Acumens Service Job Management – Functional Preview.

Acumens Service Job Management

Versions:

Dynamics BC25

Prepared & developed by

SBC Dynamics ERP

Document History

Revision History:

VERSION	DATE	SECTIONS REVISED	DESCRIPTION
1.0	02-26-2024		Document Prepared
1.0	02-27-2024		Document Revised
2.0	05-02-2024	Add planned maintenance,	Document Revised
3.0	05-03-2024	Add ASM Time Sheet	Document Revised
4.0	05-07-2024	Add service WIP	Document Revised
5.0	08-30-2024		Document Updated.
6.0	09-02-2024		Document Revised.

Table of Contents

1 Overview 5
2 Role Centers & User Profiles 7
3 ASM Service Items. 8
3.1 Service Package. 9
3.2 Service Items Labels. 10
4 ASM Setups 11
4.1 Acumens Service Job Setup. 11
4.2 ASM Service Price Groups. 11
4.3 Package prices. 12
4.4 Setup Service stations, Service Tasks, ASM fault codes and Repair codes. 13
5 Record Resource Usage and Material Consumption. 15
5.1 Setting up Service Tickets. 15
5.2 Posting Consumption. 19
6 ASM Service Estimate 21
7 ASM Service Material Availability 22
8 ASM Service Request 24
9 ASM Service Pricing. 26
10 ASM Service Billing Options. 28
10.1 Time & Material. 29
10.2 Estimate Billing. 30
10.3 Fixed Charge. 31
11 ASM Warranty Discounts 32
12 ASM Service WIP Processing. 33
13 ASM Planned Maintenance. 37
14 ASM Time Sheets Management. 41
15 Service Parts for Equipment 45
16 Equipment Inspection and Testing. 50
17 ASM Dispatch and Resource Scheduling. 57
18 Van Inventory. 60
19 ASM Custom Document Templates. 63
19.1 ASM Report Selections. 63
19.2 Overview of the reports. 64

19.3 Setup Payment Remittance Information. 67
19.4 Custom Email Templates. 68
20 Posted Documents 69

1 Overview

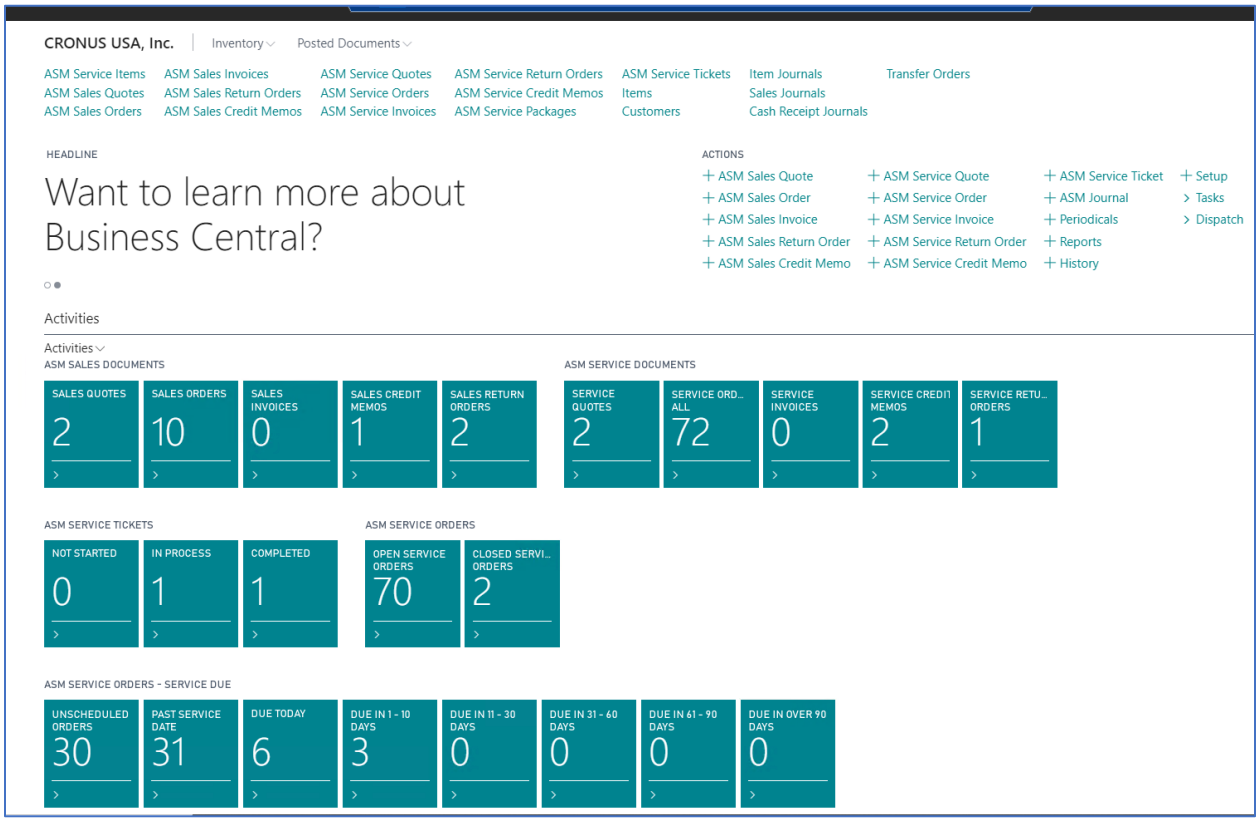
This functional document has been developed to enable you to perform the following actions:

- ✓ Role Centers & User Profiles.
  - This is the entry point and home page for Acumens eService Management with Business Central and is assigned to a user profile.
- ✓ ASM Service Items.
  - Setup Serialized items that are Serviced.
  - You can set up warranty Discounts for each service item.
  - Can be assigned a service package.
- ✓ ASM Setups.
  - Setup Service prices.
  - Setup Service stations, Setup faulty codes and repair codes.
- ✓ ASM Sales documents.
  - Generate Sales Quotes to share with the customer for approval.
  - Sell service items.
- ✓ Timesheets.
- ✓ ASM Service WIP
- ✓ Planned maintenance scheduling.
- ✓ ASM Service documents.
  - Prepare Service Estimates for Customer approval.
  - Create a service Order for the service of the item.
  - Create Service tickets.
  - Post Service consumption and usage.
  - Perform Service Billing.
- ✓ Equipment Inspection and Testing.
- ✓ Service Requests.
- ✓ Service Parts for Equipment.
- ✓ Van Inventory.
- ✓ ASM Dispatch and Scheduling.
  - You can Schedule Service orders.
  - Assign tickets to employees at the service stations.
- ✓ ASM Custom Document Templates.

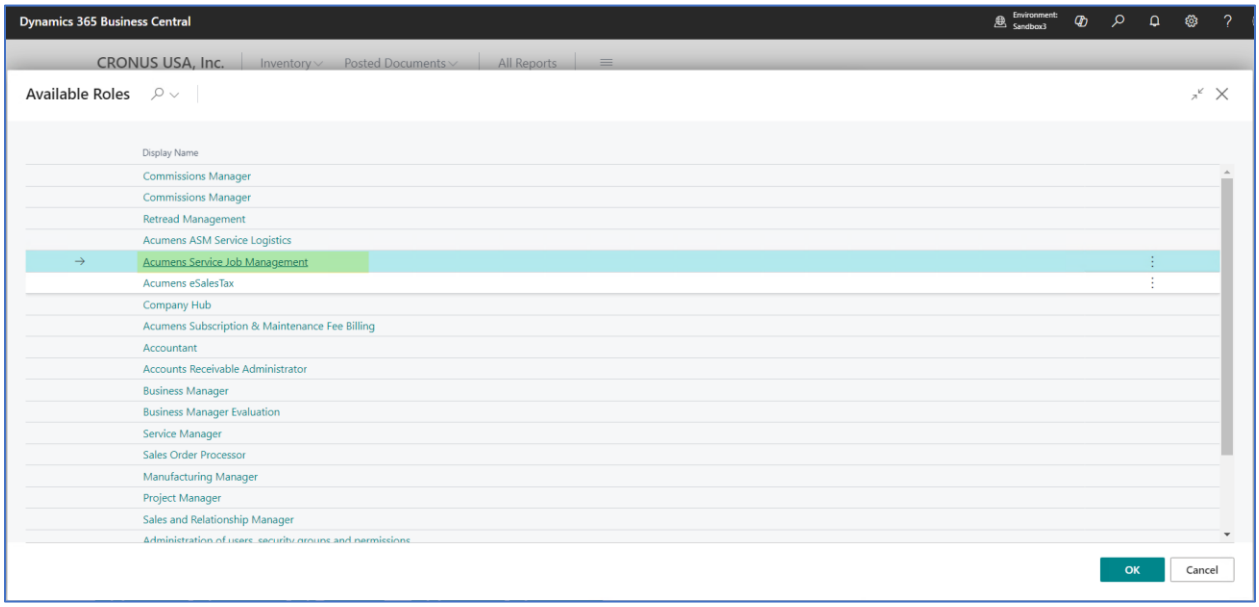
- Allows you to set up default report templates for the App.
- This has a separate report selection setup for the app reports so you can have a different setup for standard order processing.
- Comes with default email body templates.

2 Role Centers & User Profiles

The values on Cues are displayed based on the Assigned ASM role. For example, Admin will access everything within the system, Sales Team Manager will access activities for all the salespeople assigned to him/her while the salesperson will access his/her own activities only etc.

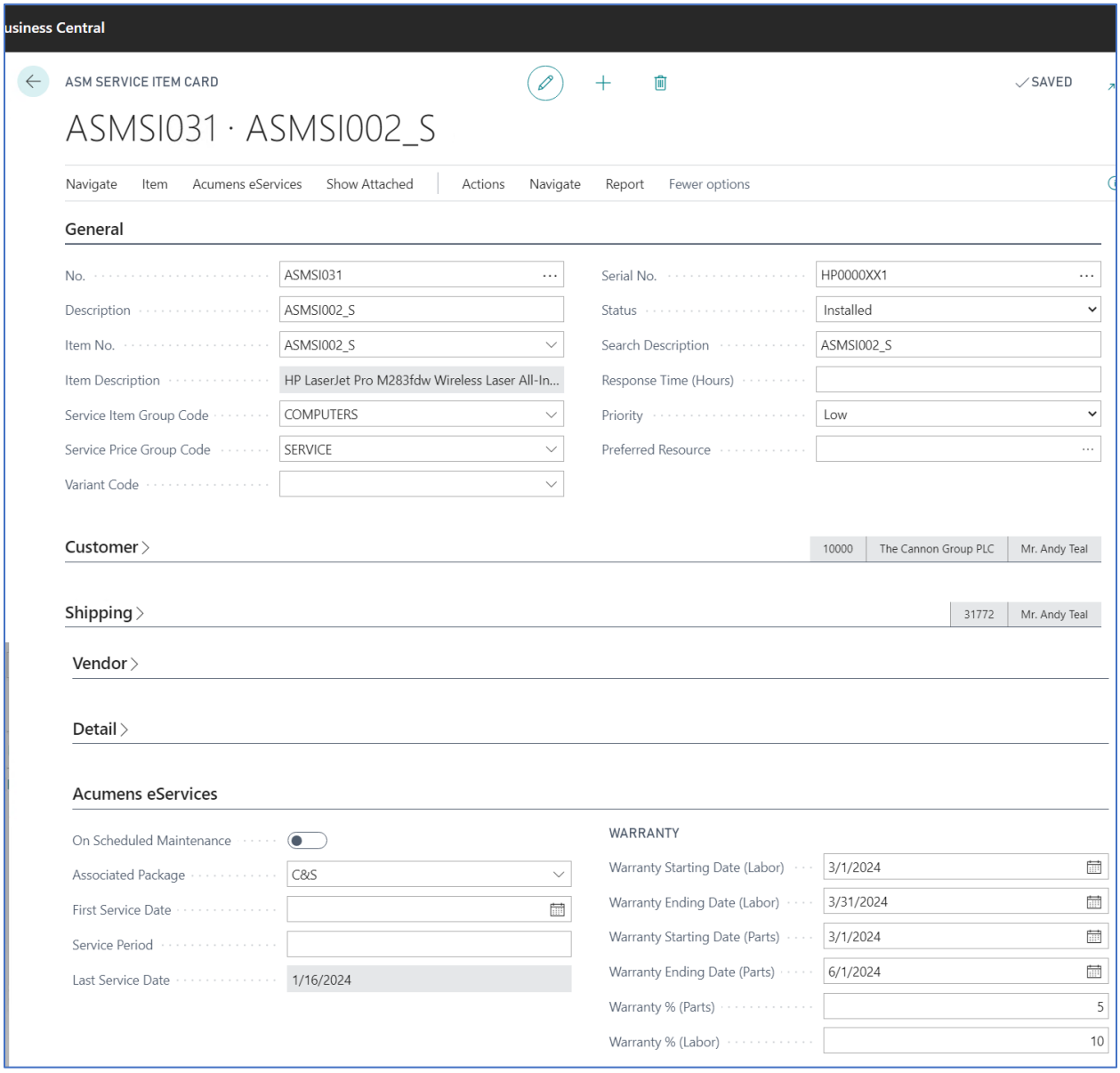


Assigning a profile to a user.



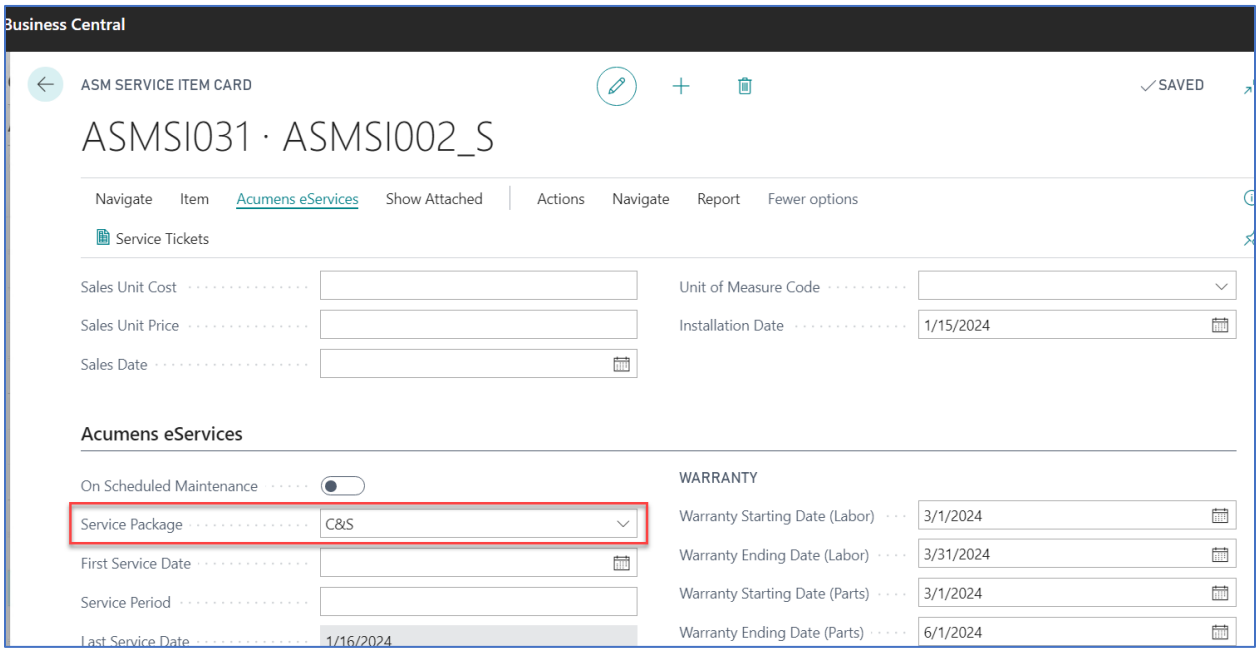
3 ASM Service Items.

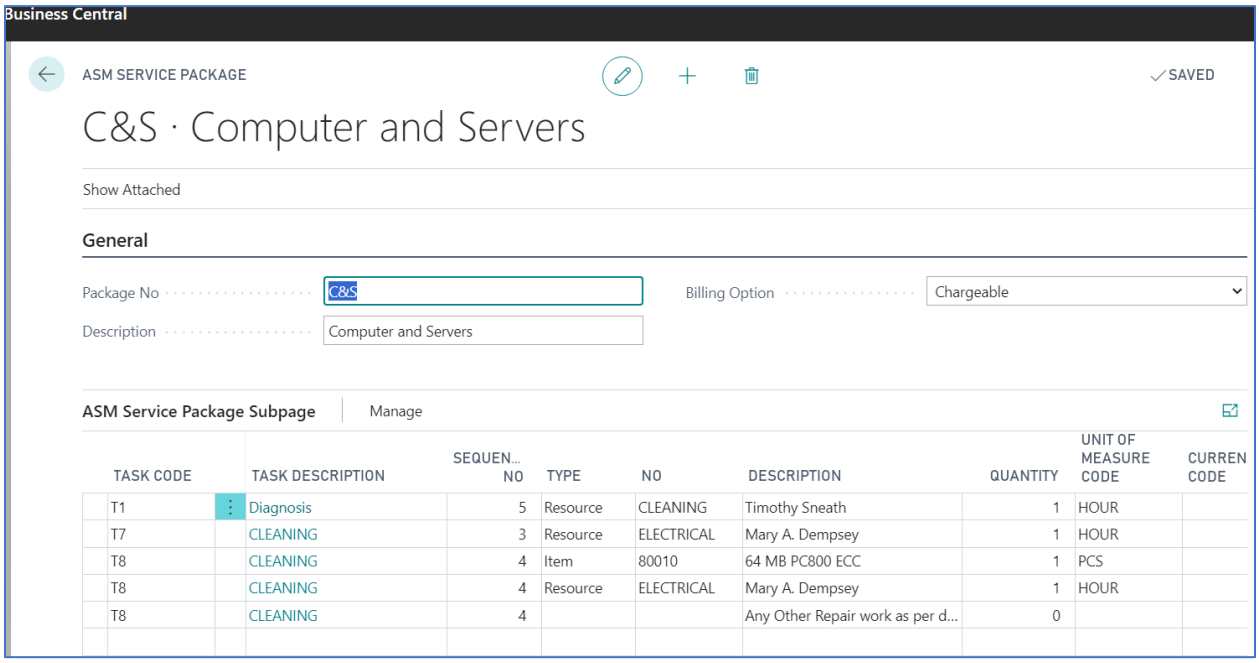
ASM Service items are items to service.



3.1 Service Package.

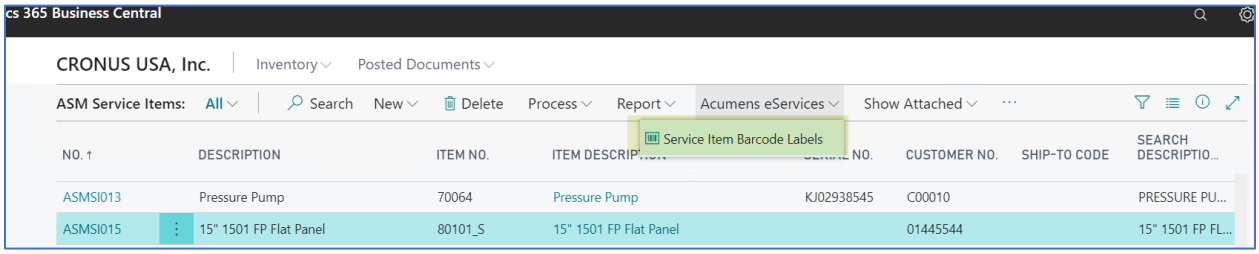
A service package consists of maintenance activities, repair activities, consumables and parts bundled into a package. This can then be associated with the service item.

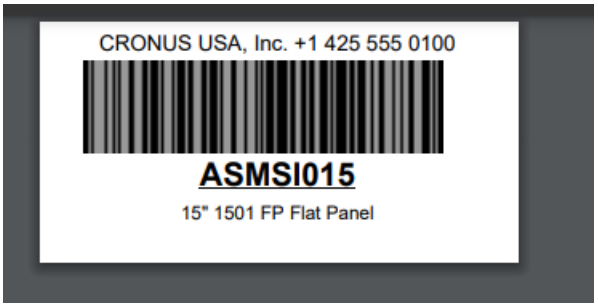




3.2 Service Items Labels.

You can print service item labels with a barcode.



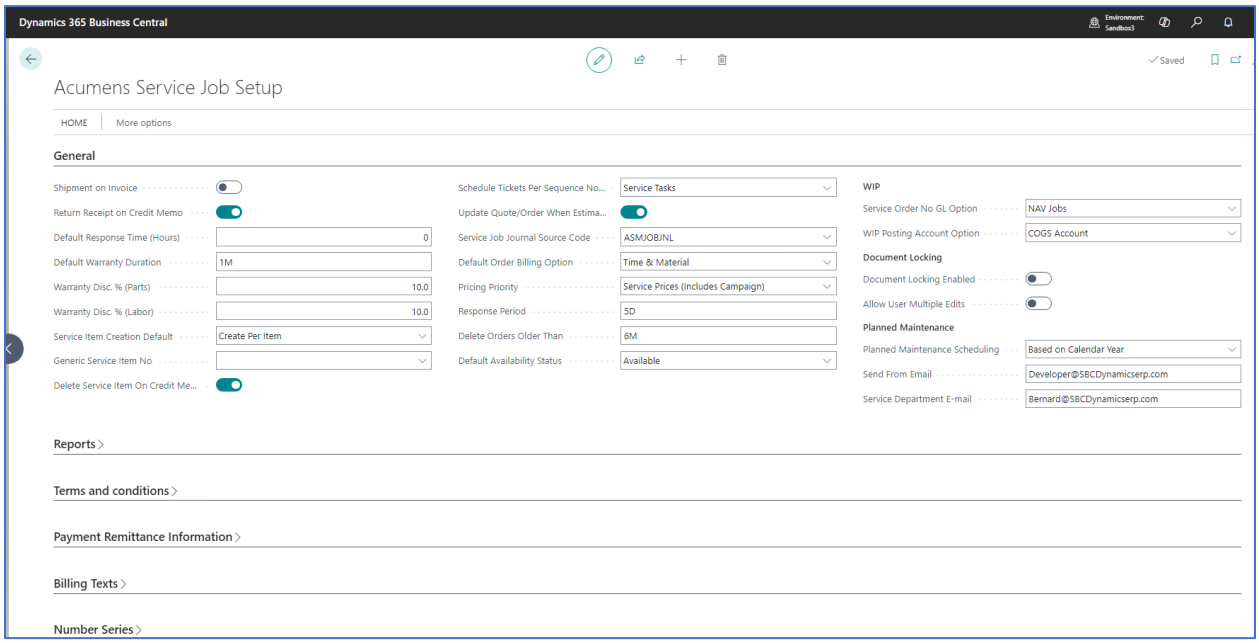


4 ASM Setups

There are several setups that are done in the system to ensure that you track manage the servicing of the items efficiently.

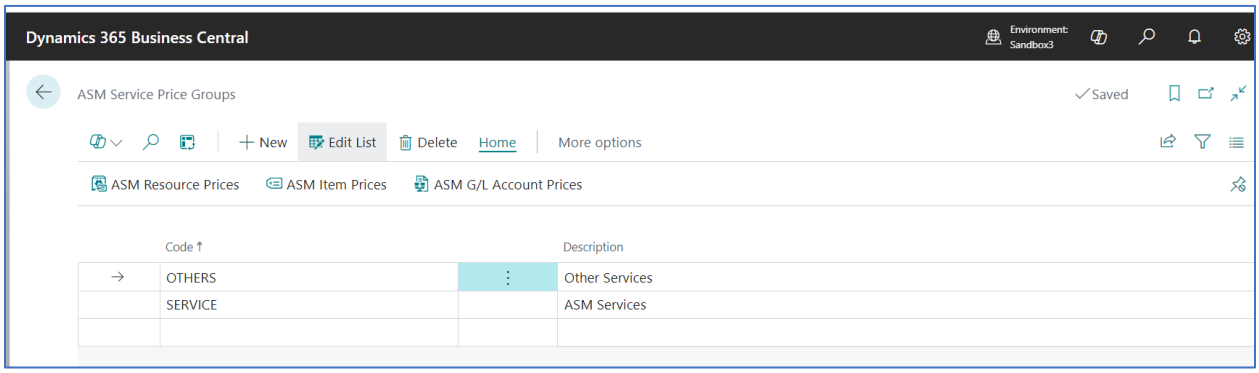
4.1 Acumens Service Job Setup.

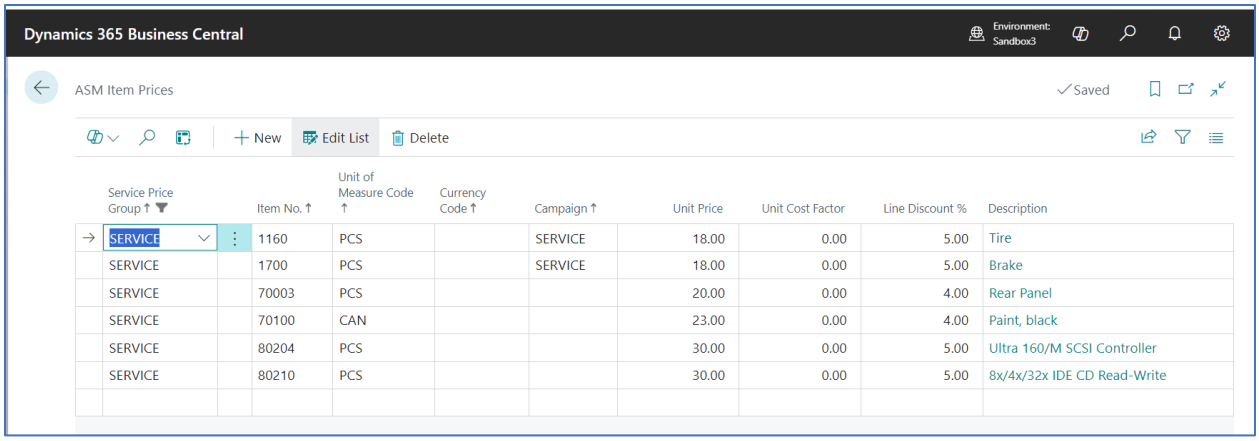
Perform global setups that control the general operations of the app.



4.2 ASM Service Price Groups.

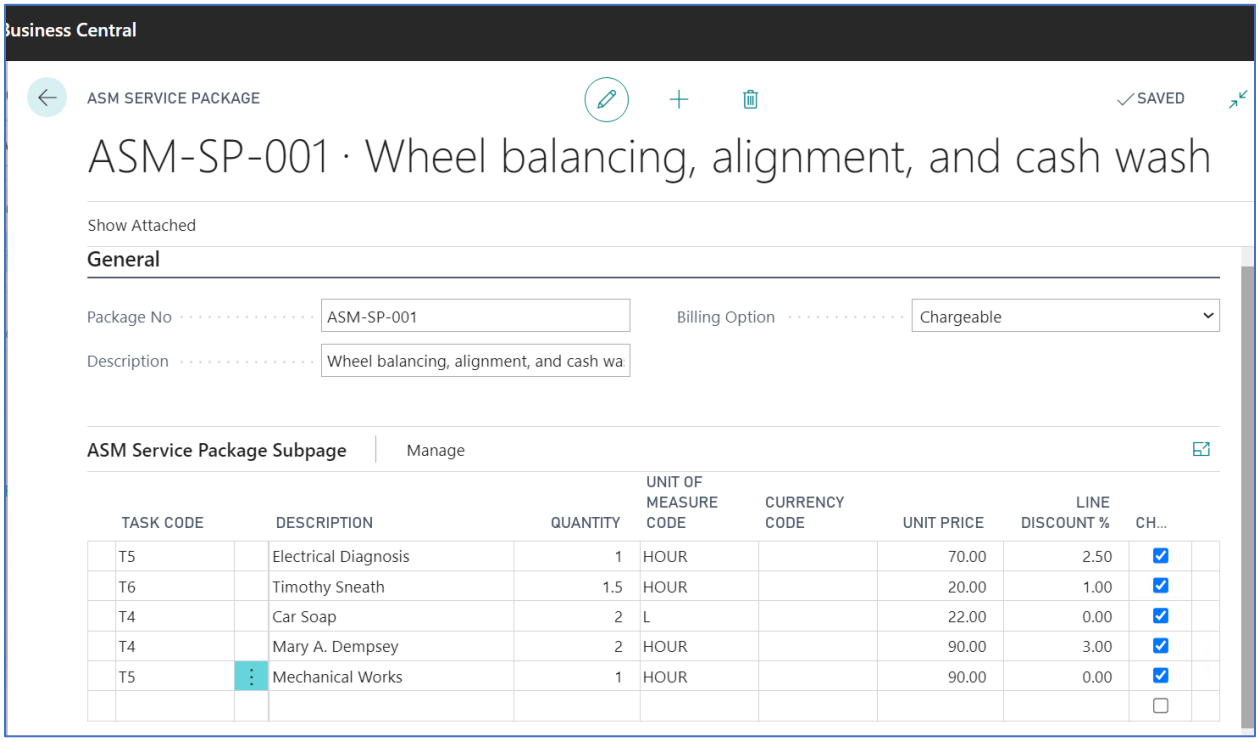
You can set up specific prices for Items, Resource, and G/L Account Prices and assign to a service price group. This can then be assigned to a customer. You can also setup promotions and marketing campaigns.





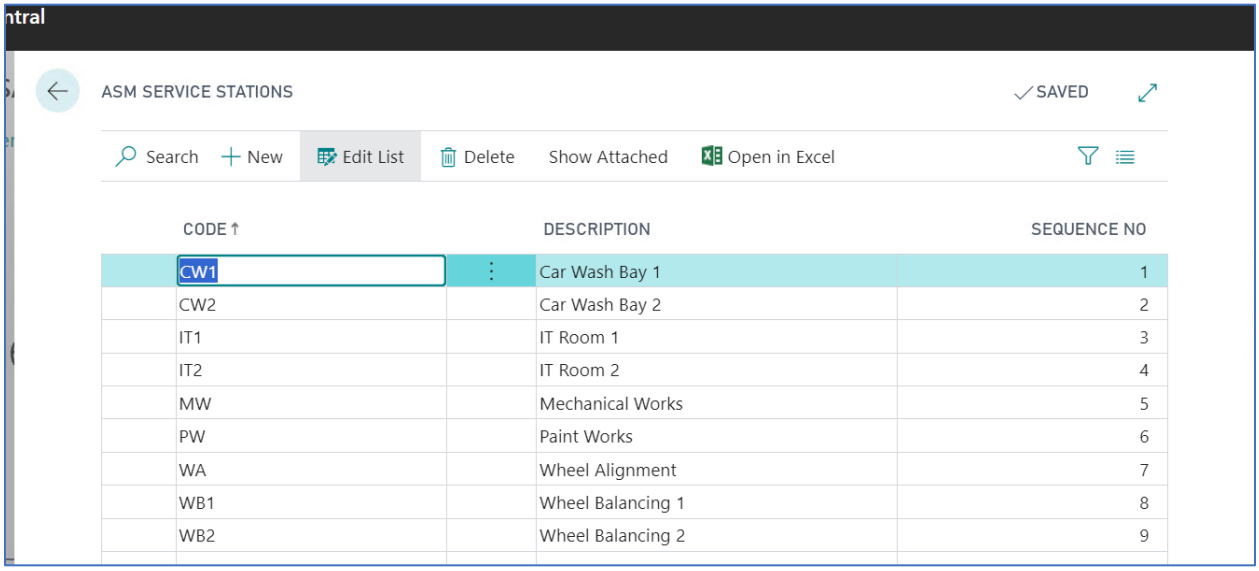
Service Price Group	Item No.	Unit of Measure Code	Currency Code	Campaign	Unit Price	Unit Cost Factor	Line Discount %	Description
SERVICE	1160	PCS		SERVICE	18.00	0.00	5.00	Tire
SERVICE	1700	PCS		SERVICE	18.00	0.00	5.00	Brake
SERVICE	70003	PCS			20.00	0.00	4.00	Rear Panel
SERVICE	70100	CAN			23.00	0.00	4.00	Paint, black
SERVICE	80204	PCS			30.00	0.00	5.00	Ultra 160/M SCSI Controller
SERVICE	80210	PCS			30.00	0.00	5.00	8x/4x/32x IDE CD Read-Write

4.3 Package prices.



TASK CODE	DESCRIPTION	QUANTITY	UNIT OF MEASURE CODE	CURRENCY CODE	UNIT PRICE	LINE DISCOUNT %	CH...
T5	Electrical Diagnosis	1	HOUR		70.00	2.50	☑
T6	Timothy Sneath	1.5	HOUR		20.00	1.00	☑
T4	Car Soap	2	L		22.00	0.00	☑
T4	Mary A. Dempsey	2	HOUR		90.00	3.00	☑
T5	Mechanical Works	1	HOUR		90.00	0.00	☑
							☐

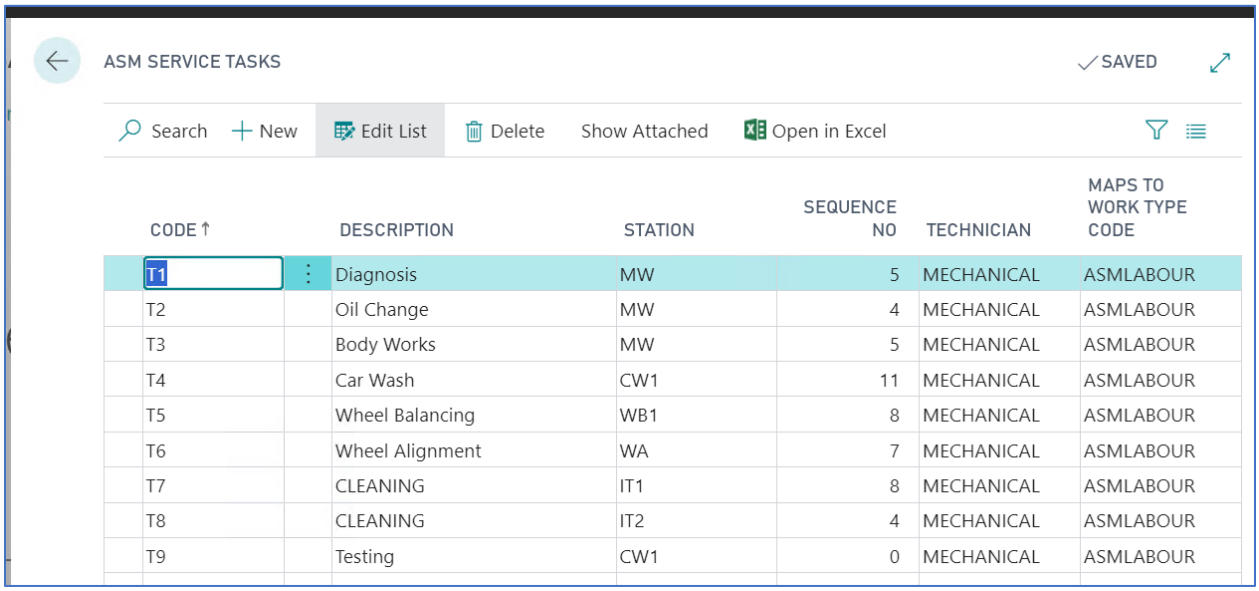
4.4 Setup Service stations, Service Tasks, ASM fault codes and Repair codes.



