum and maximum height for the scheduler is **250** and **9999**. When changing this value, the height of the scheduler will be adjusted according to the service engineers in the list. If the list of engineers is longer than the defined height, a scrollbar will be displayed on the left of the dispatch board schedule view.
- **To be planned height** – This field allows you to define the height of the to be planned service activities. By default, **180** is displayed. The minimum and maximum height is **30** and **999**. When changing this value, the height of the **To be planned** section will be adjusted accordingly.

Activity section

In this section, you can define how the tasks on the dispatch board schedule view 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 allows you to select the status with colors, whereby **Activity: Status**, **Planning status**, **Request status**, or blank can be selected. The side color selected will be applicable for both multiple and single requests.


To be planned section

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


Activity: Tooltip section

This section allows you to select the tooltips for the appointments or service activities, whereby when the mouse cursor is pointing to the appointment or service activity in the dispatch board schedule view, the information of the appointment or service activity will be displayed as a tooltip. However, only texts will be displayed in the tooltip. If free fields have been selected as a tooltip, the free fields will be displayed based on the settings defined on the **Workflow: Request type – Service request** page. Thus, if a tooltip without any value is selected, **N/A** will be displayed. For example, “Remark N/A”. The tooltips will not display the status color, hours due, and material in stock. For HR requests, the start and end dates, and start and end times will be displayed when the mouse cursor is pointing at the top of the service request.

8.6.2 Defining resource groups

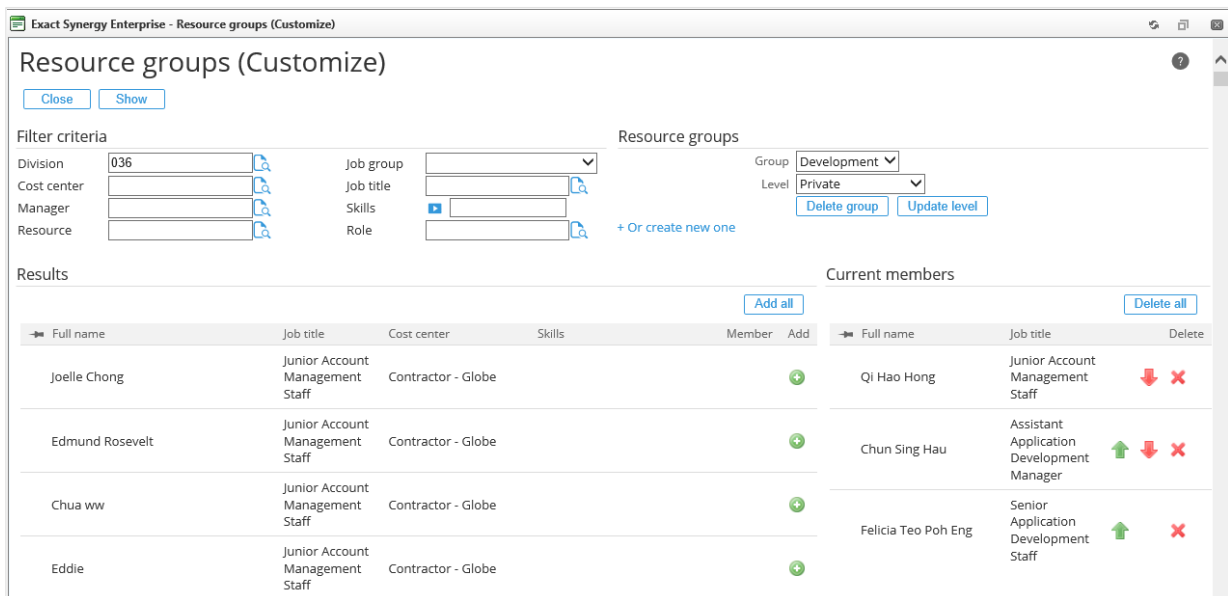
Resource groups allow a limited number of people with specific skill sets to be displayed on the dispatch board schedule view. For a better overview and faster performance, it is advisable to limit the number of people in the resource groups (preferably less than 10 people). To view the resource group page, click  under the **Planning** section on the dispatch board schedule view page.

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 people 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 relevant person, or click **Add all** to add everyone listed 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 shows the 'Resource groups (Customize)' window. It includes a 'Filter criteria' section with fields for Division (036), Cost center, Manager, Resource, Job group, Job title, Skills, and Role. The 'Resource groups' section has dropdowns for Group (Development) and Level (Private), along with 'Delete group' and 'Update level' buttons. Below are two tables:

