PUBLIC

# How to Work with the Service Module

## Solutions from SAP

## SAP Business One 2007 A and 2007 B

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THE BEST-RUN BUSINESSES RUN SAP™

## Contents

# How to Work with the Service Module

## Purpose

The Service module is mainly used by companies which provide support services to their customers. Examples include support services for computers, software, and even refrigerators.

The Service module lets you:

- Manage the interaction between service representatives and customers. It enables you to enter and maintain information on service contracts, items and serial numbers, and customer complaints and inquiries.
- Perform numerous related functions, starting with monitoring the service calls and proceeding to creating reports that reflect the department's overall status. Those reports can assist managers and support staff in their daily work.
- Optimize the potential of your sales and service departments, providing support for a variety of functions and departments in the company, such as:
    - Service operations
    - Service contract management
    - Service planning
    - Tracking of customer interaction activities
    - Customer support
    - Management of sales opportunities
- Create a knowledge base of solutions for problems that your customers complain about. You can manage this knowledge base according to your items; thus, when a certain problem recurs you can reduce the time required to solve it.

**NOTE**

In order to be able to work with the Service module you have to be familiar with the serial numbers functionality. For details on serial numbers, see the document *How to Manage Serial Numbers in 2007 A and 2007 B,* which you can download from the documentation area of the SAP Business One Customer Portal (http://channel.sap.com/sbocustomer).

# Defining Initial Settings

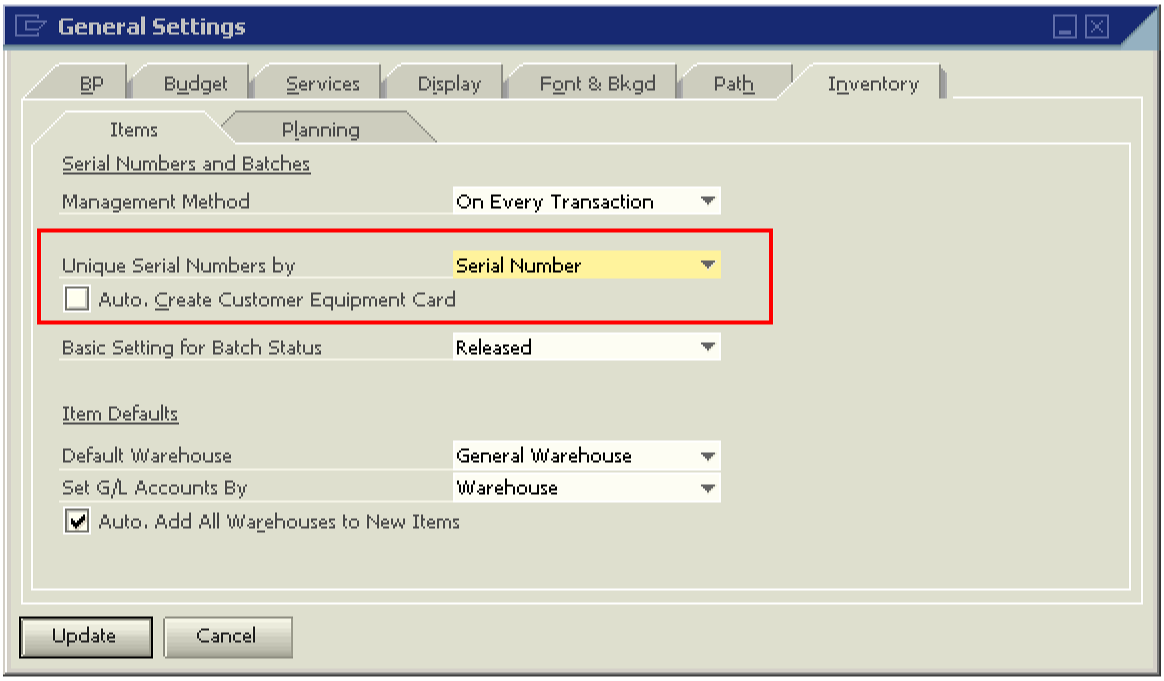
## 1. Defining General Settings

This section is relevant for companies which provide services for items according to the item serial numbers.

### Procedure

1. From the SAP Business One *Main Menu*, choose *Administration* → *System Initialization* → *General Settings* → *Inventory* tab → *Items* tab.

   The *General Settings* window opens.




2. To create customer equipment cards automatically when you provide service for items according to their serial numbers, select the *Auto. Create Customer Equipment Card* checkbox. The equipment card is created as you add corresponding delivery or A/R invoice documents.

   **NOTE**

   The *Auto. Create Customer Equipment Card* checkbox is active only if you have selected either *Serial Number* or *Mfr Serial No.* in the *Unique Serial Numbers by* field.

## 2. Defining Contract Templates

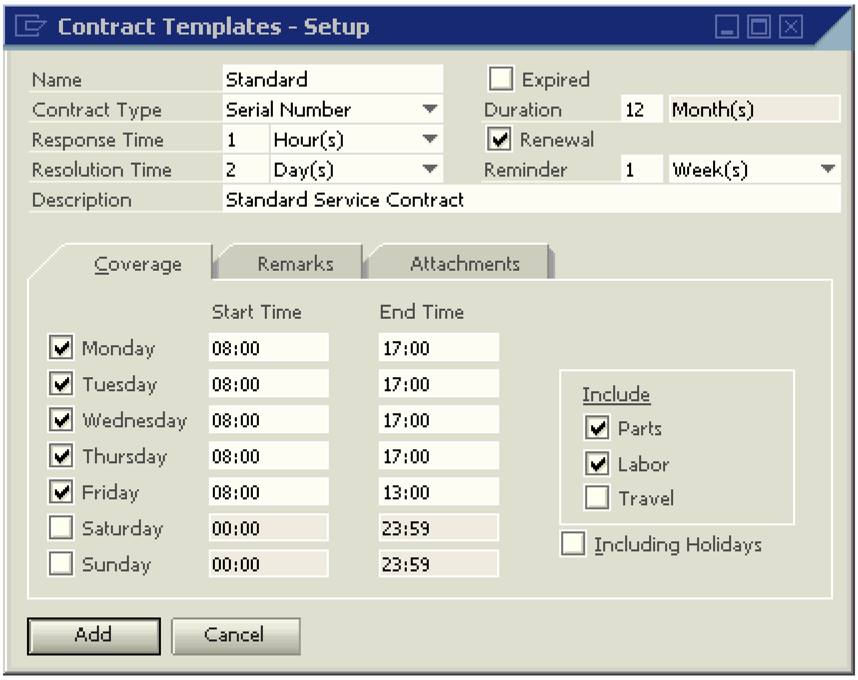
SAP Business One lets you define service contracts between a company and its customers. The contracts include items managed by serial numbers that the company supports, daily service hours, and even an obligatory resolution time for solving customer problems.

Use the *Contract Templates* window to define and update several basic contract templates. You can add and update templates at any time, but you cannot delete contract templates. However, you can define the templates as *Expired*.

## Procedure

1. From the SAP Business One *Main Menu*, choose *Administration* → *Setup* → *Service* → *Contract Templates*.

   The *Contract Templates – Setup* window opens.