ASM SERVICE STATIONS — SAVED

Search | New | Edit List | Delete | Show Attached | Open in Excel

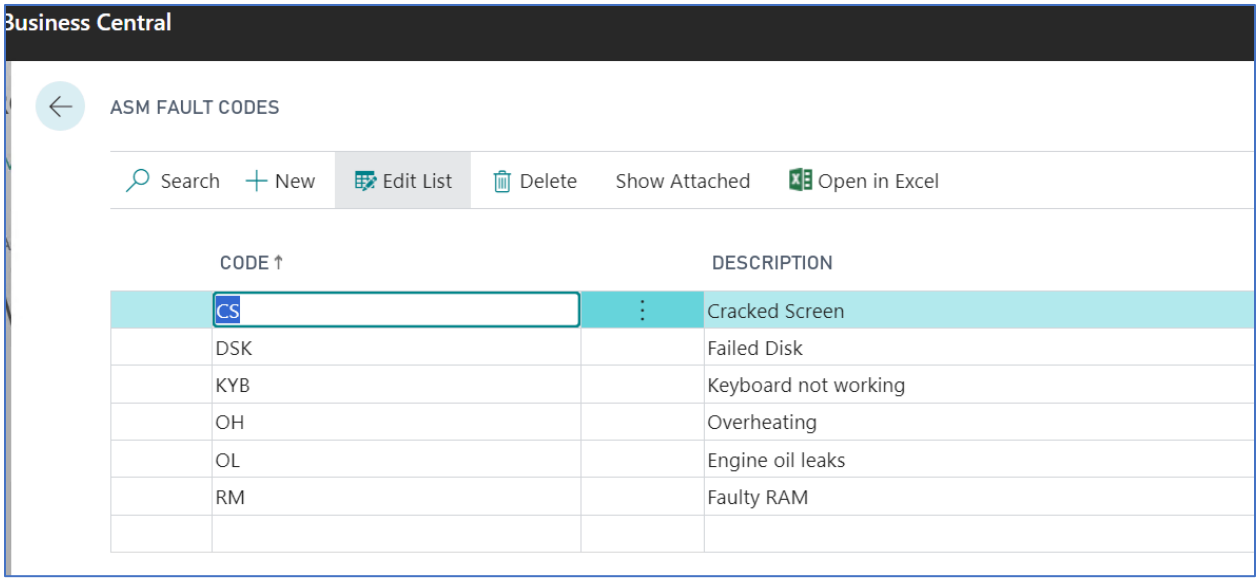
CODE	DESCRIPTION	SEQUENCE NO
CW1	Car Wash Bay 1	1
CW2	Car Wash Bay 2	2
IT1	IT Room 1	3
IT2	IT Room 2	4
MW	Mechanical Works	5
PW	Paint Works	6
WA	Wheel Alignment	7
WB1	Wheel Balancing 1	8
WB2	Wheel Balancing 2	9

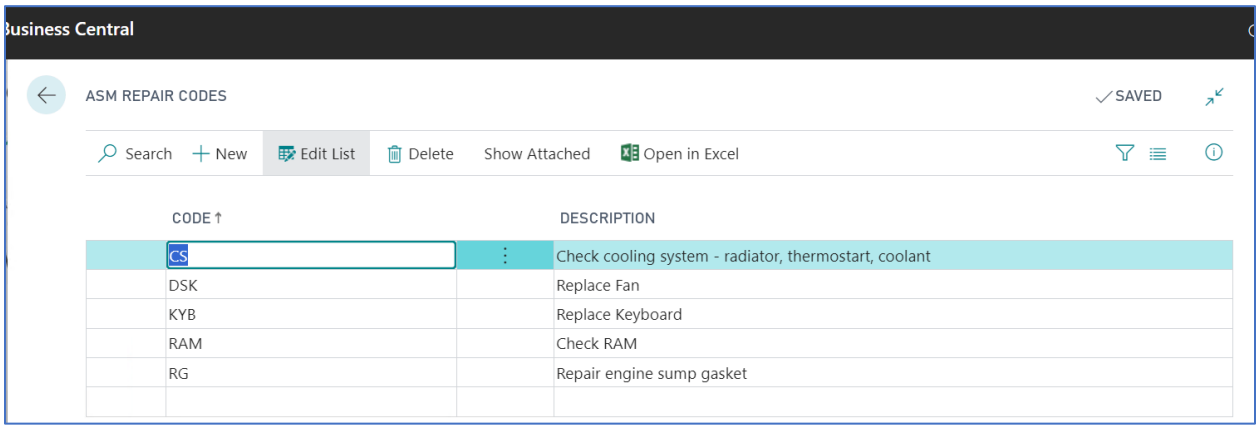


ASM SERVICE TASKS — SAVED

Search | New | Edit List | Delete | Show Attached | Open in Excel

CODE	DESCRIPTION	STATION	SEQUENCE NO	TECHNICIAN	MAPS TO WORK TYPE CODE
T1	Diagnosis	MW	5	MECHANICAL	ASMLABOUR
T2	Oil Change	MW	4	MECHANICAL	ASMLABOUR
T3	Body Works	MW	5	MECHANICAL	ASMLABOUR
T4	Car Wash	CW1	11	MECHANICAL	ASMLABOUR
T5	Wheel Balancing	WB1	8	MECHANICAL	ASMLABOUR
T6	Wheel Alignment	WA	7	MECHANICAL	ASMLABOUR
T7	CLEANING	IT1	8	MECHANICAL	ASMLABOUR
T8	CLEANING	IT2	4	MECHANICAL	ASMLABOUR
T9	Testing	CW1	0	MECHANICAL	ASMLABOUR


Business Central
ASM FAULT CODES
Search
New
Edit List
Delete
Show Attached
Open in Excel
CODE
DESCRIPTION
CS
Cracked Screen
DSK
Failed Disk
KYB
Keyboard not working
OH
Overheating
OL
Engine oil leaks
RM
Faulty RAM

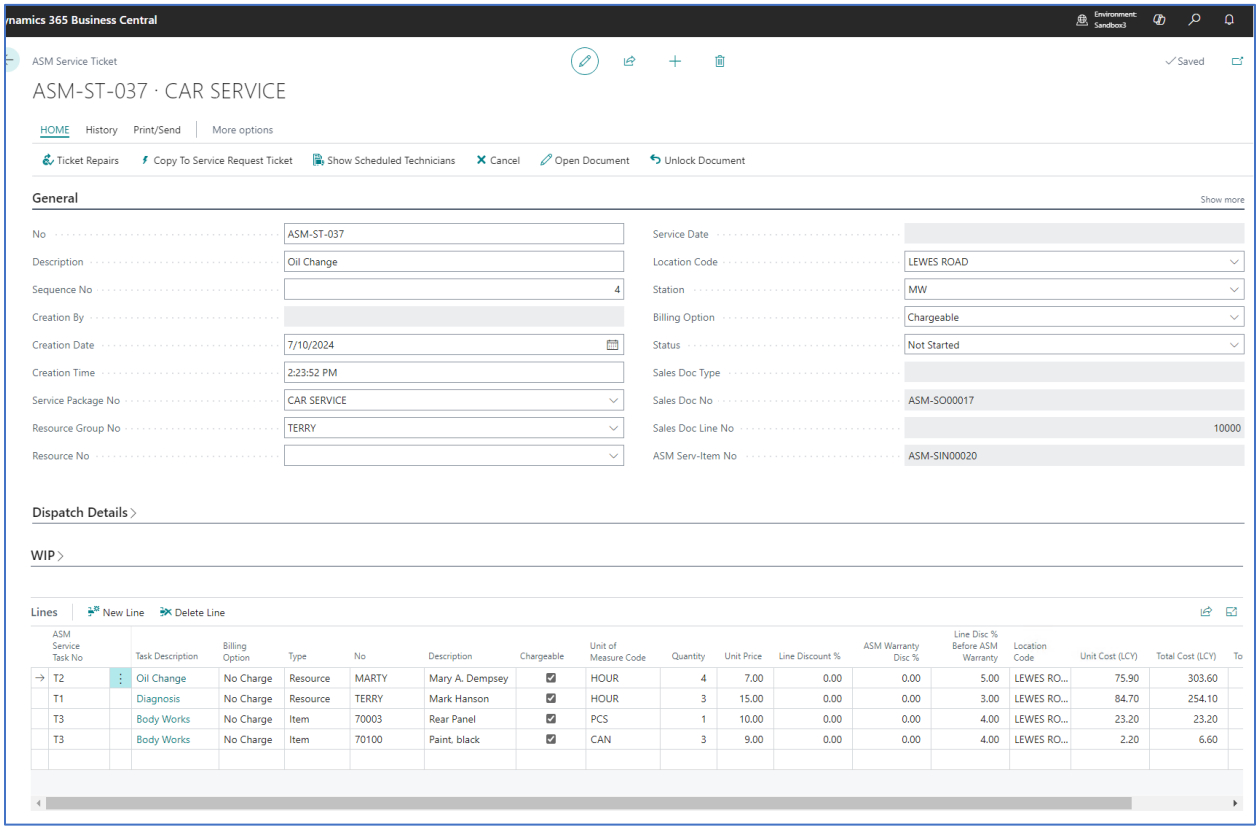

Business Central
ASM REPAIR CODES
SAVED
Search
New
Edit List
Delete
Show Attached
Open in Excel
CODE
DESCRIPTION
CS
Check cooling system - radiator, thermostart, coolant
DSK
Replace Fan
KYB
Replace Keyboard
RAM
Check RAM
RG
Repair engine sump gasket

5 Record Resource Usage and Material Consumption.

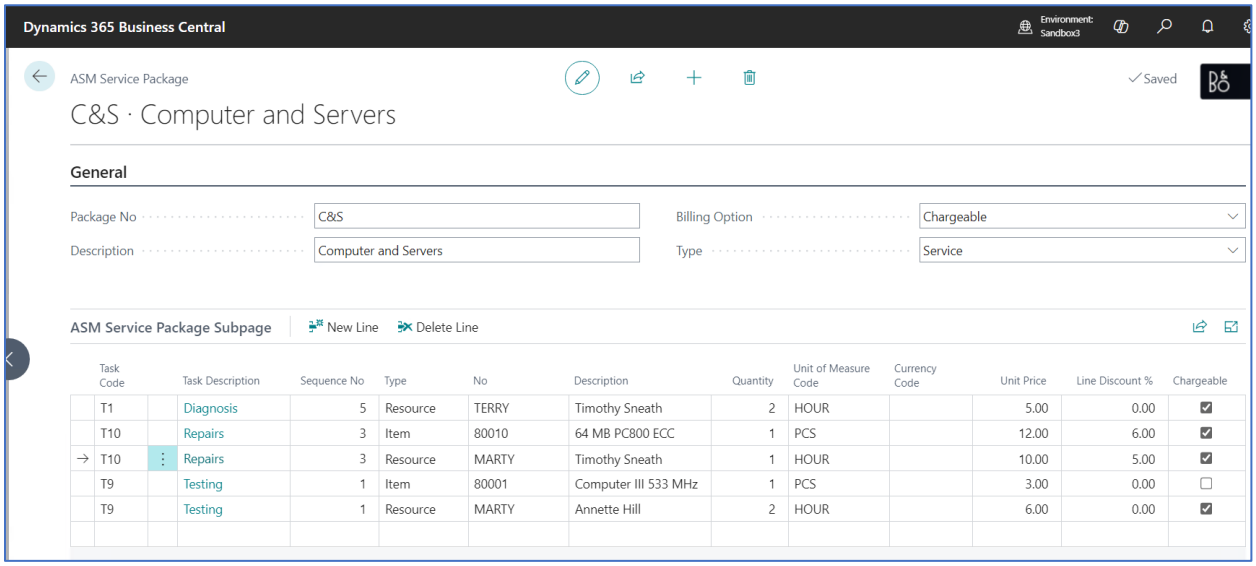
You can record resource usage and material consumption in the Acumens Service Job Management app using the Service Journal.

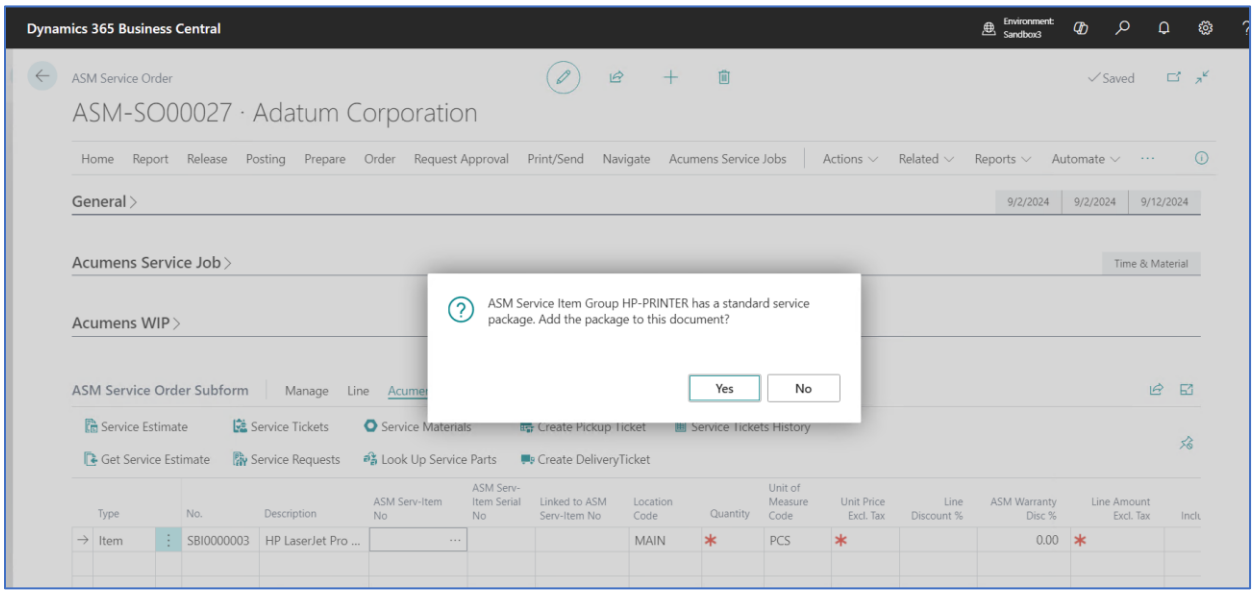
5.1 Setting up Service Tickets.

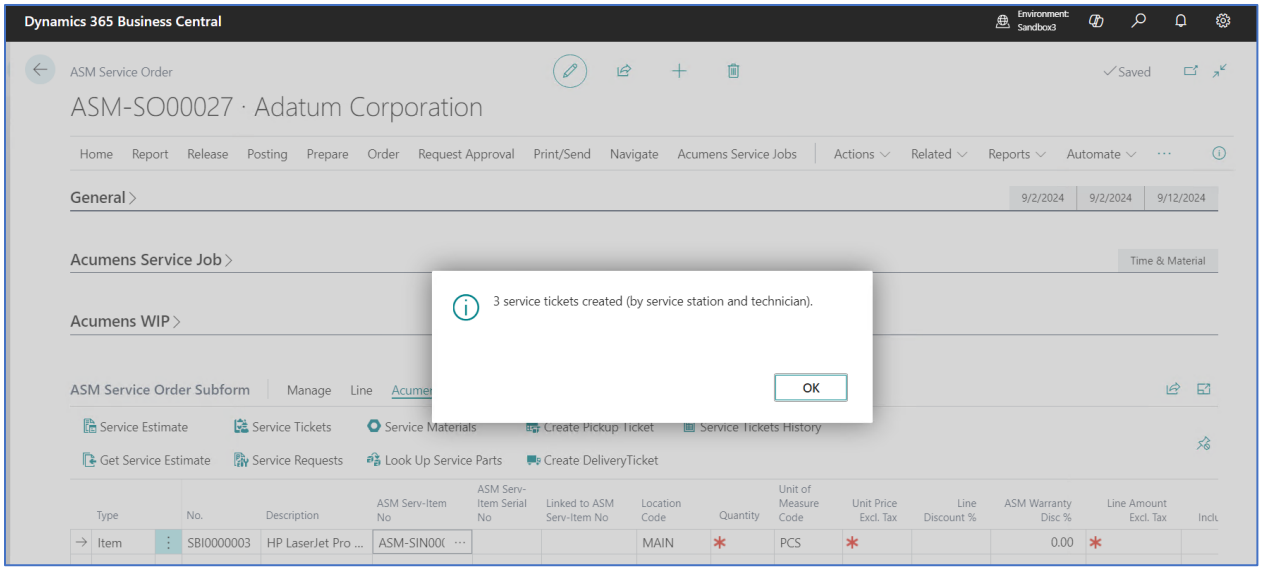
The ASM Service Tickets are used to schedule and allocate the various service tasks and capture usage by technicians. On the ticket, customer service will enter the quantity of items and resource hours expected to be used.



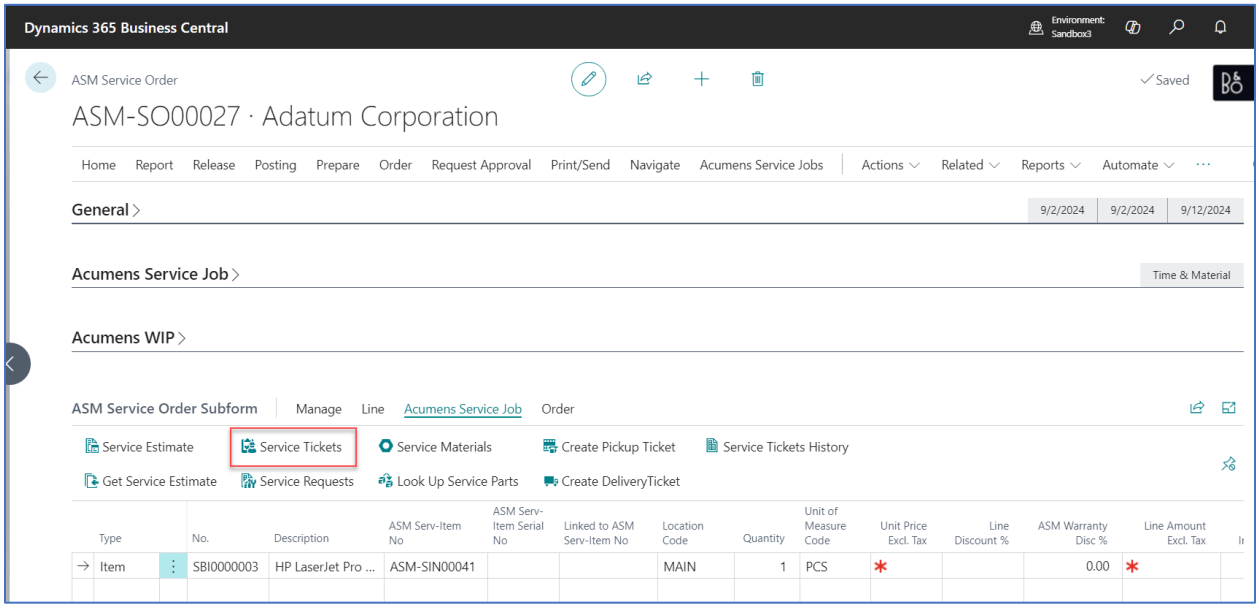
Technicians can create Service Packages and link to the service item. This can be used to automatically create service tickets when the service item is selected on Service order. The tickets are created in the order of service stations and technicians assigned.



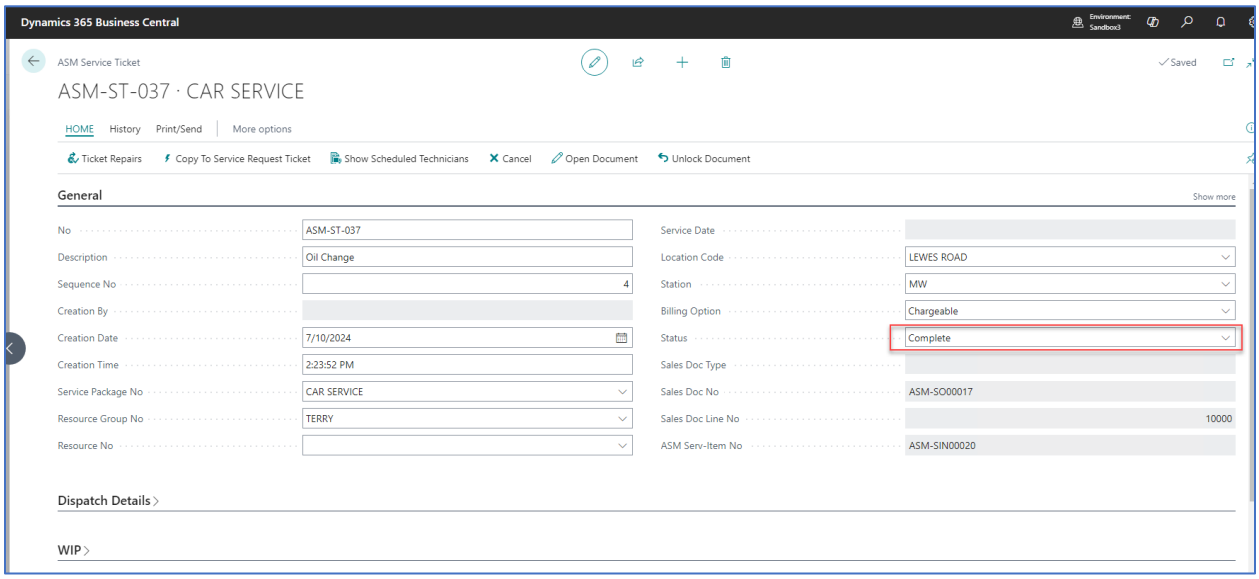




You can view ASM Service Tickets for the ASM Service Order.



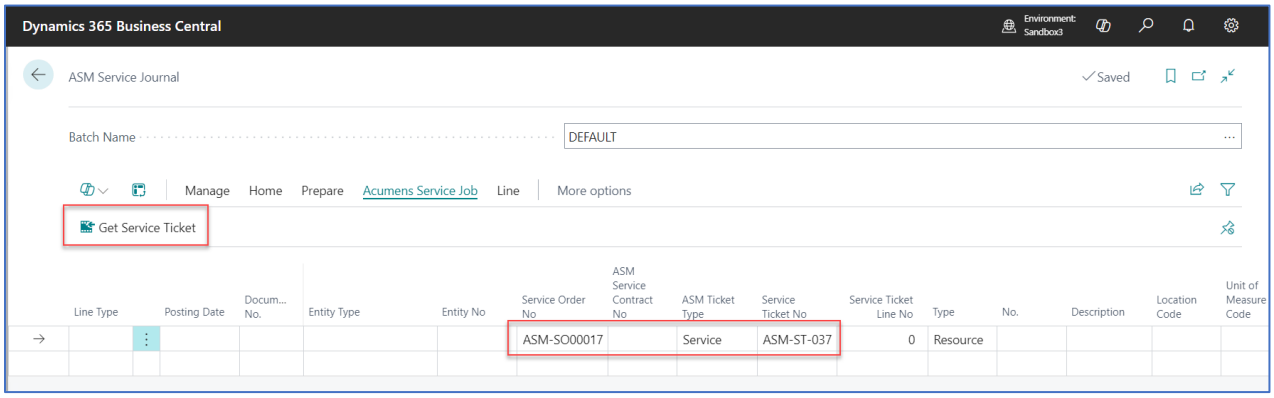
Once the ticket is completed the technician will update the status to complete. Consumption can the be posted.

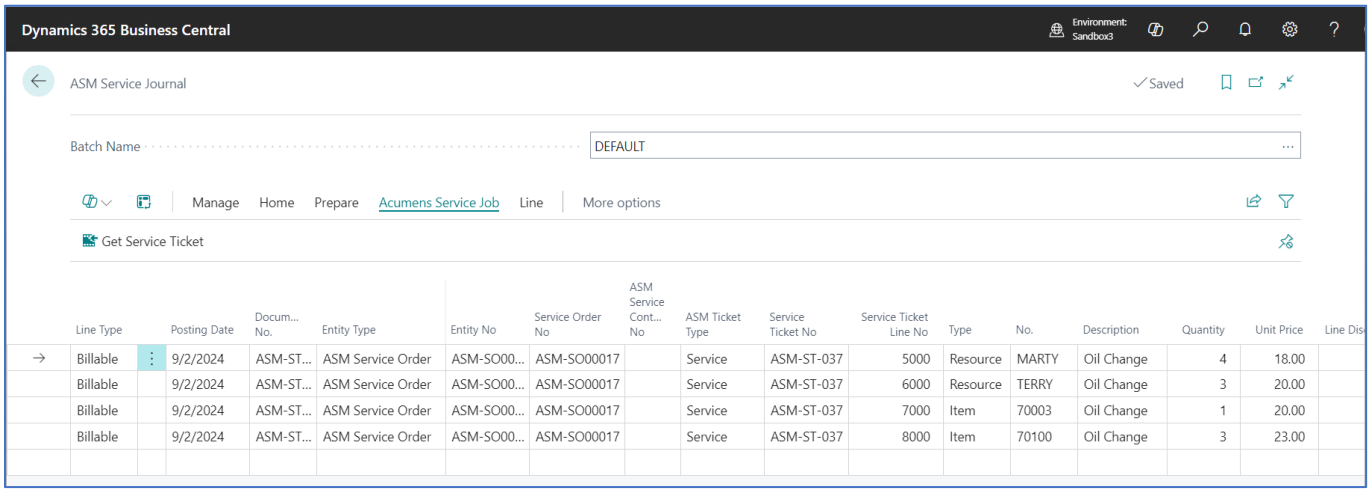


5.2 Posting Consumption.

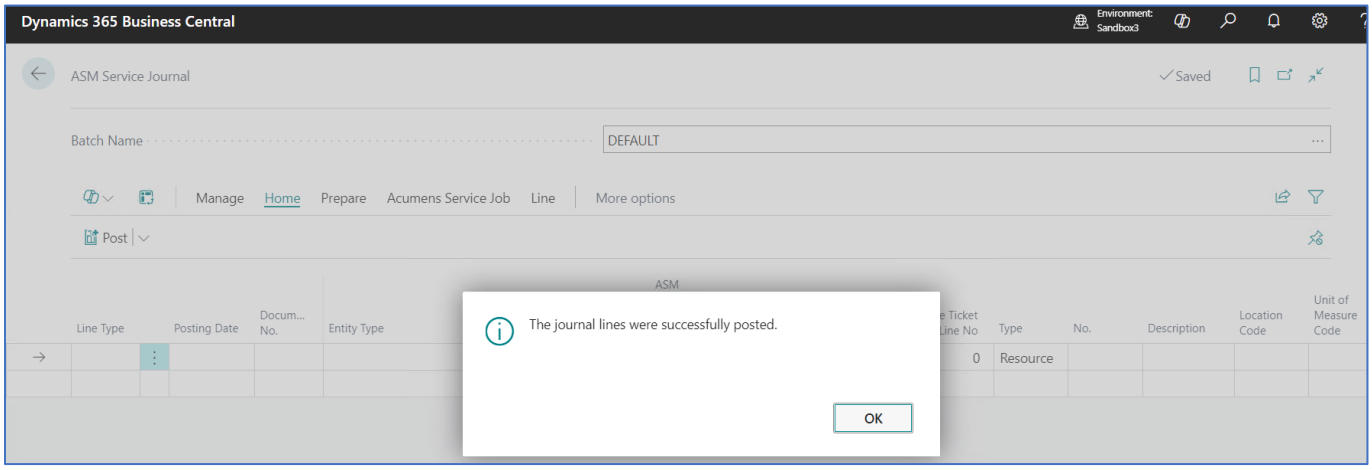
Consumption is posted to recognize the items and services used to perform a service. Usage consumption is posted from ASM Service Journal.

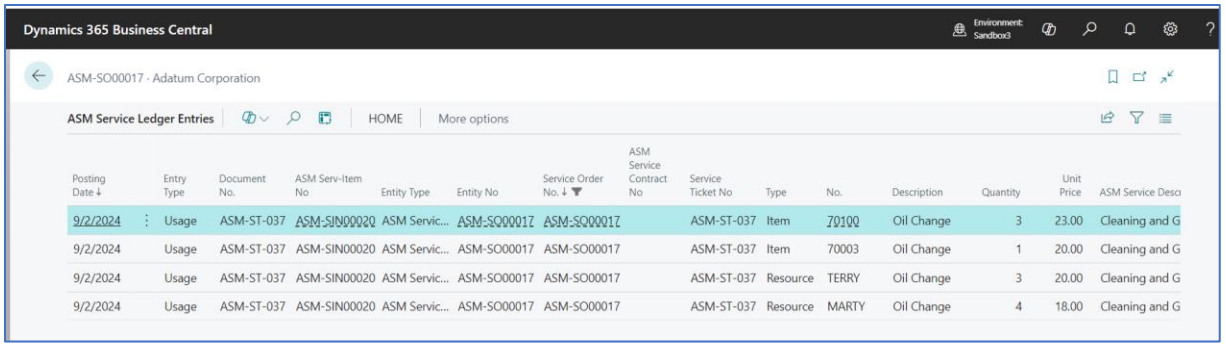
On the journal you only need to enter the Service order (or ASM Service Contracts) and the ticket No. then suggest the ticket consumption.





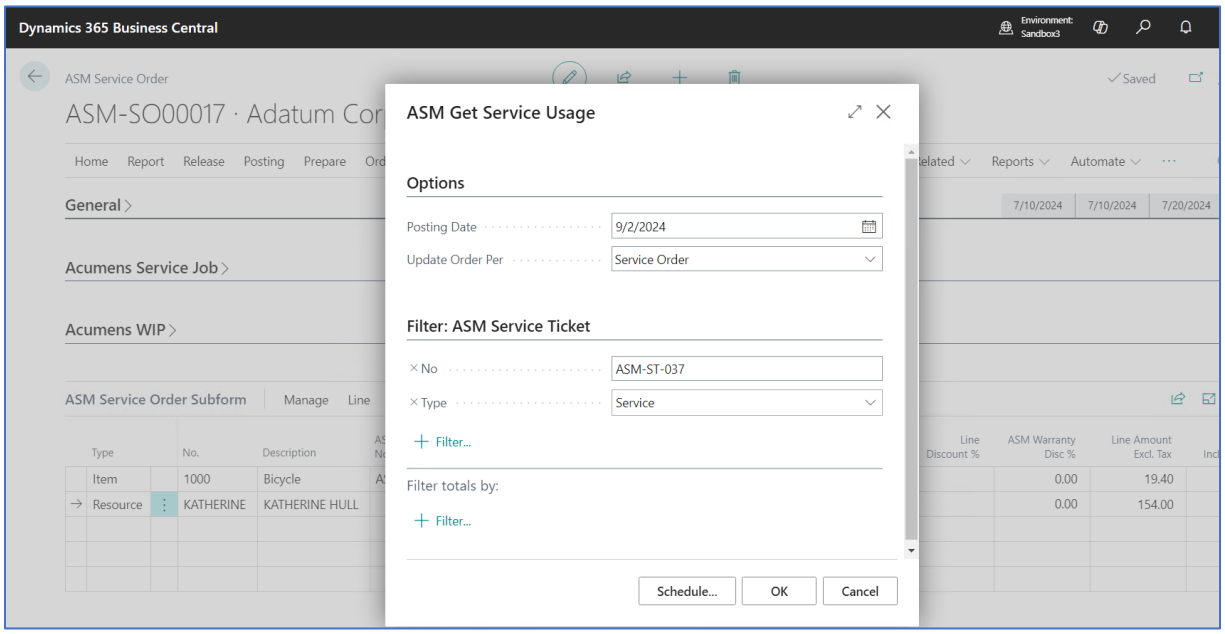
You can do this for one or more tickets. Then post the Journal.

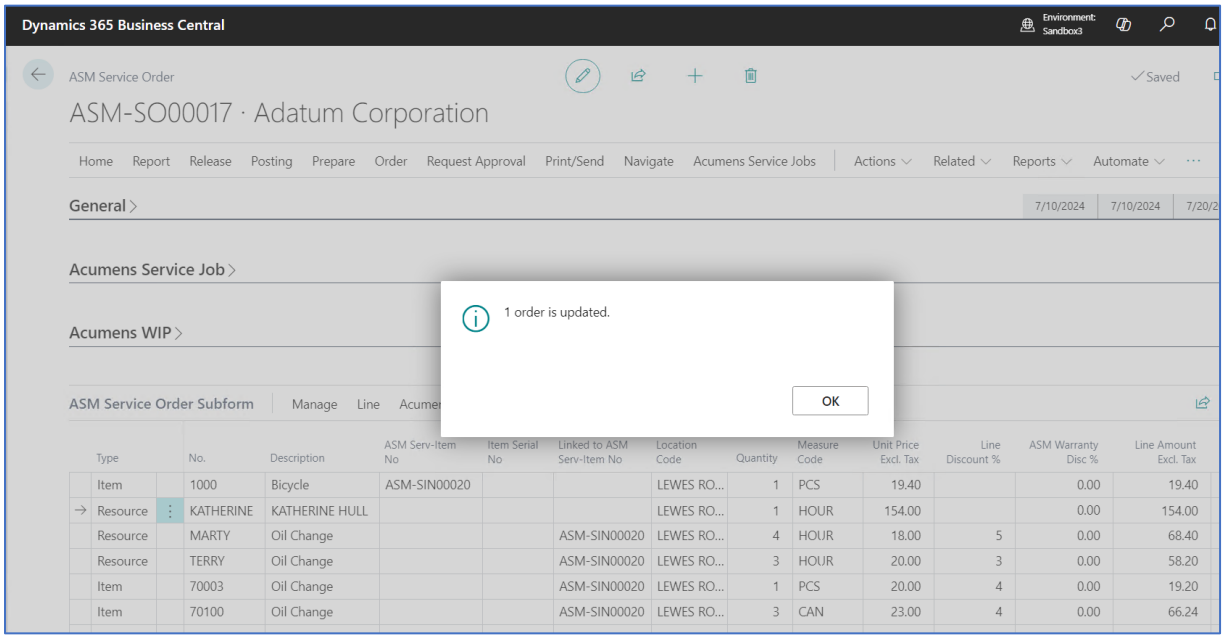




Posting Date	Entry Type	Document No.	ASM Serv-Item No	Entity Type	Entity No	Service Order No.	ASM Service Contract No	Service Ticket No	Type	No.	Description	Quantity	Unit Price	ASM Service Desc
9/2/2024	Usage	ASM-ST-037	ASM-SIN00020	ASM Servic...	ASM-SO00017	ASM-SO00017		ASM-ST-037	Item	70100	Oil Change	3	23.00	Cleaning and G
9/2/2024	Usage	ASM-ST-037	ASM-SIN00020	ASM Servic...	ASM-SO00017	ASM-SO00017		ASM-ST-037	Item	70003	Oil Change	1	20.00	Cleaning and G
9/2/2024	Usage	ASM-ST-037	ASM-SIN00020	ASM Servic...	ASM-SO00017	ASM-SO00017		ASM-ST-037	Resource	TERRY	Oil Change	3	20.00	Cleaning and G
9/2/2024	Usage	ASM-ST-037	ASM-SIN00020	ASM Servic...	ASM-SO00017	ASM-SO00017		ASM-ST-037	Resource	MARTY	Oil Change	4	18.00	Cleaning and G

When ready to bill the service, you get the usage to update the order, then post Service order.

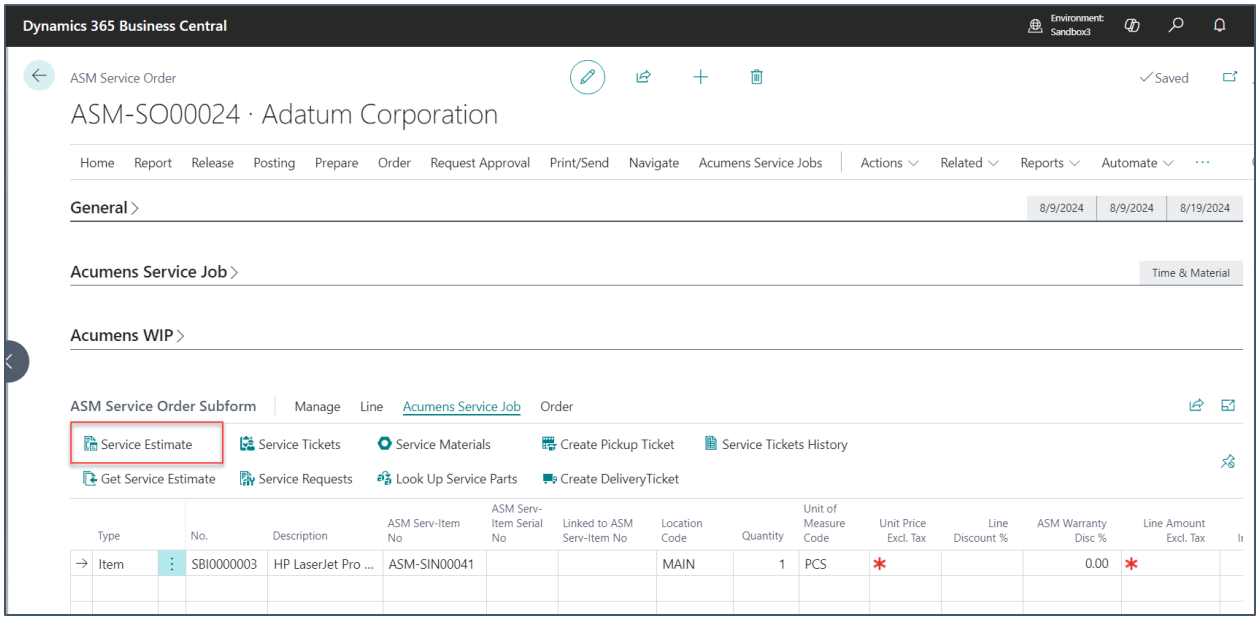




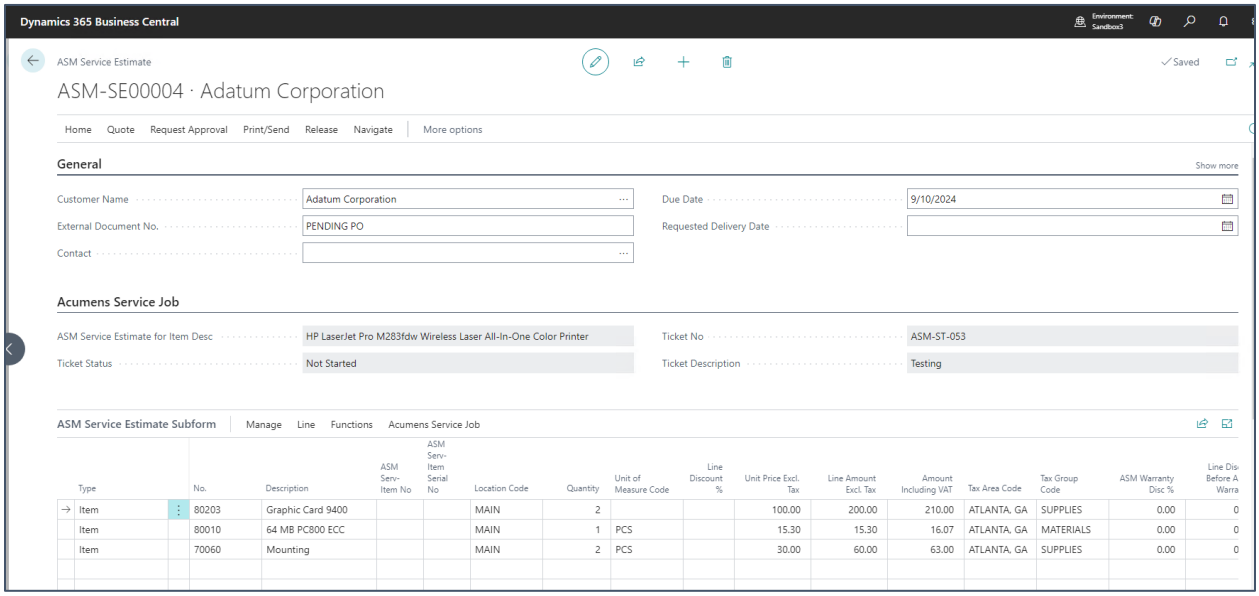
Type	No.	Description	ASM Serv-Item No	Item Serial No	Linked to ASM Serv-Item No	Location Code	Quantity	Measure Code	Unit Price Excl. Tax	Line Discount %	ASM Warranty Disc %	Line Amount Excl. Tax
Item	1000	Bicycle	ASM-SIN00020			LEWES RO...	1	PCS	19.40		0.00	19.40
Resource	KATHERINE	KATHERINE HULL				LEWES RO...	1	HOUR	154.00		0.00	154.00
Resource	MARTY	Oil Change			ASM-SIN00020	LEWES RO...	4	HOUR	18.00	5	0.00	68.40
Resource	TERRY	Oil Change			ASM-SIN00020	LEWES RO...	3	HOUR	20.00	3	0.00	58.20
Item	70003	Oil Change			ASM-SIN00020	LEWES RO...	1	PCS	20.00	4	0.00	19.20
Item	70100	Oil Change			ASM-SIN00020	LEWES RO...	3	CAN	23.00	4	0.00	66.24

6 ASM Service Estimate

Service estimate allows you to create an estimated quote for the consumable materials and resources that will be required to service an equipment. This will act a quote to simulate what will be required for an order. Once the customer has agreed, it can then be used to update the ASM Service order for billing.