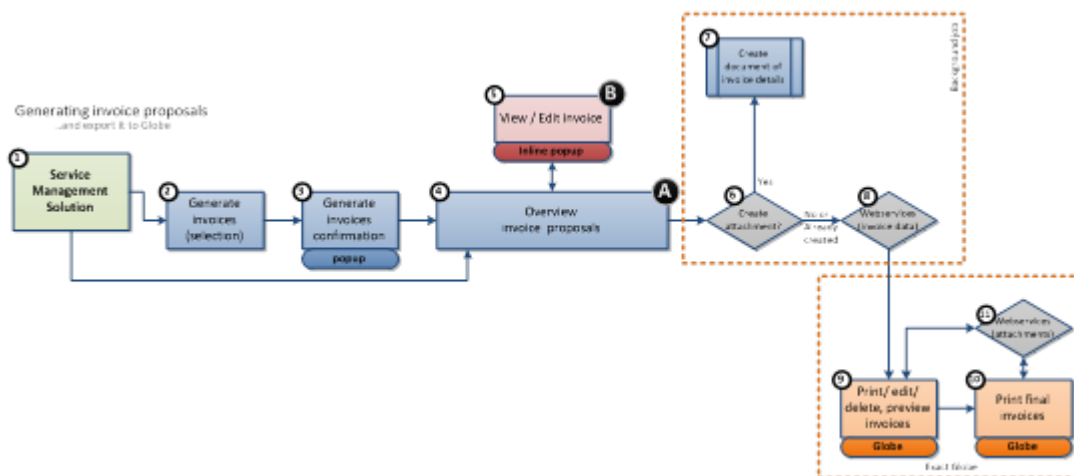
Results					Current members		
Full name	Job title	Cost center	Skills	Member	Full name	Job title	Delete
Joelle Chong	Junior Account Management Staff	Contractor - Globe			Qi Hao Hong	Junior Account Management Staff	
Edmund Rosevelt	Junior Account Management Staff	Contractor - Globe			Chun Sing Hau	Assistant Application Development Manager	
Chua ww	Junior Account Management Staff	Contractor - Globe			Felicia Teo Poh Eng	Senior Application Development Staff	
Eddie	Junior Account Management Staff	Contractor - Globe					

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.

Note:

Configuration items (including configuration parts and children) that have expired will not be invoiced. Thus, if the configuration item has expired but the configuration parts or children are active, the invoice will not be generated for the configuration item. In addition, the invoice will not be generated if the configuration item is active but the configuration parts or children are inactive or have expired.

To generate invoice proposals:

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

Service: Generate invoice proposals - Selection

Close Generate Reset Show details

Criteria

Division: 036 x Exact Asia Development

General

Invoice due date: 18-10-2012

Contract: [] []

Service request: [] []

Account: [] []

Contract type: [] []

Cost center: [] []

Selection code: [] []

Origin: Service request 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 rates

Activities: Rejected

Activities: Early invoicing

Invoice per

Division

Currency

Invoice account

Payment condition

Selection code

Origin

Contract

Service request

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.

Note:

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

- **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.
- **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 Modules → Service management → Reports → Invoices → Invoice proposals. The following page will be displayed:

The screenshot shows the 'Invoice proposals' page. At the top, there are buttons for 'Close', 'Return to selection', and 'Create invoices'. Below this is a 'Selection' section with 'Invoice due date: 18-10-2012' and 'Division: 036 — Exact Asia Development'. A 'Filter' section shows 'Status: Not created'. Below the filter, there are tabs for 'Invoice proposals (1)' and 'Warnings (0)'. A table lists the proposals with columns: Customer, Division, Payment condition, Selection code, Total amount, and Completed. One proposal is visible: AS Customer 1, 036 - Exact Asia Development, RM0.00. At the bottom, there are navigation icons and a 'Page size: 10' dropdown, with '1 items in 1 pages' displayed.

2. Select an invoice proposal that you want to view under the **Total amount** or **Completed** column. The following page will be displayed:

The screenshot shows the 'Invoice proposal details' page. At the top, it says 'Exact Synergy Enterprise - Invoice proposal details'. The main heading is 'Invoice proposal'. There are tabs for 'Invoice', 'Details', and 'Documents'. The 'Invoice' tab is selected. Below the heading, there are three columns: 'Ordered by', 'Delivery to', and 'Invoice to', all showing 'AS Customer 1 123' and 'Malaysia'. Below this is an 'Invoice' section with a 'Description' field containing 'Service'. A table lists the 'Invoice lines' with columns: Invoice lines, Quantity, Unit price, Cost center, Cost unit, Discount %, Amount, and Warranty. Three lines are shown, each with a red 'X' in the Warranty column. Below the table is a 'Totals' section showing 'Total amount excl. VAT RM0.00'. At the bottom right, there are buttons for 'Create invoice and Close' and 'Save and close'.

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.

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".

Exact Synergy Enterprise - Invoice proposal details

Invoice proposal

Invoice Details Documents

Invoice proposal documents

Select the documents to be printed among the invoice (from the back office)

General

Service invoice details

Service contract / agreement overview

[Contract 1582009033294:0001](#)