2. To define a contract template, specify the following information:

| Field | Activity/Description |
|---|---|
| *Name* | Specify a name for the contract template. This field is mandatory. |
| *Contract Type* | Specify the contract type. From the dropdown list select one of the following:<br>• *Customer*<br>Includes all the items you sell to the customer<br>• *Item Group*<br>Includes specific item groups<br>• *Serial Number*<br>Includes specific serial numbers |
| *Response Time* | Specify the maximum time allowed before responding to the service call. From the dropdown list select the time unit (hours or days) and specify the maximal number. |
| *Resolution Time* | Specify the maximum time to which the company commits to resolving a service call. From the dropdown list select the time unit (hours or days) and specify the maximal number. |
| *Description* | Enter a short description for the contract template. |
| *Expired* | Select this checkbox if you wish to mark this contract template as expired. As a result, you cannot create new contracts, or renew existing contracts, based on this template. |
| *Duration* | Specify the validity period of the service contract, in months. |

| Field | Activity/Description |
|---|---|
| *Renewal* | Select this checkbox if you wish to define that contracts based on this template should be renewed once their validity period has ended. |
| *Reminder* | Specify the time period prior to the contract's termination when you wish to generate an alert for renewing the contract. From the dropdown list, select a time unit (*Days, Weeks* or *Months*) and define the maximal number.<br>**NOTE**<br>The *Reminder* field is active only if the *Renewal* checkbox is selected. |

3. To define the days and hours of service to which you are committed for your customers according to the service contract:
   a. Select the *Coverage* tab.
   b. Select the checkboxes of the days you wish to include in the contract.
   c. Specify the *Start Time* and *End Time* of the daily service.
   d. Specify the following information:

| Field | Activity/Description |
|---|---|
| *Include* | Select one or more of the following to include them in the service coverage:<br>• *Parts*<br>The customer is not charged for the parts (items) used by a technician in order to solve the service call.<br>• *Labor*<br>The customer is not charged for the technician's labor time, for example, the time required for the technician to fix the problem at the customer site.<br>• *Travel*<br>The customer is not charged for the technician's traveling time, for example, the time required for the technician to travel from the office to the customer site and back. |
| *Including Holidays* | Select this checkbox to entitle the customer to service during holidays.<br>**NOTE**<br>The *Holidays* table is defined in the *Company Details* window (*Administration* → *System Initialization* → *Company Details* → *Accounting Data* tab). |

4. On the *Remarks* tab, optionally enter any remarks related to the contract template.

5. On the *Attachments* tab, attach any necessary documents and files to the service contract (for example, a printed copy of the contract).

   You can browse, display and delete attachments.

   - In order to attach a file, choose the *Browse* button and select the required file.
   - In order to display a selected file, click the file path, as displayed on the *Attachments* tab, and choose the *Display* button.
   - In order to delete an attached file, click the file's path and choose the *Delete* button.

6. Add the contract template.

## Duplicating Contract Templates

In order to create numerous templates with slight differences among them, you can duplicate existing contract templates.

### Procedure

1. Open the *Contract Templates – Setup* window.
2. Find the contract template you want to duplicate.
3. Right-click the general area and choose *Duplicate*. Alternatively, from the menu bar, choose *Data* → *Duplicate.*
4. A new duplicated template opens, with the name of the original template deleted. Specify a new name and make the required changes.
5. To add the new contract template, choose the *Add* button.

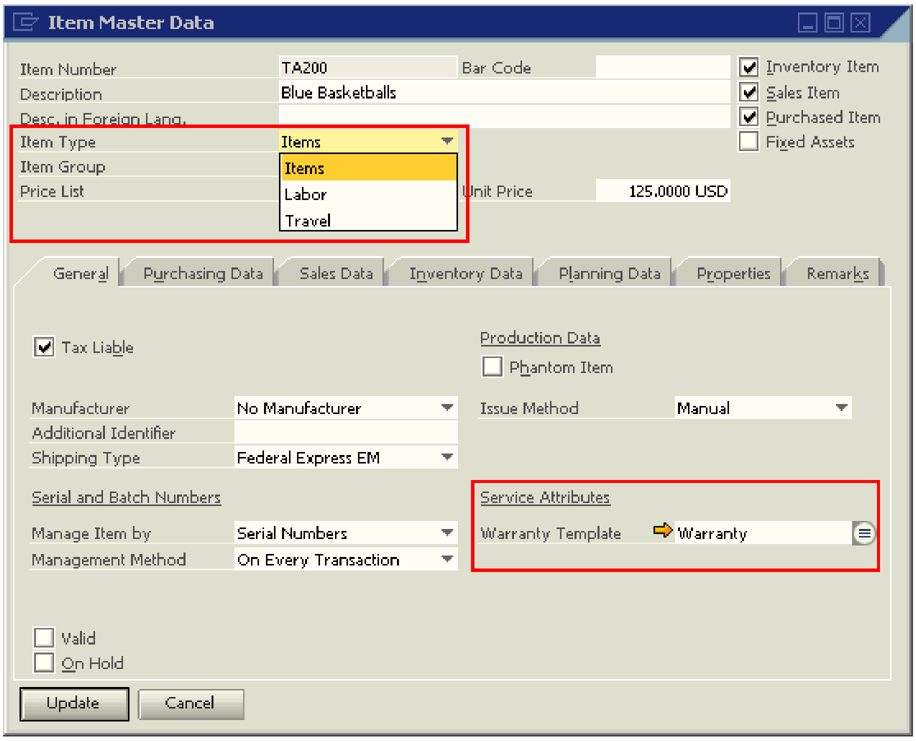
# 3. Defining Items

Use the *Item Master Data* window to define a warranty template for items with serial number management. You can choose a serial number contract template for the item. Then, when you create A/R invoices or deliveries for this item, SAP Business One automatically creates a contract for the customer for this item.

## Procedure

1. From the SAP Business One *Main Menu*, choose *Inventory* → *Item Master Data* → *General* tab.

The *Item Master Data* window opens.




2. From the *Item Type* dropdown list select the item type. Every item can be defined as one of the following:
   - *Items* – You can define a warranty template for items managed by serial numbers.
   - *Labor* – With this "item" you can add to a service call the hours which the technician worked at the customer site.
   - *Travel* – With this "item" you can add to a service call the travel time required for the technician to get to the customer's site and back to the office.

   **NOTE**

   An item defined as *Labor* or *Travel* can be defined as a *Sales Item* only.

3. If you define *Item Type* as *Item*, choose the item to be managed by serial numbers.

   From the *Manage Item by* dropdown list, select *Serial Numbers*. The *Service Attributes* title is displayed.

4. To define a warranty template for the item, from the *Warranty Template* dropdown list, select the required contract template.

   **NOTE**

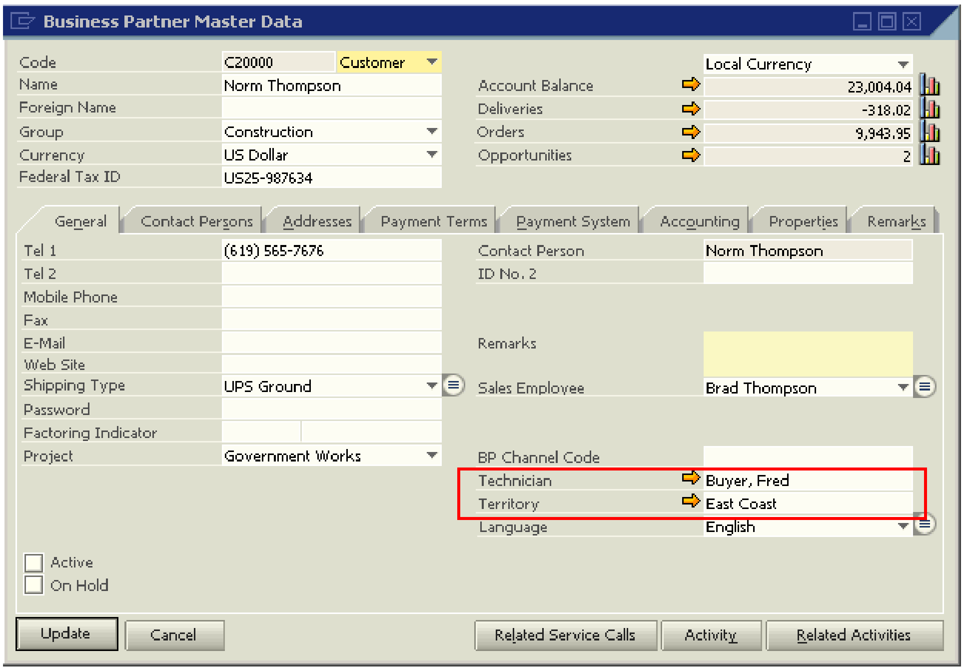
   When several items with different warranty templates are sold in the same document, a corresponding number of service contracts are created automatically.