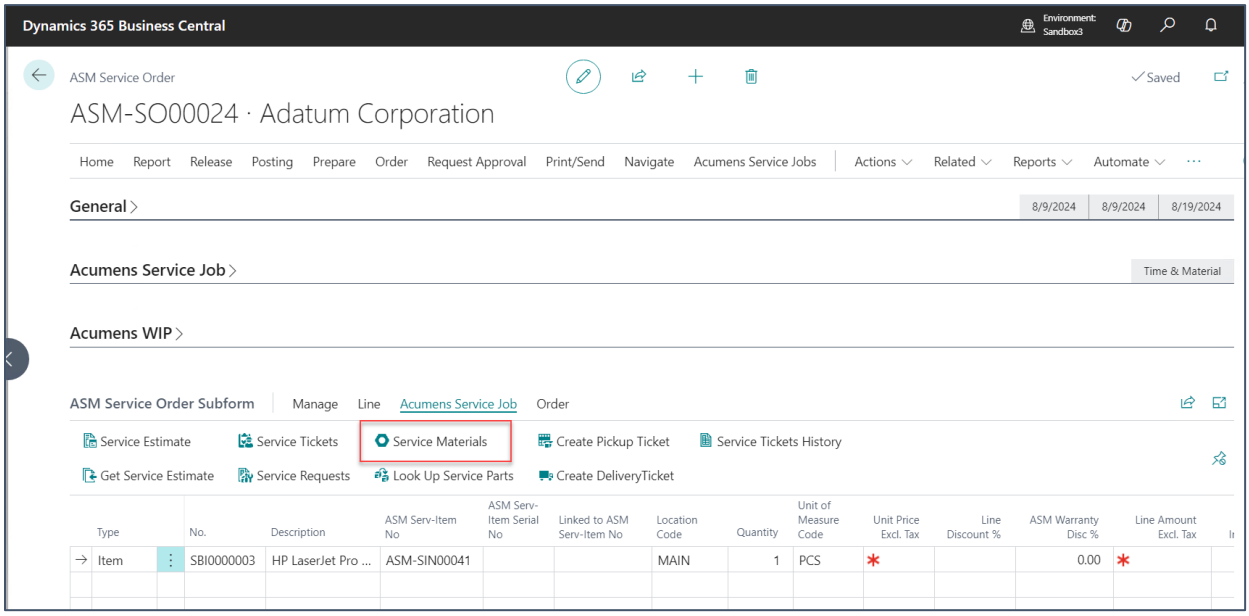


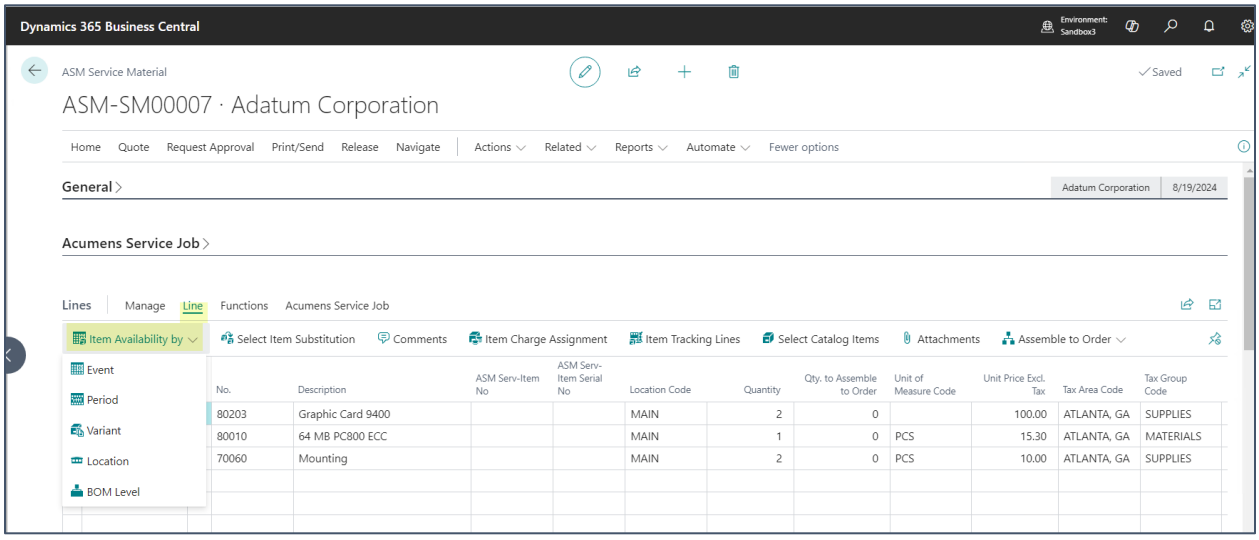
You select the lines on the estimate.

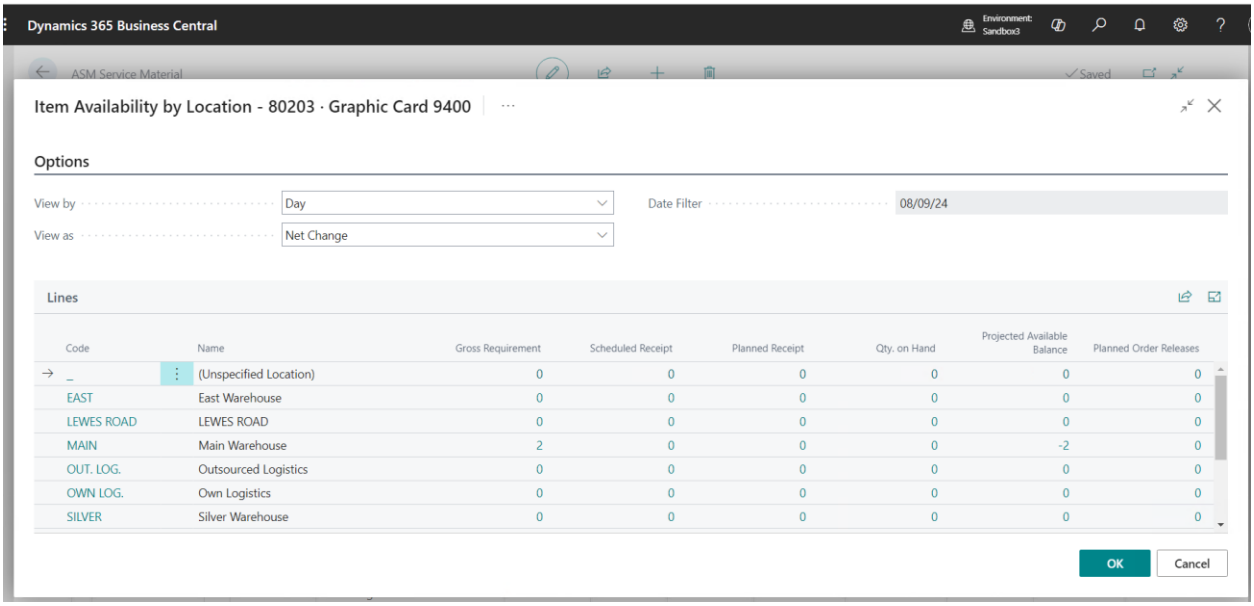


7 ASM Service Material Availability

Service materials availability feature is used to check inventory availability and create anticipated demand for parts required for a particular Service. This allows you to efficiently and cost-effectively plan for and be able to meet the requirements for the service consumables to be used for a service.

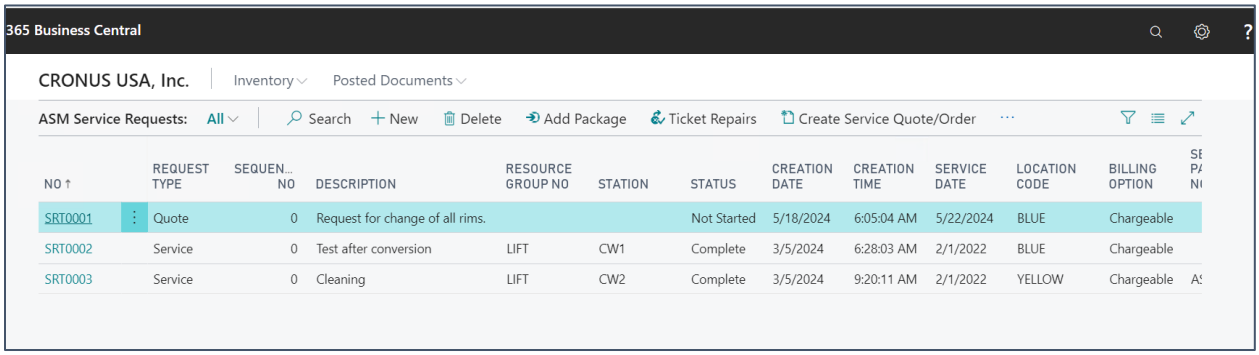




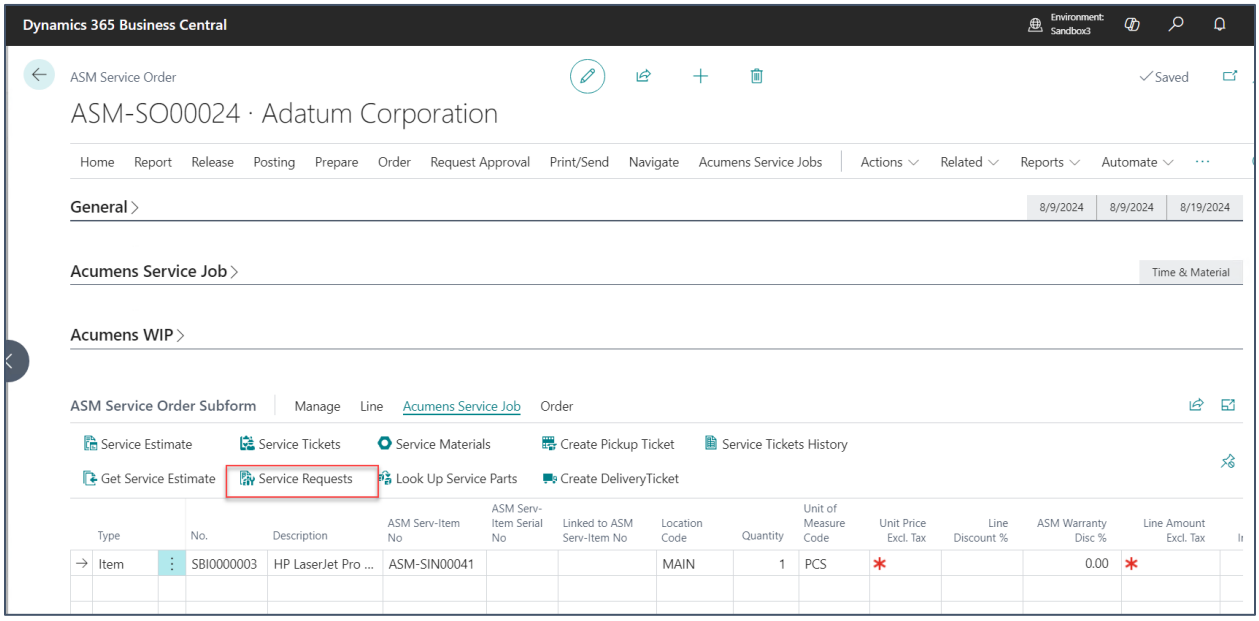

Dynamics 365 Business Central
Environment: Sandbox3
ASM Service Material
Saved
Item Availability by Location - 80203 · Graphic Card 9400
Options
View by
Day
Date Filter
08/09/24
View as
Net Change
Lines
Code
Name
Gross Requirement
Scheduled Receipt
Planned Receipt
Qty. on Hand
Projected Available Balance
Planned Order Releases
_ (Unspecified Location) 0 0 0 0 0 0
EAST East Warehouse 0 0 0 0 0 0
LEWES ROAD LEWES ROAD 0 0 0 0 0 0
MAIN Main Warehouse 2 0 0 0 -2 0
OUT. LOG. Outsourced Logistics 0 0 0 0 0 0
OWN LOG. Own Logistics 0 0 0 0 0 0
SILVER Silver Warehouse 0 0 0 0 0 0
OK
Cancel

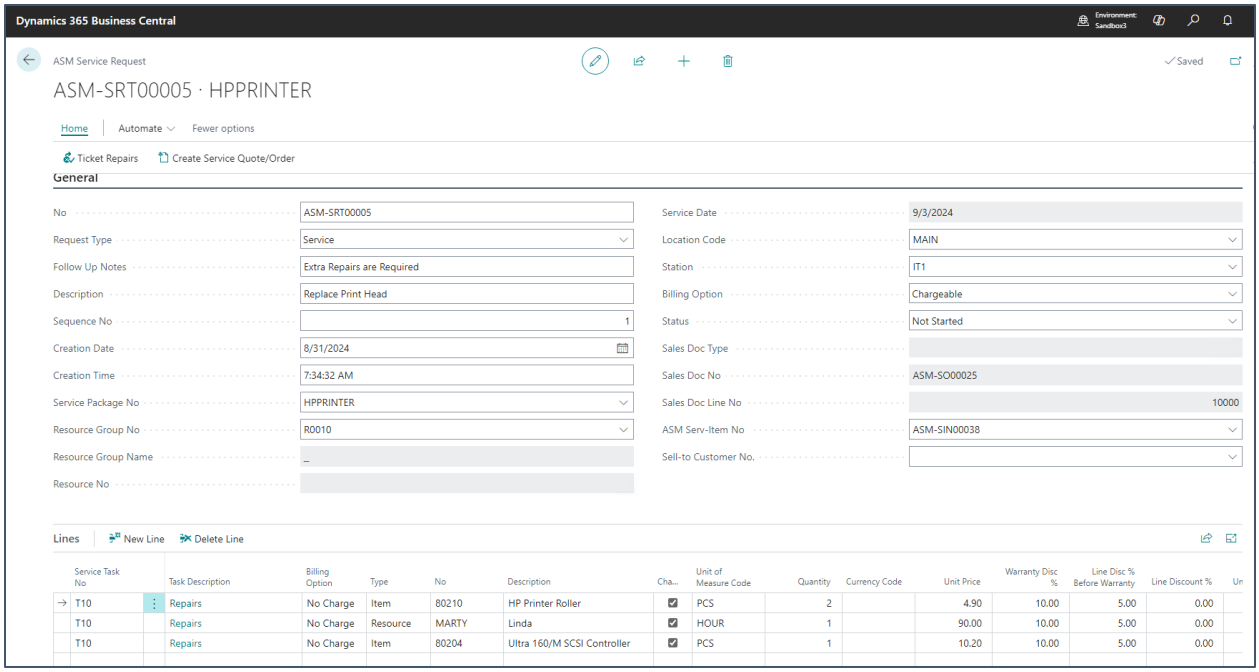
8 ASM Service Request

ASM Service request gives a technician the ability to request additional work or corrective actions during a service and follow through to completion.

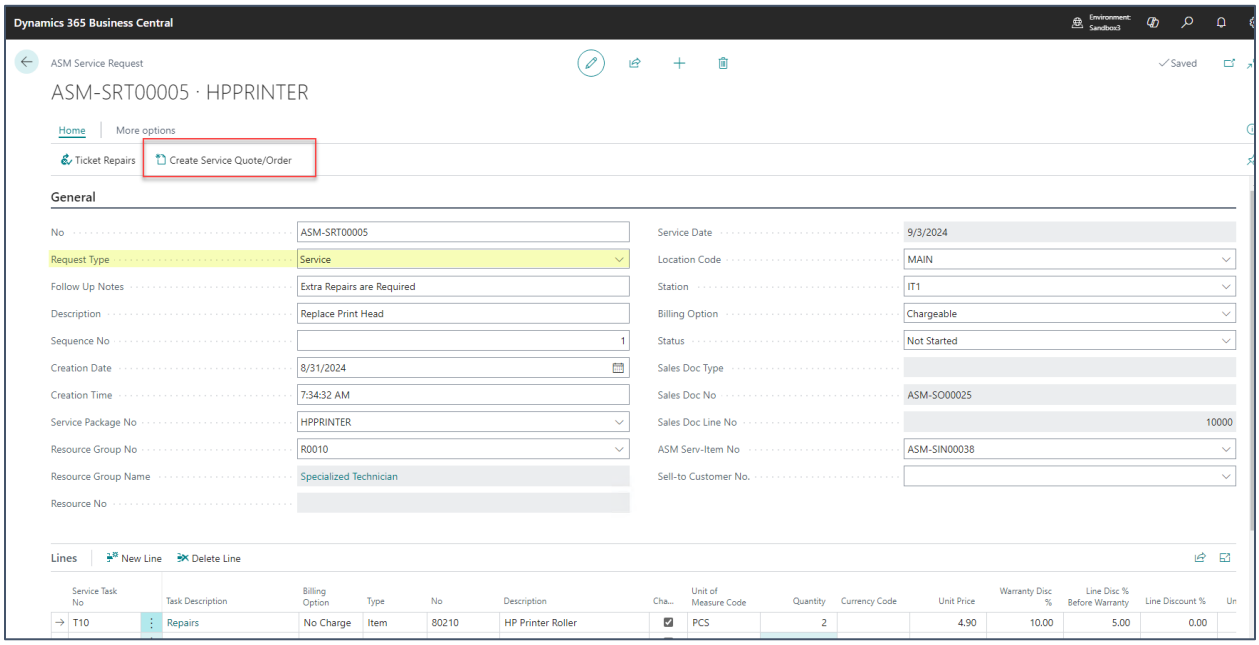


A service request can be initiated from an existing Service Ticket, ASM Service order or ASM Service quote.



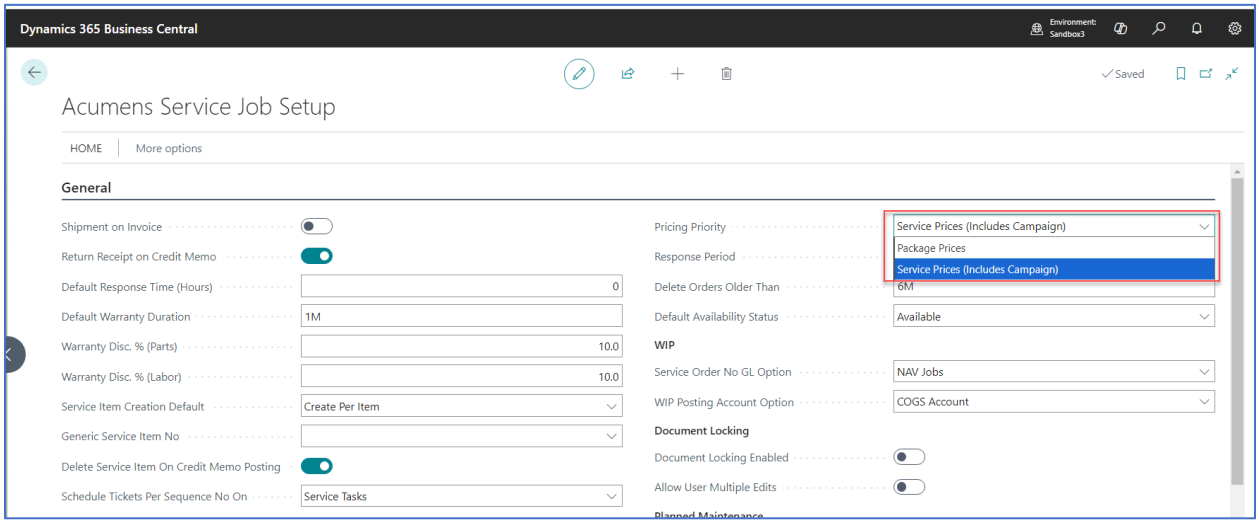


You can then create an ASM Service order or ASM Service Quote from the Service Request.



9 ASM Service Pricing.

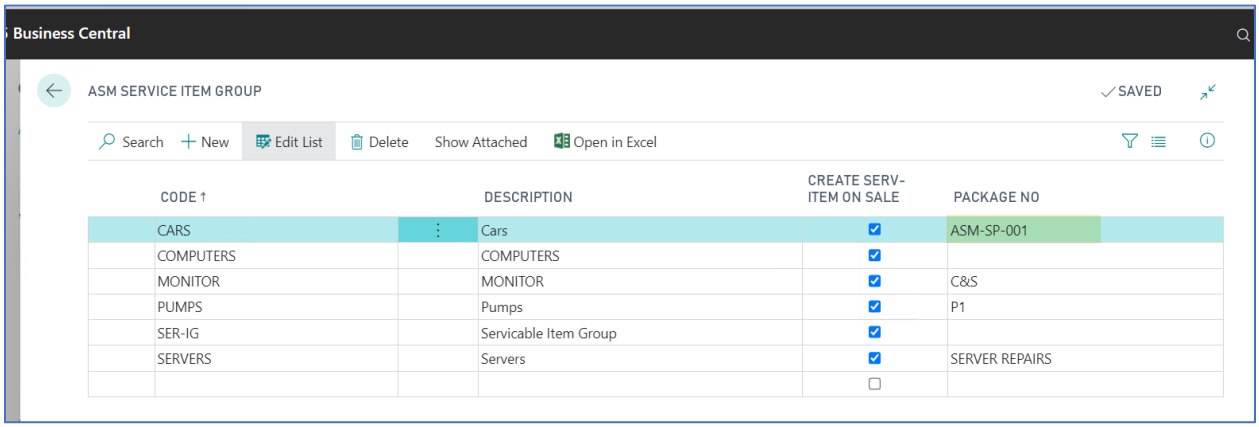
ASM Service prices can be set to use prices from the Service package or from the ASM Service prices.



a. ASM Package Prices.

Prices for resources and Items are set on ASM Service package.

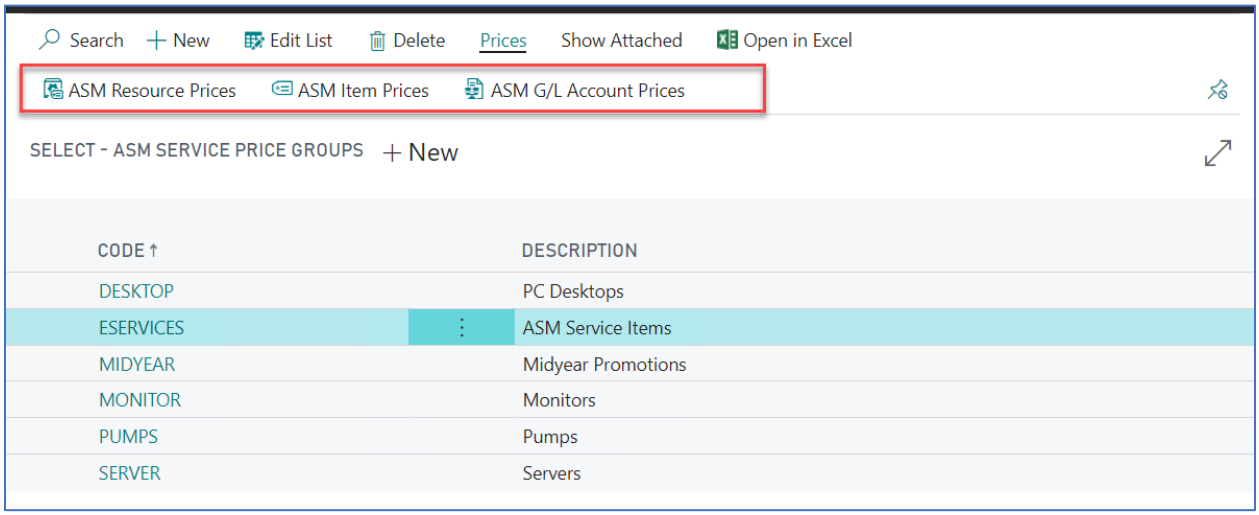
The package is assigned to ASM Service Item Groups of a service item. When the setup is set to use Package prices, Prices are populated from the service Package to the tickets and to ASM Service Order.

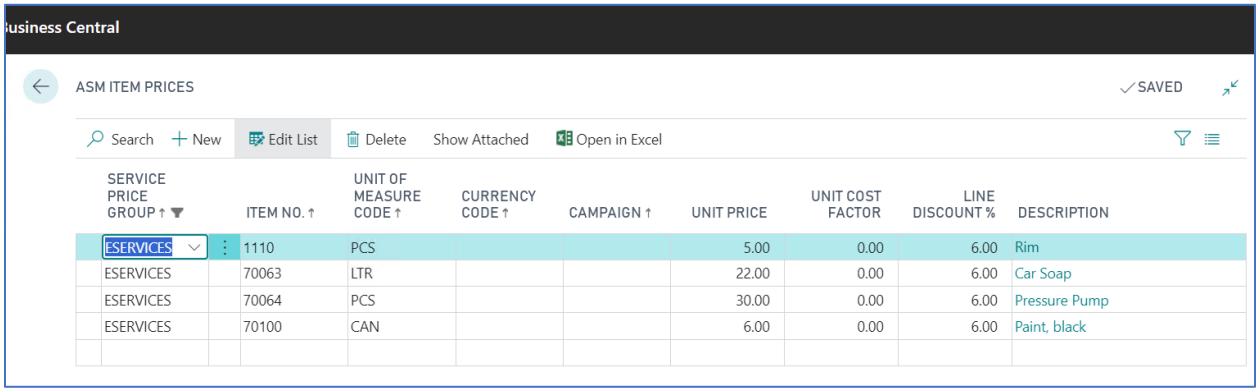


CODE	DESCRIPTION	CREATE SERV-ITEM ON SALE	PACKAGE NO
CARS	Cars	☑	ASM-SP-001
COMPUTERS	COMPUTERS	☑	
MONITOR	MONITOR	☑	C&S
PUMPS	Pumps	☑	P1
SER-IG	Servicable Item Group	☑	
SERVERS	Servers	☑	SERVER REPAIRS
		☐	

b. ASM Service prices.

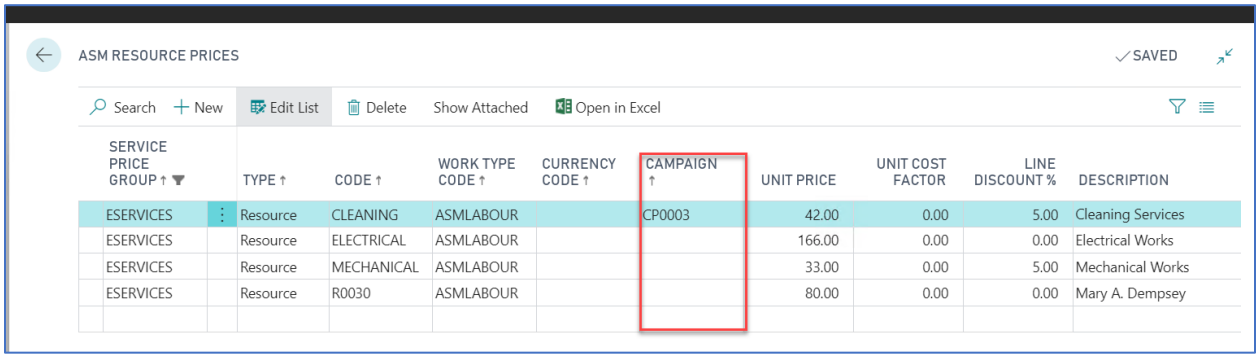
ASM Service prices are set per ASM price group which is then assigned to a customer.





Promotional campaigns can also be set up for Service Prices.

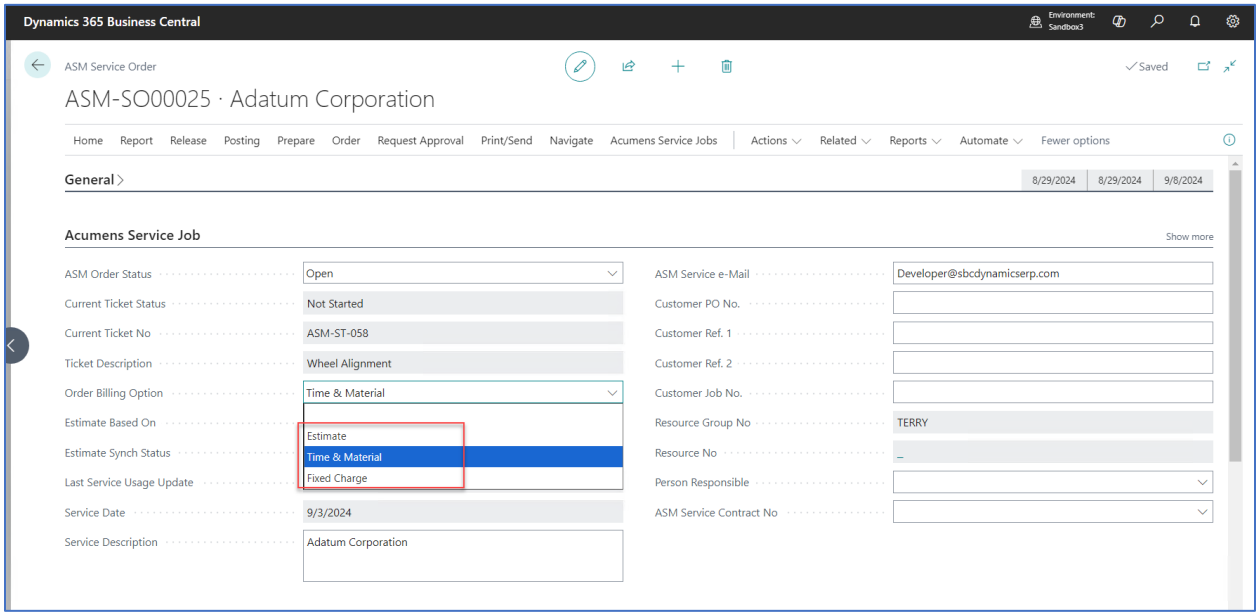
The Campaign feature can be used for seasonal pricing. These prices apply to items, resources, and g/l sales made through addd-on.



If the service prices are setup, the prices from ASM Service prices is populated on ASM Service journal when posting usage consumption and on ASM Service Order for billing.

10 ASM Service Billing Options.

Setup Steps for Service Billing in the Acumens Service Job Management app.

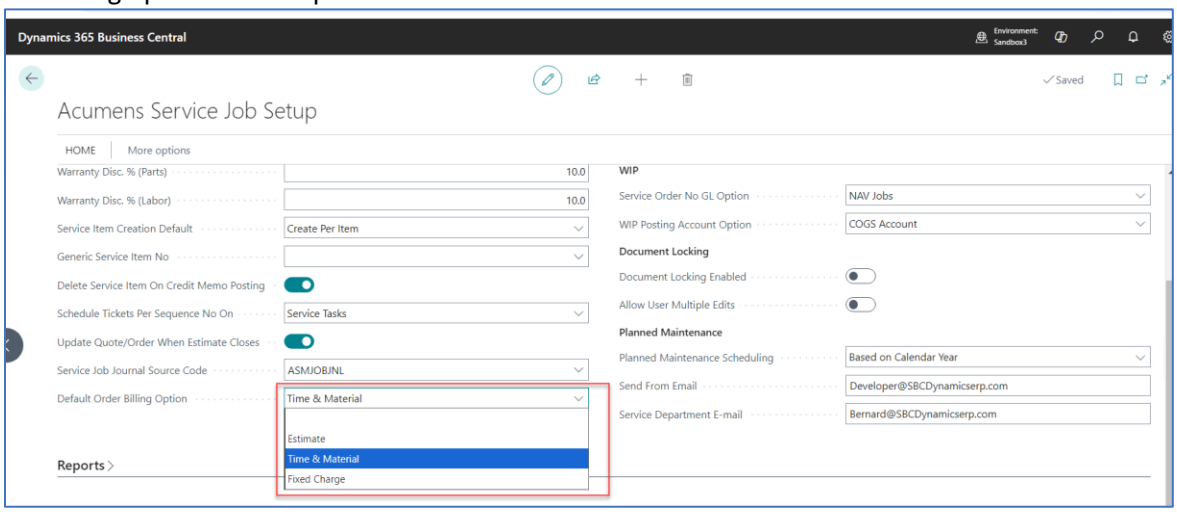


There are 3 billing options in the ASM app:

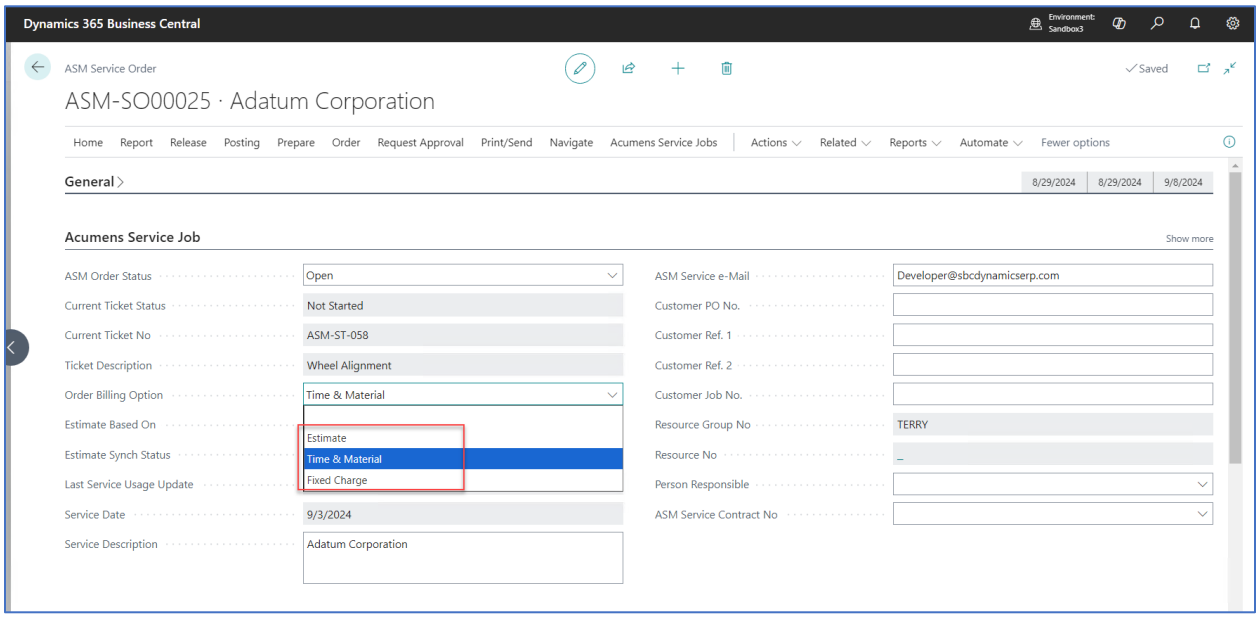
- **Time & Material** is where the ASM Service Order is billed based on actual values posted from the ASM Service Tickets associated with it.
- **Estimate** is where the ASM Service Order is billed based on the ASM Service Estimate associated with it, ignoring the actual consumption from the tickets.
- **Fixed Charge** is the option where figures billed to the client will be manually captured on the ASM Service Order lines without considering the consumption posted or the Service Estimates (if any).

To set up ASM Service billing, there is a 2-stage process:

a. Set up Default Billing Option on the Acumens Service Job setup. This setup is the default billing option that the system will adopt in the absence of an intervention from a user to define a billing option for the specific ASM Service Order under consideration.



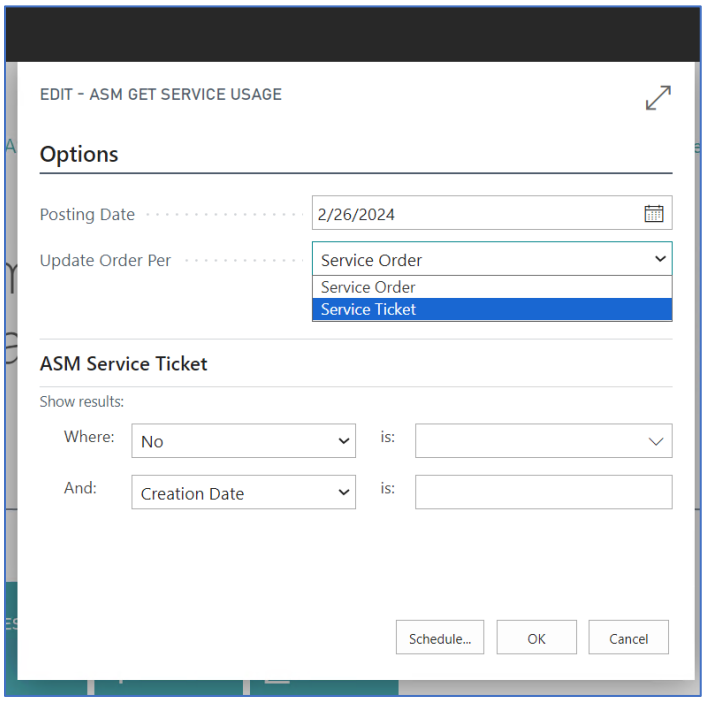
b. The option from the setup is defaulted but you can change and set a different Billing Option on the ASM Service Order when creating it.



If the billing option is defined on the ASM Service Order, it takes precedence over the default billing option specified on the Acumens Service Job setup when processing the Service Order.

10.1 Time & Material.

You can get the actual cost to bill by running Service Usage batch.



You can select the following options for **Update Order Per** field:

- **Service Order**: The usage shall be updated on the ASM Service Order lines as a single entry aggregating the total sum of the usage for billing.

- **Service Ticket**: The usage shall be updated on the ASM Service Order lines as captured per Service Ticket processed.

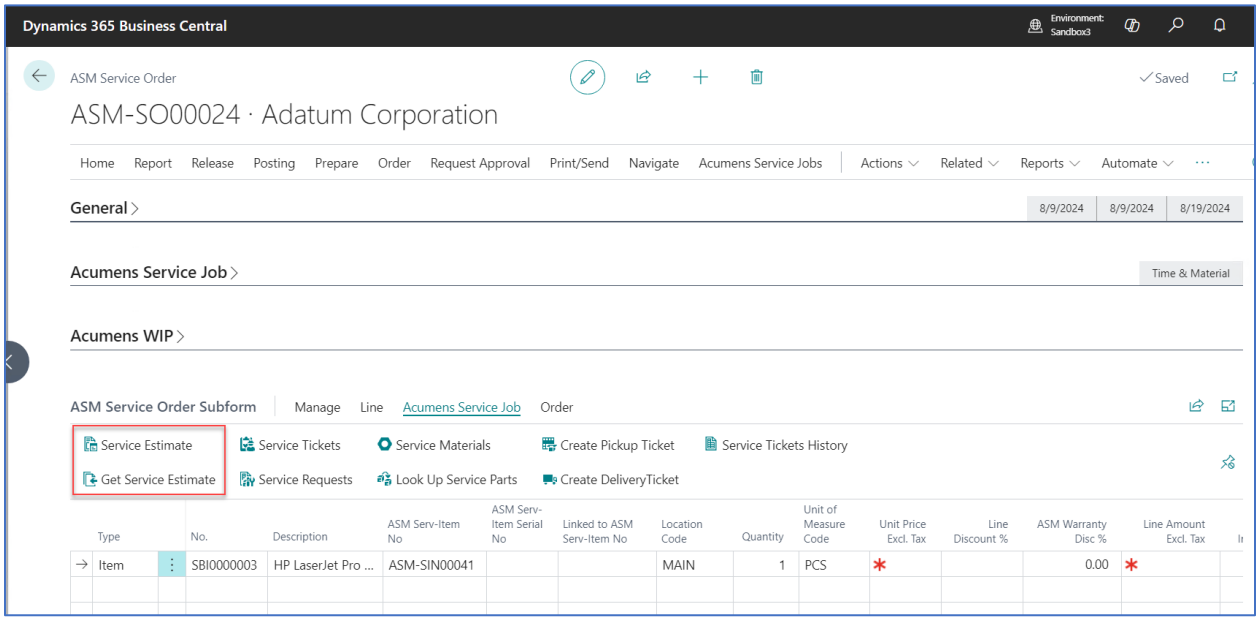
On the Request Page, click **OK** and this will update the service orders, and the app will display a prompt of all the tickets retrieved for billing and transferred / updated on various service orders.