Service activities linked documents


Documents - Attachments	Attachment
No records to display	

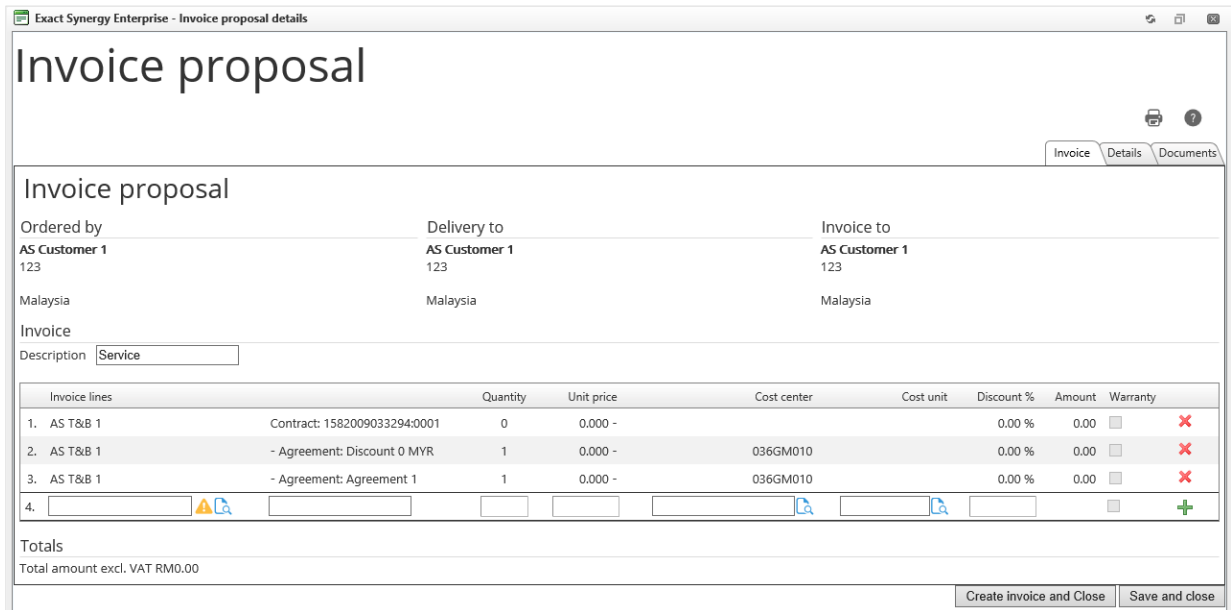
Create invoice and Close Save and close








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 Modules → 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:



Invoice lines	Quantity	Unit price	Cost center	Cost unit	Discount %	Amount	Warranty
1. AS T&B 1 Contract: 1582009033294:0001	0	0.000 -			0.00 %	0.00	<input type="checkbox"/> 
2. AS T&B 1 - Agreement: Discount 0 MYR	1	0.000 -	036GM010		0.00 %	0.00	<input type="checkbox"/> 
3. AS T&B 1 - Agreement: Agreement 1	1	0.000 -	036GM010		0.00 %	0.00	<input type="checkbox"/> 
4. <input type="text"/>  <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> 	<input type="text"/> 	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> 

Totals
Total amount excl. VAT RM0.00

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**.

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:

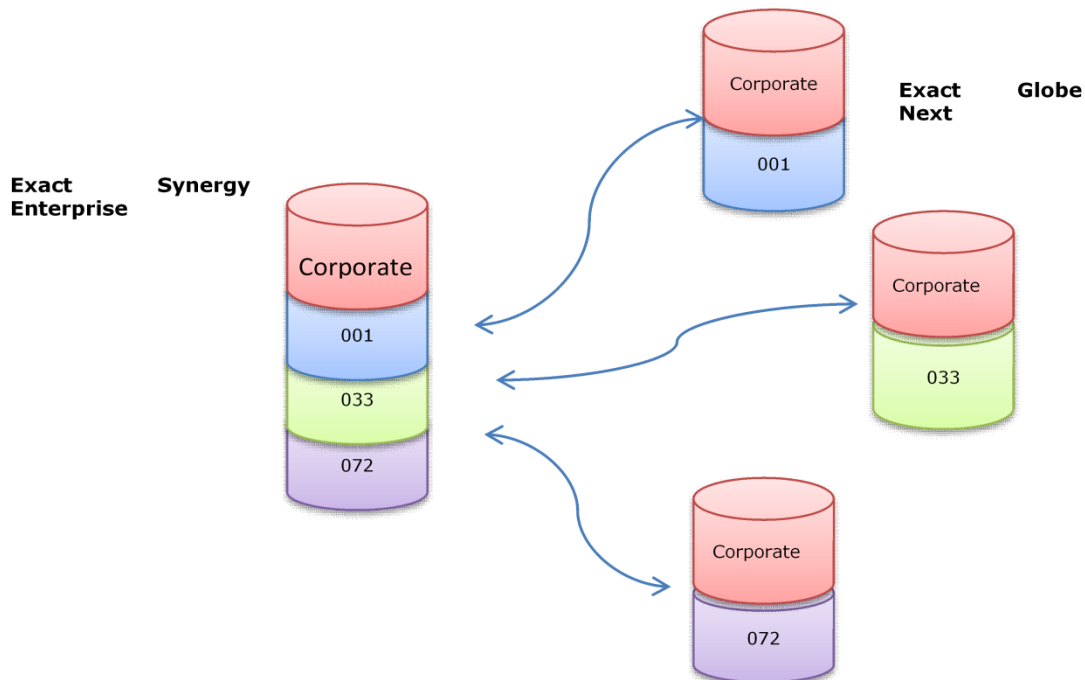
1. Go to Modules → Service management → Reports → Invoices → Invoice proposals.
2. Click the **Invoice proposals** tab. By default, this tab is selected.
3. Click **✖ Delete**.
4. A message "Are you sure you want to delete this record?" will be displayed.
5. Click **OK**.

To delete invoice lines:

1. Go to Modules → 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**.

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 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 1:1 Scenario, One Exact Synergy, 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.

Service: Problem codes ☰ 🖨️ ☆ ?

[Close](#) [Refresh](#) [New](#) [Delete](#)

Criteria

Division [Exact Software Deutschland GmbH \(merged\)](#)

Page size [Show](#)

<input type="checkbox"/>	Code ▲▼	Description ▲▼
<input type="checkbox"/>	P001	Fix machine
<input type="checkbox"/>	P002	Broken pump

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

Service: Settings ☆ ?