# 4. Defining Business Partners

Two fields in the *Business Partner Master Data* window let you link a specific technician and a relevant territory to your customers.

## Procedure

1. From the SAP Business One *Main Menu*, choose *Business Partners* → *Business Partner Master Data* → *General* tab.




2. Choose a customer.
3. From the *Technician* dropdown list, select a specific technician to assign to all the customer's service calls. This technician is then displayed as the default in every customer equipment card created for this customer.

   **NOTE**

   You can select only those technicians who are employees defined as technicians under *Human Resources* → *Employee Master Data* → *Membership* tab → *Roles* table.

4. From the *Territory* dropdown list, select the territory pertinent to the customer. If a territory is specified in the customer's master data, it is displayed as the default territory in the customer equipment card.

   **NOTE**

   To define territories, from the SAP Business One *Main Menu*, choose *Administration* → *Setup* → *General* → *Territories*.

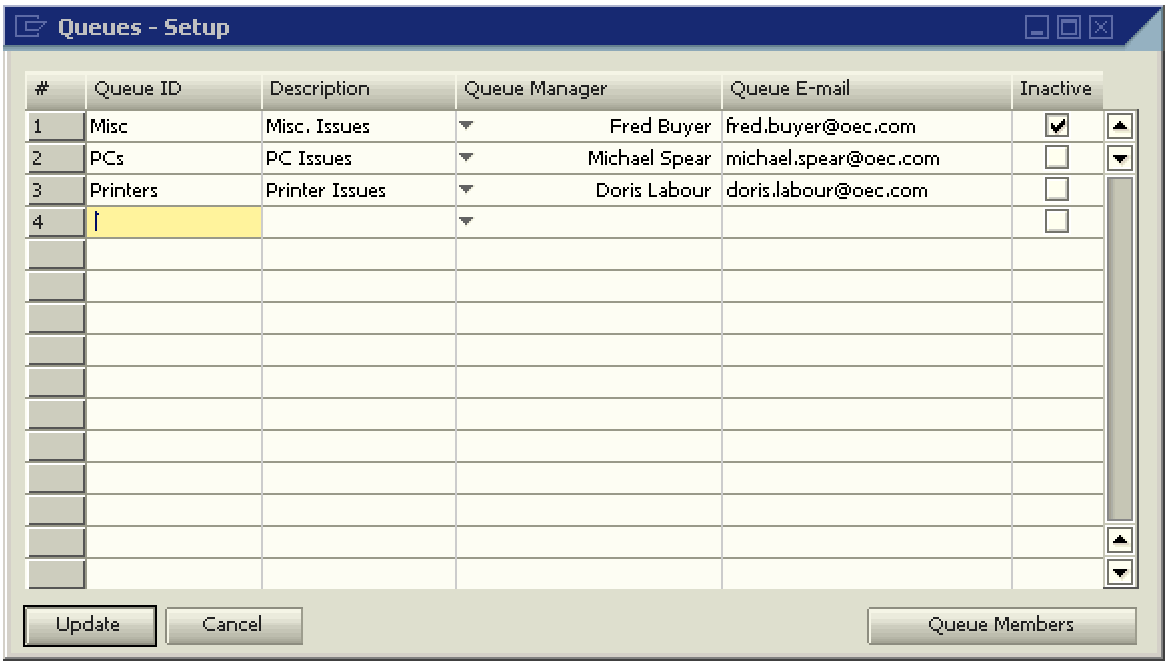
# 5. Defining Queues for Service Calls

You can manage several queues in order to handle your service calls more efficiently. For example, define three different queues for managing service calls concerning support, accounting issues, and sales promotions. This way, you can navigate each service call to its relevant consultant, department, or sales employee.

## Procedure

1. From the SAP Business One *Main Menu*, choose *Administration* → *Setup* → *Service* → *Queues.*

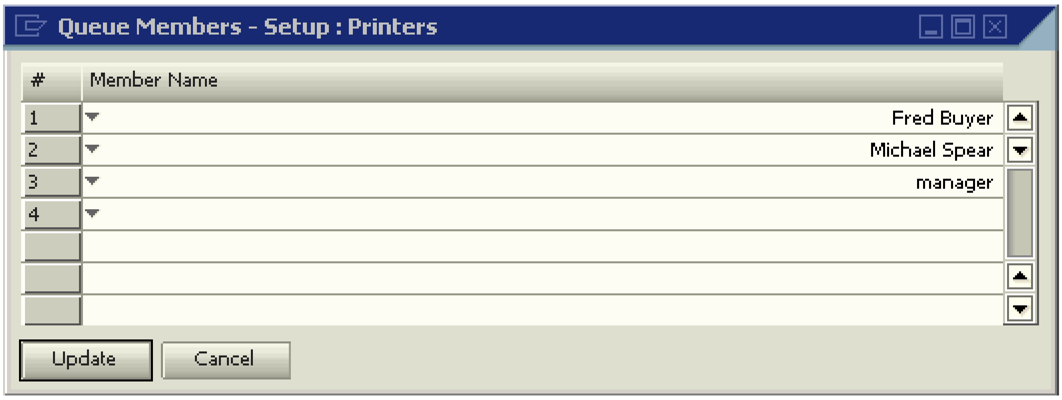
   The *Queues – Setup* window opens.




2. To define a queue, specify the following information:

| Field | Activity/Description |
|---|---|
| *Queue ID* | Specify a relevant code for the queue. The code (*ID*) is displayed in windows related to this queue. This field is mandatory. |
| *Description* | Enter a relevant description for the queue. This field is mandatory. |
| *Queue Manager* | Assign a manager for the queue. From the dropdown list, select an SAP Business One user to be in charge of the queue. This field is mandatory. |
| *Queue E-mail* | Specify an e-mail address for the queue, if required. |
| *Inactive* | Select this checkbox if you would like to define a certain queue as *On Hold* or to cancel it.<br>**NOTE**<br>As long as a queue is defined as inactive you cannot navigate any service calls to it. |

3. To assign queue members, open the *Queue Members – Setup : XXX (Queue ID)* window by using one of the following alternatives:
   - Double-click a selected row number in the table.
   - Select a row and choose the *Queue Members* button.
   - Right-click a row and choose *Queue Members.*
4. From the *Member Name* dropdown list, select the users who handle service calls in this queue. The names in the list are all the users defined for the company database. To save the list, choose *Update.*




   To close this window, choose *OK*.

5. In the *Queues – Setup* window, to save changes of the queue, choose *Update*.

   **NOTE**

   You can remove a queue by right-clicking the queue name and choosing *Remove*. Alternatively, from the menu bar choose *Data* → *Remove*. Only queues which are not linked to service calls can be removed.

# Setting Authorizations

For information on authorizations required for MRP, see the document *How to Define Authorizations in Releases 2007 A and 2007 B,* which you can download from the documentation area of the SAP Business One Customer Portal ([http://channel.sap.com/sbocustomer](http://channel.sap.com/sbocustomer)).