You can then release and post the Service order.

10.2 Estimate Billing.

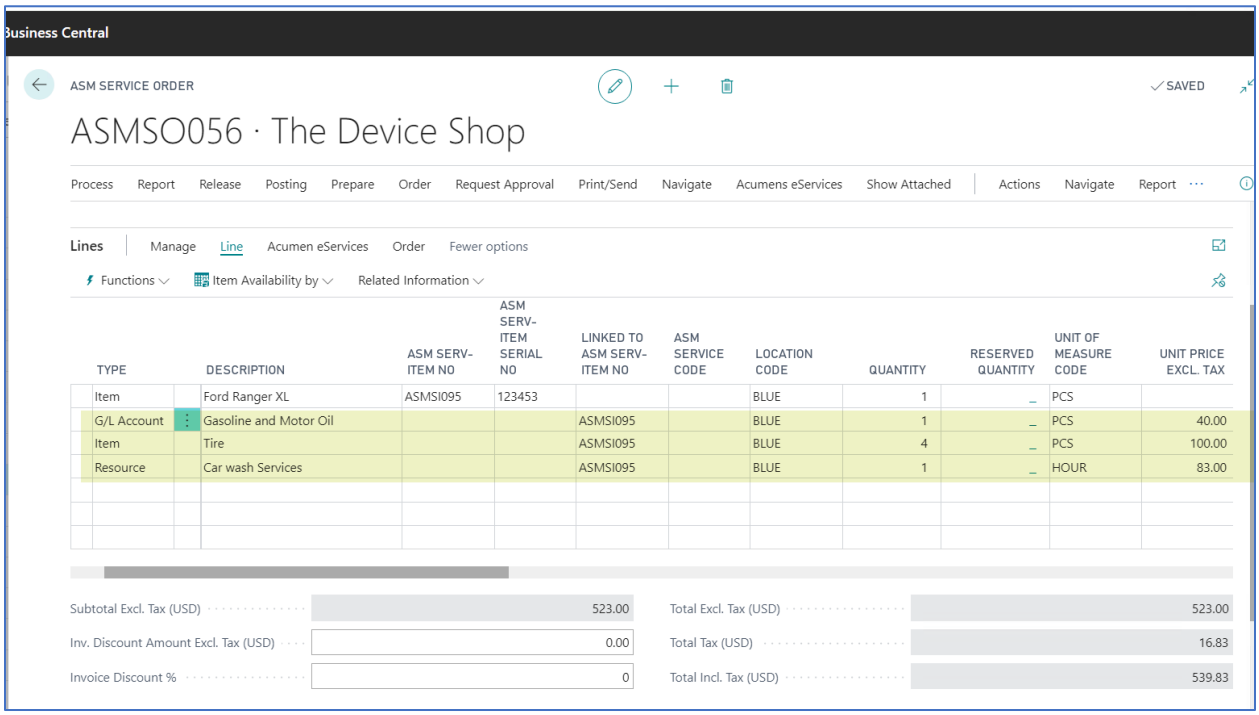
Here you can create a service to share with the customer for approval.

To create a Service Estimate for the Service Order, from the Lines of the Service Order, navigate to Acumens Service Job -> Service Estimate. In case the service estimate was already created, and you just need to update the Service Order with the Estimate values, click on Get Service Estimate.



10.3 Fixed Charge.

Here consumption lines are manually captured on the ASM Service Order lines without considering the consumption posted from the Service tickets or the Service Estimates.

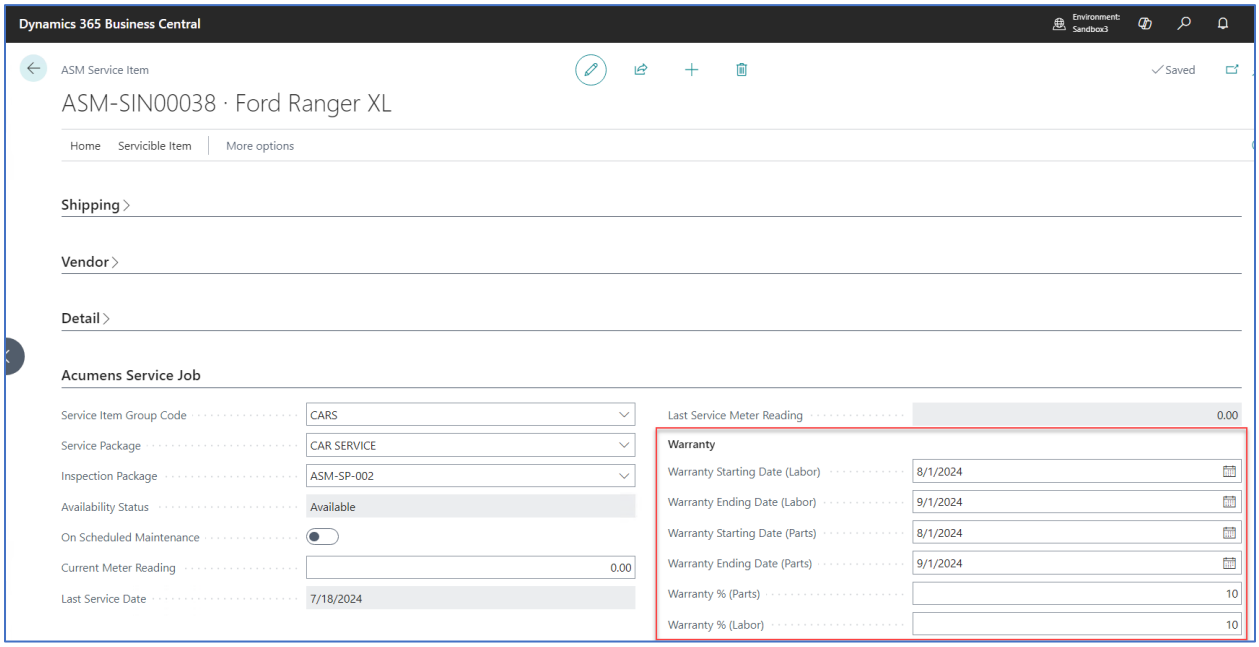


Once Lines are entered, Release and Post ASM Service Order.

11 ASM Warranty Discounts

You can set up a warranty discount for the Service Item. This will be applied to the parts (items) and labor (Resources) used to service the service item.

The higher discount between warranty discount on service item or the standard line discount is applied as the line discount %.

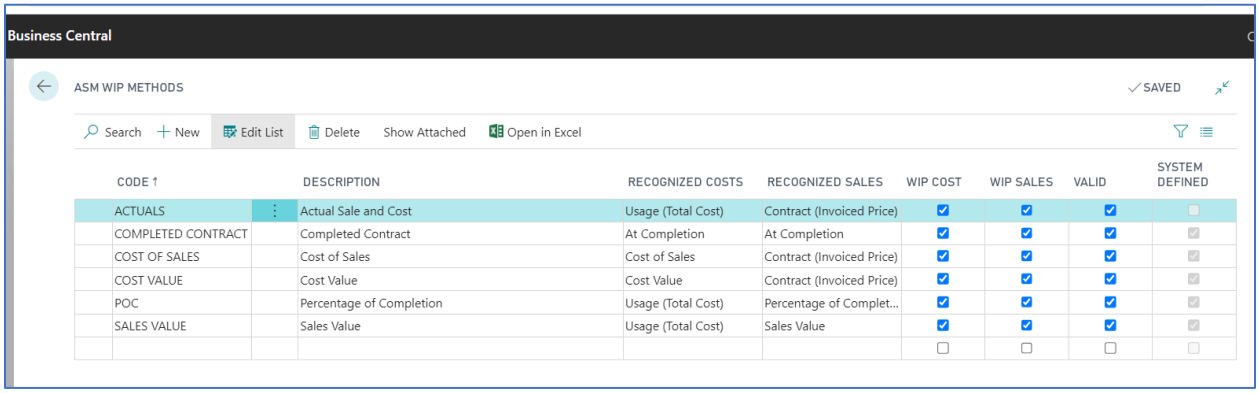


12 ASM Service WIP Processing.

As a service progresses, materials, resources, and other expenses are consumed and must be posted for the service. ASM Work in Progress (ASM WIP) enables you to estimate the financial value of the Service in the general ledger while the Service is still ongoing. In most cases, you might post usage for a service before invoicing the Order. When only usage has been posted, your financial statement will be incorrect.

To track the value in the general ledger, you can calculate WIP and post the value to the G/L ledger.

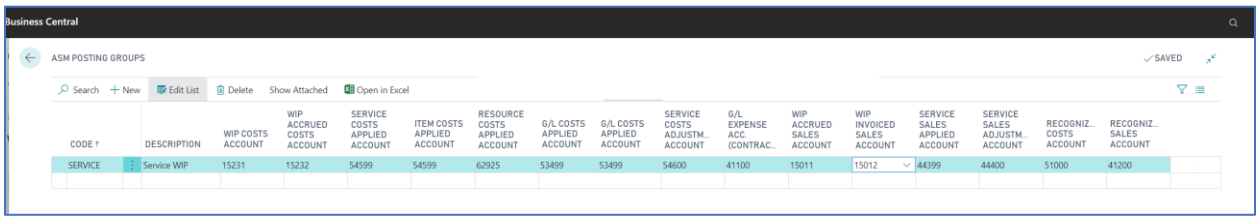
ASM WIP supports below WIP methods of calculating and recording the value of work in process.



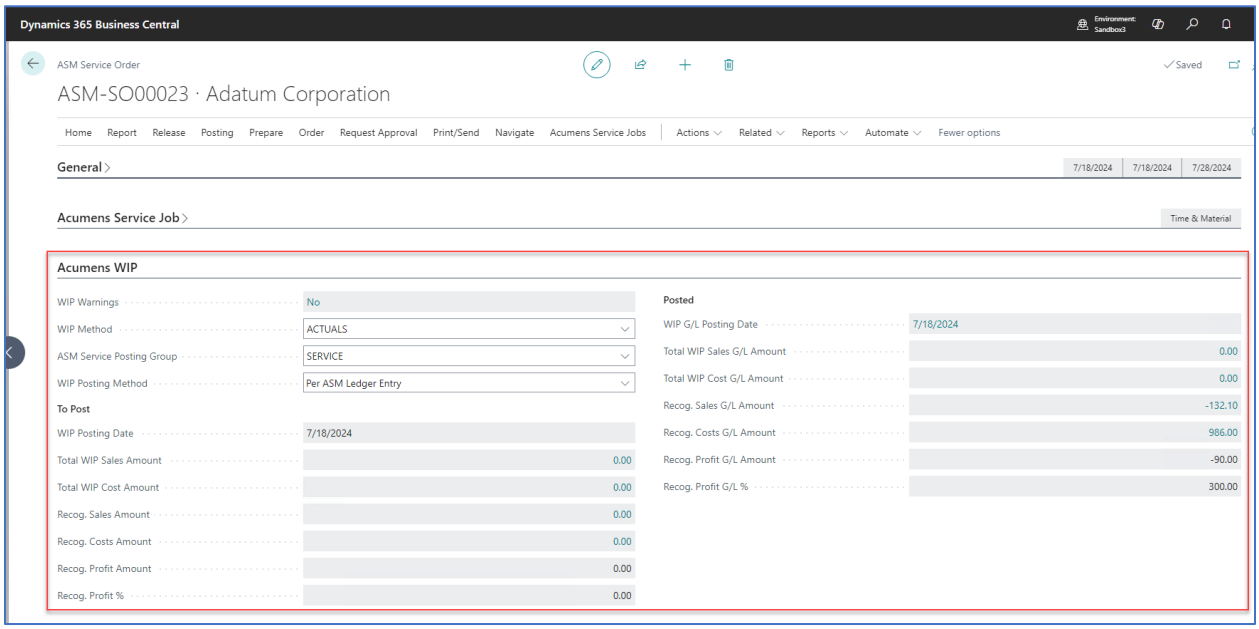
The methods are summarized below.

WIP Method	Description	Recognized Costs	Recognized Sales
ACTUALS	Actual Sale and Cost	Usage (Total Cost)	Contract (Invoiced Price)
COMPLETED CONTRACT	Completed Contract	At Completion	At Completion
COST OF SALES	Cost of Sales	Cost of Sales	Contract (Invoiced Price)
COST VALUE	Cost Value	Cost Value	Contract (Invoiced Price)
POC	Percentage of Completion	Usage (Total Cost)	Percentage of Completion
SALES VALUE	Sales Value	Usage (Total Cost)	Sales Value

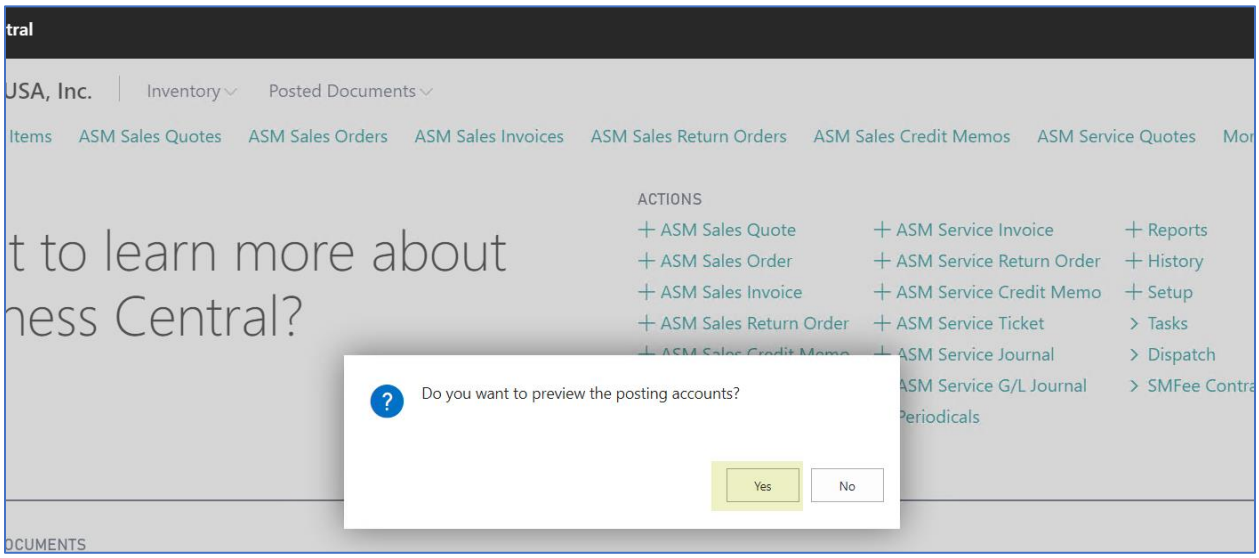
ASM WIP includes ASM Posting groups where you setup accounts that the WIP entries will post to, depending on the WIP method you opt to use.

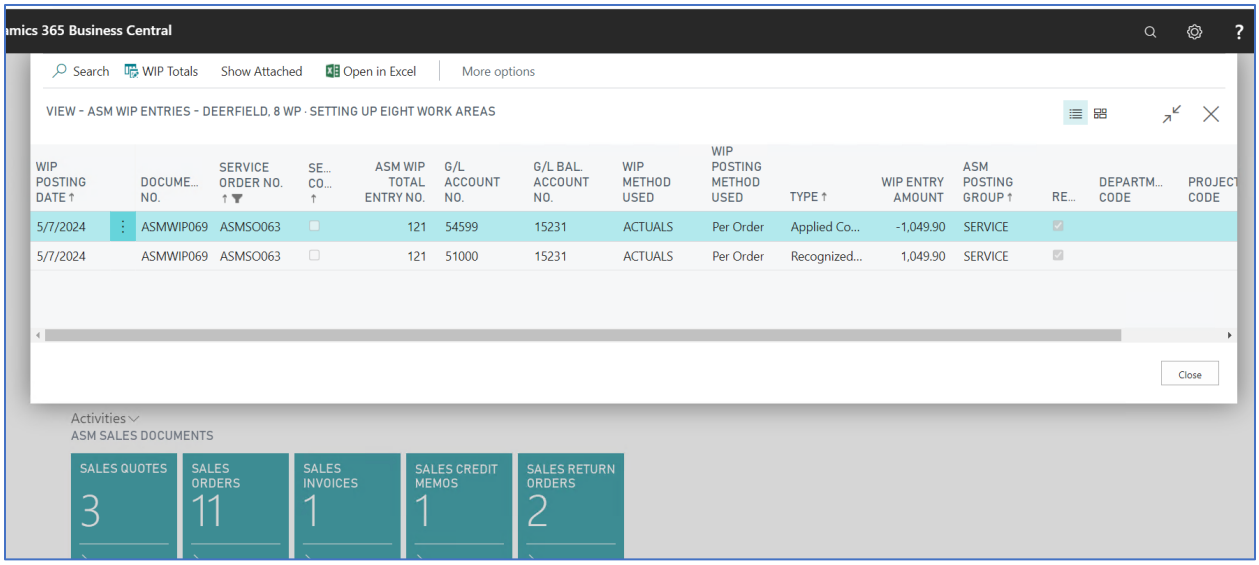


You calculate your WIP as the Service progresses on and post entries continuously to the G/L. ASM Service Order shows the calculated and the posted WIP amounts.

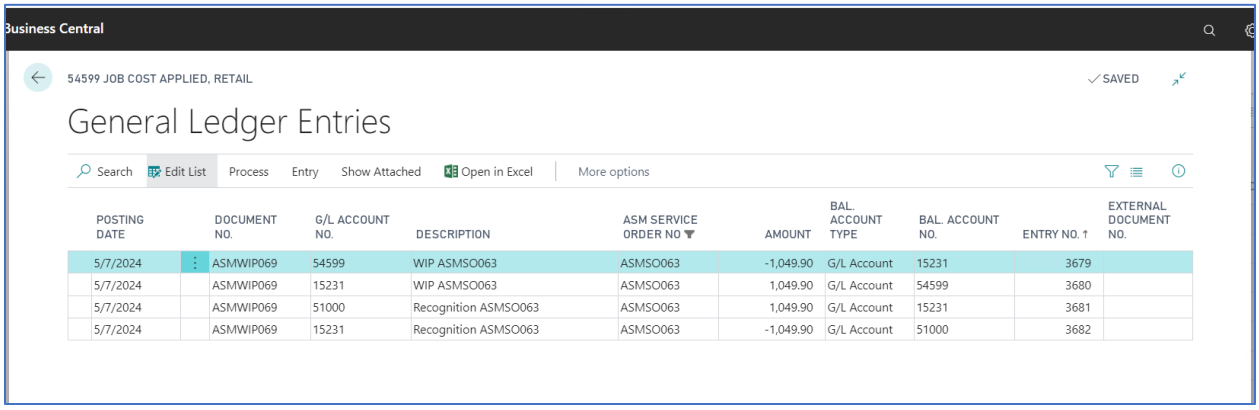


When Posting ASM WIP to the G/L you are provided with the option to Preview how the entries posted. This allows you do review you your values and setups in case they are wrong before posting any WIP to the general ledger. This will reduce the chances of users doing wrong postings then having to reverse.

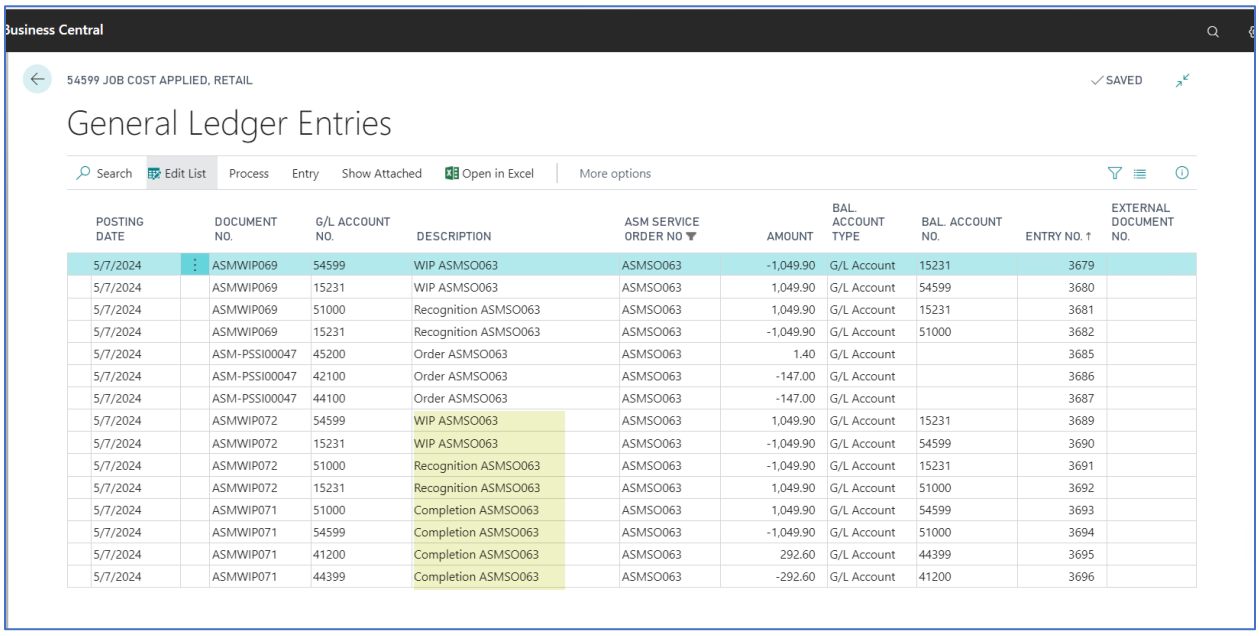




You can always navigate to review posted WIP G/L entries.



When the ASM Service Order is closed, Completion entries are also posted to clear out the WIP entries and recognize the final revenue and costs.



Business Central

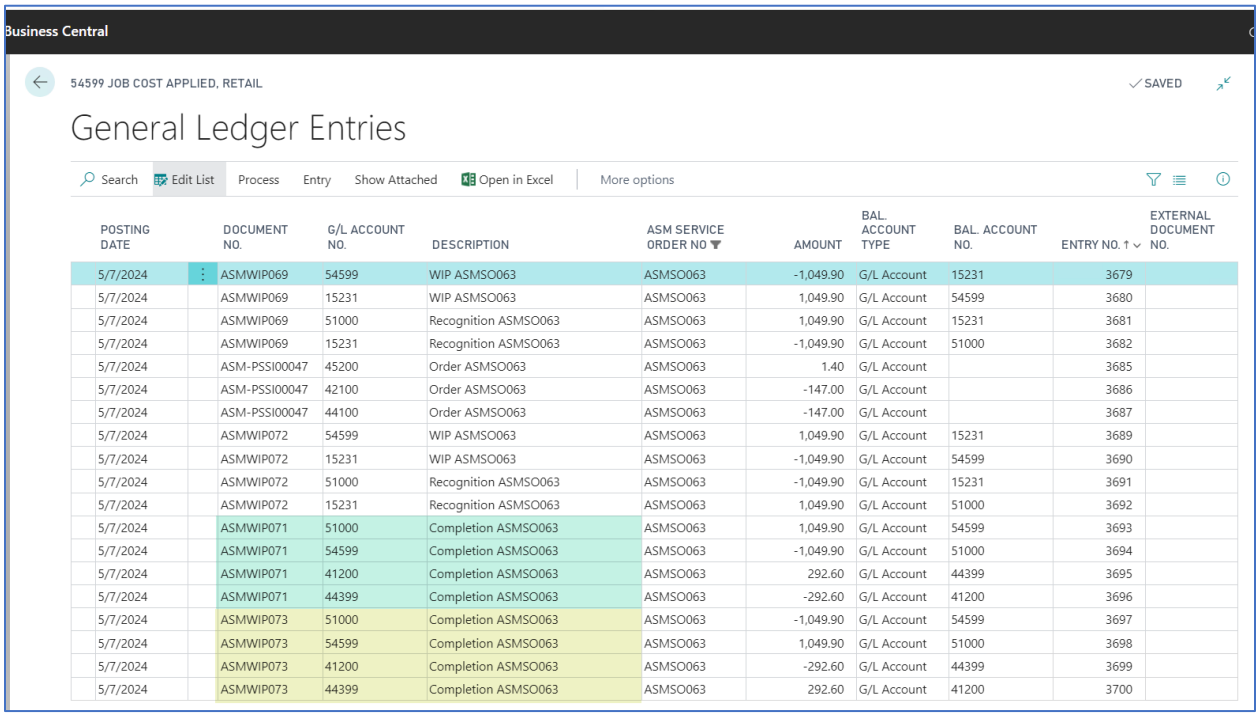
54599 JOB COST APPLIED, RETAIL — SAVED

General Ledger Entries

Search | Edit List | Process | Entry | Show Attached | Open in Excel | More options

POSTING DATE	DOCUMENT NO.	G/L ACCOUNT NO.	DESCRIPTION	ASM SERVICE ORDER NO	AMOUNT	BAL. ACCOUNT TYPE	BAL. ACCOUNT NO.	ENTRY NO.	EXTERNAL DOCUMENT NO.
5/7/2024	ASMWIP069	54599	WIP ASMSO063	ASMSO063	-1,049.90	G/L Account	15231	3679	
5/7/2024	ASMWIP069	15231	WIP ASMSO063	ASMSO063	1,049.90	G/L Account	54599	3680	
5/7/2024	ASMWIP069	51000	Recognition ASMSO063	ASMSO063	1,049.90	G/L Account	15231	3681	
5/7/2024	ASMWIP069	15231	Recognition ASMSO063	ASMSO063	-1,049.90	G/L Account	51000	3682	
5/7/2024	ASM-PSSI00047	45200	Order ASMSO063	ASMSO063	1.40	G/L Account		3685	
5/7/2024	ASM-PSSI00047	42100	Order ASMSO063	ASMSO063	-147.00	G/L Account		3686	
5/7/2024	ASM-PSSI00047	44100	Order ASMSO063	ASMSO063	-147.00	G/L Account		3687	
5/7/2024	ASMWIP072	54599	WIP ASMSO063	ASMSO063	1,049.90	G/L Account	15231	3689	
5/7/2024	ASMWIP072	15231	WIP ASMSO063	ASMSO063	-1,049.90	G/L Account	54599	3690	
5/7/2024	ASMWIP072	51000	Recognition ASMSO063	ASMSO063	-1,049.90	G/L Account	15231	3691	
5/7/2024	ASMWIP072	15231	Recognition ASMSO063	ASMSO063	1,049.90	G/L Account	51000	3692	
5/7/2024	ASMWIP071	51000	Completion ASMSO063	ASMSO063	1,049.90	G/L Account	54599	3693	
5/7/2024	ASMWIP071	54599	Completion ASMSO063	ASMSO063	-1,049.90	G/L Account	51000	3694	
5/7/2024	ASMWIP071	41200	Completion ASMSO063	ASMSO063	292.60	G/L Account	44399	3695	
5/7/2024	ASMWIP071	44399	Completion ASMSO063	ASMSO063	-292.60	G/L Account	41200	3696	

If the ASM Service Order is reopened, you will only need to run Post Service batch. This will automatically reverse the completion entries so that WIP can still be posted.



Business Central

54599 JOB COST APPLIED, RETAIL — SAVED

General Ledger Entries

Search | Edit List | Process | Entry | Show Attached | Open in Excel | More options

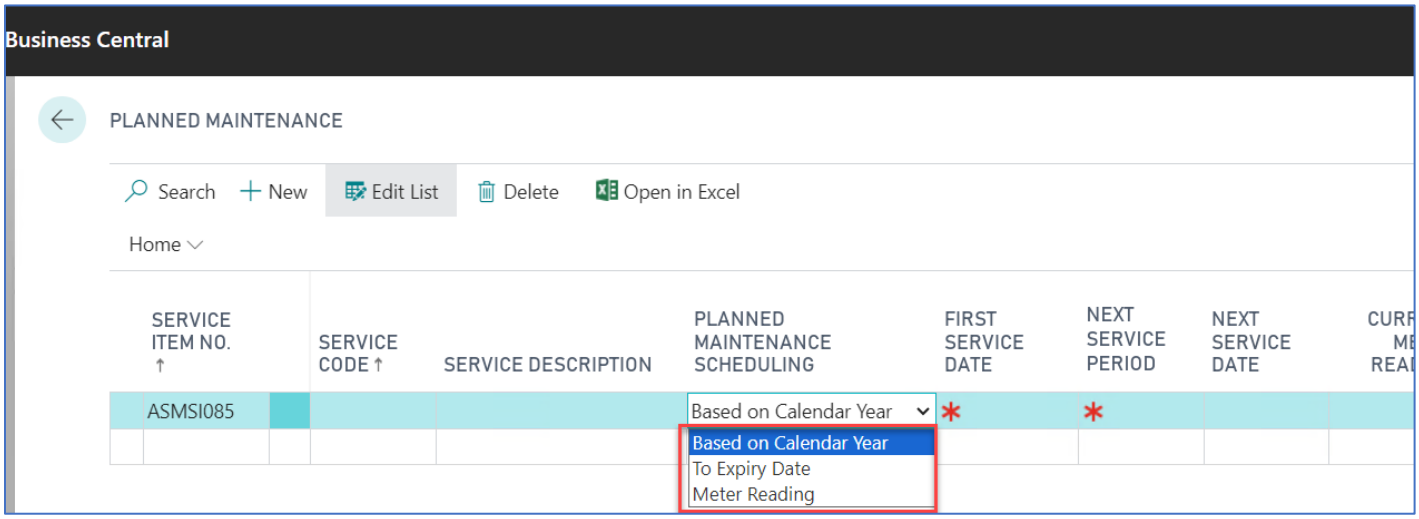
POSTING DATE	DOCUMENT NO.	G/L ACCOUNT NO.	DESCRIPTION	ASM SERVICE ORDER NO	AMOUNT	BAL. ACCOUNT TYPE	BAL. ACCOUNT NO.	ENTRY NO.	EXTERNAL DOCUMENT NO.
5/7/2024	ASMWIP069	54599	WIP ASMSO063	ASMSO063	-1,049.90	G/L Account	15231	3679	
5/7/2024	ASMWIP069	15231	WIP ASMSO063	ASMSO063	1,049.90	G/L Account	54599	3680	
5/7/2024	ASMWIP069	51000	Recognition ASMSO063	ASMSO063	1,049.90	G/L Account	15231	3681	
5/7/2024	ASMWIP069	15231	Recognition ASMSO063	ASMSO063	-1,049.90	G/L Account	51000	3682	
5/7/2024	ASM-PSSI00047	45200	Order ASMSO063	ASMSO063	1.40	G/L Account		3685	
5/7/2024	ASM-PSSI00047	42100	Order ASMSO063	ASMSO063	-147.00	G/L Account		3686	
5/7/2024	ASM-PSSI00047	44100	Order ASMSO063	ASMSO063	-147.00	G/L Account		3687	
5/7/2024	ASMWIP072	54599	WIP ASMSO063	ASMSO063	1,049.90	G/L Account	15231	3689	
5/7/2024	ASMWIP072	15231	WIP ASMSO063	ASMSO063	-1,049.90	G/L Account	54599	3690	
5/7/2024	ASMWIP072	51000	Recognition ASMSO063	ASMSO063	-1,049.90	G/L Account	15231	3691	
5/7/2024	ASMWIP072	15231	Recognition ASMSO063	ASMSO063	1,049.90	G/L Account	51000	3692	
5/7/2024	ASMWIP071	51000	Completion ASMSO063	ASMSO063	1,049.90	G/L Account	54599	3693	
5/7/2024	ASMWIP071	54599	Completion ASMSO063	ASMSO063	-1,049.90	G/L Account	51000	3694	
5/7/2024	ASMWIP071	41200	Completion ASMSO063	ASMSO063	292.60	G/L Account	44399	3695	
5/7/2024	ASMWIP071	44399	Completion ASMSO063	ASMSO063	-292.60	G/L Account	41200	3696	
5/7/2024	ASMWIP073	51000	Completion ASMSO063	ASMSO063	-1,049.90	G/L Account	54599	3697	
5/7/2024	ASMWIP073	54599	Completion ASMSO063	ASMSO063	1,049.90	G/L Account	51000	3698	
5/7/2024	ASMWIP073	41200	Completion ASMSO063	ASMSO063	-292.60	G/L Account	44399	3699	
5/7/2024	ASMWIP073	44399	Completion ASMSO063	ASMSO063	292.60	G/L Account	41200	3700	

13 ASM Planned Maintenance.

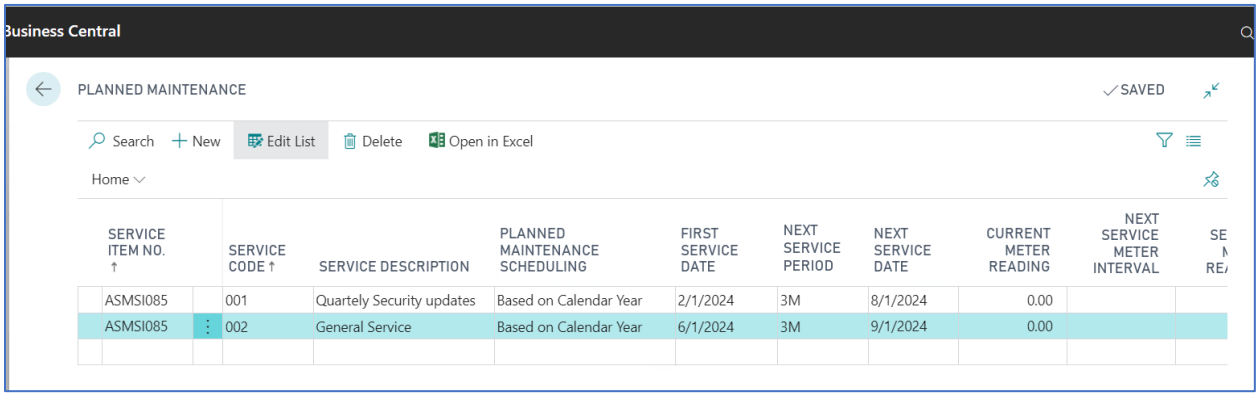
Planned Maintenance scheduling can be setup based on:

- Based on calendar Year: Creates a schedule based on service dates.

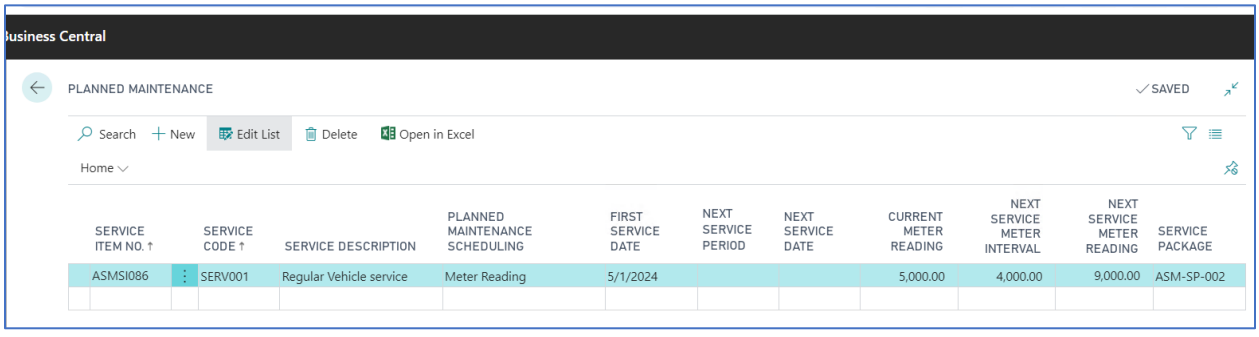
- Meter reading: Creates a maintenance schedule based on the meter readings.



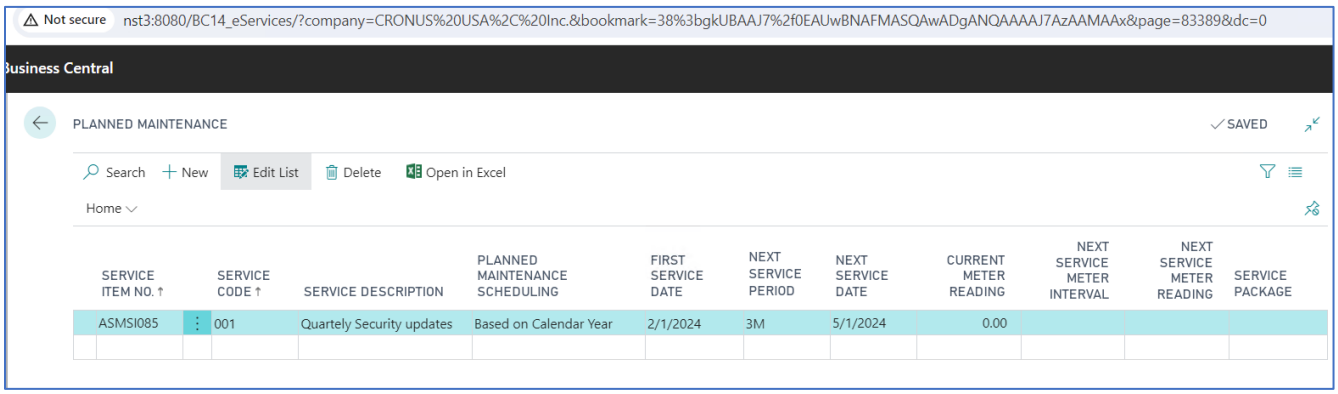
Sample maintenance based on service dates. You can create multiple planned maintenance for the service item.



Sample maintenance based on meter readings. You can also create multiple service codes for the same service item.