[Close](#) [Edit](#)

Criteria

Division [Exact Asia Development](#)

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
- Detailed planning
- Compressed planning
- Service contract
- Invoice details attachment
- Mobile service report
- Mobile service report with signature

Document printing: Create Document Type

- Service slip [Service slip](#)
- Detailed planning [Service Planning](#)
- Compressed planning [Service Planning](#)
- Service contract [Service contract](#)
- Service details attachment [Service Invoicing](#)

Invoice items for agreement types

- Parent [AS T&B 1 — AS T&B Item 1](#)
- Text [AS T&B 1 — AS T&B Item 1](#)
- Response time [AS T&B 1 — AS T&B Item 1](#)
- Preventive maintenance [AS T&B 1 — AS T&B Item 1](#)
- Additional part / hour [AS T&B 1 — AS T&B Item 1](#)
- Parts / Hours [AS T&B 1 — AS T&B Item 1](#)
- Discount [AS T&B 1 — AS T&B Item 1](#)
- Discount on agreement [AS T&B 1 — AS T&B Item 1](#)

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 Modules → 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.

HRM: Person

Close Edit Create letter Create email vCard

Created by Coert Hagestein 06-03-2000 15:10
Modified by Felicia Teo Poh Eng 19-12-2013 10:12

Out of office

Gerben Talsma - 54

Job title Customer Support Staff
Division 172 — Exact MKB
Mobile / Mobile extension 06-24269874
Office phone / Extension +31 15 2624323 7717
E-mail gerben.talsma@exact.com

General

Status Active (25 Years 4 Months), 1.00 FTE
Time 30-10-2015 04:54
Action: Last 18-02-2014 11:37 (619 Days)
Physical location Zwolle - Netherlands
Contractual location Zwolle - Netherlands
Room
Outlook Web Access Outlook Web Access

Organization

Manager 2893 — Ronald Everts
Assistant
Subordinates
Security level 12
Job group Support
Job activity Customer Support
Group delft

Personal

Nationality / Language Netherlands NL — Dutch
First name / Initials Gerben G.
Middle name
Last name Talsma
Maiden name
Place of birth
Date of birth 01-01-1970
Marital status Single
Marital status date
Address / Number Map Route
Address 2
City / State Overijssel
Country Netherlands
Home phone
Mobile
Home e-mail

Roles

Role	Level
Customer manager	Division
Hour entry	Division
Project manager	Division
Professional	Corporate
Enabling add-on solutions	Corporate
Project administration	Project
Hour planning	Division
Support	Group
Sales View opportunity cards	Group
Purchasing Manager	Cost center group

Add

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 Modules → 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:

Accounts: Prospect

Close Edit Actions Create letter Create email

Created by Jo-Anna Goh Li Ping 06-05-2015 09:48
Modified by Jo-Anna Goh Li Ping 06-05-2015 09:50

Bike Corp - 390318
Address 83 Rose Rd
Zip code / City 50400
Country / State Malaysia (MY)
Website www.bikecorp.com
E-mail bikecorp@gmail.com
Phone / Extension 98473647
Fax 63748273

Kuala Lumpur (4)

Contracts
Projects
Quotations
Service contracts

Items
Documents
Reports
Service activities

Workflow
Opportunities
Service configuration

Contacts All Add
Mr. ---

External References Add
Type Link

Marketing
Type / Since Prospect 06-05-2015
Status / Since Active 06-05-2015
Security level 10
Source Phone
Sector Unknown
Classification / Rating Corporate Account 7
Size Unknown
Document
D&B Number

Relations
Manager Paul Kaeser (Employee)
Cost center Management & Secretariat
Reseller 390036 - Exact Asia Development Centre Sdn Bhd
Parent account
Subsidiaries (0)

Activity
Read - Recent
Log: Application

Divisions New: Customer code New: Vendor code
Code - Division Main

Financial
Tax number
Customer account
Check date
Offset account

Remarks - None

Requests: Reports
Hours / Quantity / Amount
Quality analysis

5. Click **New: Customer code**. The following page will be displayed:

Accounts: New - Customer code

Created by Jo-Anna Goh Li Ping 30-10-2015 12:02

Close Save Save + New

Account

Division: Exact Asia Development

Main: Yes

Customer code:

Name:

Type:

Status:

Main contact:

Representative:

Show notes upon entry:

Sales order - Invoice

Sales order confirmation:

Partial delivery allowed:

Ship via:

Apply shipping charges:

Invoice customer:

Add extra receipt to sales order:

Digital postbox:

Commissionable:

Territory code:

Send method:

Invoice copies:

Selection code:

eInvoice:

Extra duty:

Group invoice:

INTRASTAT

INTRASTAT system:

Transaction A code:

Transport:

Financial

Currency:

Customer account:

Automatic matching:

Offset account:

Extra description:

Credit limit:

Payment condition:

Bank account: Add

Price list:

Discount (%):

Payee name:

Credit management

Scenario:

Account empl.:

Intermediary:

Print customer statements:

Last seq. number:

Last reminder:

Send reminders:

TAX

Tax liability:

Tax number:

Check date:

Tax code:

VAT services:

VAT services adjustable:

- Type or select a division at **Division** under the **Account** section. By default, the customer code at **Customer code** will be displayed. Make sure the customer 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.