# Methods for Working with Customer Equipment Cards

## Creating Customer Equipment Cards Manually

The *Customer Equipment Card* window lets you display and update serial numbers for items located at the customer's site.

Use the *Customer Equipment Card* window to specify serial numbers for items you sold to your customers. This feature enables you to track the history of a specific serial number from the day you sold the item and thoughout its entire service period. The customer equipment card contains information such as:

- Location of the item for which you provide service
- Service calls related to the item
- Service contracts that cover the item
- Sales information
- Inventory transaction data

SAP Business One offers the following options for creating customer equipment cards:

- Specify the serial numbers data manually in the *Customer Equipment Card* window.
- Create customer equipment cards automatically for every sold item managed by serial numbers.

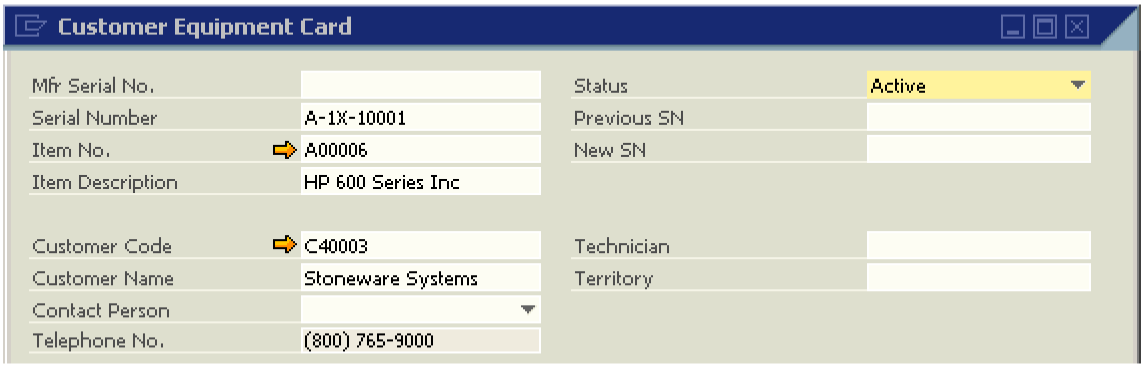
**NOTE**

If your customer purchased equipment from another source and needs only support or service from your company for this equipment, no sales transaction takes place in SAP Business One. In this case, you can record these serial numbers manually in the *Customer Equipment Card* window. However, you can view these items only in the *Service* module and not in the *Inventory* module.

### Procedure

1. From the SAP Business One *Main Menu*, choose *Service* → *Customer Equipment Card*.

   The *Customer Equipment Card* window opens.




2. Switch to *Add* mode.
3. For item and customer details, specify the following information:

| Field | Activity/Description |
|---|---|
| *Mfr Serial No.* | Specify the manufacturer serial number of the item. This number functions as a unique identifier for the item. |

| Field | Activity/Description |
|---|---|
| *Serial Number* | Specify the item's internal serial number. This number functions as a unique internal ID for the item.<br>**NOTE**<br>You have to specify a number in at least one of the serial number (SN) fields. |
| *Item No.* | Choose the appropriate item number as defined in the *Item Master Data* window. |
| *Item Description* | The item's description appears automatically after an item number is selected. |

**NOTE**

The *Mfr Serial No.* and the *Serial Number* fields are unique numbers. If you create customer equipment cards automatically when creating documents, their serial numbers are considered unique as well. In order to ensure that the serial numbers are indeed unique, go to *Administration* → *System Initializations* → *General Settings* → *Inventory* tab → *Items* tab and in the *Unique Serial Numbers by* dropdown list, select the unique serial number.

4. Specify the details of the customer who owns the equipment:

| Field | Activity/Description |
|---|---|
| *Customer Code* | Specify a relevant customer code.<br>**NOTE**<br>For information about changing the customer, see Changing the Customer in a Customer Equipment Card. |
| *Customer Name* | The customer's name automatically appears after a customer code is selected. |
| *Contact Person* | From the dropdown list, select one of the contact persons defined in the customer's master data. |
| *Telephone No.* | If a telephone number is defined for the selected contact person, it is displayed automatically. Otherwise, the telephone number defined for the customer in the *Business Partner Master Data* window is displayed. |

| Field | Activity/Description |
|---|---|
| *Status* | Define the status of the sold item. From the dropdown list select one of the following:<br>• *Active*<br>The item is at the customer site.<br>• *Returned*<br>The item was returned from the customer to the company's warehouse.<br>• *Terminated*<br>The item is not in use and therefore is not eligible for service. A customer equipment card defined as *Terminated* cannot be added to a service contract or to a service call.<br>• *Loaned*<br>The item is loaned to the customer. You might use this status if you need to repair an item for the customer and you loan him a similar item until his item is fixed. The serial number of a loaned item should be entered in the *Previous SN* field.<br>• *In Repair Lab*<br>The item was returned from the customer's site for repair. If another item was loaned to the customer until his item is fixed, the serial number of this loaned item can be entered in the *New SN* field. |
| *Previous SN* | If you loan an item to a customer, in order to replace an item which is currently being repaired in your lab, you can specify the serial number of the repaired item in the customer equipment card of the loaned item. |
| *New SN* | If an item is being repaired in your lab and you have loaned another item to replace it, you can specify the serial number of the loaned item in the customer equipment card of the repaired item. |
| *Technician* | Choose the technician who is responsible for the item, as specified in the customer equipment card.<br>**NOTE**<br>If a technician is specified in the customer's master data (*Business Partners* → *Business Partner Master Data* → *General* tab), she is displayed in this field as default. |
| *Territory* | Choose a territory related to the customer.<br>**NOTE**<br>If a territory is specified in the customer's master data (*Business Partners* → *Business Partner Master Data* → *General* tab), it is displayed in this field as default. |

5. On the *Address* tab, specify the address details for the customer who obtained the item with this serial number (see Address tab).

6. On the *Sales Data* tab, specify the buyer code, delivery, and sales invoice details, if available in SAP Business One (see Sales Data tab).

**NOTE**

You can browse to existing equipment cards and link relevant documents after you create them.

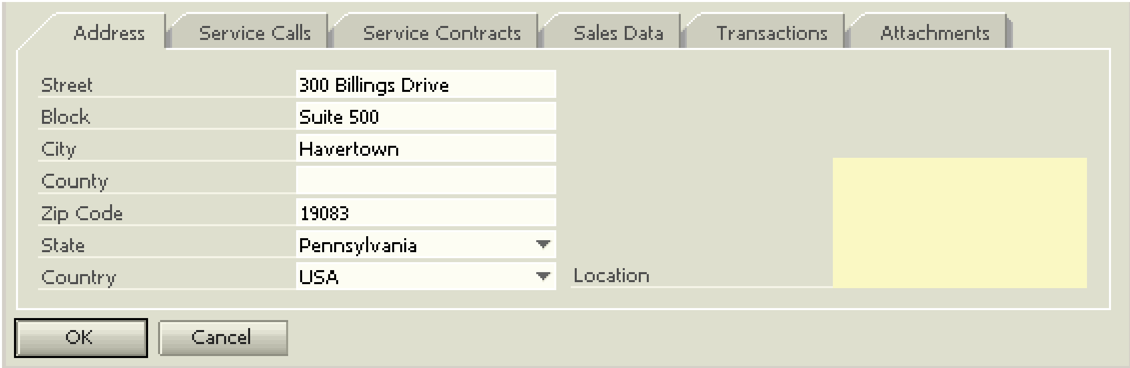
7. On the *Attachments* tab, add an attachment, if necessary (see Attachments tab).
8. To save the customer equipment card, choose the *Add* button.