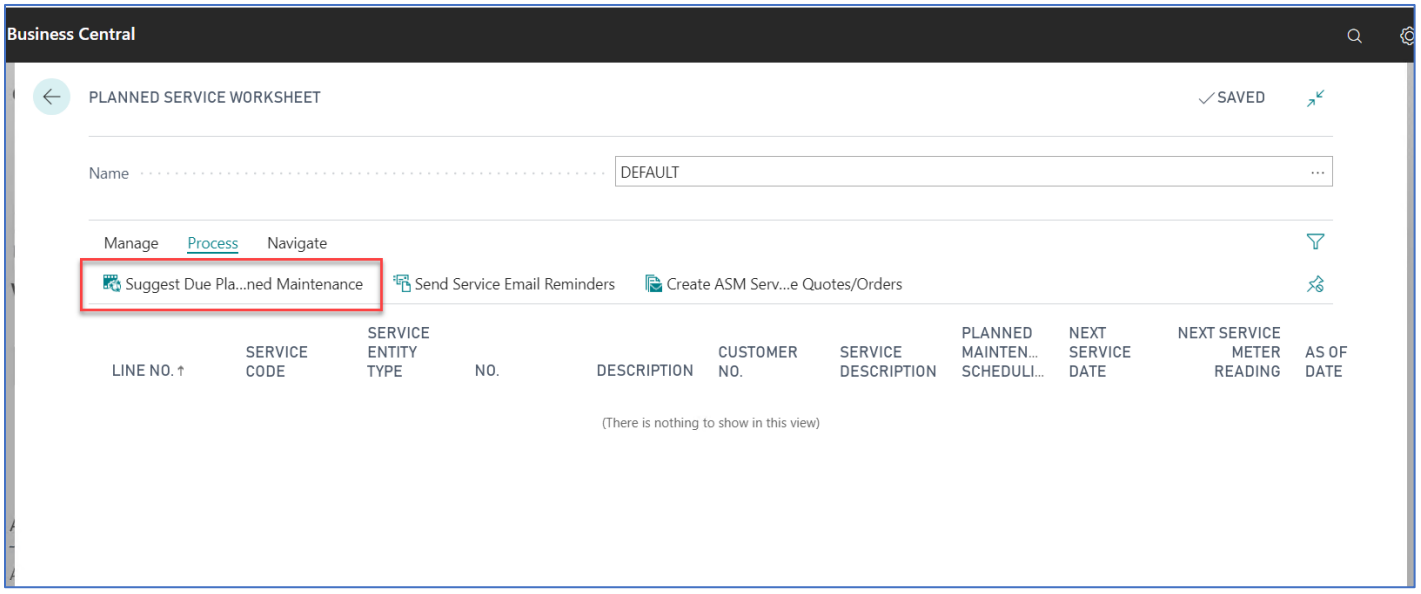


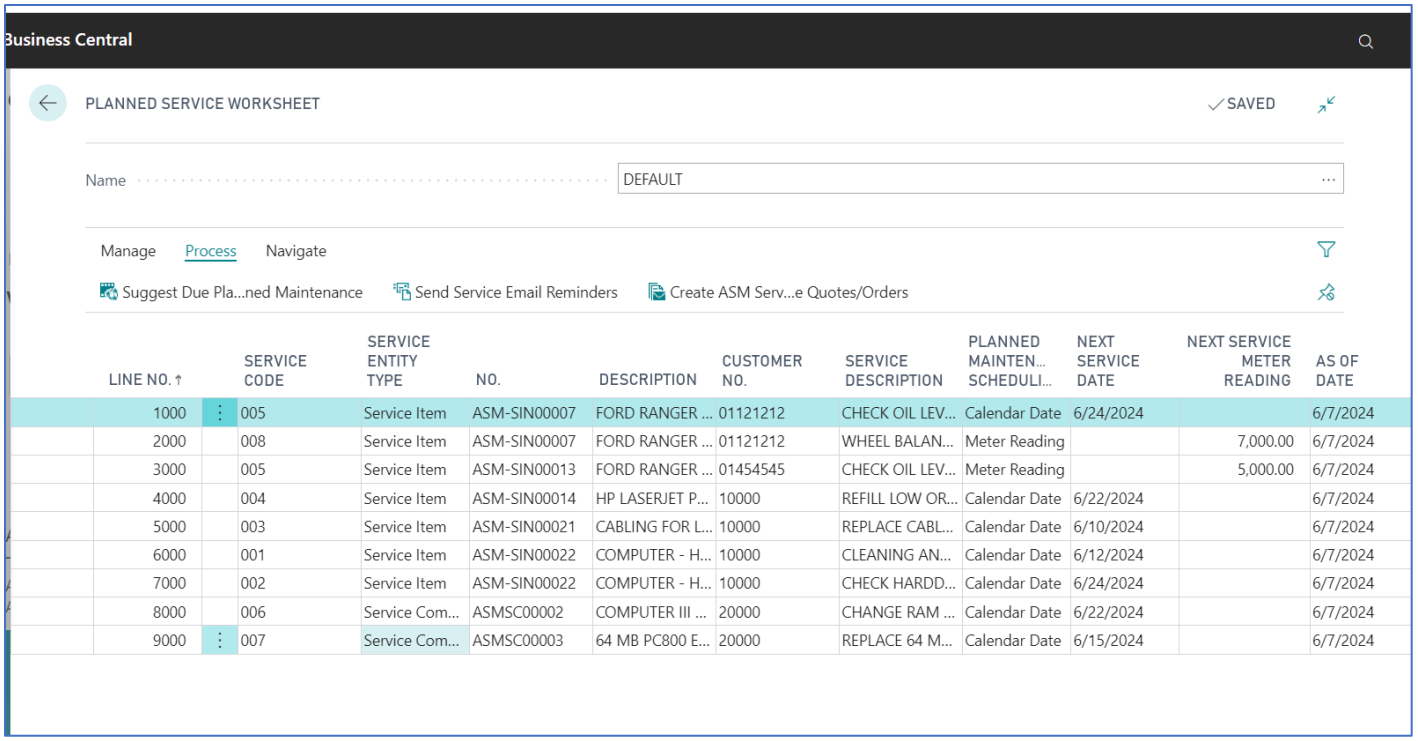
For maintenance based on date, Next Service Date should be greater than or equal to today. If Next Service date is greater than today, then service is not due.
Example for below entry, if today is 05/01/2024 and Next Service date is 05/01/2024 so service is due.



The Planned Maintenance Worksheet allows you to suggest due planned maintenances. You can then send email remainders and create ASM Service quotes or orders.

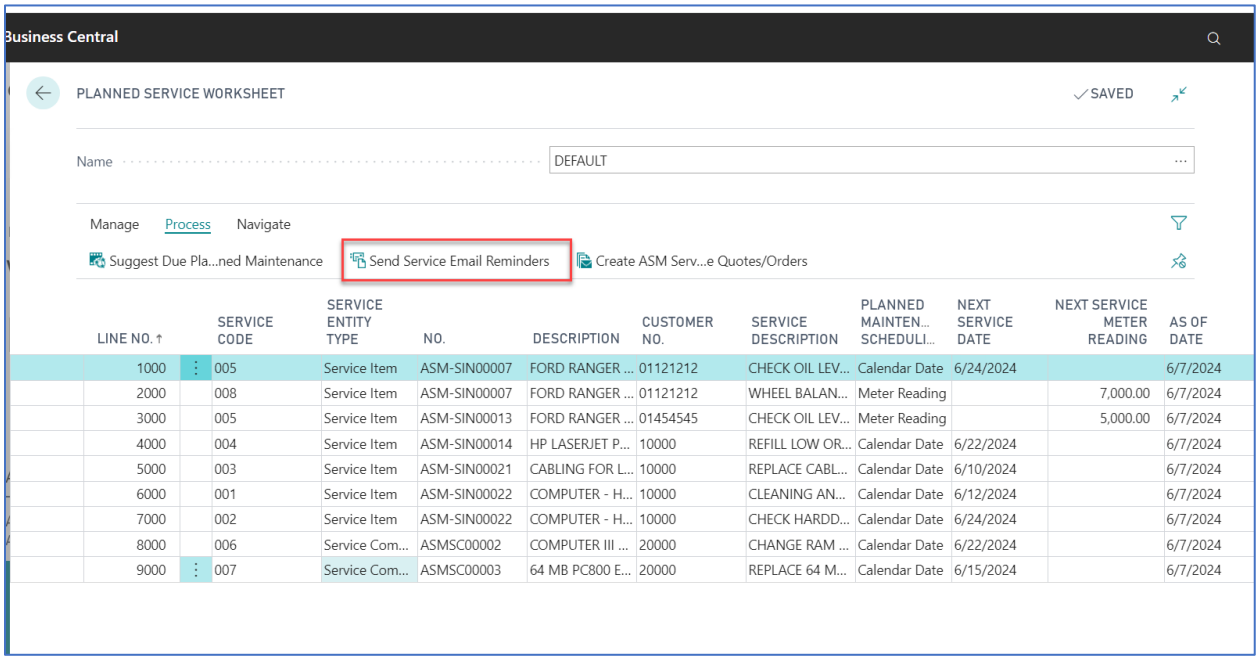
You use Suggest Due Planned Maintenance action to suggest planned maintenance that are due or almost due for service.



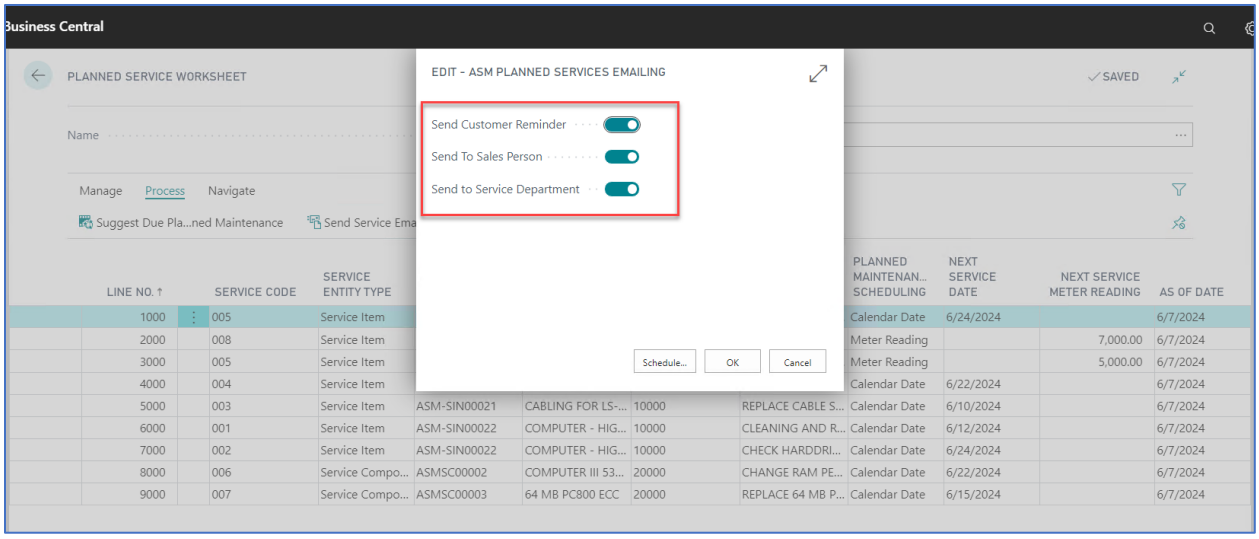


LINE NO.	SERVICE CODE	SERVICE ENTITY TYPE	NO.	DESCRIPTION	CUSTOMER NO.	SERVICE DESCRIPTION	PLANNED MAINTEN... SCHEDULI...	NEXT SERVICE DATE	NEXT SERVICE METER READING	AS OF DATE
1000	005	Service Item	ASM-SIN00007	FORD RANGER ...	01121212	CHECK OIL LEV...	Calendar Date	6/24/2024		6/7/2024
2000	008	Service Item	ASM-SIN00007	FORD RANGER ...	01121212	WHEEL BALAN...	Meter Reading		7,000.00	6/7/2024
3000	005	Service Item	ASM-SIN00013	FORD RANGER ...	01454545	CHECK OIL LEV...	Meter Reading		5,000.00	6/7/2024
4000	004	Service Item	ASM-SIN00014	HP LASERJET P...	10000	REFILL LOW OR...	Calendar Date	6/22/2024		6/7/2024
5000	003	Service Item	ASM-SIN00021	CABLING FOR L...	10000	REPLACE CABL...	Calendar Date	6/10/2024		6/7/2024
6000	001	Service Item	ASM-SIN00022	COMPUTER - H...	10000	CLEANING AN...	Calendar Date	6/12/2024		6/7/2024
7000	002	Service Item	ASM-SIN00022	COMPUTER - H...	10000	CHECK HARDD...	Calendar Date	6/24/2024		6/7/2024
8000	006	Service Com...	ASMSC00002	COMPUTER III ...	20000	CHANGE RAM ...	Calendar Date	6/22/2024		6/7/2024
9000	007	Service Com...	ASMSC00003	64 MB PC800 E...	20000	REPLACE 64 M...	Calendar Date	6/15/2024		6/7/2024

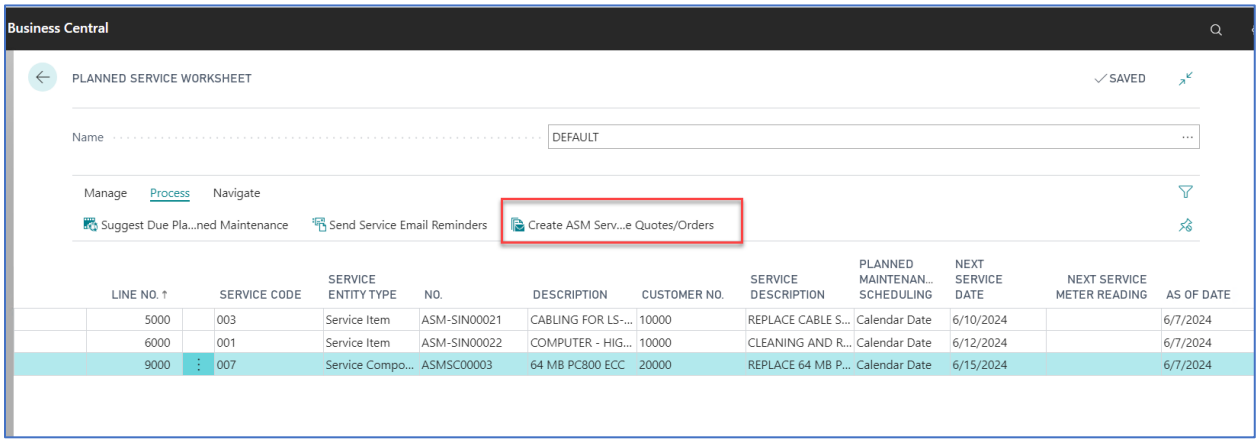
On the planned Service worksheet, you can send Service reminders via email. Service Reminders can be sent to the customers, Salespeople and to the Service Department depending on the selected options.

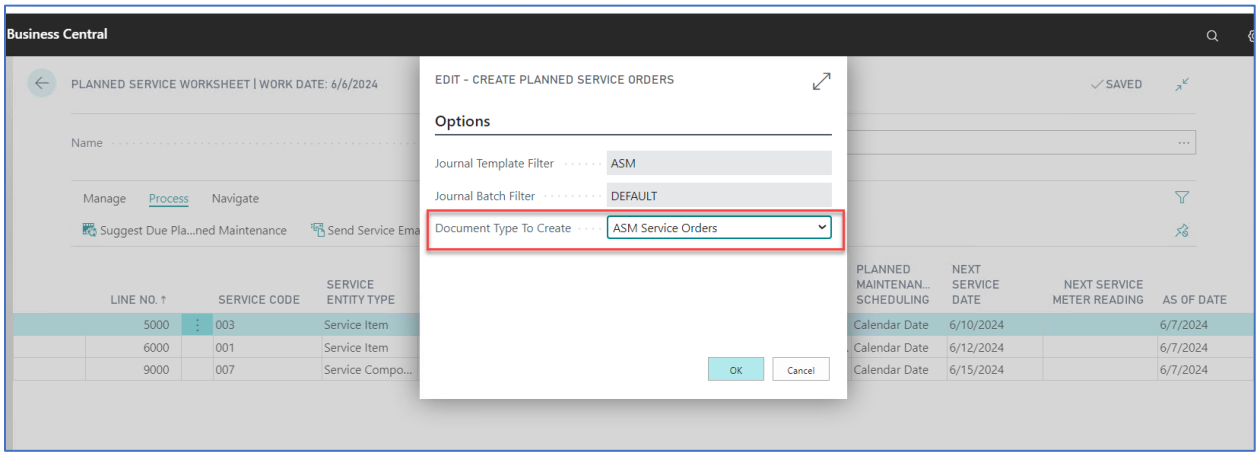


LINE NO.	SERVICE CODE	SERVICE ENTITY TYPE	NO.	DESCRIPTION	CUSTOMER NO.	SERVICE DESCRIPTION	PLANNED MAINTEN... SCHEDULI...	NEXT SERVICE DATE	NEXT SERVICE METER READING	AS OF DATE
1000	005	Service Item	ASM-SIN00007	FORD RANGER ...	01121212	CHECK OIL LEV...	Calendar Date	6/24/2024		6/7/2024
2000	008	Service Item	ASM-SIN00007	FORD RANGER ...	01121212	WHEEL BALAN...	Meter Reading		7,000.00	6/7/2024
3000	005	Service Item	ASM-SIN00013	FORD RANGER ...	01454545	CHECK OIL LEV...	Meter Reading		5,000.00	6/7/2024
4000	004	Service Item	ASM-SIN00014	HP LASERJET P...	10000	REFILL LOW OR...	Calendar Date	6/22/2024		6/7/2024
5000	003	Service Item	ASM-SIN00021	CABLING FOR L...	10000	REPLACE CABL...	Calendar Date	6/10/2024		6/7/2024
6000	001	Service Item	ASM-SIN00022	COMPUTER - H...	10000	CLEANING AN...	Calendar Date	6/12/2024		6/7/2024
7000	002	Service Item	ASM-SIN00022	COMPUTER - H...	10000	CHECK HARDD...	Calendar Date	6/24/2024		6/7/2024
8000	006	Service Com...	ASMSC00002	COMPUTER III ...	20000	CHANGE RAM ...	Calendar Date	6/22/2024		6/7/2024
9000	007	Service Com...	ASMSC00003	64 MB PC800 E...	20000	REPLACE 64 M...	Calendar Date	6/15/2024		6/7/2024



You can create ASM Service orders or Quotes for the suggested Services on the worksheet. Create ASM Service quotes or orders using “Create ASM Service Quotes/Orders” action.

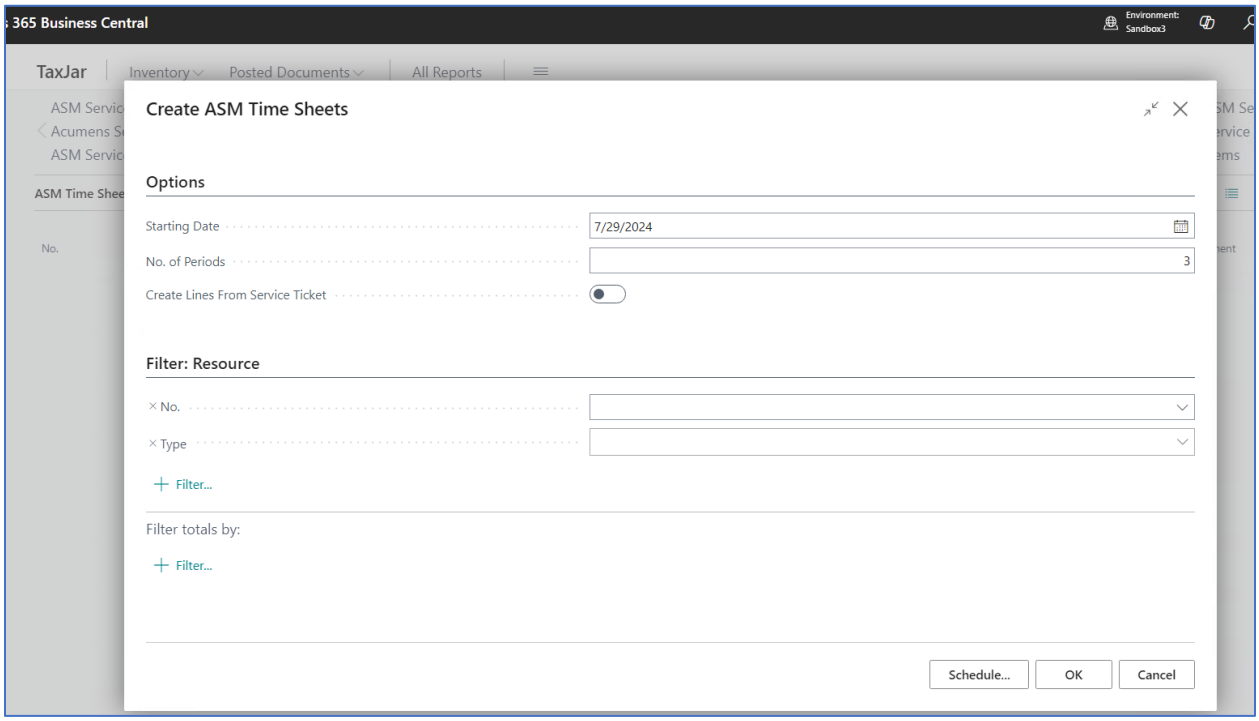




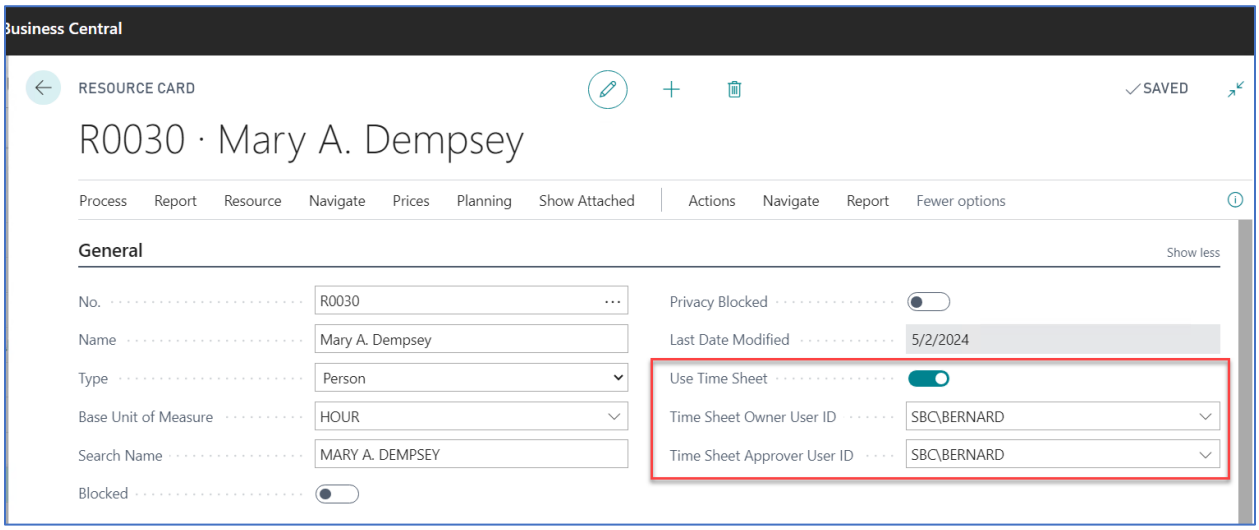
14 ASM Time Sheets Management.

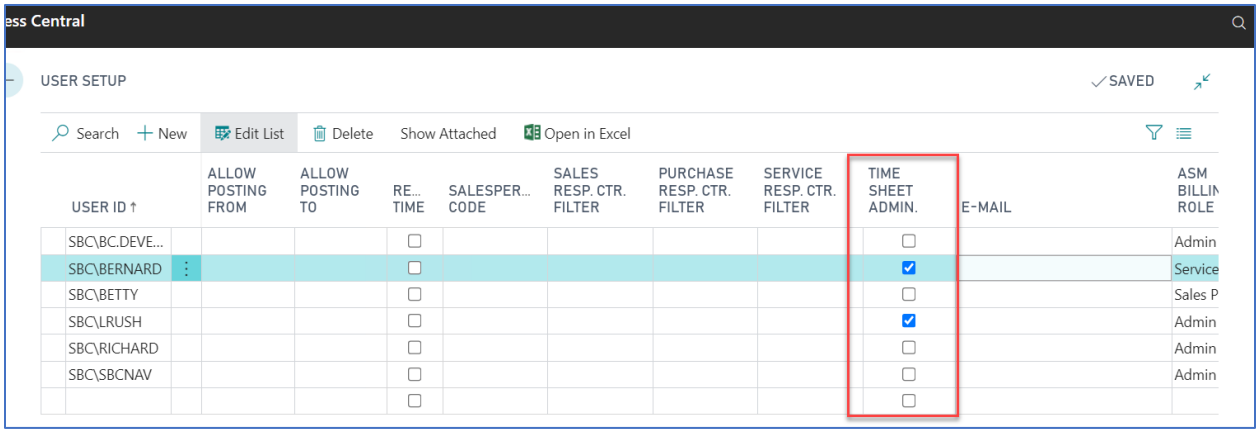
ASM Time Sheets provides a way to track time and resources that are spent on a service task. It also allows tracking resource absence.

ASM Time sheets has a simplified approval process that makes it easy to record time usage for resources or a machine so that managers can review the usage and its allocation. You can create timesheets using a batch.

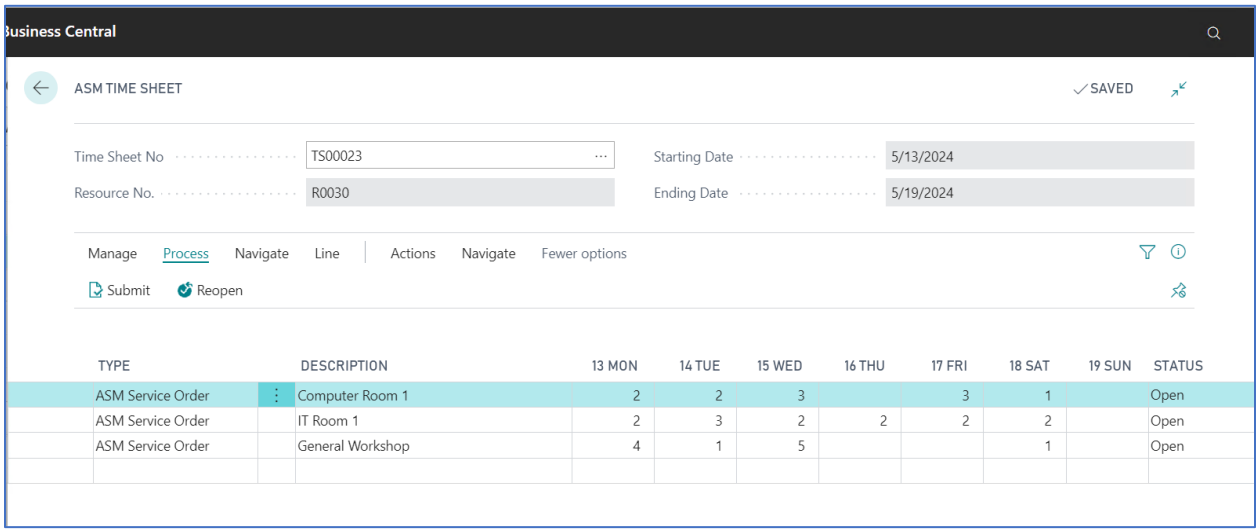


Time sheets will be created for eligible resources only. Before you can use time sheets, you must set up general information and specify a timesheet owner and approver of time sheets.

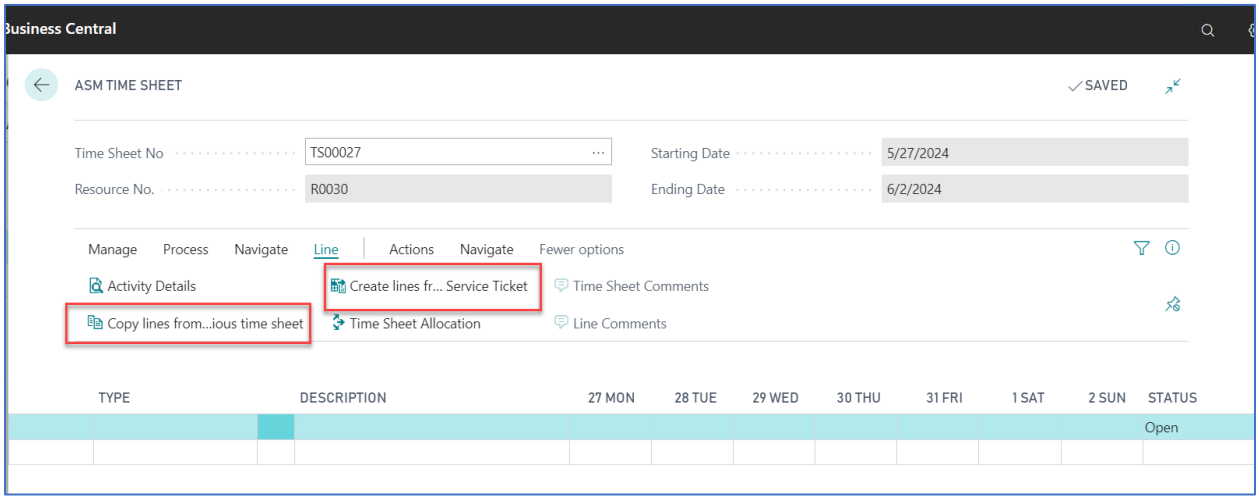




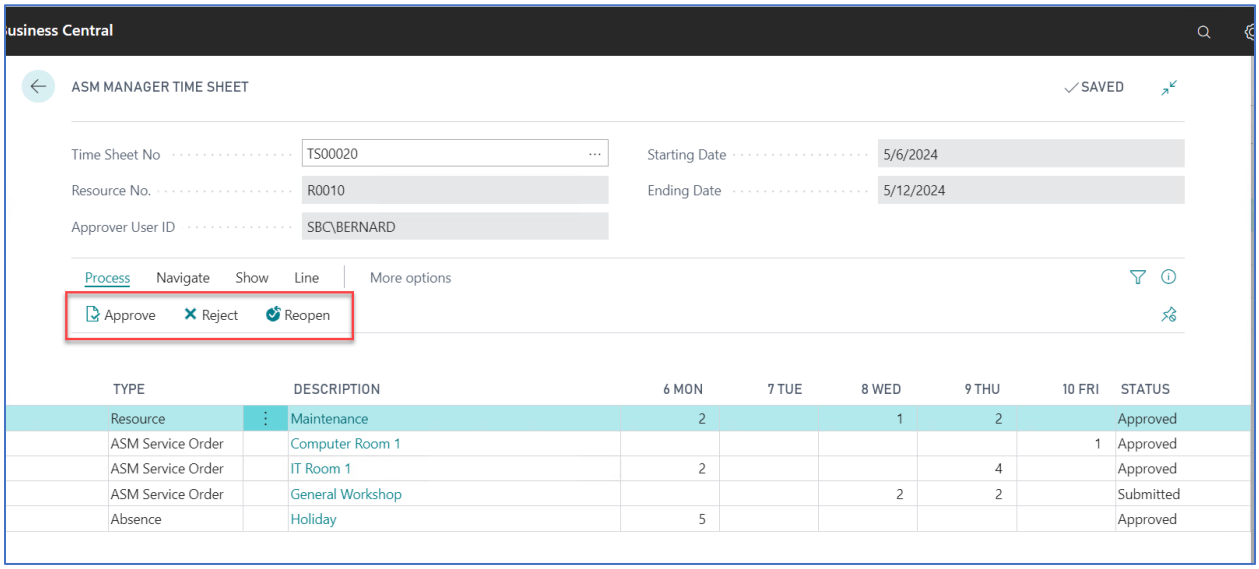
You can then create and submit timesheets for approval.



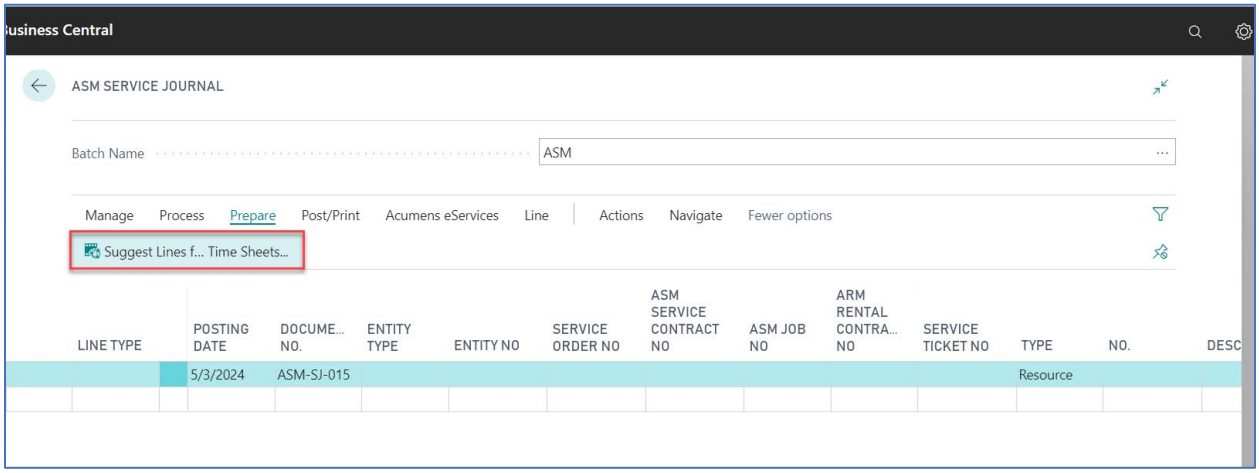
Instead manually entering timesheet Lines, you can copy and use your ASM ticket lines, or copy and reuse line from previuous time sheets. In that way, you will only to enter the information in one place and the line information is always correct.



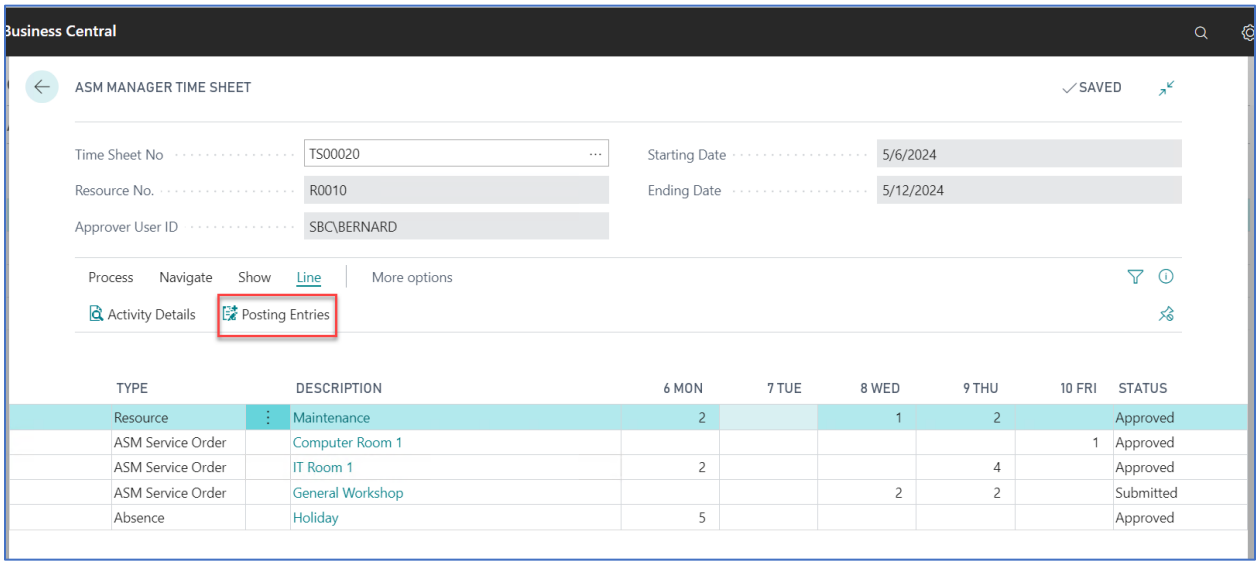
Among other functionalities, ASM Manager Time sheet allows a manager to review and approve or reject submitted timesheets.

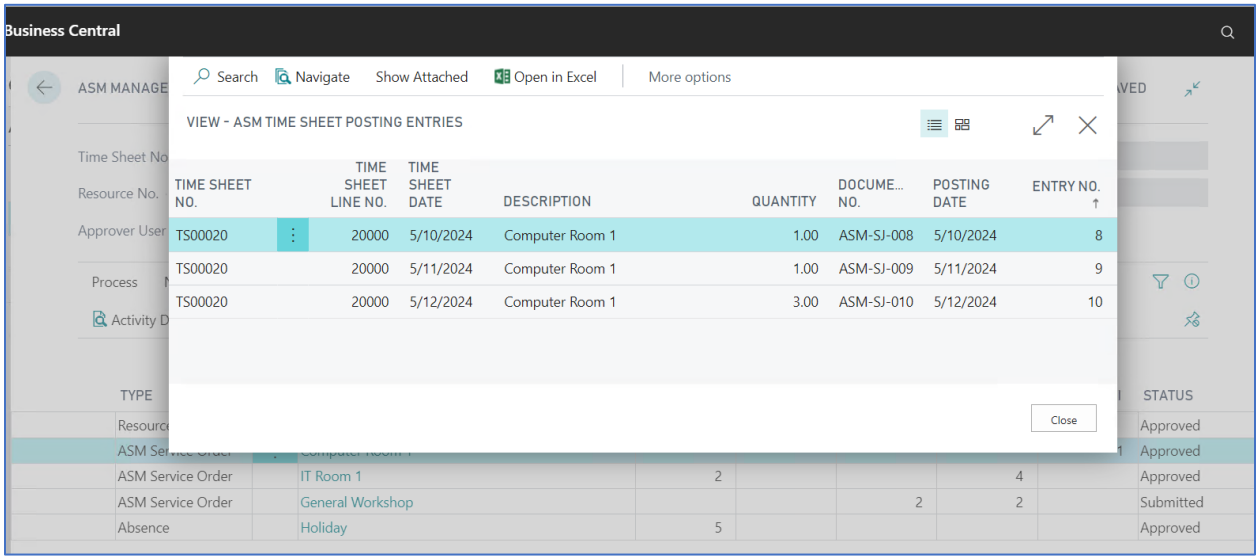


After you approve a time sheet entries for a job, you can suggest them on ASM Service Journal for usage posting and billing.

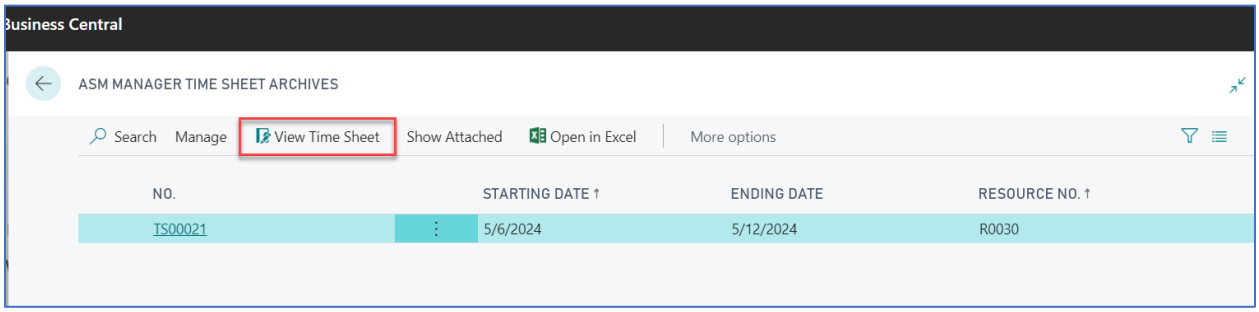


Once posted, the manager can review the posted entries from ASM Managers Timesheet page.