The screenshot shows the 'New activity' page in the Exact Synergy Enterprise application. The page title is 'New activity' and the status is 'Open'. The page has a navigation bar with buttons for 'Save', 'Plan', 'Realize', 'Authorize', 'Copy: Activity', 'Dispatchboard', 'Print report', and 'Close'. Below the navigation bar are tabs for 'General', 'Configurations', 'Resources', and 'Material'. The 'General' tab is active, and the 'Division' field is highlighted with a red box. The 'Division' field contains the value '092' and the selected entity 'Exact Software Deutschland GmbH (merged)'. Other fields include 'Activity type', 'Description', 'Address', 'Problem', 'Solution', and 'PM type'. A 'Remarks/Notes' text area is on the right. At the bottom, there are buttons for 'Add', 'Timestamp', and 'Full screen'.

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 Modules → Service management → Entry → Invoices → Generate invoice proposals).

Service: Generate invoice proposals - Selection

Close Generate Reset Show details

Criteria

Division: 036 x Exact Asia Development

General

Invoice due date: 18-10-2012

Contract: [] []

Service request: [] []

Account: [] []

Contract type: [] []

Cost center: [] []

Selection code: [] []

Origin: Service request 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 rates

Activities: Rejected

Activities: Early invoicing

Invoice per

Division

Currency

Invoice account

Payment condition

Selection code

Origin

Contract

Service request

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

Invoice proposals

Close Return to selection Create invoices

Selection

Invoice due date: 18-10-2012

Division: 036 - Exact Asia Development

Filter

Status: Not created

Invoice proposals (1) Warnings (0)

Customer	Division	Payment condition	Selection code	Total amount	Completed
> AS Customer 1	036 - Exact Asia Development			RM0.00	

Page size: 10 1 items in 1 pages

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**.

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:

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.
- 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:

The screenshot shows the 'Exact Globe Next' application window. The title bar includes the 'exact' logo and window controls. The breadcrumb navigation shows 'Order > Entries > Fulfillment >'. The 'Warehouse' section has a dropdown menu currently set to '--All--'. The 'Selection' section contains five radio button options: 'Sales order' (selected), 'Production order', 'Internal use', 'Interbranch transfer', and 'RTV order'. Below the selection options, there is a 'Fulfillment date' field with the value '20/09/2016' and a calendar icon, followed by an 'All' checkbox and a dropdown menu set to 'Advanced'. A table with the following columns is displayed: 'Sales order', 'Description', 'Your ref.', 'Date', 'Person', 'Delivery debtor', 'Name', 'Project code', 'Fulfillment date', 'Shipping via', and 'Wrh.'. The table is currently empty. At the bottom of the window, a toolbar contains several buttons: 'Refresh', 'Print labels', 'New returns', 'Complete', 'Procgss', 'Eufilment...', 'Open', and 'Close'.

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.
5. Click **Fulfillment**. The following screen will be displayed:

603 Fulfillment - Exact

603 File Edit View Help

Sales order: 20053 Your reference: PO: 20053
 Debtor: 60090 - Lunchroom de Orka Representative: Andrew Ng Yeng Joo
 Created: 8/9/2011 Shipping via: Verzending via TNT
 Description: Entry number: 16910001
 Lunchroom de Orka
 Mevrouw Haak
 H. Baanplein 33
 8370 Blankenberge
 Belgium

	Item	Description	Status	Location	Ordered	Actuals	Unit	Add to sales Ze
1	CM002	Coffee Machine CSM 123	Active	Main	1	1	-	<input checked="" type="checkbox"/>
2	CM003	MacBean Coffee Machine MB00	Active	Main	1	1	-	<input checked="" type="checkbox"/>
3								<input type="checkbox"/>
4								<input type="checkbox"/>
5								<input type="checkbox"/>
6								<input type="checkbox"/>
7								<input type="checkbox"/>
8								<input type="checkbox"/>
9								<input type="checkbox"/>
10								<input type="checkbox"/>
11								<input type="checkbox"/>
12								<input type="checkbox"/>

Warehouse: 1 - Main Warehouse Total quantity: 2

Item

- Define the fields.
- Click **Fulfillment**.

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.

Exact Synergy Enterprise - Water holder

Water holder Status: Planned

Save Reopen Plan Realize Authorize Copy: Activity Dispatchboard Print report Close

General Configurations Resources **Material**

Errors
Back office - Division

Resource planning select all: []

Configuration	Hour type	Hours required	Person	Start date	End date	Warranty	Agreement	Status	Actions
Sample 123	C0077	2.00	Kerstin Bene	23-01-2013	09:00 - 11:00	23-01-2013			
Sample 123	C1860	3	Sabine Christiansen	24-01-2013					

Details

Contract	Contract	Part agreement
Price	Sales price	Unit price
		0.00
Invoice	Total amount	
	€ 0.00	
	Cost center	Cost unit