## Working with the Tabs in the Customer Equipment Card Window

Use the different tabs of the *Customer Equipment Card* window to specify or to view information related to the item associated with the existing serial number.

### Address Tab

Use the *Address* tab to specify the location of the item for which you are providing the service.

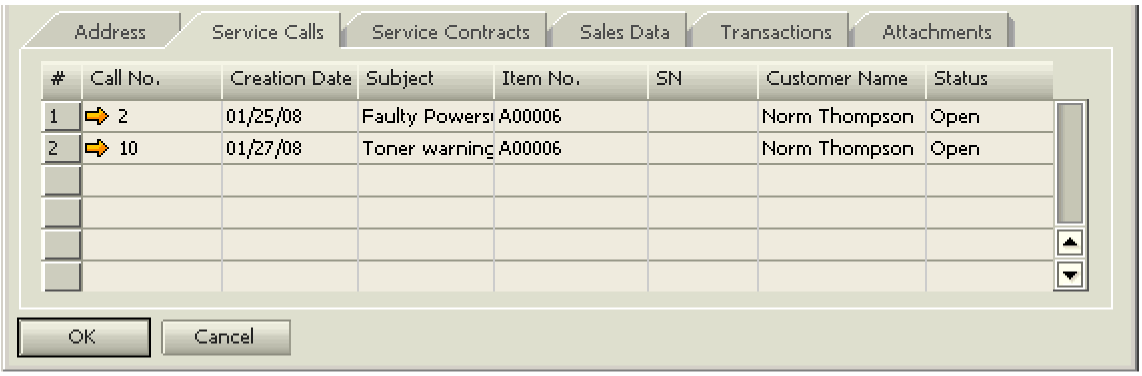



Specify the following information:

| Field | Activity/Description |
|---|---|
| *Street, Block, City, County, Zip Code, State, Country* | Specify the complete address of the item's location. |
| *Location* | Use this free text field to specify the item’s exact location. |

### Service Calls Tab

Use the *Service Calls* tab to view all the service calls recorded for the serial number.

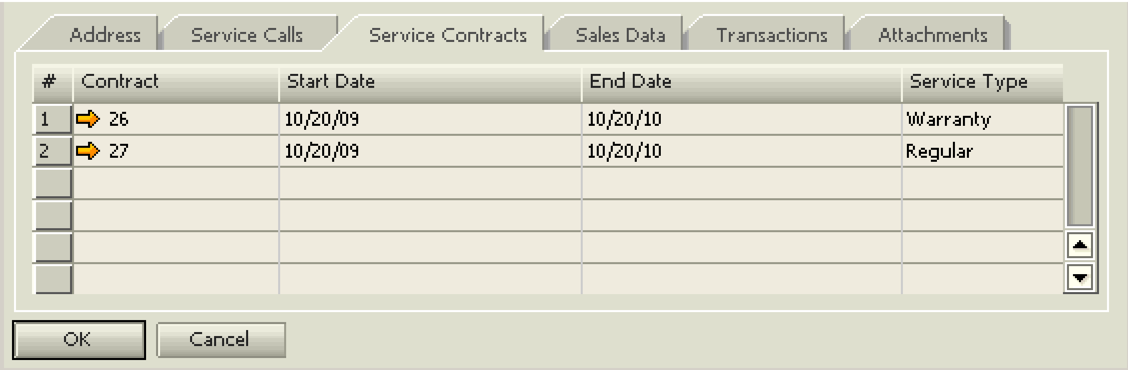


View the following information:

| Field | Activity/Description |
|---|---|
| *Call No.* | The service call number. This field contains a link to the actual service call. |
| *Creation Date* | The date on which the service call was created |
| *Subject* | The subject of the service call, as recorded in the *Service Call* window |
| *Item No.* | The item number |
| *SN* | The serial number for which the call was opened |
| *Customer Name* | The name of the customer related to the service call |
| *Status* | The status of the service call |

### Service Contracts Tab

Use the *Service Contracts* tab to view all the service contracts recorded for this customer involving the existing serial number.

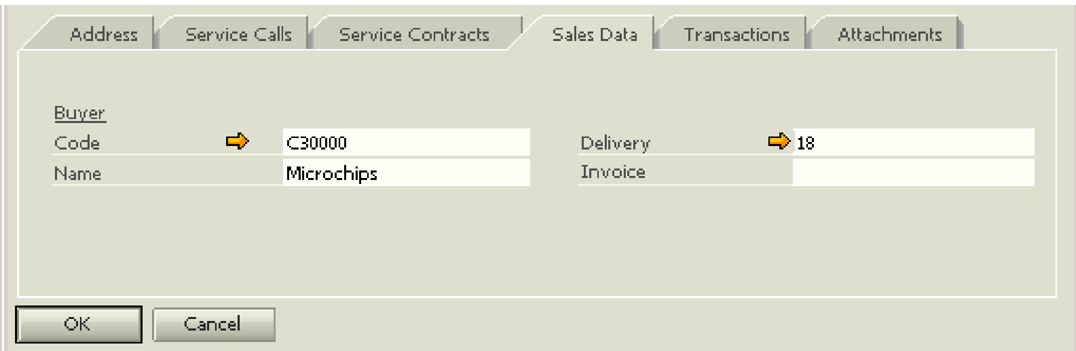



View the following information:

| Field | Activity/Description |
|---|---|
| *Contract* | The number of the service contract. This field contains a link to the *Service Contract* window. |
| *Start Date* | The date on which the service contract begins |
| *End Date* | The date on which the service contract expires |
| *Service Type* | The service type (regular or warranty) |

### Sales Data Tab

Use the *Sales Data* tab to view and specify details about the customer who purchased the item (the customer selected in the A/R invoice/delivery).

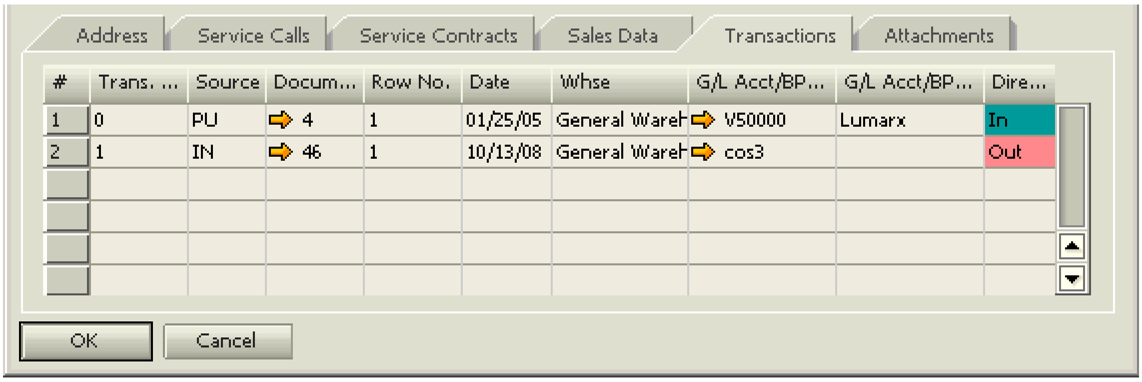


View or specify the following information:

| Field | Activity/Description |
|---|---|
| *Code* | Specify the customer's code. |
| *Name* | The customer's name automatically appears after a customer code is selected.<br>**NOTE**<br>The customer could be the business partner in the delivery or his customer. |
| *Delivery* | Specify the number of the delivery document with which the item was shipped to the customer. The field contains a link to the delivery document. |
| *Invoice* | Specify the number of the A/R invoice document by which the customer was invoiced for the purchased item. The field contains a link to the A/R invoice document. |

### Transaction Tab

Use the *Transaction* tab to view all the inventory transactions for the serial number linked to the customer equipment card.