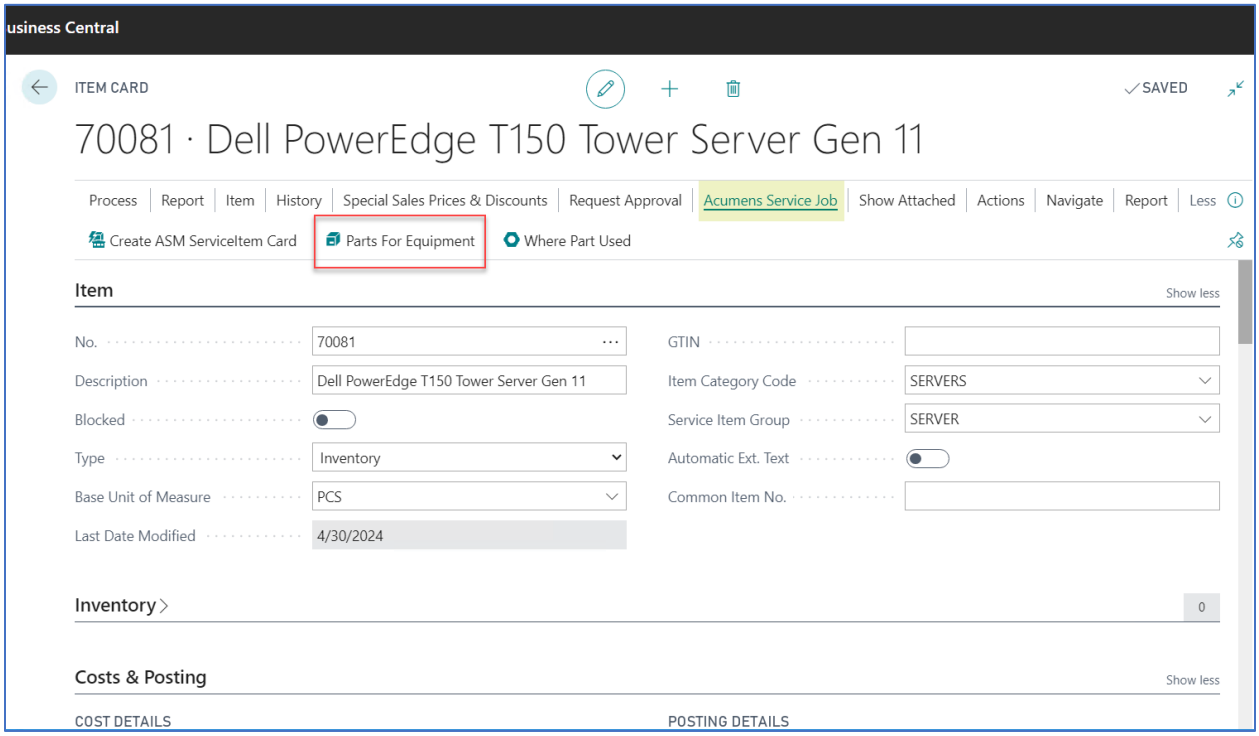


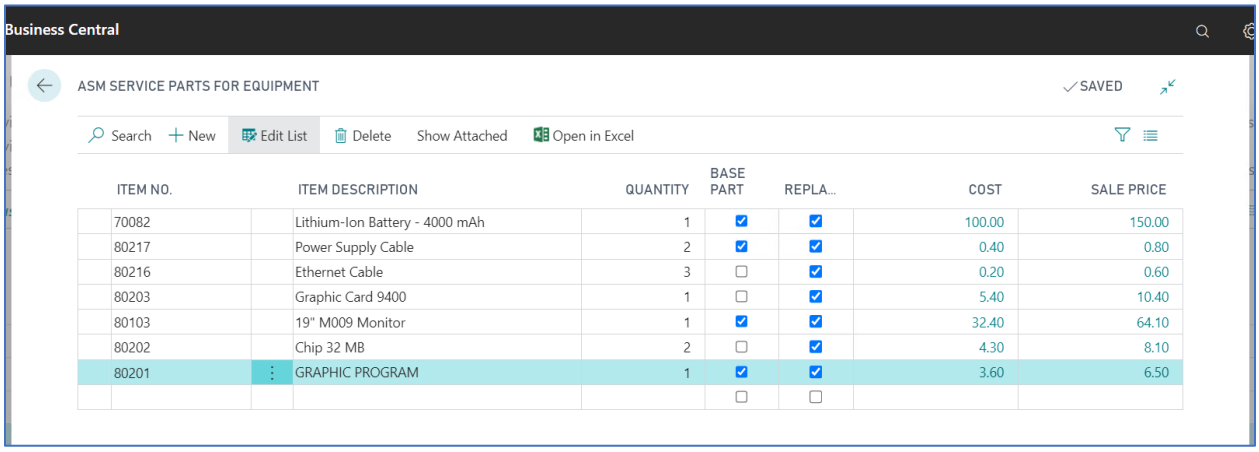
Posted Time Sheets can optionally be archived for future reference.



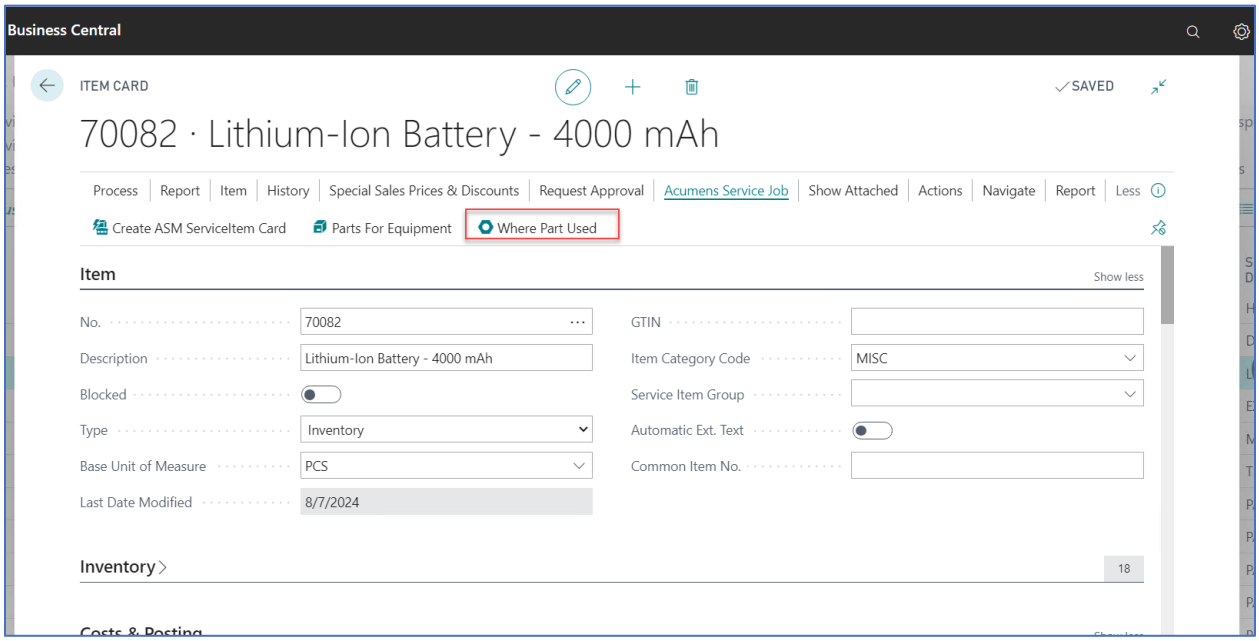
15 Service Parts for Equipment

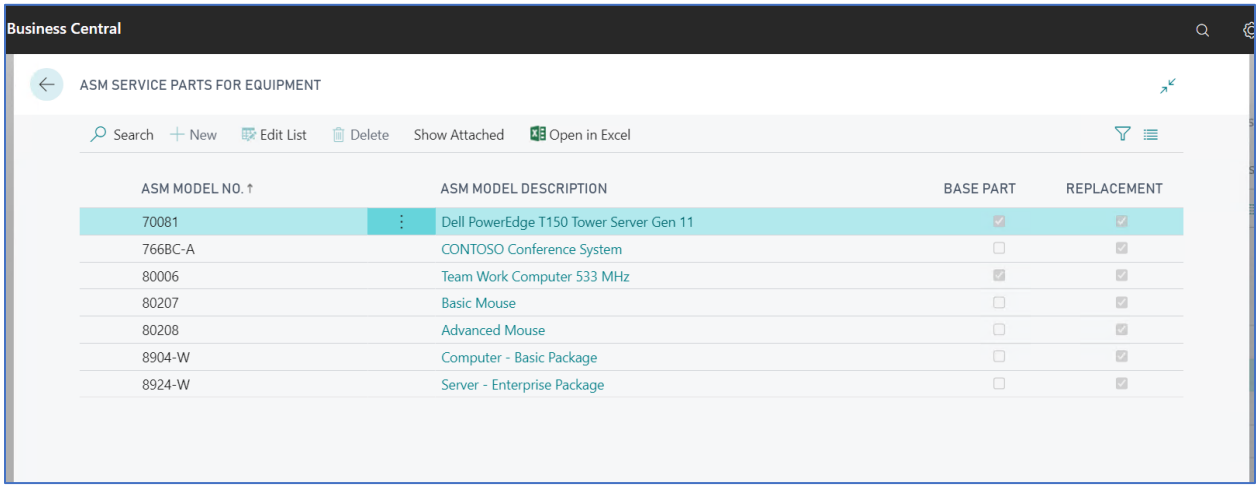
The feature allows users to setup service parts that might be required or are regularly used to repair or service an item. This makes it easy purchase or select these items during or a service.



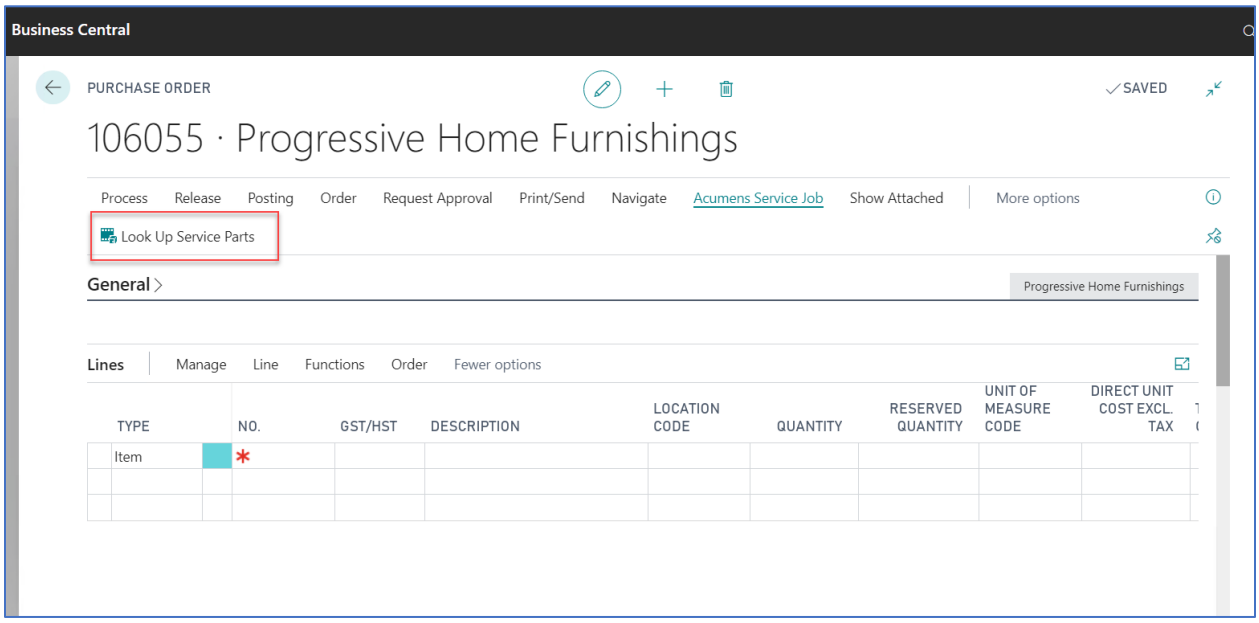


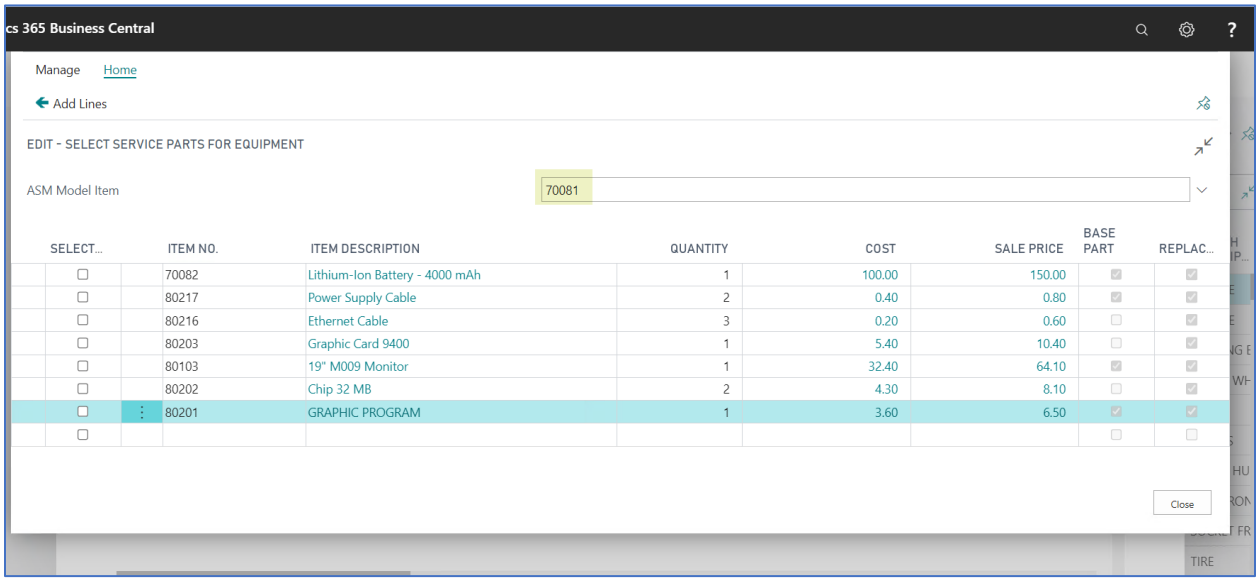
Users can also view where the item is used as a part.





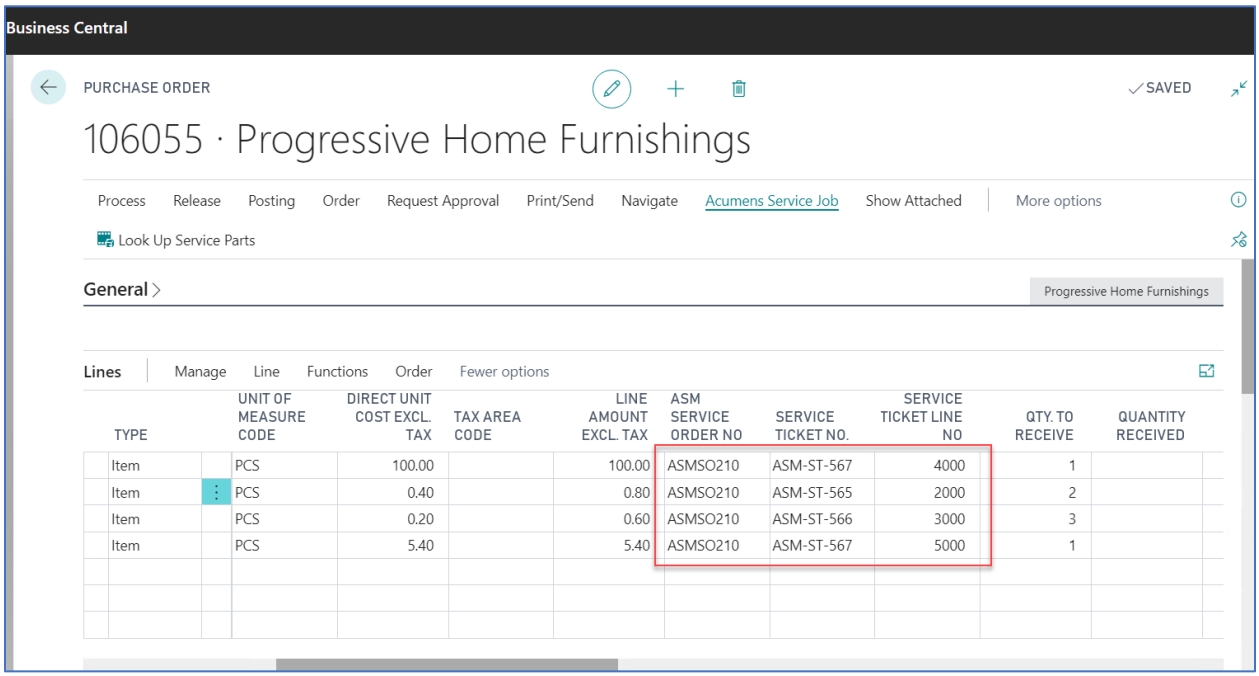
From the Purchase Order, you can view the Service Parts. It also allows you to select and populate them on the purchase order.



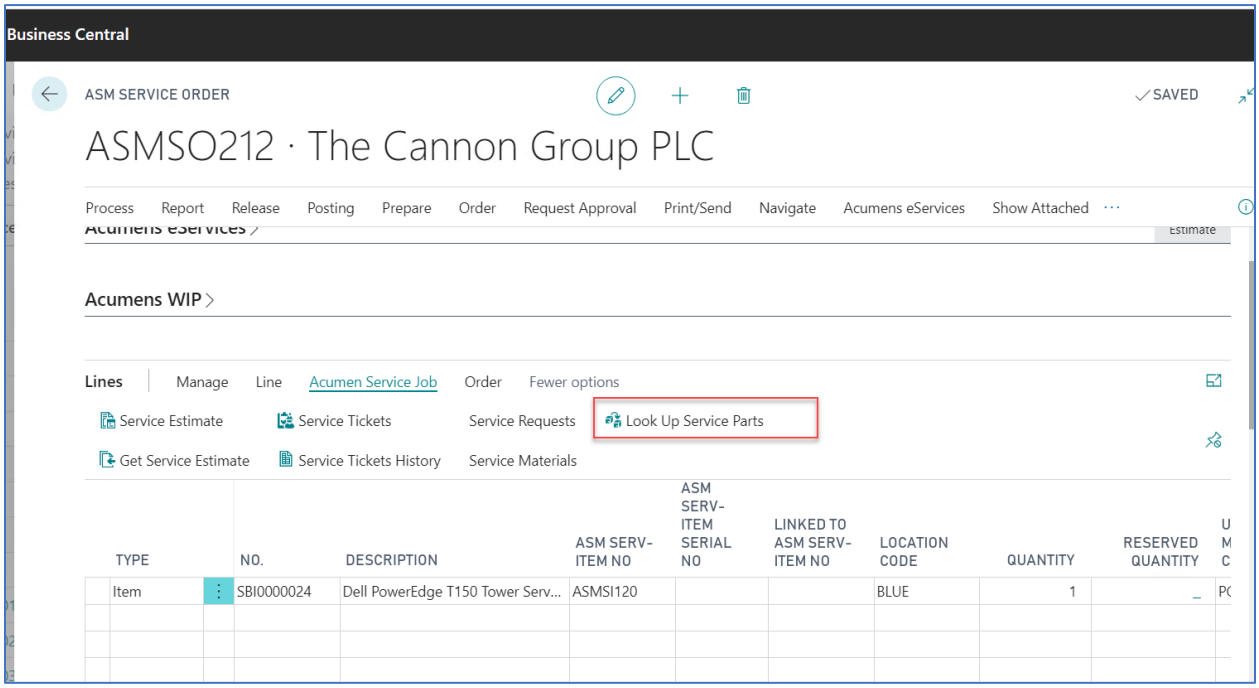


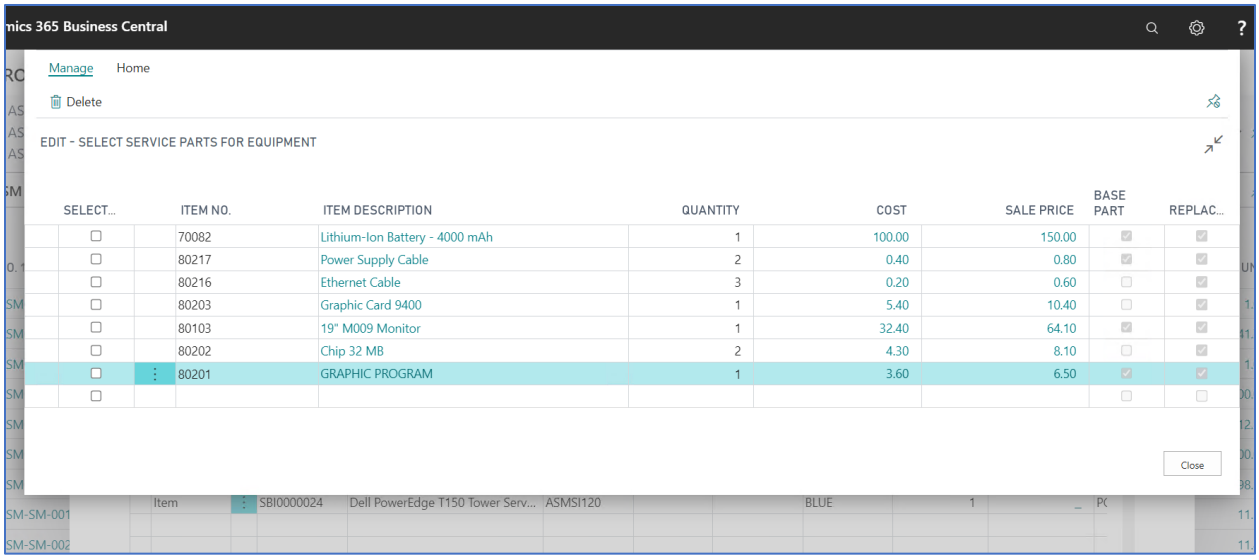
Once the parts and replacements are entered into the purchase order, you can the post the purchase order.

The purchase order can be linked to the ASM Service order. This allows you to purchase the parts directly for the purchase order and in the process post consumption for the purchased parts.

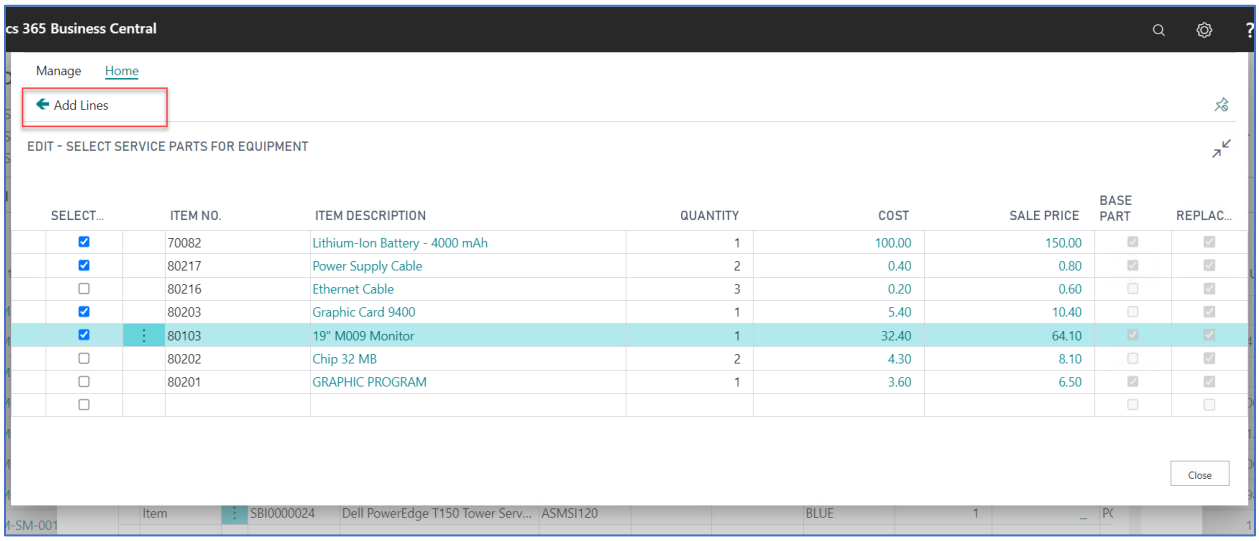


On ASM Service Order you can view the parts.





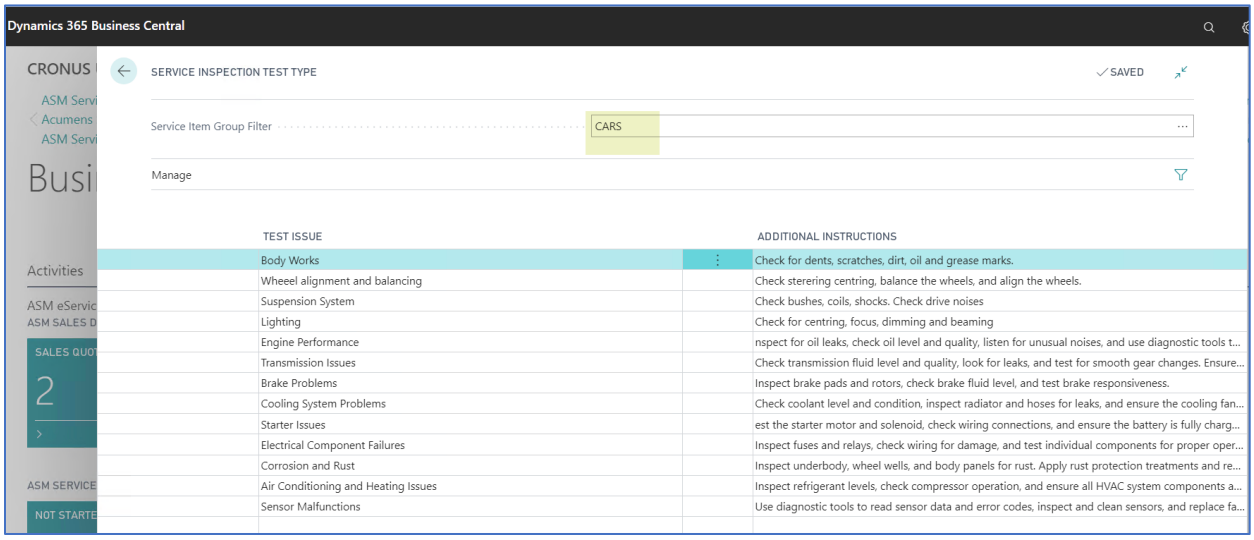
You can opt select the items and add them to the ASM Service order.



16 Equipment Inspection and Testing.

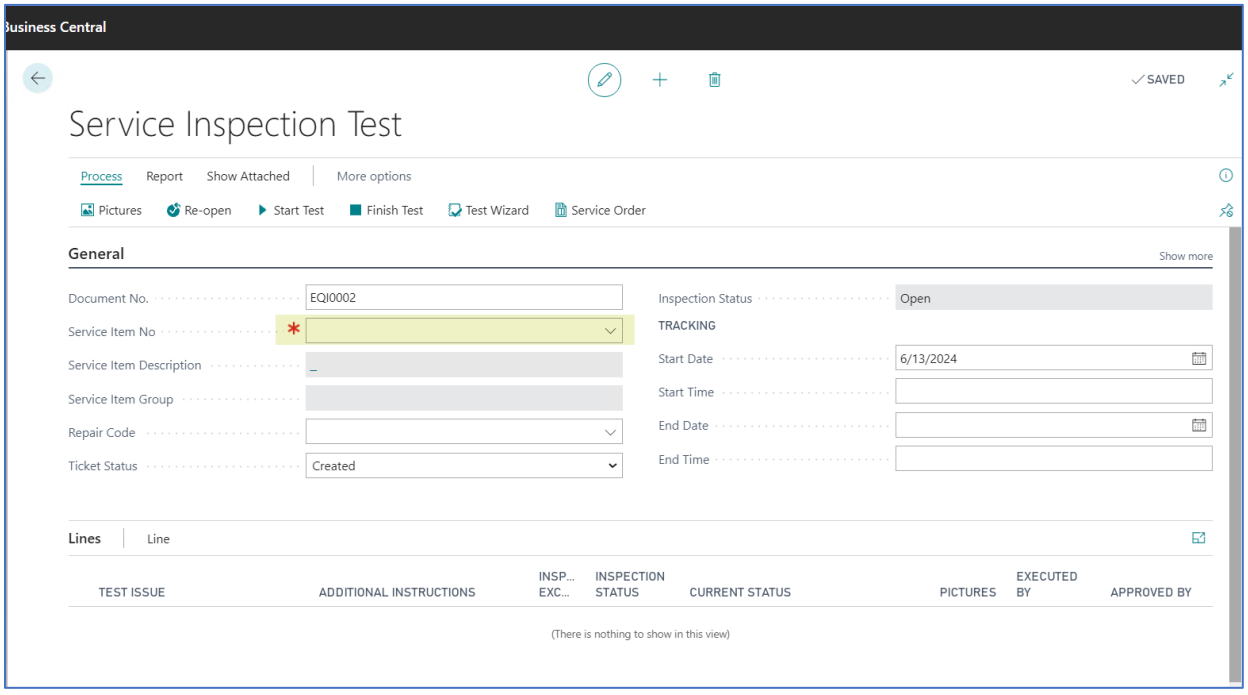
Equipment Inspection and Testing provides an option to conduct inspections and tests on equipment to check for operational efficiency, compliance and quality.

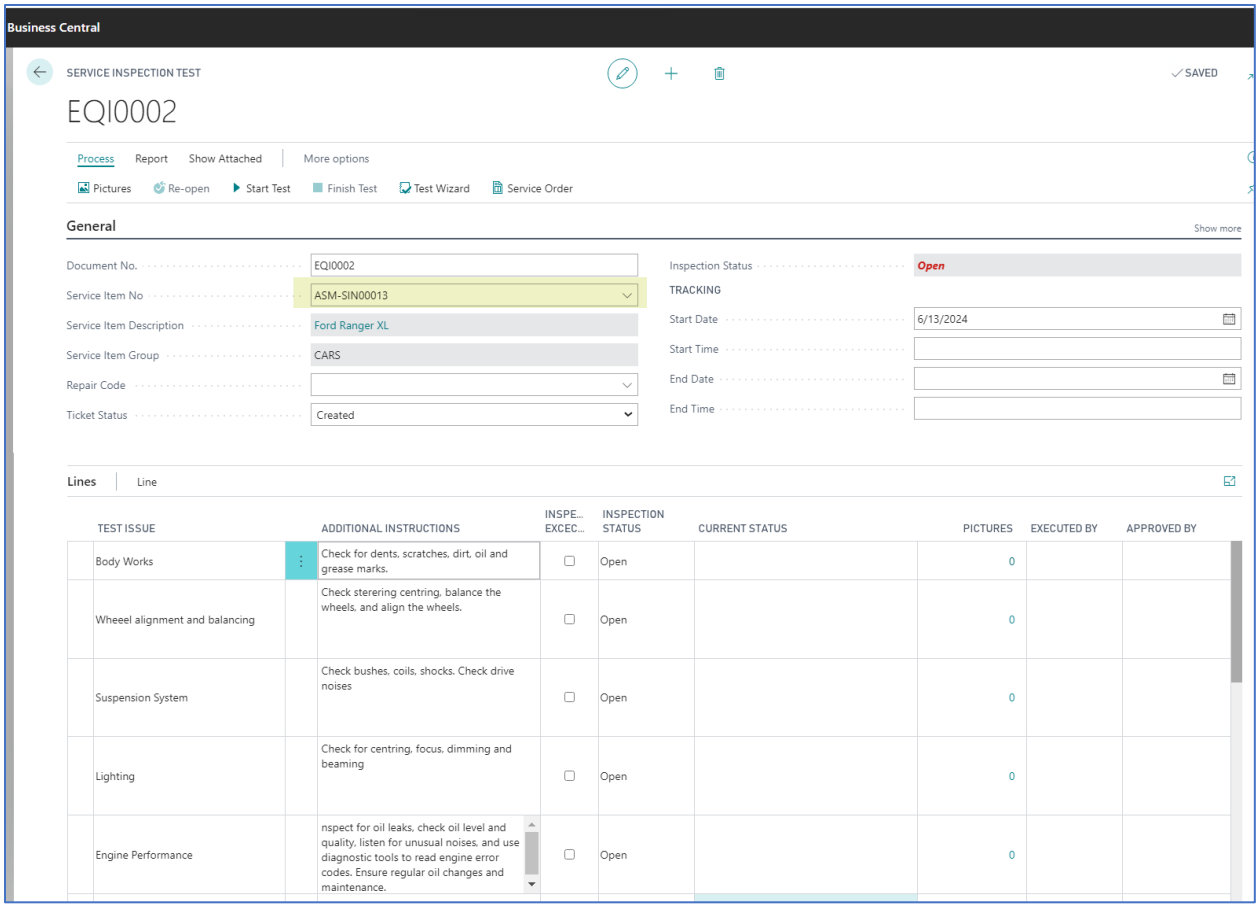
You can setup different inspection activities and tasks for each service item group.



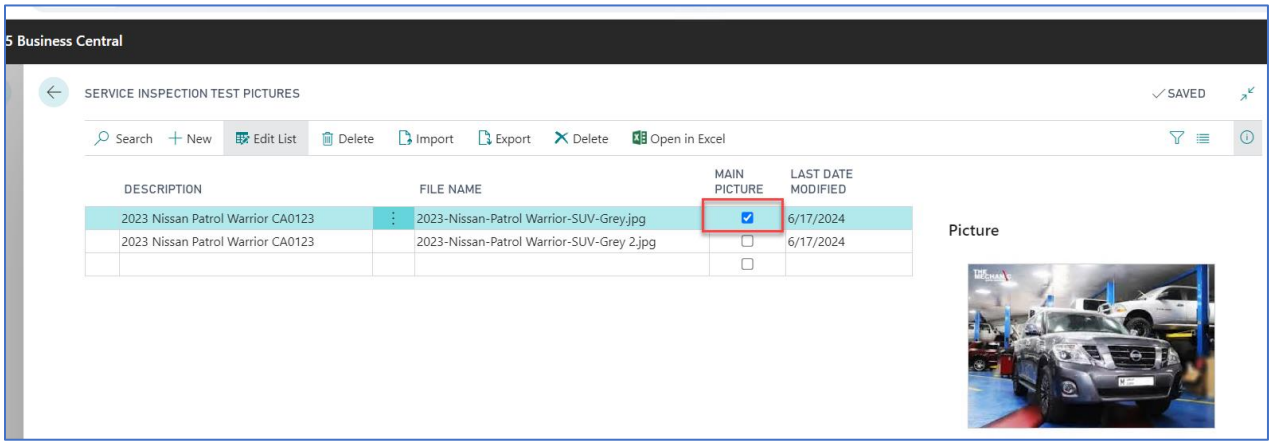
Inspection tests are performed for ASM Service items.

When the technician creates a new Service Inspection Test, they must select the ASM Service item to perform tests. Service Inspection lines are automatically populated from the Service Item Group.

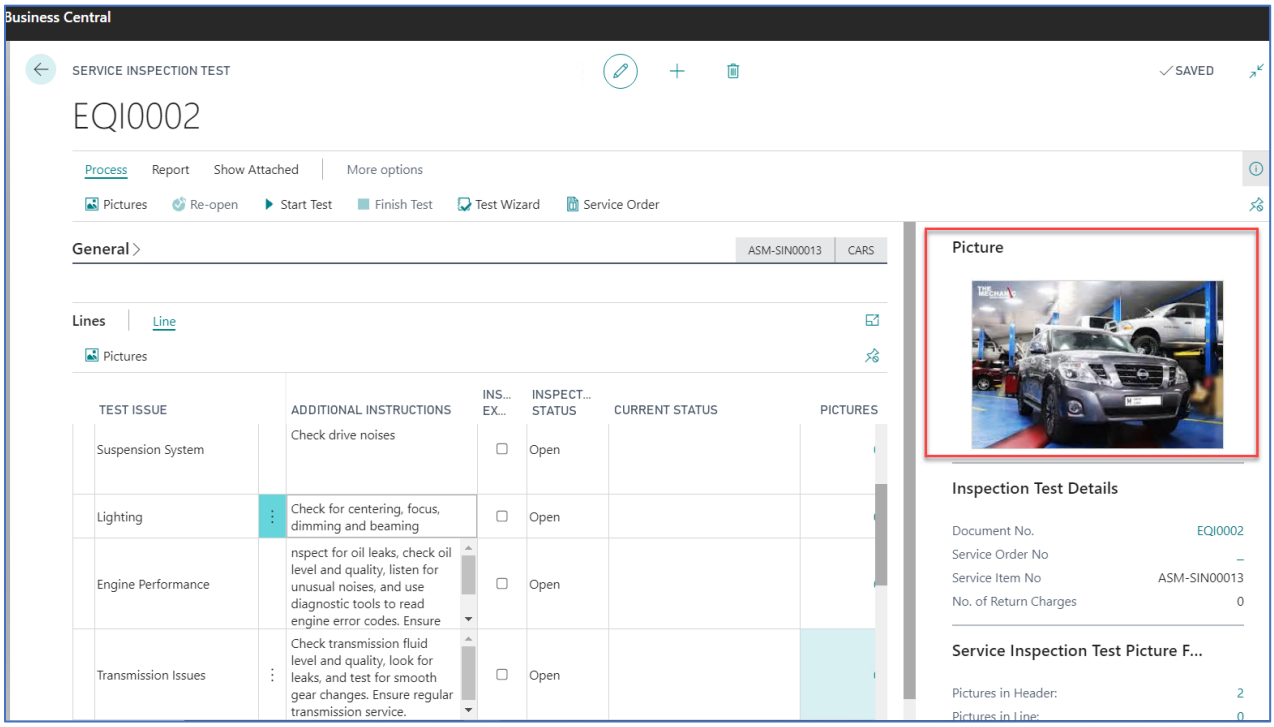




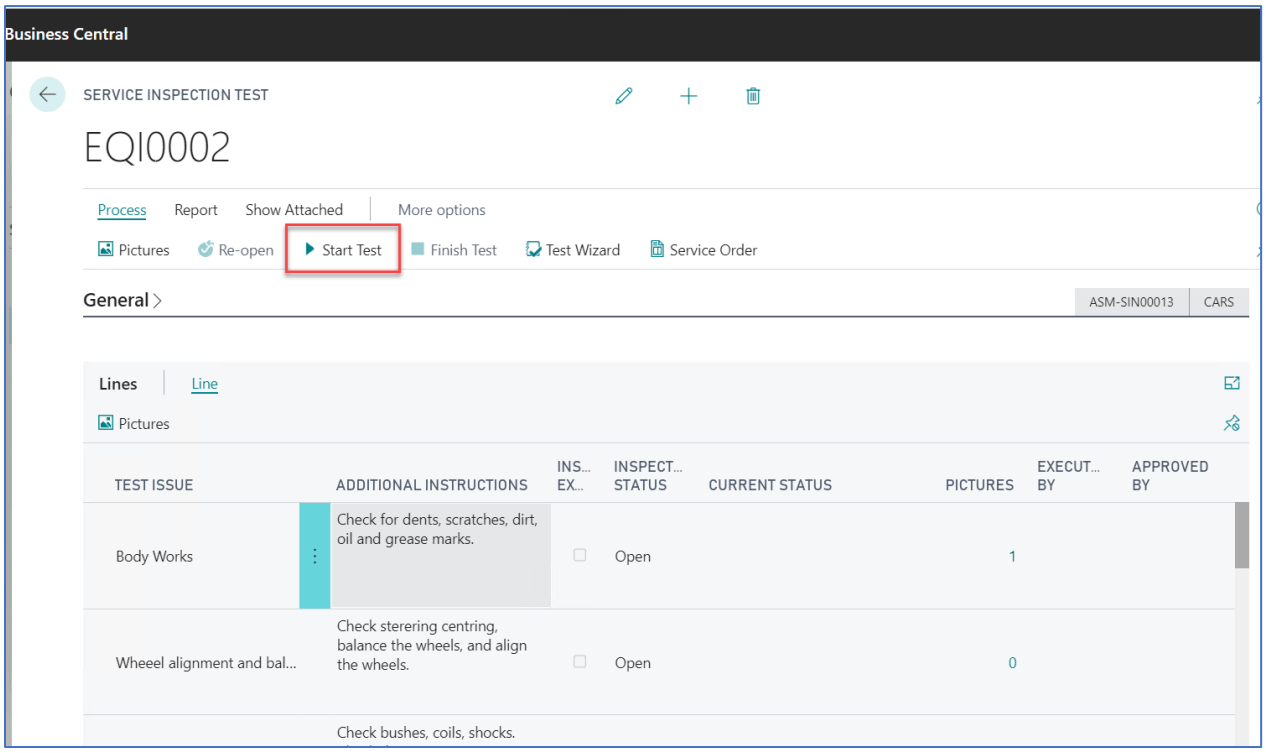
Technician can add pictures for the general inspection and for individual line items. Choose and mark the main picture to be displayed on card page.