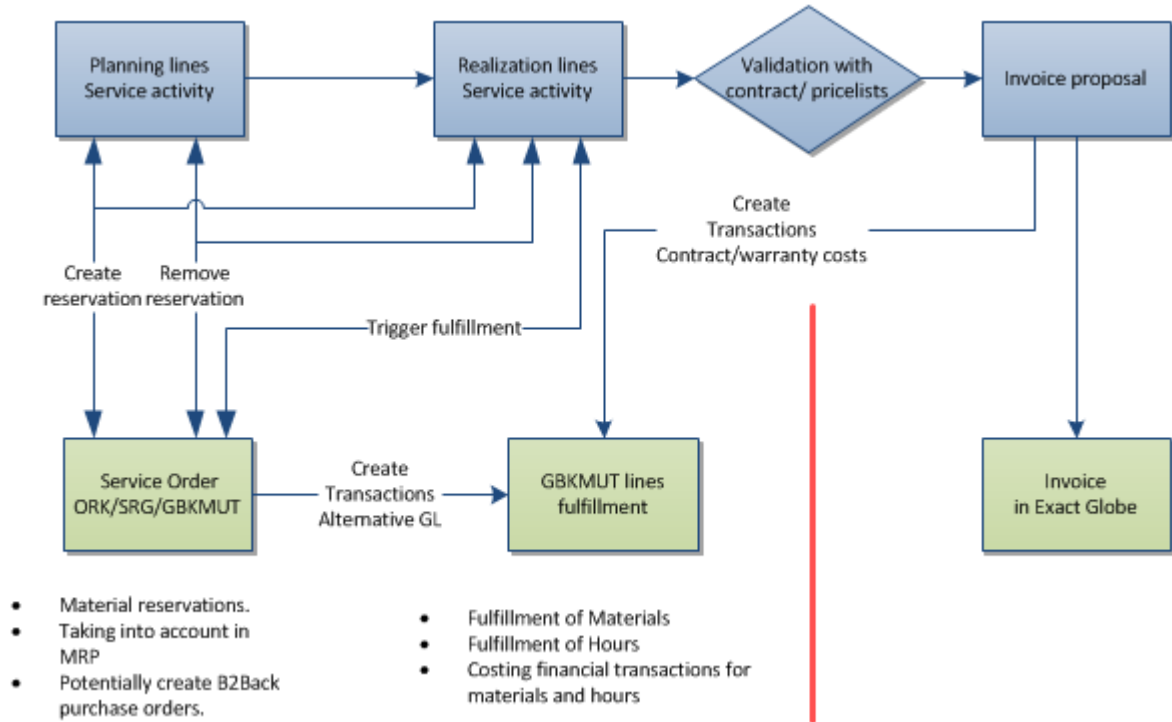
Account dropdown: None, Account, Reseller, Parent account, Invoice debtor 1, Invoice debtor 2, Invoice debtor 3, Invoice debtor 4, Invoice debtor 5

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.

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 SAP MRP planning interface. The window title is "603 Item management: Planning - Exact". The search criteria are set to "Advanced" view, "Warehouses" checked, and a 30-day period from 20/09/2016 to 19/10/2016. The table below shows the planning data for various items over this period.

Items	Unit	20/9 (Tu)	21/9 (We)	22/9 (Th)	23/9 (Fr)	24/9 (Sa)	25/9 (Su)	26/9 (Mo)	27/9 (Tu)	28/9 (We)	29/9 (Th)	30/9 (Fr)	1/10 (Sa)	2/10 (Su)	3/10 (Mo)	4/10 (Tu)	5/10 (We)	6/10 (Th)	7/10 (Fr)
Total quantity																			
Total costs																			
Average																			

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

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**.

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:

The screenshot shows a dialog box titled "603 Invoice history" with a yellow header and a red close button. The dialog is divided into several sections:

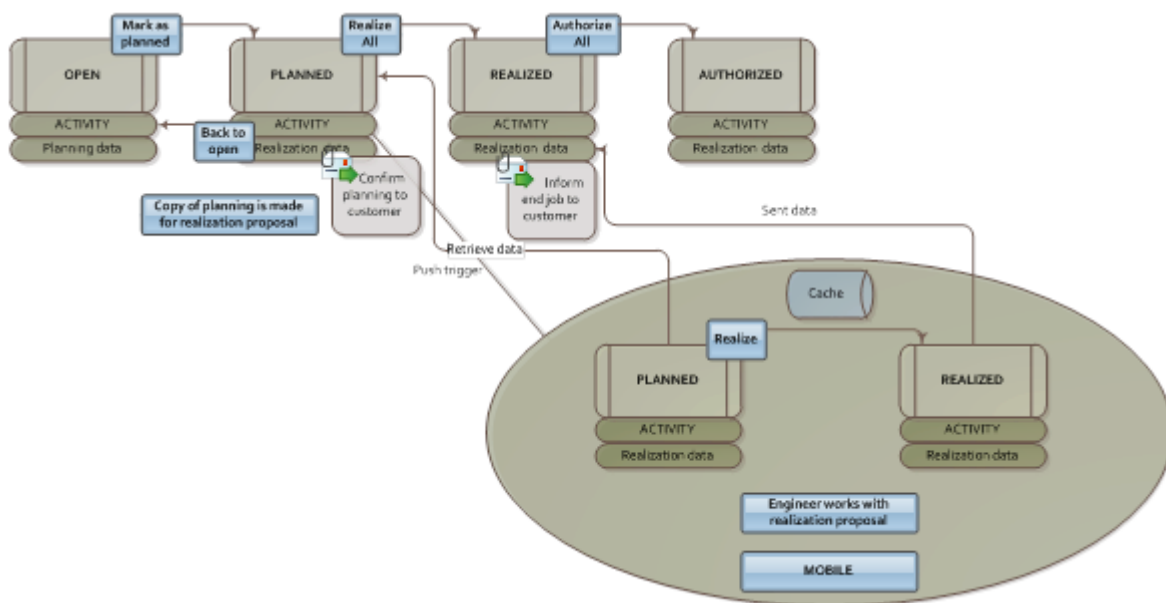
- Print**: Contains radio buttons for "Duplicate" and "Invoice history" (selected). Below are options for "Output" (radio buttons for "Based on account", "Printer", and "E-mail"), a checked "Change address" checkbox, a "Compress" dropdown menu set to "None", and a "Layout" field with a dropdown menu set to "MB_INV1" and a file selection button next to "MacBean Invoice 1".
- E-mail**: Contains a "Covering letter" field with a file selection button, an "E-mail address" field with "(Multiple)" text, a "Subject: Include" dropdown menu set to "None", an empty "Subject" field, an empty "Alternative descr." field, and an "eInvoice" checkbox.
- Free text lines**: Contains a "Print free text lines" checkbox and three empty text input fields labeled "Free text line 1", "Free text line 2", and "Free text line 3".