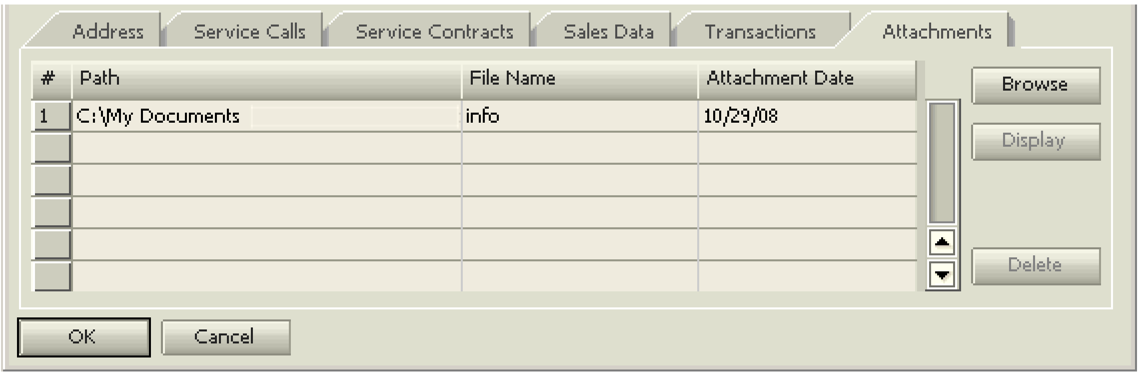

View the following information:

| Field | Activity/Description |
|---|---|
| *Trans. No* | A successive numbering of the serial number transaction |
| *Source* | The type of the inventory transaction, for example: *IN* – A/R invoice |
| *Document No.* | The number of the document involving the serial number |
| *Row No.* | The document row number containing the item |
| *Date* | The posting date of the document |
| *Whse* | The warehouse involved in the transaction |
| *G/L Acct/BP Code* | The G/L account or business partner code involved in the transaction |
| *G/L Acct/BP Name* | The G/L account or business partner name involved in the transaction |
| *Direction* | Displays one of the following:<br>• *In* - Receipt transactions<br>• *Out* - Release transactions |

### Attachments Tab

Use the *Attachment* tab to attach files related to the customer equipment card (Word, Excel, .bmp files and other file extensions).




You can browse for, display, and delete attachments:

- To attach a file, choose the *Browse* button and select the required file.
- To display a selected file, click the file path as displayed in the *Attachments* tab and choose the *Display* button.
- To delete an attached file, click the file path and choose the *Delete* button.

## Changing the Customer in a Customer Equipment Card

In some cases, items managed by serial numbers are transferred to a different customer. If the original customer has a customer equipment card, you need to change that customer in the customer equipment card.

### Procedure

If the customer equipment card has no service calls connected to it, proceed as follows:

1. From the SAP Business One *Main Menu*, choose *Service* → *Customer Equipment Card*.
2. Open the existing customer equipment card and change the *Customer Code* field.
3. To save your changes, choose the *Update* button.

If the customer equipment card has service calls connected to it, proceed as follows:

1. From the SAP Business One *Main Menu*, choose *Service* → *Service Call,* and close all the service calls connected to the existing customer equipment card.
2. From the SAP Business One *Main Menu*, choose *Service* → *Customer Equipment Card*.
3. Open the existing customer equipment card and change the *Status* field to *Terminated*.
4. To save your changes, choose the *Update* button.
5. Using the same serial number, create a new customer equipment card for the new customer.

# Creating Customer Equipment Cards Automatically

You can create customer equipment cards automatically when creating A/R invoices or deliveries. Use the automatic creation method when the customer purchases both equipment and service for the item from your company.

When using this method, if you create an A/R invoice or delivery for items with serial number management, SAP Business One creates corresponding customer equipment cards automatically. The *Mfr Serial No.* and the *Serial Number* values of this customer equipment card are then taken from the serial numbers recorded in the inventory transactions.

**NOTE**

In order to create customer equipment cards automatically, in *General Settings* → *Inventory* tab, select the *Auto. Create Customer Equipment Card* checkbox. For information, see General Settings.

## Scenarios

The following table includes various scenarios which result from an attempt to create a customer equipment card from a delivery or from an A/R invoice while another customer equipment card with the same serial number already exists in SAP Business One.

**NOTE**

In the following table, the word "document" refers to either a delivery or an A/R invoice.

| Additional Information to the Scenario | Status of Existing Customer Equipment Card | Is a New Customer Equipment Card Created? | Additional Information |
|---|---|---|---|
| *None* | *Active* | NO | |
| The document is recorded for a customer who is linked to an existing customer equipment card. | *Returned* | NO | The status of the existing customer equipment card is changed to *Active*. |
| The document is recorded for a different customer than the one linked to the existing customer equipment card. | *Returned* | YES - for the new customer | The status of the former customer equipment card is changed to *Terminated*. |
| The document is recorded for the same customer that is linked to the existing customer equipment card. | *Terminated* | NO | You can change the status of the customer equipment card manually to *Active*. |
| The document is recorded for a different customer than the one linked to the existing customer equipment card. | *Terminated* | YES - for the new customer | |
| *None* | *Loaned* | NO | |
| The document is recorded for the same customer that is linked to the existing customer equipment card. | *In Repair Lab* | NO | The status of the existing customer equipment card is changed to *Active*. |

| Additional Information to the Scenario | Status of Existing Customer Equipment Card | Is a New Customer Equipment Card Created? | Additional Information |
|---|---|---|---|
| The document is recorded for a different customer than the one linked to the existing customer equipment card. | *In Repair Lab* | NO | |

## Deleting a Customer Equipment Card

In order to delete an existing customer equipment card that contains a serial number, you must ensure that the following conditions are met:

- The customer equipment card is not linked to an A/R invoice or delivery.
- The customer equipment card does not have a history of service contracts, service calls, or valid service contracts.

### Procedure

1. From the SAP Business One *Main Menu*, choose *Service* → *Customer Equipment Card*.
2. Open an existing customer equipment card.
3. Choose one of the following alternatives:
   - From the *Data* menu, choose *Remove*.
   - Right-click the *Customer Equipment Card* window and choose *Remove*.

# Creating Service Contracts

A service contract provides maintenance and repair for a product beyond the manufacturer's warranty coverage. Use the *Service Contract* window to define the kind of service for which the customer is eligible and to display all the information regarding the agreement between your company and the customer.