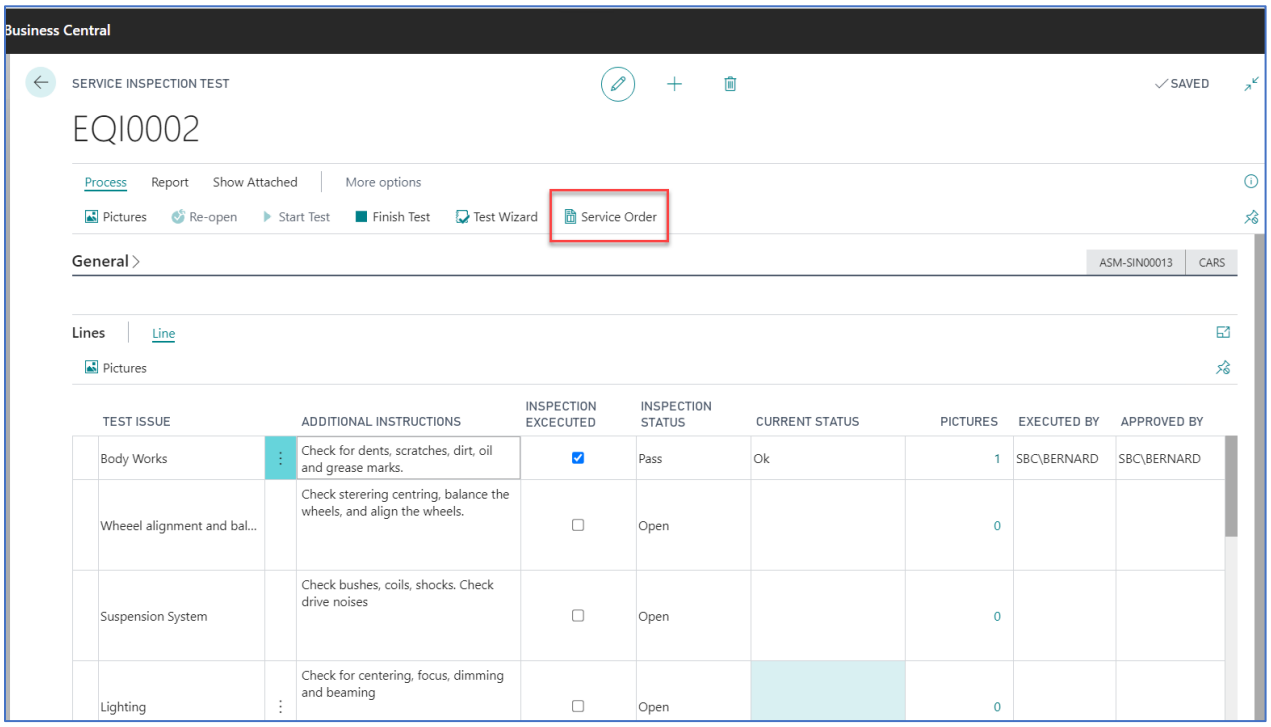
The main picture is displayed on the main page.



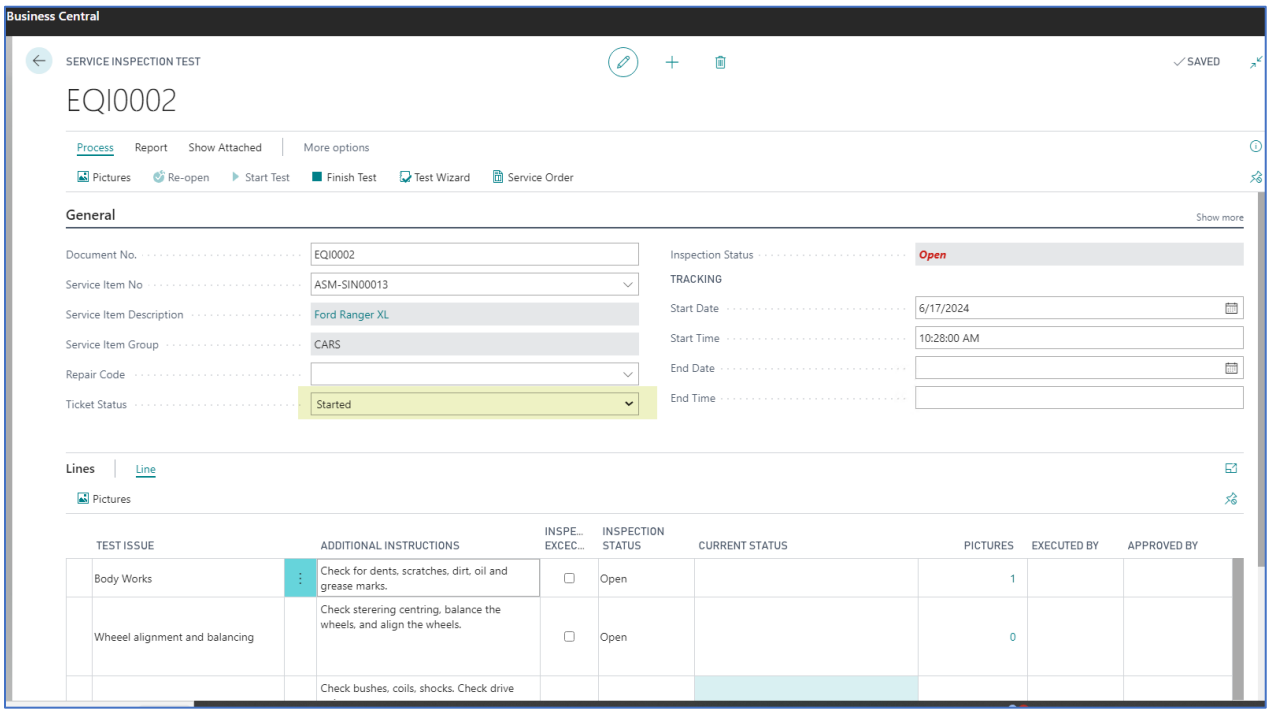
Once the test issues have been identified and updated on the lines, the Inspection testing process can begin.



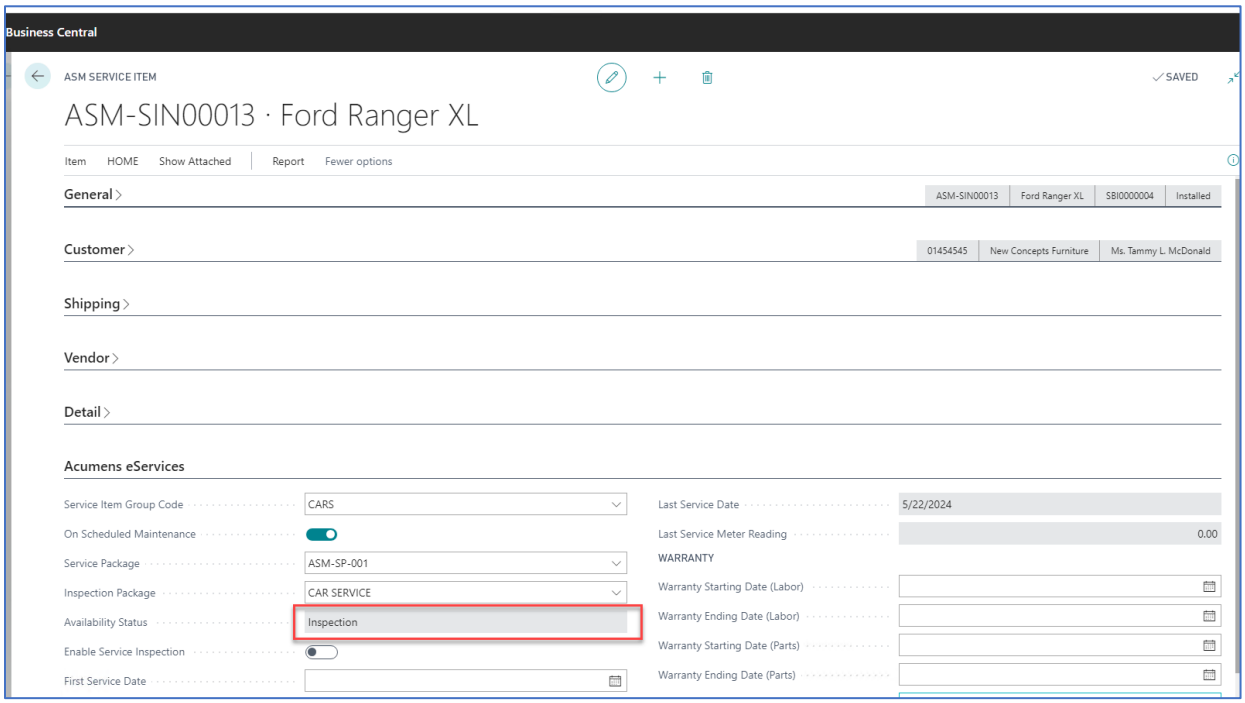
You can create a Service Order is created for the inspection in case some items are required to be billed for repairs done. This creates an ASM Service Order and related tickets.



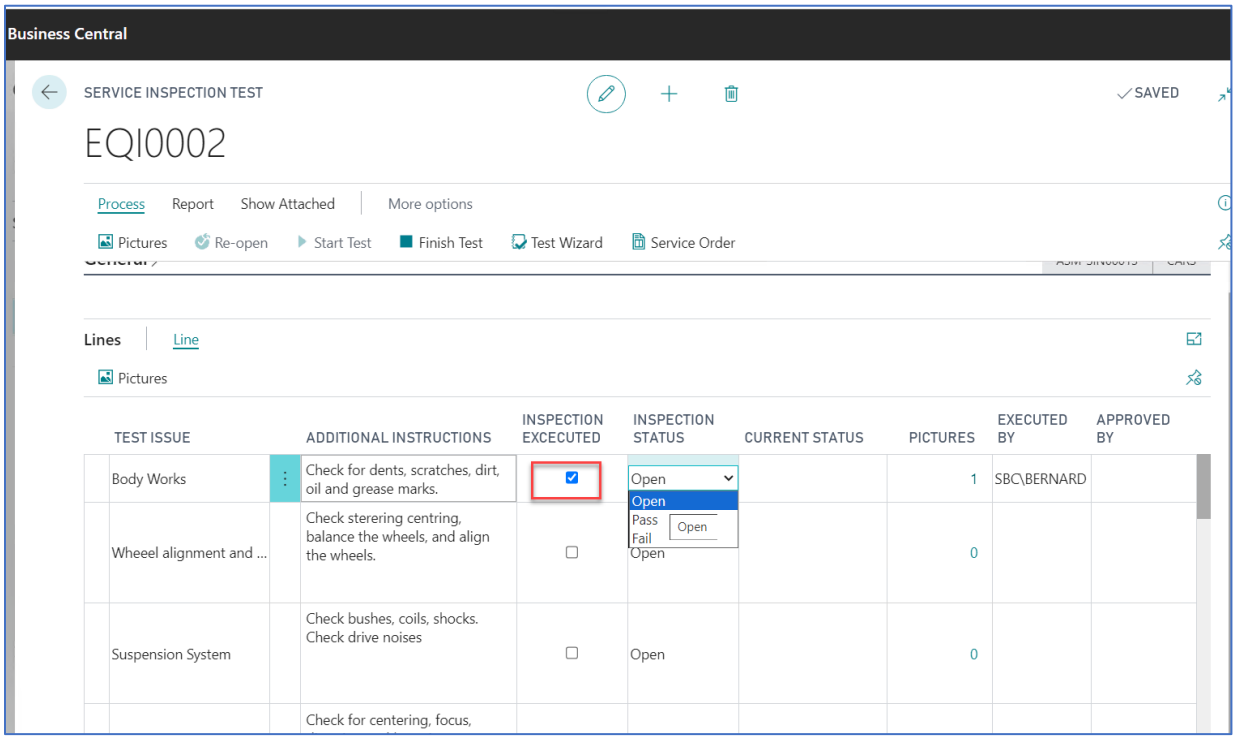
Once Inspection is started, the status is updated on the Service inspection page for ease of tracking by the technicians.

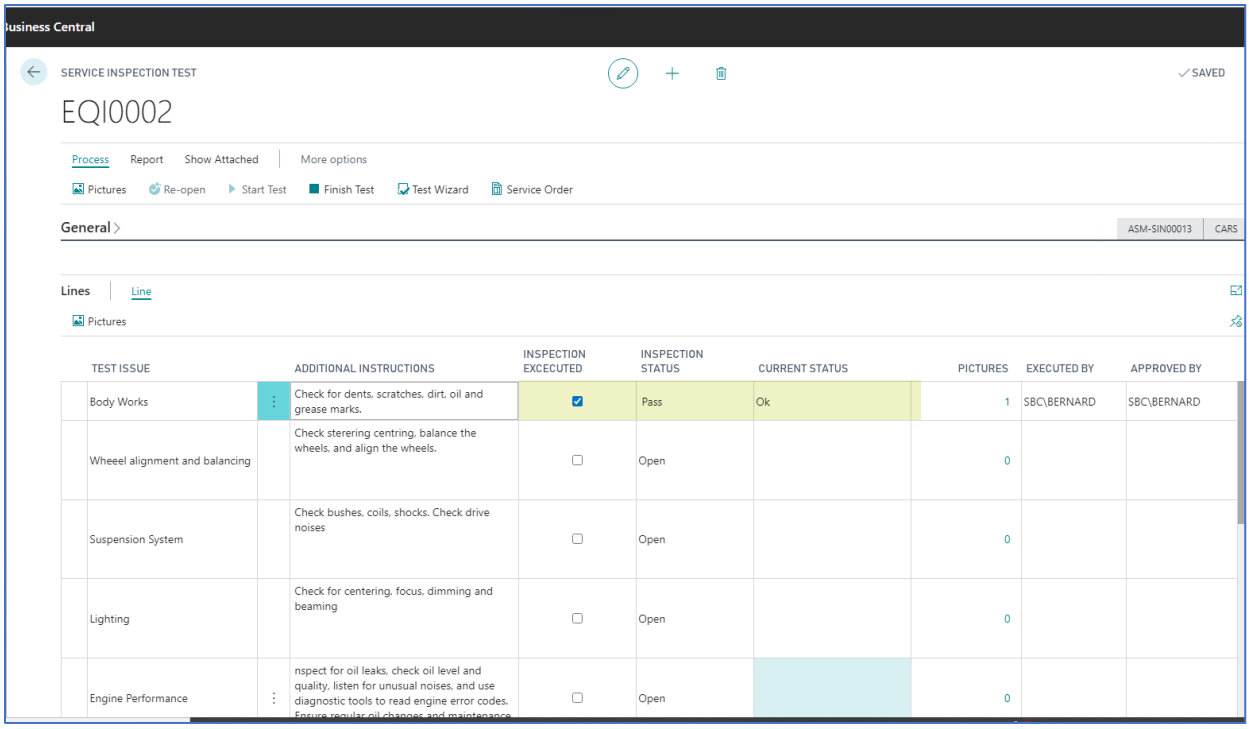


The ASM Service Item is also continuously updated so the users or technicians can know the progress of the inspection.

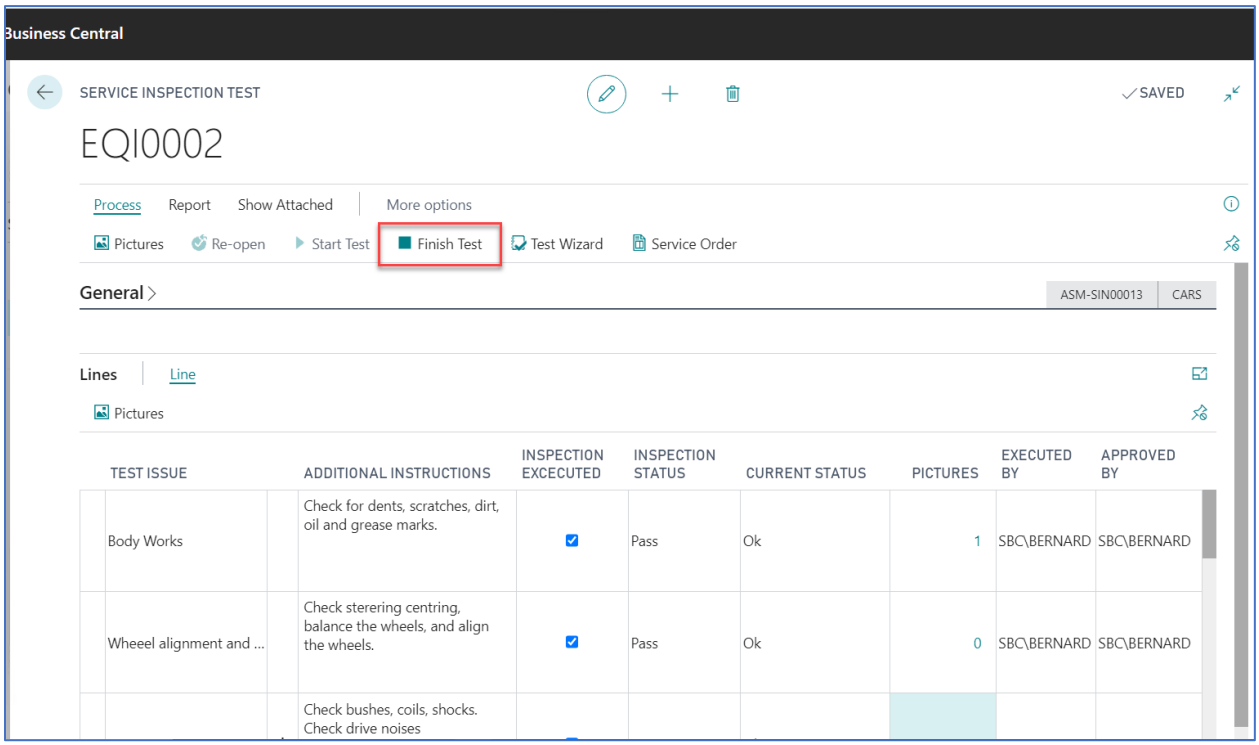


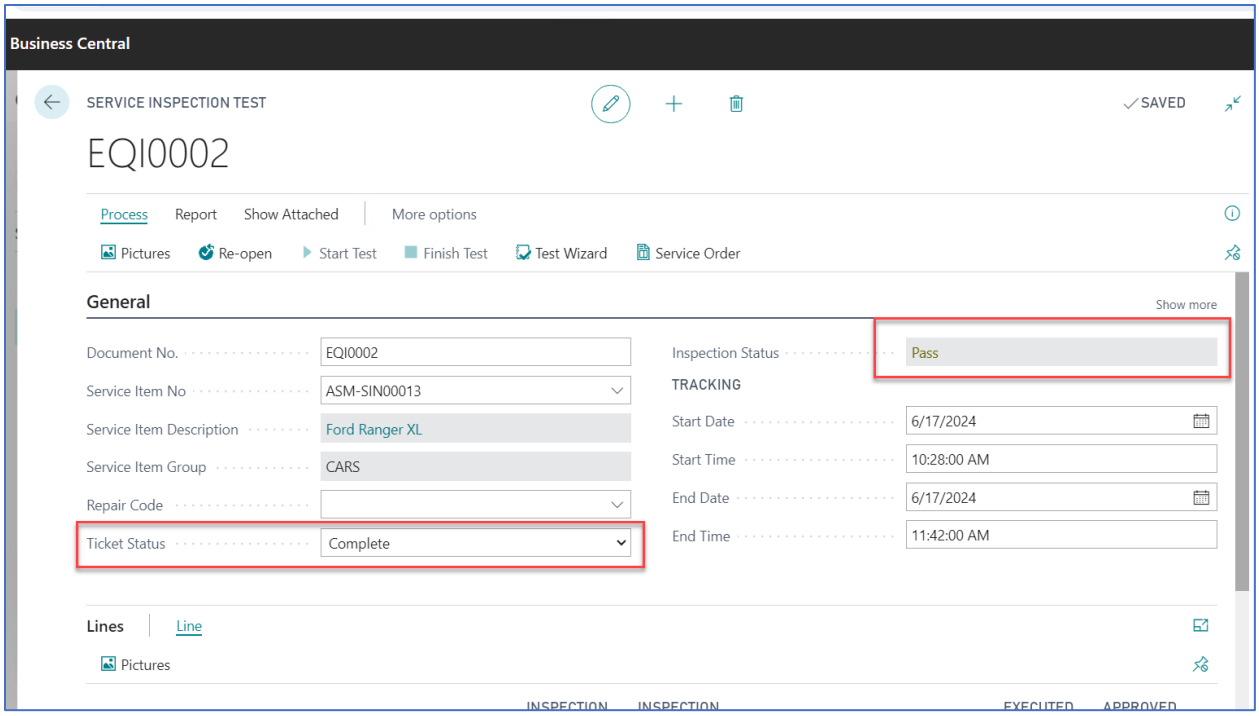
To update the Inspection lines, the technician ticks the “Inspection Executed” field and then select status of the inspection on “Inspection Status” field. “Current Status” is automatically updated.



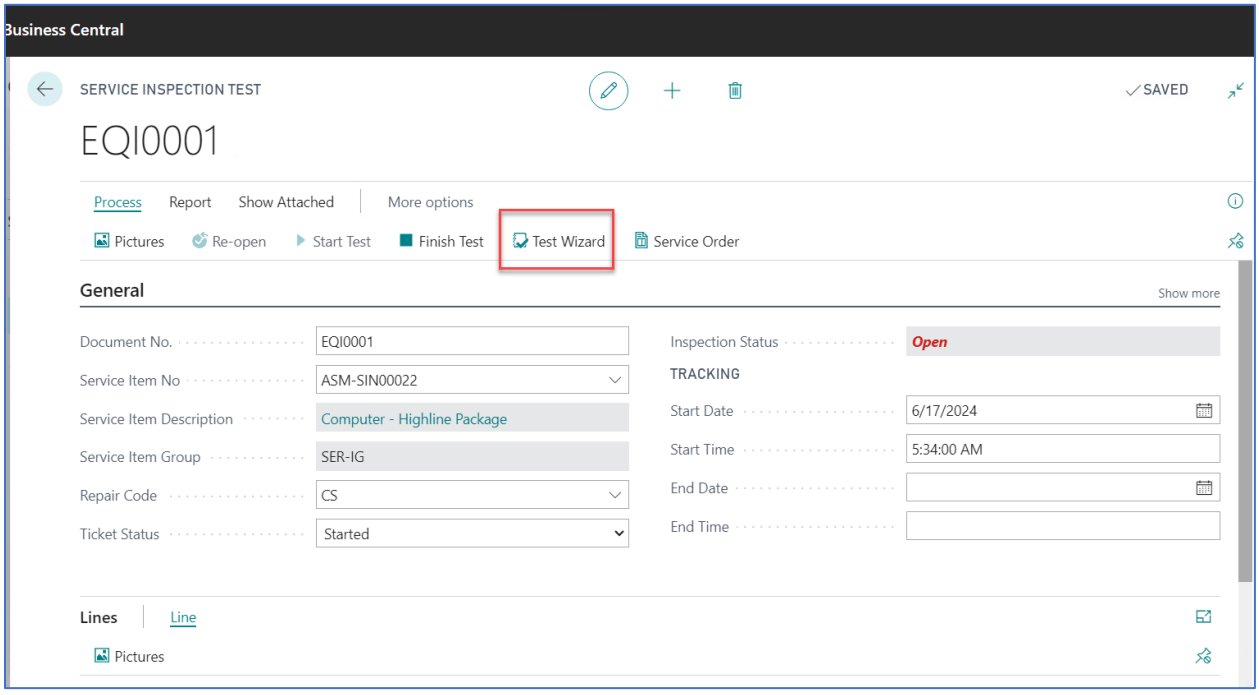


If the Inspection fails, the technician can manually add a new ticket to the created ASM Service to resolve the Issue. Once the Inspection is completed, then the technician can finish the inspection and the ASM Service Item is updated accordingly.





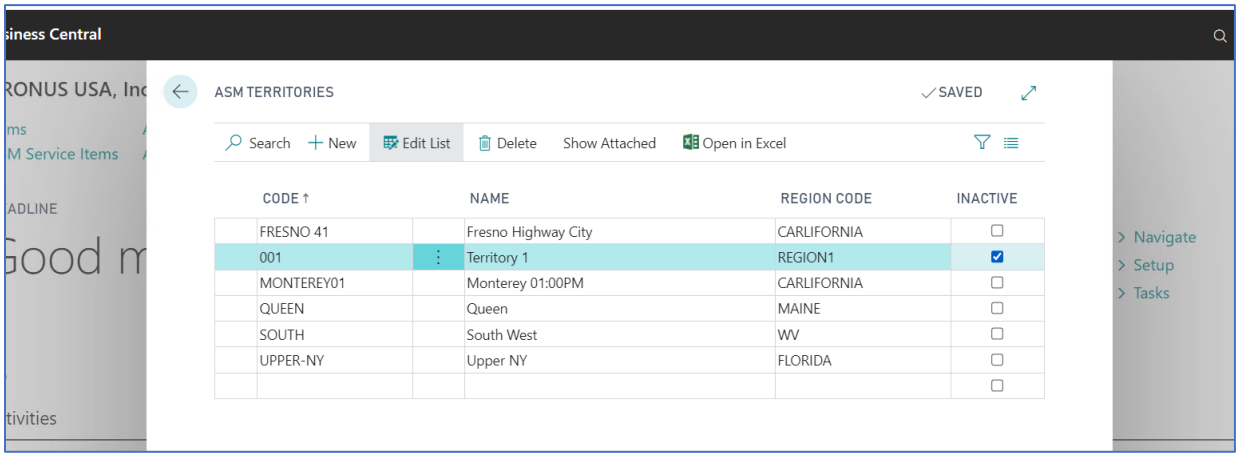
The technician can also use the Test Wizard to perform the Inspectionn tests.



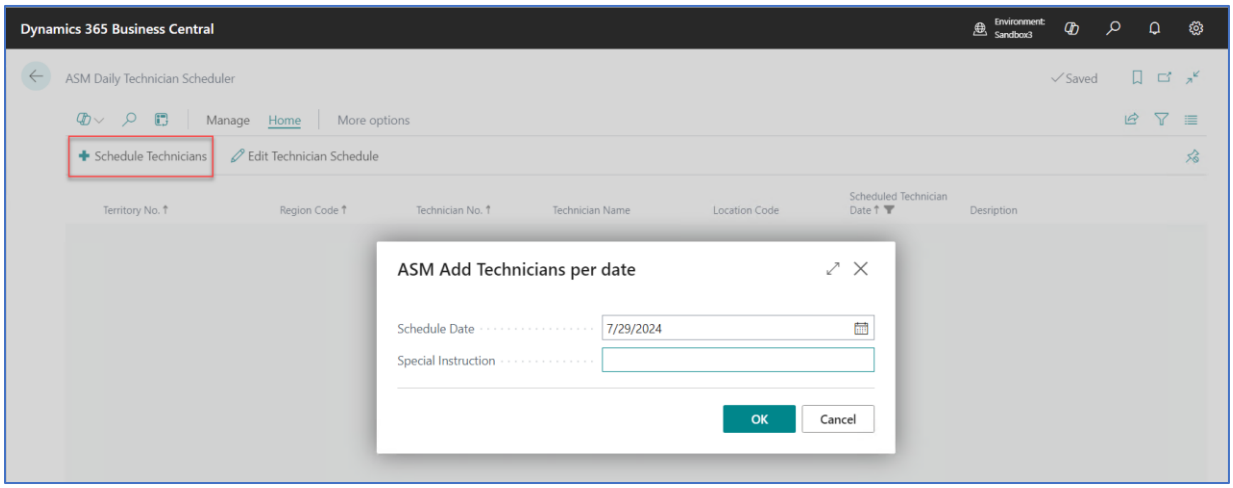
17 ASM Dispatch and Resource Scheduling

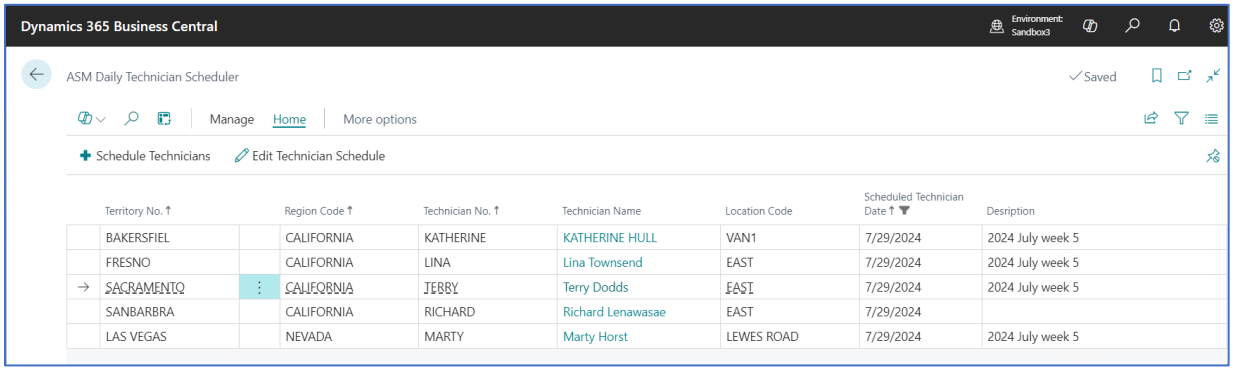
Acumens Service Job management provides a module for planning service item pickup, delivery and onsite scheduling for technicians.

You define territories or regions where individual technicians will be assigned.

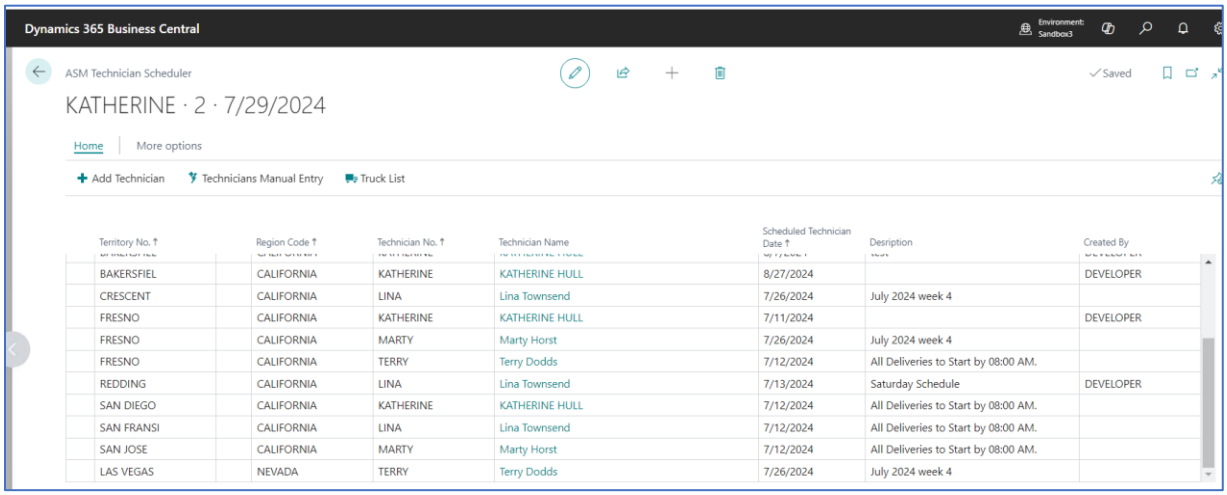


All Technicians can be scheduled on a specified date.



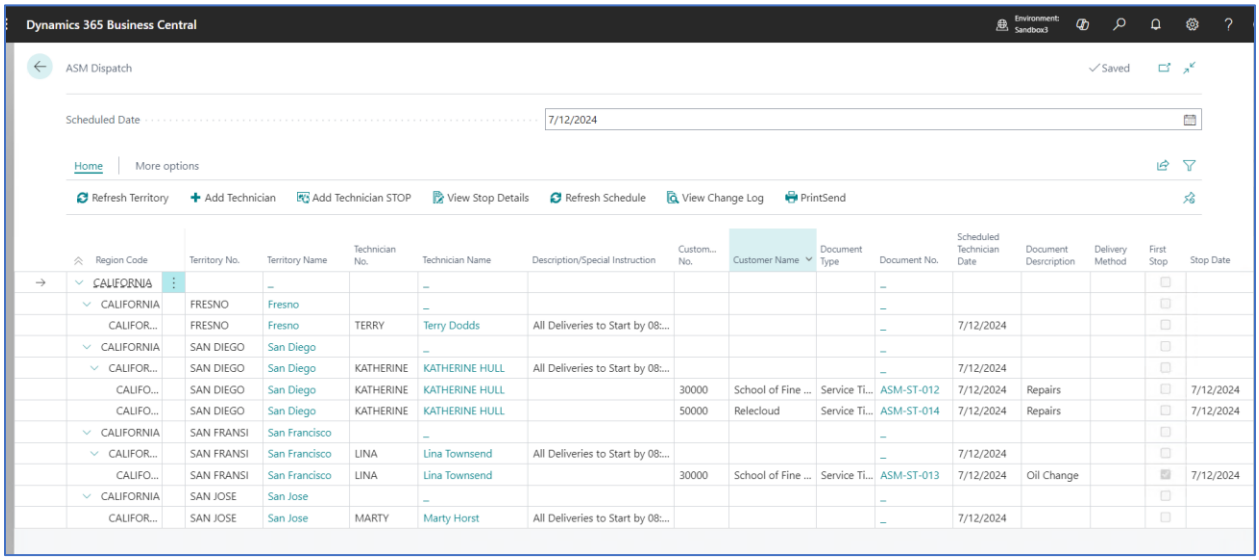


You can view the schedule of each technician.



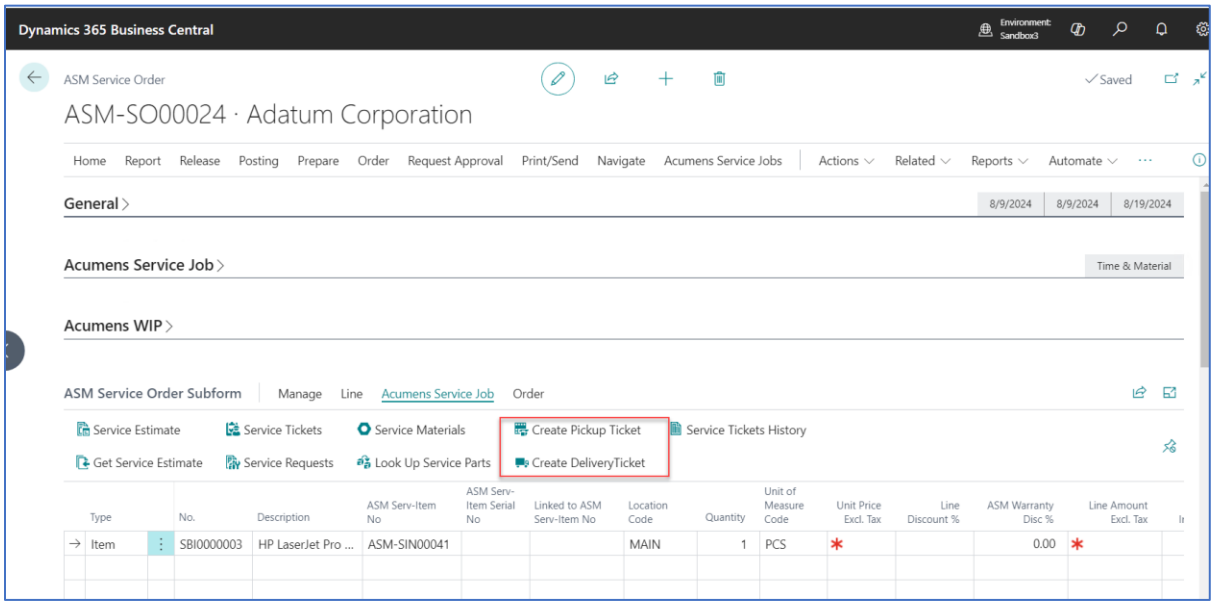
Territory No.	Region Code	Technician No.	Technician Name	Scheduled Technician Date	Desription	Created By
BAKERSFIEL	CALIFORNIA	KATHERINE	KATHERINE HULL	8/27/2024		DEVELOPER
CRESCENT	CALIFORNIA	LINA	Lina Townsend	7/26/2024	July 2024 week 4	
FRESNO	CALIFORNIA	KATHERINE	KATHERINE HULL	7/11/2024		DEVELOPER
FRESNO	CALIFORNIA	MARTY	Marty Horst	7/26/2024	July 2024 week 4	
FRESNO	CALIFORNIA	TERRY	Terry Dodds	7/12/2024	All Deliveries to Start by 08:00 AM.	
REDDING	CALIFORNIA	LINA	Lina Townsend	7/13/2024	Saturday Schedule	DEVELOPER
SAN DIEGO	CALIFORNIA	KATHERINE	KATHERINE HULL	7/12/2024	All Deliveries to Start by 08:00 AM.	
SAN FRANSI	CALIFORNIA	LINA	Lina Townsend	7/12/2024	All Deliveries to Start by 08:00 AM.	
SAN JOSE	CALIFORNIA	MARTY	Marty Horst	7/12/2024	All Deliveries to Start by 08:00 AM.	
LAS VEGAS	NEVADA	TERRY	Terry Dodds	7/26/2024	July 2024 week 4	

The dispatch list provides a detailed view of all active schedules for each day. This is a collapsible and expandable page. This will show the technicians and the respective assigned Ticket or ASM Service orders.