At the bottom right, there are three buttons: "Giro" (with a card icon), "Print" (with a printer icon), and "Close" (with a red X icon).

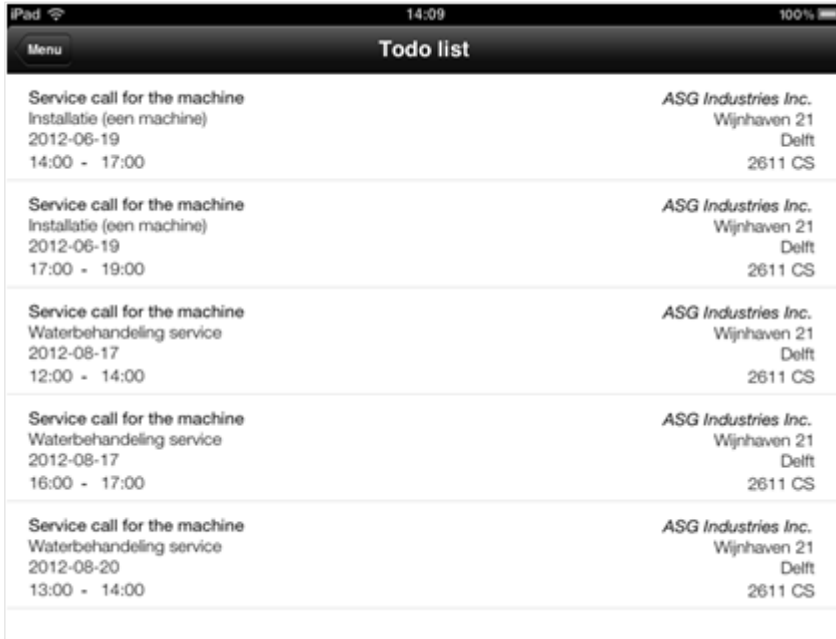
6. Select **Invoice history** under the **Print** section.
7. At **Output**, select **Printer** to print the selected invoice(s) or **E-mail** if you want the selected invoice(s) to be emailed.
8. Define the other fields.
9. Click **Print**.

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:

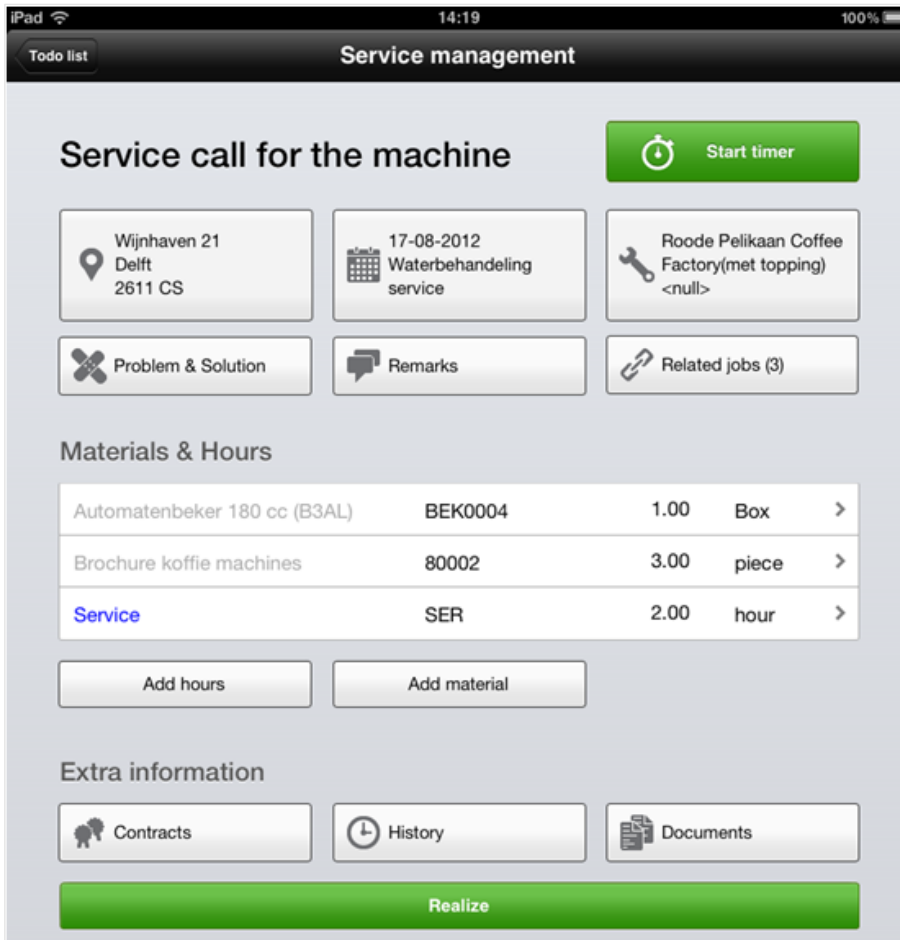


The service management option in the main menu of the application will be displayed if the service engineer starts the Exact Synergy Enterprise mobile application and function right **1002 - Service Management Mobile Access** is available. Once the service management option is selected, the service activity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



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 screenshot shows a mobile application interface with a blue header bar containing the text 'Company name'. Below the header is a white card with rounded corners containing customer information. The information is organized into five rows, each with a label on the left and the value on the right:

- Relation**: van Daal Machinewerk
- Address**: Hoofdstraat 13-14
Apeldoorn
4534 BV
- Contact**: Martin Ortgiess
- Email**: ortgiess@vandaal.nl
- Phone**: +31 6 73 82 72 47

At the bottom of the card is a large, light gray button with the text 'Navigate'.

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

The third button on the screen (top right button) displays the information of the machine that requires service and ability to change to the correct machine if the planned machine is not the actual machine that requires servicing.

The **Problem & Solution** button displays the problems and solutions of the machine, and the **Remarks** buttons displays the remarks for the service job. The other service jobs that are scheduled for the machine can also be viewed. The problems and solutions can be changed, and remarks can be defined for the service activity. The **Related jobs** button displays the other activities that are planned for the machine.

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.

The screenshot shows the 'Hours' form in the Service management application. The form is displayed on an iPad screen with the time 14:31 and 100% battery. The form fields are as follows:

Date	August 17, 2012
Start time	10:00
End time	12:00
Warranty	<input type="checkbox"/> No
Hour type	SER >

A green 'Done' button is located at the bottom of the form.

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.

The screenshot shows the 'Items' list in the Service management application. The list is displayed on an iPad screen with the time 14:32 and 100% battery. The list items are as follows:

Material	Items	Done
CND0020	14 grams filterbakje	
01	14D - 25%, 30D - 75%	
CND0019	7-grams filterbakje	
ADD-PART-HO...	Additional Part / Hour	
ALG	Algemeen - intern	
ASS	Assemblage	
ATV	ATV	
BEK0003	Automatenbeker 150 cc (B2AL)	
BEK0004	Automatenbeker 180 cc (B3AL)	✓
SUR0003	Automatensuiker	
VER0001	Bag dark roast	
VER0006	Bag extra dark	
VER0007	Bag mild	
VER0005	Bag regular	
SER0004	Bart cacaomok 29cl.	
SER0003	Bart kop cappuccino 18cl.	
SER0001	Bart kop espresso 6,5cl.	
SER0002	Bart kop koffie 15cl.	
SER0005	Bart schotel cacaomok 15,3	
SER0006	Bart schotel espresso 11,1	
SER0007	Bart schotel koffie/cappuccino 13,4	
BON0009	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

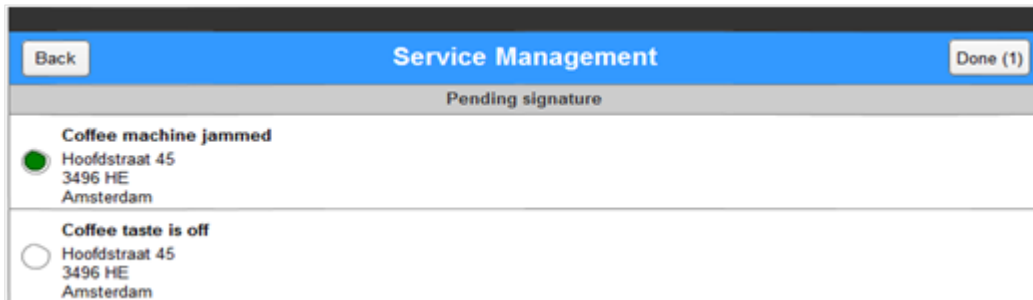
Once the service job is completed, whereby the quantities have been updated, hour and material items in the individual lines have been defined, or new lines for the hours or materials have been added, the service job can be realized by pressing the **Realize** button.

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.



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.

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

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
255	5.2.1, 7.0, 7.1, 8
256	4.1, 4.2.1, 5.2.1, 5.3.1, 5.3.2, 5.3.3, 5.4.1, 5.4.2, 5.4.3, 5.4.4, 6, 6.1, 6.2, 7.1, 7.2, 7.3, 7.4, 7.5, 7.6, 8, 8.1, 8.2, 8.4, 8.5, 8.6, 8.6.1, 8.6.2, 9.1, 9.2, 9.3, 10.2, 10.3, 10.4, 10.6
257	5.4.4, 7.2, 8.1, 8.6, 8.6.1
258	7.2, 8.6, 8.6.1, 11.1, 11.2, 12.1, 13.1