Region Code	Territory No.	Territory Name	Technician No.	Technician Name	Description/Special Instruction	Custom... No.	Customer Name	Document Type	Document No.	Scheduled Technician Date	Document Descrription	Delivery Method	First Stop	Stop Date
CALIFORNIA		_		_					_					
CALIFORNIA	FRESNO	Fresno		_					_					
CALIFOR...	FRESNO	Fresno	TERRY	Terry Dodds	All Deliveries to Start by 08:...				_	7/12/2024				
CALIFORNIA	SAN DIEGO	San Diego		_					_					
CALIFOR...	SAN DIEGO	San Diego	KATHERINE	KATHERINE HULL	All Deliveries to Start by 08:...				_	7/12/2024				
CALIFO...	SAN DIEGO	San Diego	KATHERINE	KATHERINE HULL		30000	School of Fine ...	Service Ti...	ASM-ST-012	7/12/2024	Repairs			7/12/2024
CALIFO...	SAN DIEGO	San Diego	KATHERINE	KATHERINE HULL		50000	Relecloud	Service Ti...	ASM-ST-014	7/12/2024	Repairs			7/12/2024
CALIFORNIA	SAN FRANSI	San Francisco		_					_					
CALIFOR...	SAN FRANSI	San Francisco	LINA	Lina Townsend	All Deliveries to Start by 08:...				_	7/12/2024				
CALIFO...	SAN FRANSI	San Francisco	LINA	Lina Townsend		30000	School of Fine ...	Service Ti...	ASM-ST-013	7/12/2024	Oil Change			7/12/2024
CALIFORNIA	SAN JOSE	San Jose		_					_					
CALIFOR...	SAN JOSE	San Jose	MARTY	Marty Horst	All Deliveries to Start by 08:...				_	7/12/2024				

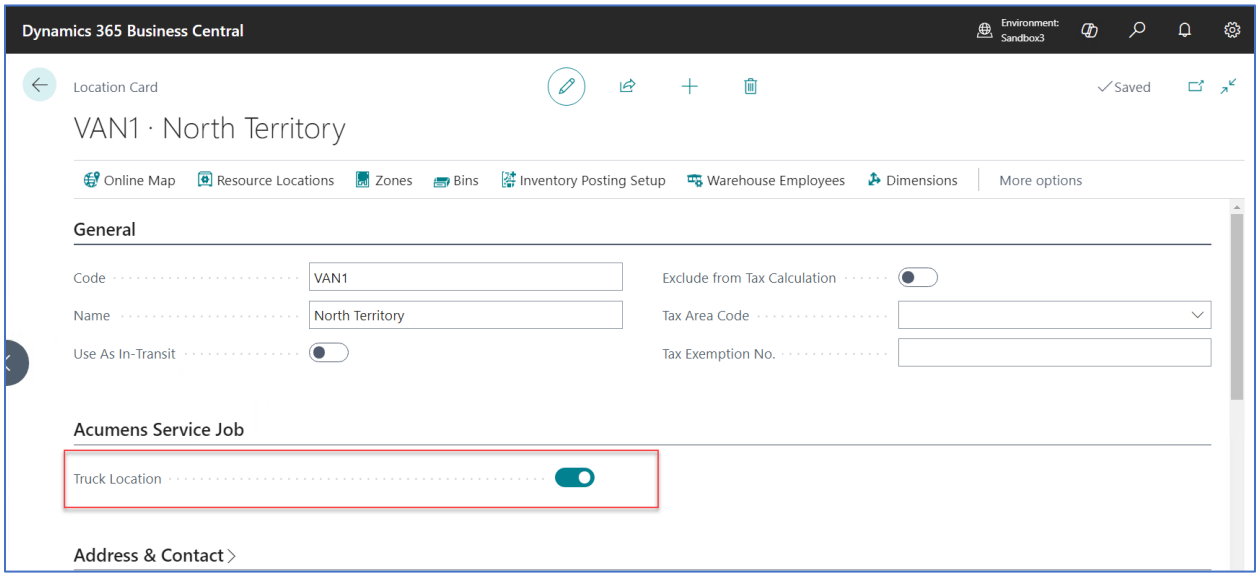
If an item requires in-shop service, technicians can create Pickup and Delivery tickets.

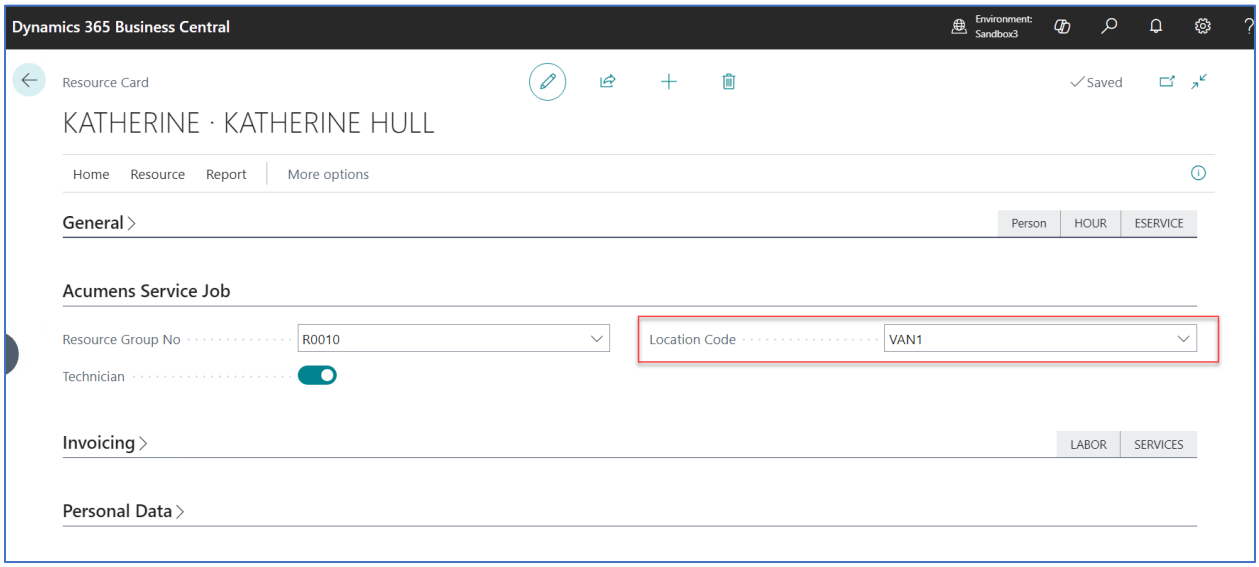


18 Van Inventory.

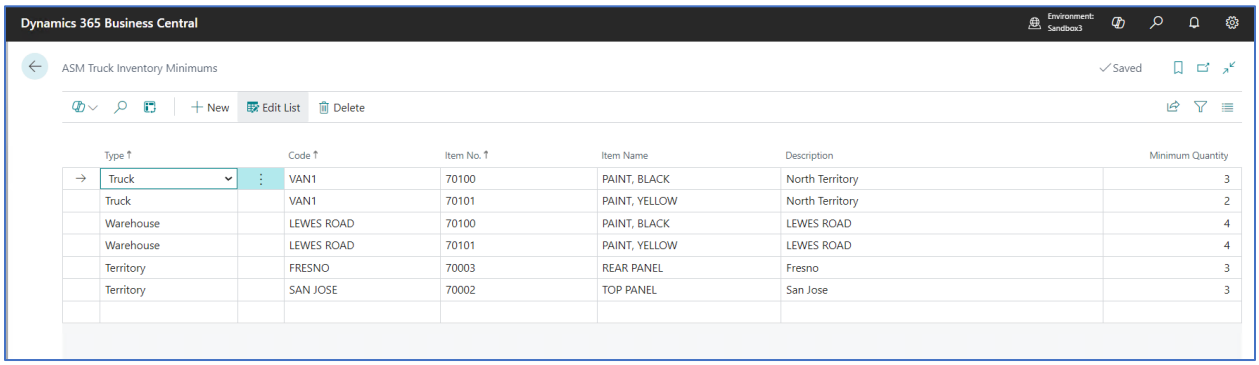
Van Inventory feature provides an option to monitor inventory items used by technicians on a field service.

A location is setup as a truck\Van location. This is then be assigned to a technician.





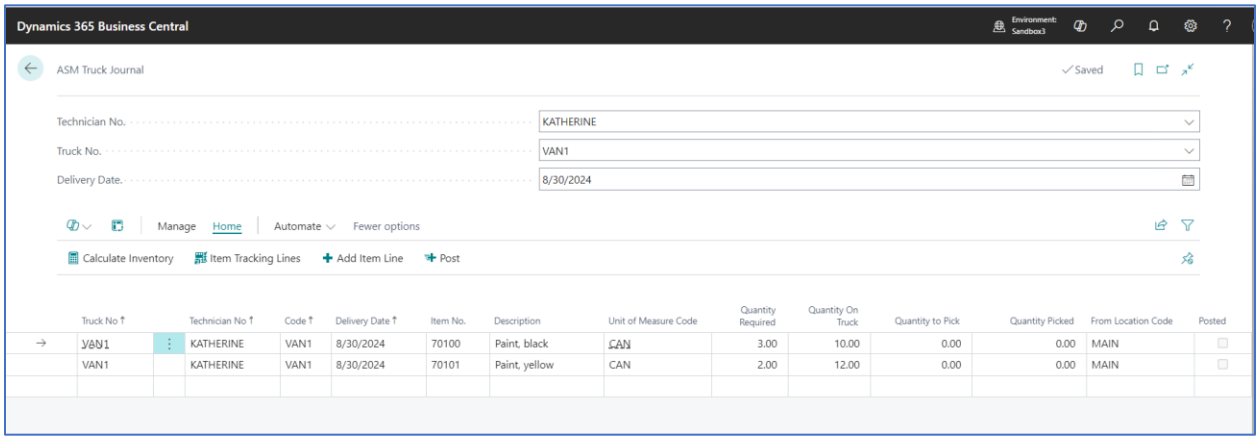
ASM Truck Inventory Minimums allows setting up minimum quantities required for a territory or location.



Type	Code	Item No.	Item Name	Description	Minimum Quantity
Truck	VAN1	70100	PAINT, BLACK	North Territory	3
Truck	VAN1	70101	PAINT, YELLOW	North Territory	2
Warehouse	LEWES ROAD	70100	PAINT, BLACK	LEWES ROAD	4
Warehouse	LEWES ROAD	70101	PAINT, YELLOW	LEWES ROAD	4
Territory	FRESNO	70003	REAR PANEL	Fresno	3
Territory	SAN JOSE	70002	TOP PANEL	San Jose	3

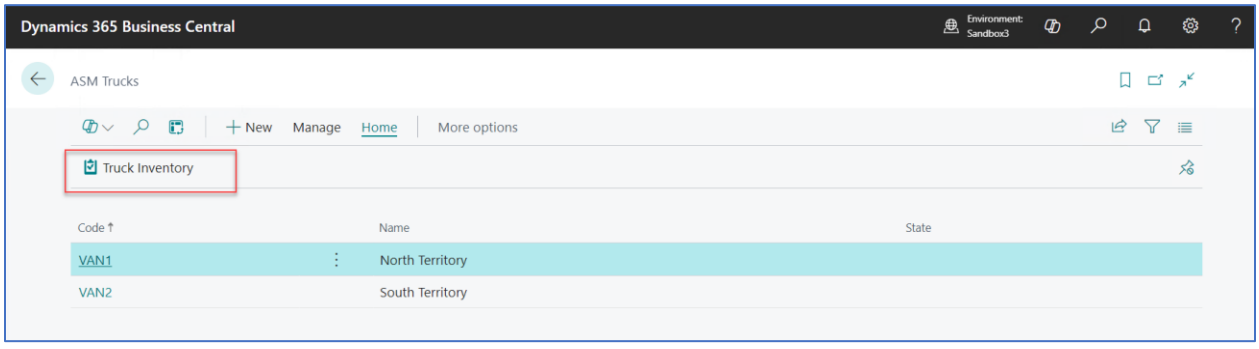
This guides a technician on the minimum inventory they should have during a field service. If a restock is required, the technician will use the truck journal to transfer and replenish their stocks.

An item can be set on Territory, warehouse and Truck level. When inventory is calculated on the truck Journal, Truck level will take precedence then warehouse and lastly Territory level.

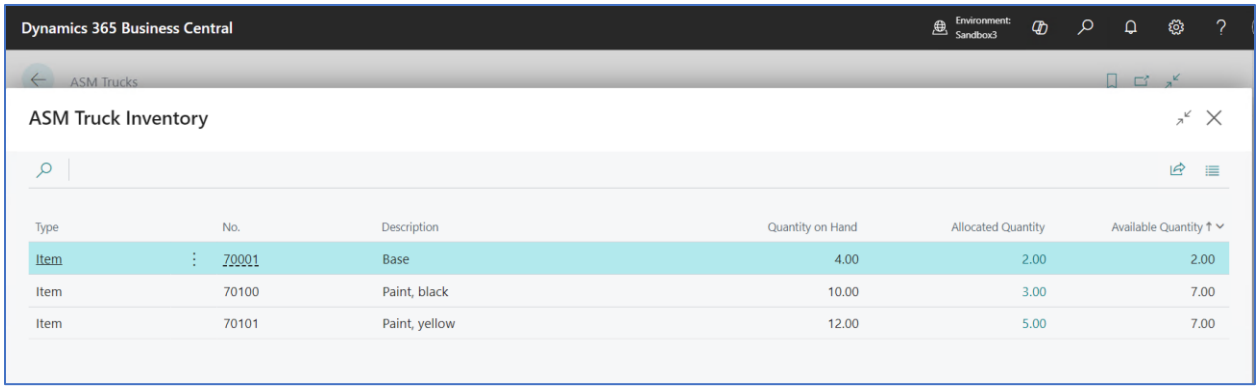


Truck No	Technician No	Code	Delivery Date	Item No.	Description	Unit of Measure Code	Quantity Required	Quantity On Truck	Quantity to Pick	Quantity Picked	From Location Code	Posted
VAN1	KATHERINE	VAN1	8/30/2024	70100	Paint, black	CAN	3.00	10.00	0.00	0.00	MAIN	
VAN1	KATHERINE	VAN1	8/30/2024	70101	Paint, yellow	CAN	2.00	12.00	0.00	0.00	MAIN	

From the truck location you can view the inventor assigned and available quantities.



Code	Name	State
VAN1	North Territory	
VAN2	South Territory	

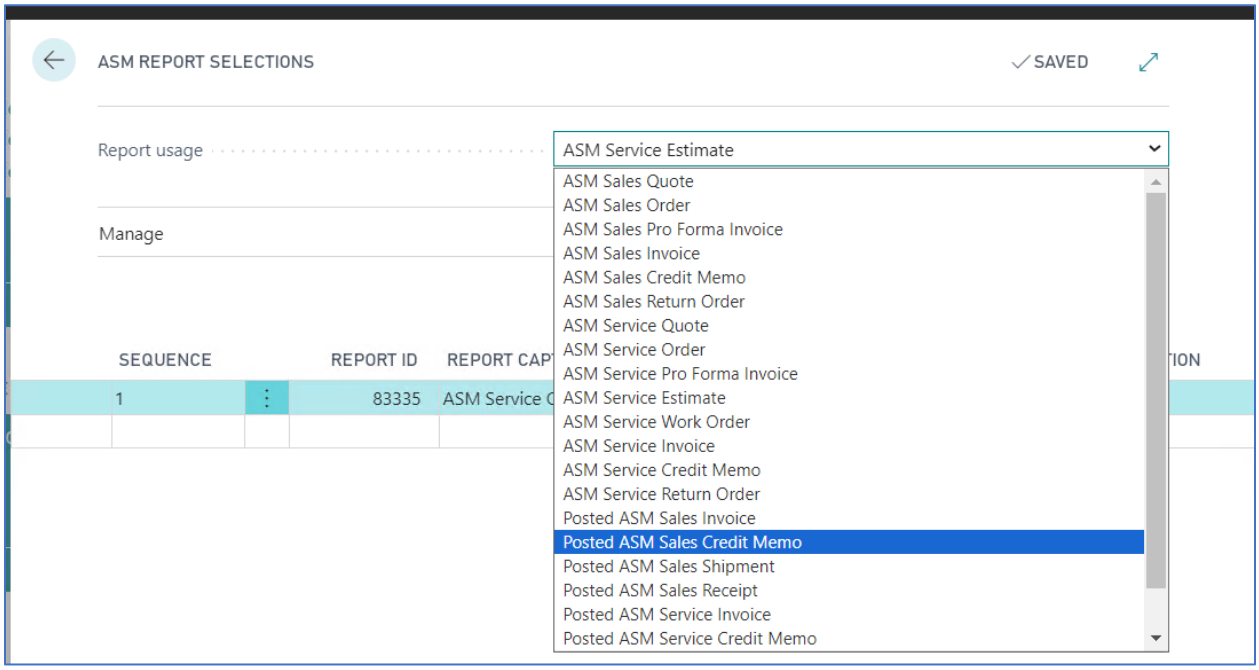

Dynamics 365 Business Central
Environment:
Sandbox3
ASM Trucks
ASM Truck Inventory
Type
No.
Description
Quantity on Hand
Allocated Quantity
Available Quantity
Item
70001
Base
4.00
2.00
2.00
Item
70100
Paint, black
10.00
3.00
7.00
Item
70101
Paint, yellow
12.00
5.00
7.00

19 ASM Custom Document Templates.

This provides the option to print and email document report printout directly from the document. The report printouts are standardized across ASM Service and ASM Sales Documents.

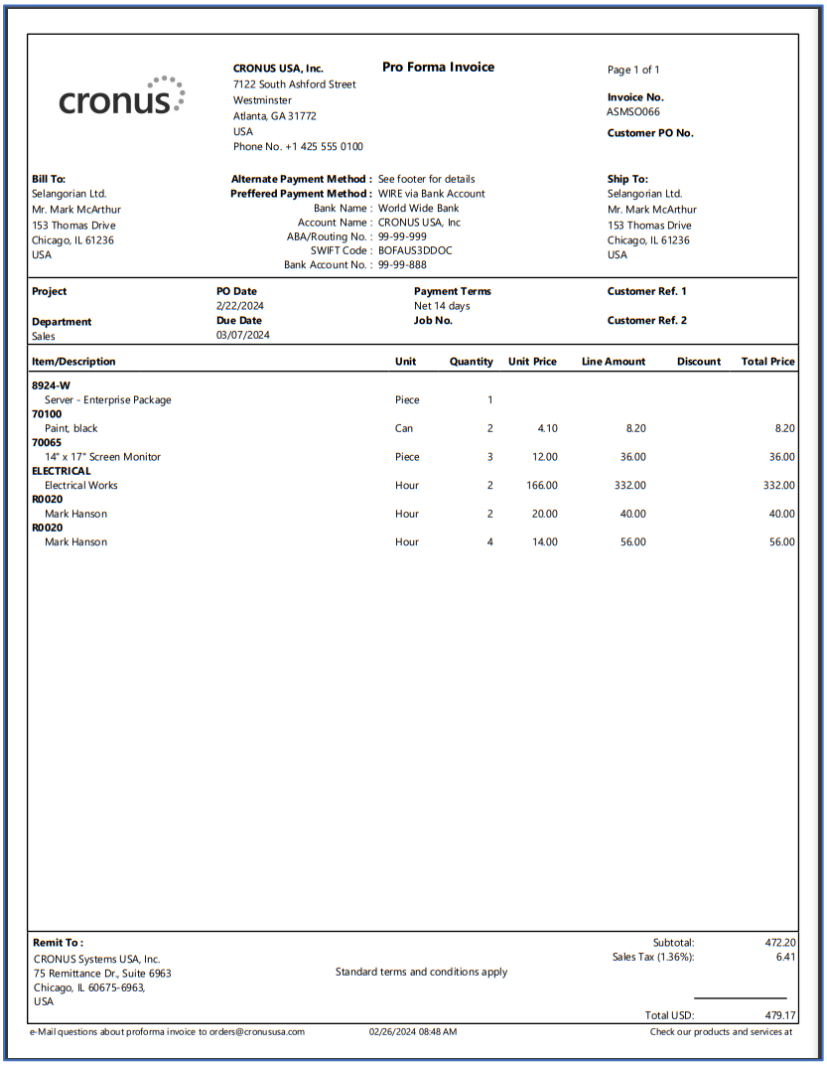
19.1 ASM Report Selections.

You can set up reports for the documents below.



19.2 Overview of the reports.

Most ASM document reports have a standardized print layout below.



cronus

CRONUS USA, Inc.
7122 South Ashford Street
Westminster
Atlanta, GA 31772
USA
Phone No. +1 425 555 0100

Pro Forma Invoice

Page 1 of 1

Invoice No.
ASMSO066

Customer PO No.

Bill To:
Selangorian Ltd.
Mr. Mark McArthur
153 Thomas Drive
Chicago, IL 61236
USA

Alternate Payment Method : See footer for details
Preffered Payment Method : WIRE via Bank Account
Bank Name : World Wide Bank
Account Name : CRONUS USA, Inc
ABA/Routing No. : 99-99-999
SWIFT Code : BOFAUS3DDOC
Bank Account No. : 99-99-888

Ship To:
Selangorian Ltd.
Mr. Mark McArthur
153 Thomas Drive
Chicago, IL 61236
USA

Project	PO Date	Payment Terms	Customer Ref. 1
	2/22/2024	Net 14 days	
Department	**Due Date**	**Job No.**	**Customer Ref. 2**
Sales	03/07/2024		

Item/Description	Unit	Quantity	Unit Price	Line Amount	Discount	Total Price
8924-W						
Server - Enterprise Package	Piece	1				
70100						
Paint, black	Can	2	4.10	8.20		8.20
70065						
14" x 17" Screen Monitor	Piece	3	12.00	36.00		36.00
ELECTRICAL						
Electrical Works	Hour	2	166.00	332.00		332.00
R0020						
Mark Hanson	Hour	2	20.00	40.00		40.00
R0020						
Mark Hanson	Hour	4	14.00	56.00		56.00

Remit To :
CRONUS Systems USA, Inc.
75 Remittance Dr., Suite 6963
Chicago, IL 60675-6963,
USA

Standard terms and conditions apply

Subtotal: 472.20
Sales Tax (1.36%): 6.41
Total USD: 479.17

e-Mail questions about proforma invoice to orders@cronususa.com 02/26/2024 08:48 AM Check our products and services at

Workorder and Service Estimate Reports have a different layout.

cronus

SERVICE WORK ORDER

CRONUS USA, Inc.
7122 South Ashford Street
Westminster
Atlanta, GA 31772
USA
Phone No. +1 425 555 0100

Page 1 of 1

ASM Service Order No.
ASMSO066

Customer RFQ No.

Bill To:
Selangorian Ltd.
Mr. Mark McArthur
153 Thomas Drive
Chicago, IL 61236
USA

Ship-to:
Selangorian Ltd.
Mr. Mark McArthur
153 Thomas Drive
Chicago, IL 61236
USA

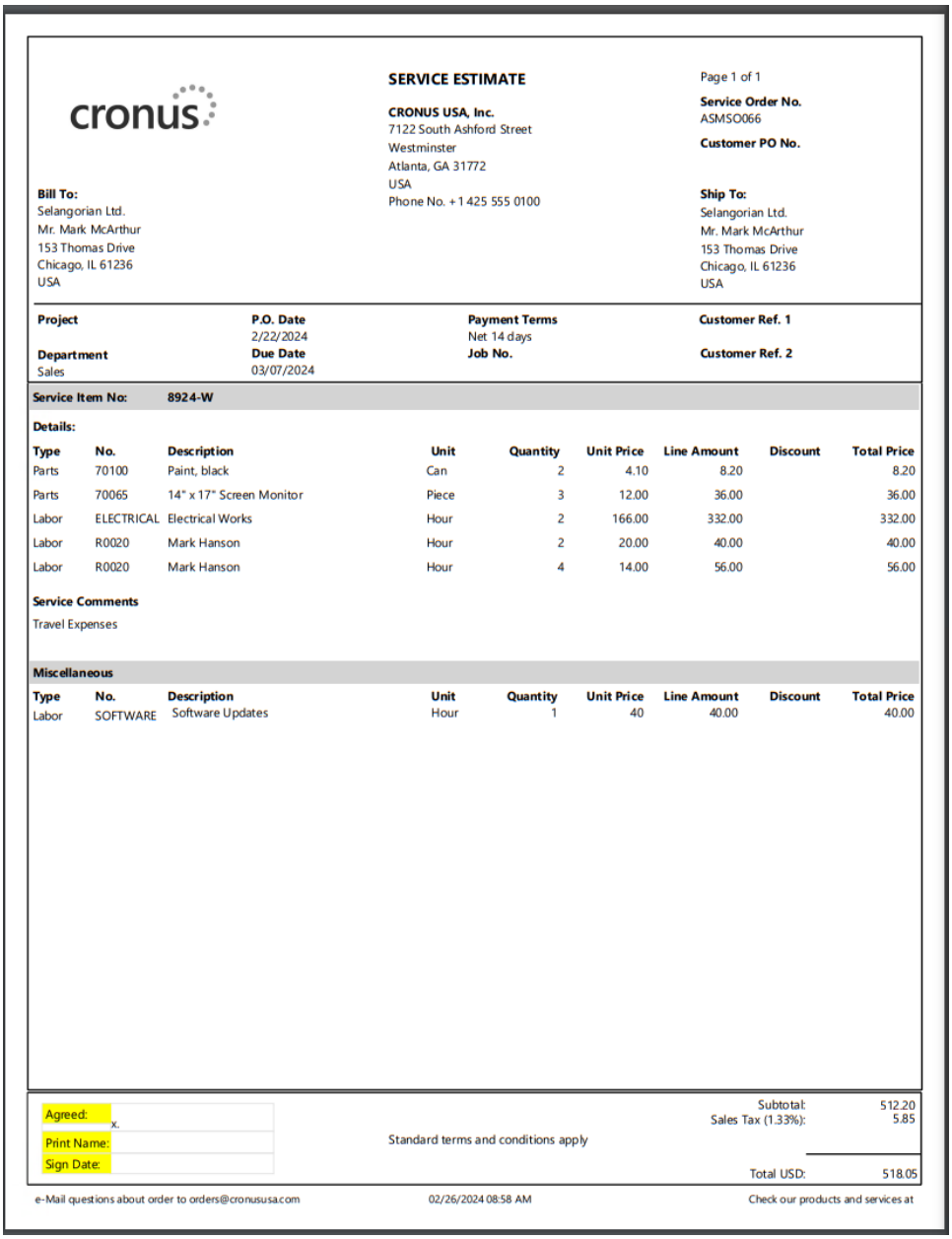
Project	Document Date	Payment Terms	Customer Ref. 1
	February 22, 2024	Net 14 days	
Department	**Due Date**	**Job No.**	**Customer Ref. 2**
Sales	03/07/2024		

Ticket No	Ticket Description	Task No	Task Description	Billing Option	Technician / Parts	Qty	Unit of Measure
ASM-ST-262	Car Wash Bay 1	T4	Car Wash	No Charge	Car Soap	2	L
		T4	Car Wash	No Charge	Mary A. Dempsey	2	HOUR
ASM-ST-263	Wheel Alignment	T6	Wheel Alignment	No Charge	Timothy Sneath	1.5	HOUR
		T1	Diagnosis	No Charge	Pressure Wash	3	PCS
ASM-ST-264	Wheel Balancing 1	T5	Wheel Balancing	No Charge	Electrical Diagnosis	1	HOUR
		T5	Wheel Balancing	No Charge	Mechanical Works	1	HOUR

Agreed: x
Print Name:
Sign Date:

Standard terms and conditions apply

e-Mail questions about quotation to orders@cronususa.com 02/26/2024 08:52 AM Check our products and services at



cronus

SERVICE ESTIMATE

CRONUS USA, Inc.
7122 South Ashford Street
Westminster
Atlanta, GA 31772
USA
Phone No. +1 425 555 0100

Service Order No.
ASMSO066

Customer PO No.

Bill To:
Selangorian Ltd.
Mr. Mark McArthur
153 Thomas Drive
Chicago, IL 61236
USA

Ship To:
Selangorian Ltd.
Mr. Mark McArthur
153 Thomas Drive
Chicago, IL 61236
USA

Project	P.O. Date	Payment Terms	Customer Ref. 1
	2/22/2024	Net 14 days	
Department	**Due Date**	**Job No.**	**Customer Ref. 2**
Sales	03/07/2024		

Service Item No: **8924-W**

Details:

Type	No.	Description	Unit	Quantity	Unit Price	Line Amount	Discount	Total Price
Parts	70100	Paint, black	Can	2	4.10	8.20		8.20
Parts	70065	14" x 17" Screen Monitor	Piece	3	12.00	36.00		36.00
Labor	ELECTRICAL	Electrical Works	Hour	2	166.00	332.00		332.00
Labor	R0020	Mark Hanson	Hour	2	20.00	40.00		40.00
Labor	R0020	Mark Hanson	Hour	4	14.00	56.00		56.00

Service Comments
Travel Expenses

Miscellaneous

Type	No.	Description	Unit	Quantity	Unit Price	Line Amount	Discount	Total Price
Labor	SOFTWARE	Software Updates	Hour	1	40	40.00		40.00

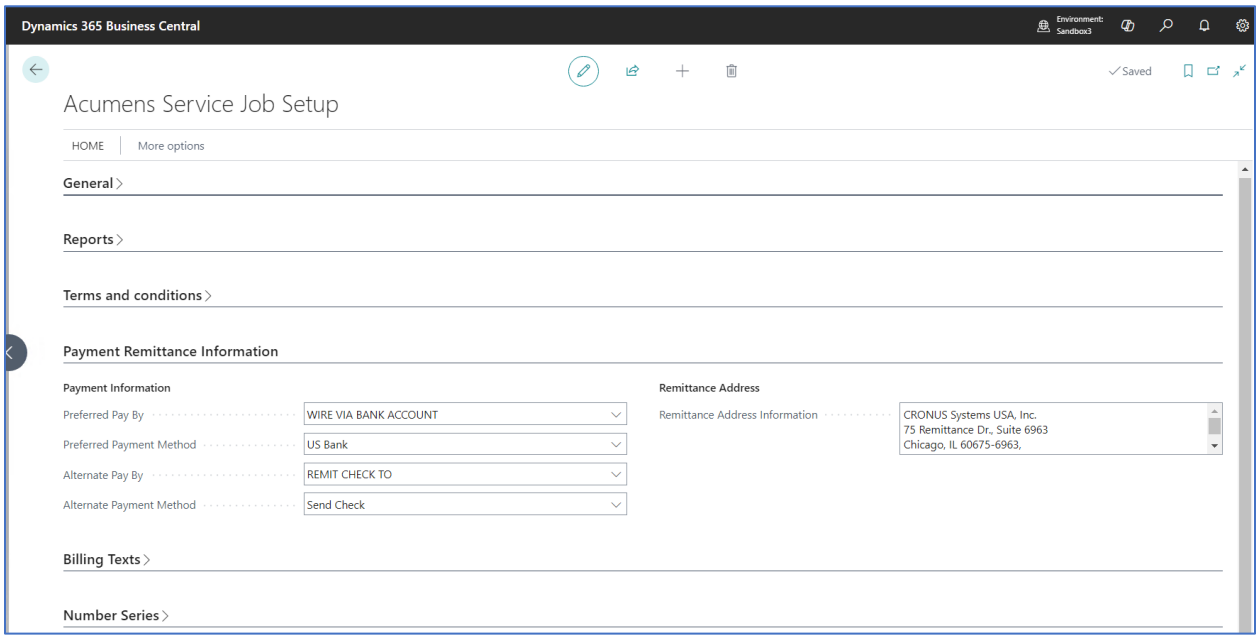
Agreed: x.
Print Name:
Sign Date:

Standard terms and conditions apply

Subtotal:	512.20
Sales Tax (1.33%):	5.85
Total USD:	518.05

19.3 Setup Payment Remittance Information.

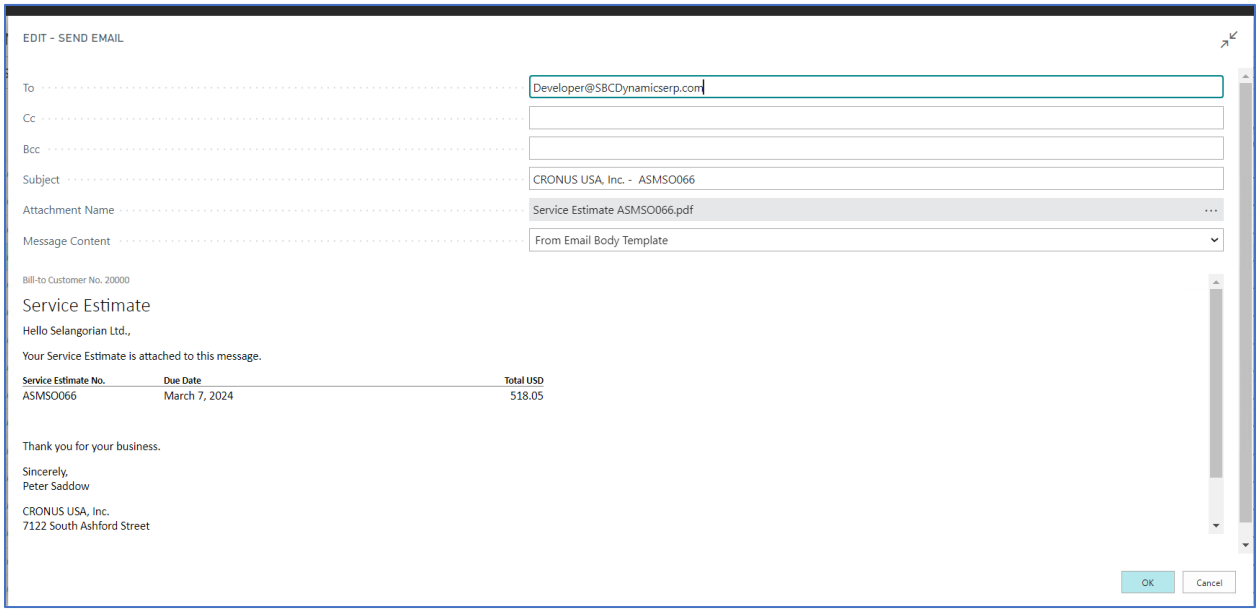
You can set the preferred and alternate payment options to be printed on the report. Preferred and alternate payment options can also be set up for individual customers.



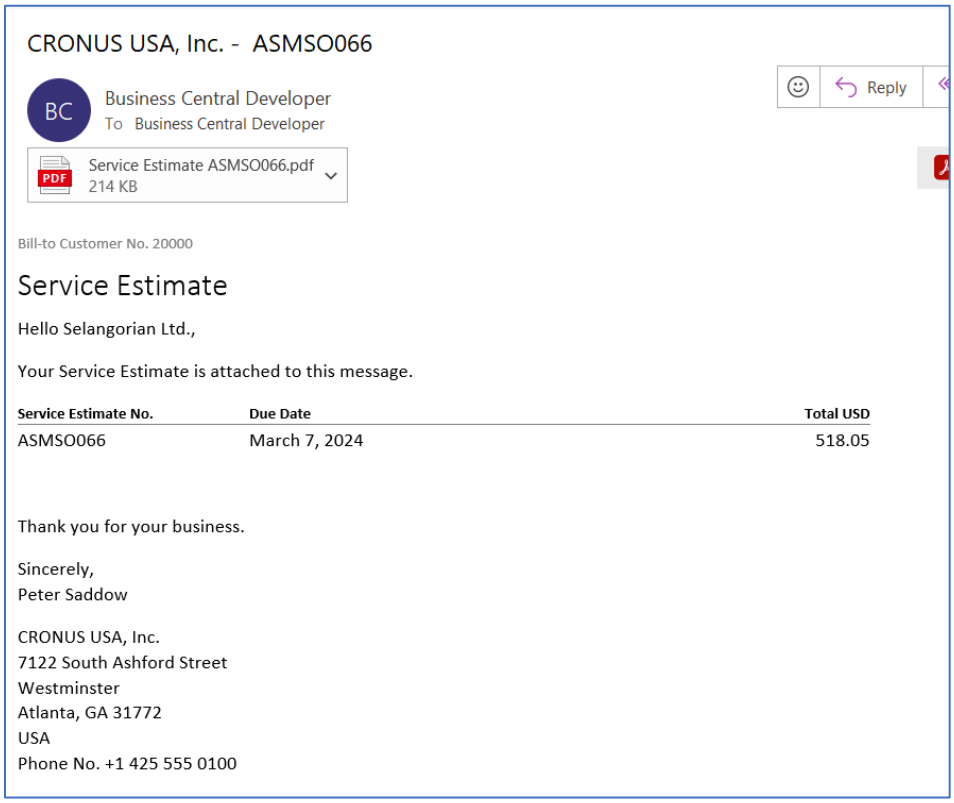
19.4 Custom Email Templates.

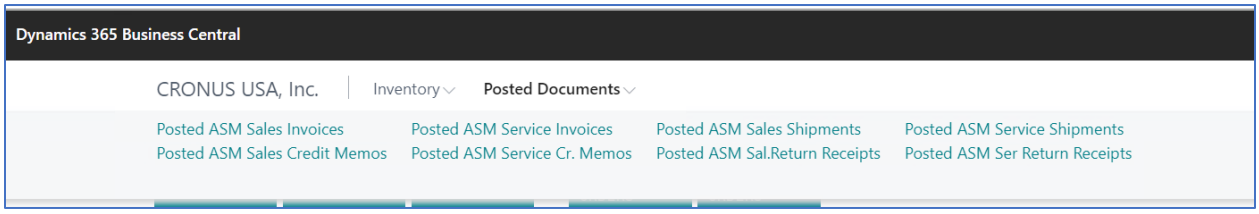
Allows you to send quick emails with the preformatted email body templates. The email will include an attachment of the related document report.

When a user clicks on Send email, they will get an email dialog to preview before sending the email.



Sample of the received email with attachment.



20 Posted Documents

Summary of the posted documents.