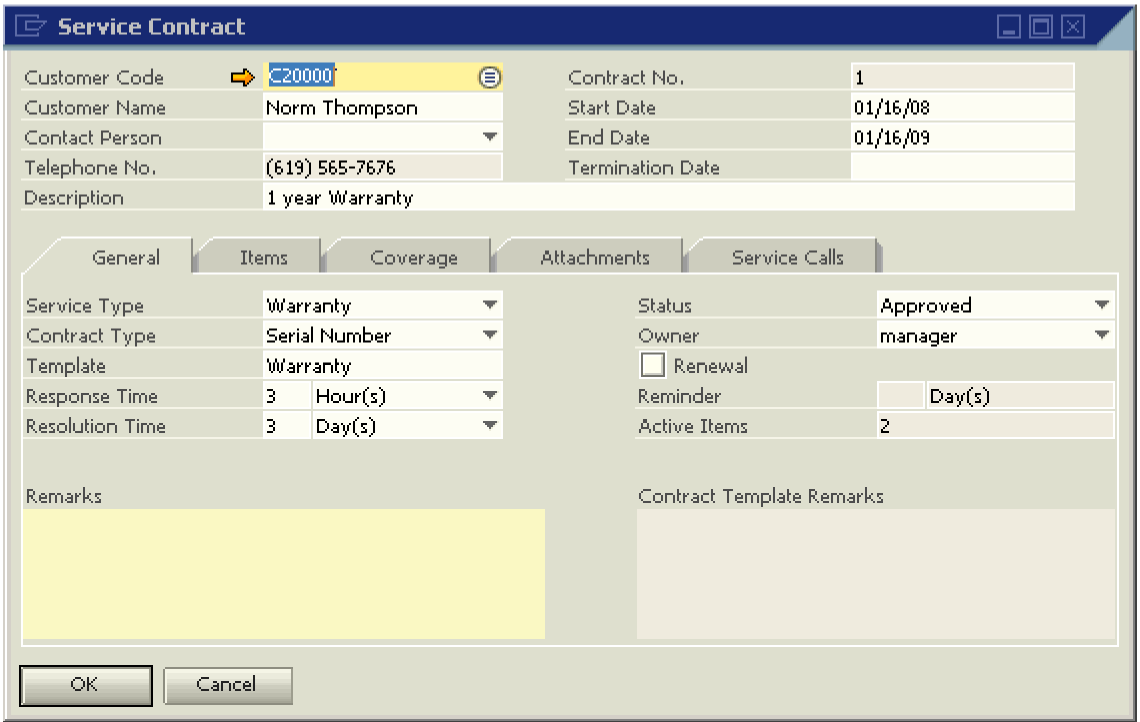
**NOTE**

- If you have linked a warranty template to an item and you have defined that customer equipment cards are automatically created for serial number items (*Administration* → *System Initialization* → *General Settings* → *Inventory* tab → *Items* tab), then service contracts are also automatically created when a serial number item is delivered, either in a delivery or an A/R invoice document.
- When several items with different warranty templates are sold in the same document, a corresponding number of service contracts are created automatically.

## Procedure

1. From the SAP Business One *Main Menu*, choose *Service* → *Service Contract*.

   The *Service Contract* window opens.




2. In the general area, specify or view information about the customer and the time period of the service contract:

| Field | Activity/Description |
|---|---|
| *Customer Code* | Specify a relevant customer code. |
| *Customer Name* | The customer's name automatically appears after a customer code is selected. |
| *Contact Person* | From the dropdown list, select one of the contact persons defined in the customer's master data. |

| Field | Activity/Description |
|---|---|
| *Telephone No.* | If a phone number was entered for the selected contact person, then it is displayed automatically; otherwise, the phone number listed for the customer in the *Business Partner Master Data* window is displayed instead. |
| *Description* | Specify a relevant description for the service contract. |
| *Contract No.* | A number assigned by the system of successive numbering of service contracts. |
| *Start Date* | Specify the date from which the contract is valid. If the current date is prior to the start date of the contract, the contract is considered as valid. |
| *End Date* | Specify the last date of the service contract. |
| *Termination Date* | If the contract was terminated during its validity period, specify the termination date. The status of the contract is changed to *Terminated*. As a result, all the fields in this window are blocked and the *Renewal* checkbox (in the *General* tab) is deselected. |

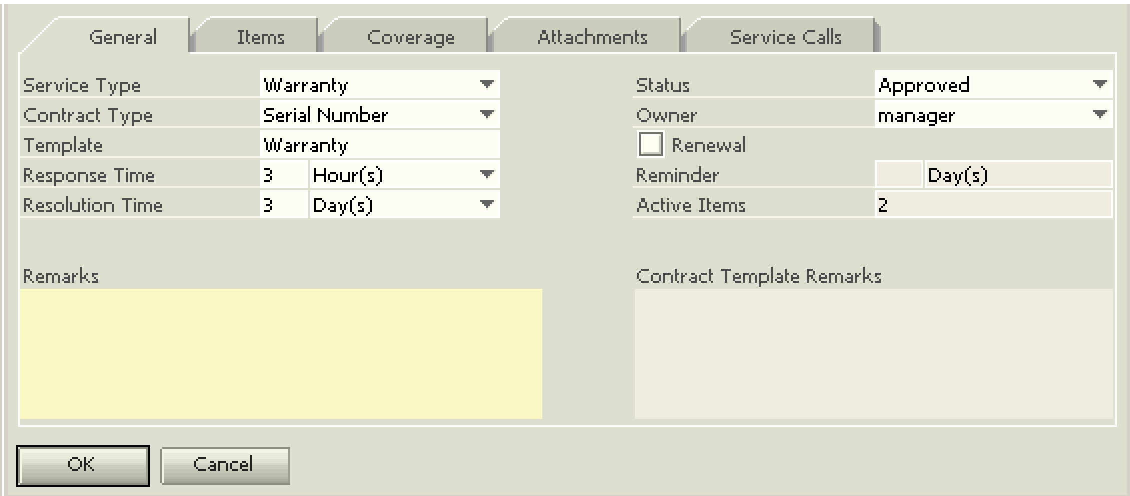
3. On the *General* tab, enter general details about the service contract (see General tab).
4. On the *Items* tab, enter item details according to the service contract type (serial number or item group) (see Items tab).
5. On the *Coverage* tab, enter details for the service contract coverage and availability (see Coverage tab).
6. On the *Attachments* tab, add any attachments that may be relevant for the service contract (see Attachments tab).
7. To save your changes, choose *Add*.

## Working with the Tabs in the Service Contract Window

Use the different tabs in the *Service Contract* window to specify or view information about the service contract and its related customer and items.

### General Tab

Use the *General* tab to enter general information about the service contract.



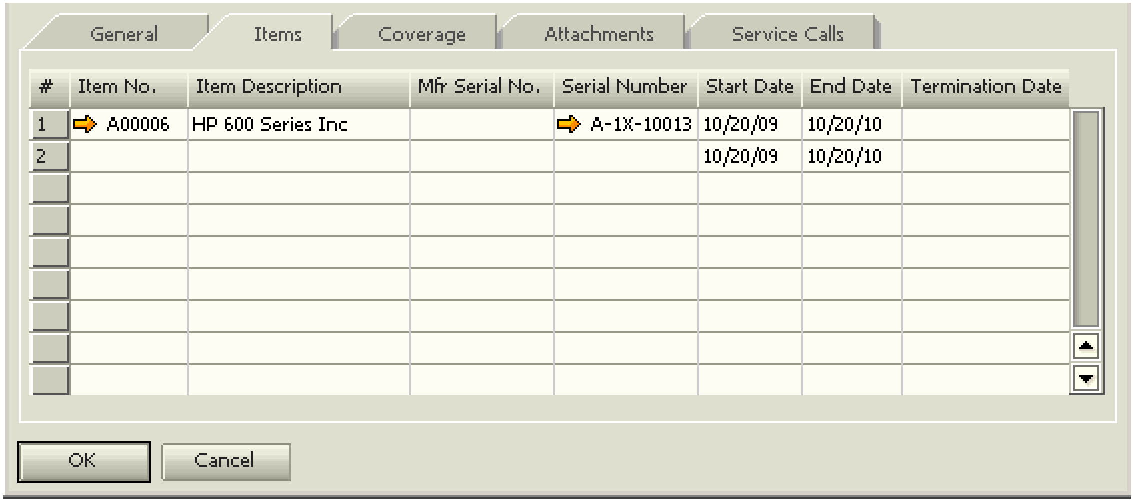
Specify the following information:

| Field | Activity/Description |
|---|---|
| *Service Type* | From the dropdown list select either *Regular* or *Warranty*. The difference between these two options is that a warranty contract can be automatically created when adding A/R invoices or deliveries for items with serial number management.<br>Regular contracts can only be defined manually. |
| *Contract Type* | Choose from among the following three types of contracts:<br>• *Serial Number*<br>Includes specific serial numbers (the serial numbers are defined under the *Items* tab). For more information, see Items tab.<br>• *Customer*<br>Includes all the items you sell to your customers<br>• *Item Group*<br>Includes items in selected item groups (the item groups are defined under the *Items* tab). For more information, see Items tab. |
| *Template* | You can choose one of the existing contract templates instead of defining all the fields in the template manually. Only contract templates which are not expired are available for selection. |
| *Response Time* | Specify the time required to respond to a service call. Specify the time period unit and its value. |
| *Resolution Time* | Specify the maximum time the company can take to resolve a service call. Specify the time period unit and its value. |
| *Remarks* | Specify remarks related to the service contract. |
| *Status* | From the dropdown list, select one of following options:<br>• *Approved*<br>The customer is entitled to the service.<br>• *On hold*<br>This option enables you to freeze a service contract.<br>• *Draft*<br>The customer is not entitled to service yet. *Draft* is the default status for every new service contract.<br>• *Terminated*<br>This option enables you to end the service contract. You must specify the termination date in the *Termination Date* field.<br>**NOTE**<br>You can change the status at any time. If you change the status of the contract to another status, the *Termination Date* field is cleared. |
| *Owner* | Choose an SAP Business One user who is responsible for the service contract. |
| *Renewal* | Select this checkbox if you wish to define that the contract can be renewed. |

| Field | Activity/Description |
|---|---|
| *Reminder* | If you have selected the *Renewal* checkbox, use this field to define the time period, prior to the contract's termination date, during which you wish to generate an alert for renewing the service contract. Specify the time period unit and its value. |
| *Active Items* | The field displays the number of items that are related to this service contract and are defined as *Active*. An active item is an item that does not have a termination date defined and its end date has not arrived yet. **NOTE** This field is displayed only if the contract type is *Serial Number*. |
| *Contract Template Remarks* | If the contract is based on a contract template and the contract template includes remarks, then these remarks are displayed. |

## Items Tab

Use the *Items* tab to specify the items for the contract type.




The structure of this tab changes according to the selected *Contract Type:*

- *Customer*

  For a customer contract type, the *Items* tab is inactive. The customer service contract includes all the items in the company, thus there is no need to define items manually.

- *Item Group*

  For this contract type, specify relevant item groups for the service contract:

| Field | Activity/Description |
|---|---|
| *Item Group* | From the dropdown list, select the relevant item groups. |
| *Start Date* | Specify the date from which the contract for the item group is valid. |
| *End Date* | Specify the date on which the contract for the item group expires. |
| *Termination Date* | Specify a termination date of the service contract for every item group, if required. |

- *Serial Number*

  For this contract type, specify the serial numbers included in the contract.

| Field | Activity/Description |
|---|---|
| *Item No.* | Specify relevant item numbers. |
| *Item Description* | The item's description |
| *Mfr Serial No.* | Select the manufacturer serial number. You can choose an existing serial number. The field contains a link to the *Customer Equipment Card* window. |
| *Serial Number* | Select the item's serial number. The field contains a link to the *Customer Equipment Card* window.<br>**NOTE**<br>Select one of these fields according to the definition of the *Unique Serial Numbers by* field in the *General Settings* window. |
| *Start Date* | Specify the date from which the contract for the item is valid. |
| *End Date* | Specify the date on which the contract for the item expires. |
| *Termination Date* | Specify a termination date of the service contract for every item, if required. |

## Coverage Tab

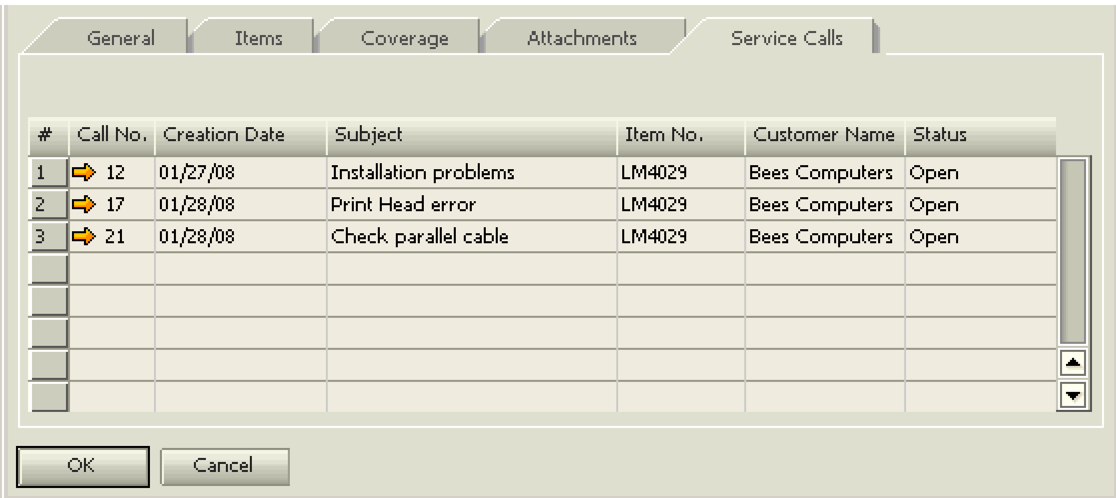
Use the *Coverage* tab to define the days and hours of service you have committed to providing the customer, according to the contract.

Select the checkboxes of the days you wish to include in the service contract and specify the *Start Time* and *End Time* of the daily service hours. In addition, specify the following information:

| Field | Activity/Description |
|---|---|
| *Include* | Select one or more of the following to include them in the service coverage:<br>• *Parts*<br>You do not charge the customer for the parts (items) used by a technician in order to fix the problem and solve the service call issues.<br>• *Labor*<br>You do not charge the customer for the technician's labor time, that is, the time required for the technician to fix the problem at the customer site.<br>• *Travel*<br>You do not charge the customer for the technician's traveling time, that is, the time required for the technician to travel from the office to the customer site and back. |
| *Including Holidays* | Select this checkbox if the customer is entitled to service during holidays.<br>**NOTE**<br>The holiday table is defined in the *Company Details* window (*Administration* → *System Initialization* → *Company Details* → *Accounting Data* tab). |

## Service Calls Tab

Use the *Service Calls* tab to view all the service calls associated with the service contract.




View the following information:

| Field | Activity/Description |
|---|---|
| *Call No.* | The service call number. This field contains a link to the actual service call. |
| *Creation Date* | The date on which the service call was recorded |
| *Subject* | The subject of the service call, as recorded in the *Service Call* window |
| *Item No.* | The item number |
| *SN* | The serial number for which the call was opened |

| Field | Activity/Description |
|---|---|
| *Customer Name* | The name of the customer related to the service call. |
| *Status* | The status of the service call: *Open*, *Closed, Pending* and so on. |

**NOTE**

For more information, see the *Service Call Window* section.

## Printing Service Contracts

With SAP Business One you can print service contracts for your customers using default printing templates. Using printing templates lets you design the printed version of the service contracts you give your customers.

### Procedure

1. From the SAP Business One *Main Menu*, choose *Service* → *Service Contract*.

   The *Service Contract* window opens.
2. View the relevant contract.
3. From the *Tools* menu, choose *Print Layout Designer*, or click in the toolbar.
4. Choose the preferred printing template
5. Print the service contract.

**NOTE**

You can edit the default templates or create new ones by using *Print Layout Designer* (PLD). For more information about the PLD, see the document *How to Customize Printing Templates with the Print Layout Designer*, which you can download from the documentation area of the SAP Business One Customer Portal (http://channel.sap.com/sbocustomer).

# Creating Service Calls

The *Service Call* window lets you manage your service calls. You can open a service call for an item even if a corresponding customer equipment card has not been defined yet.

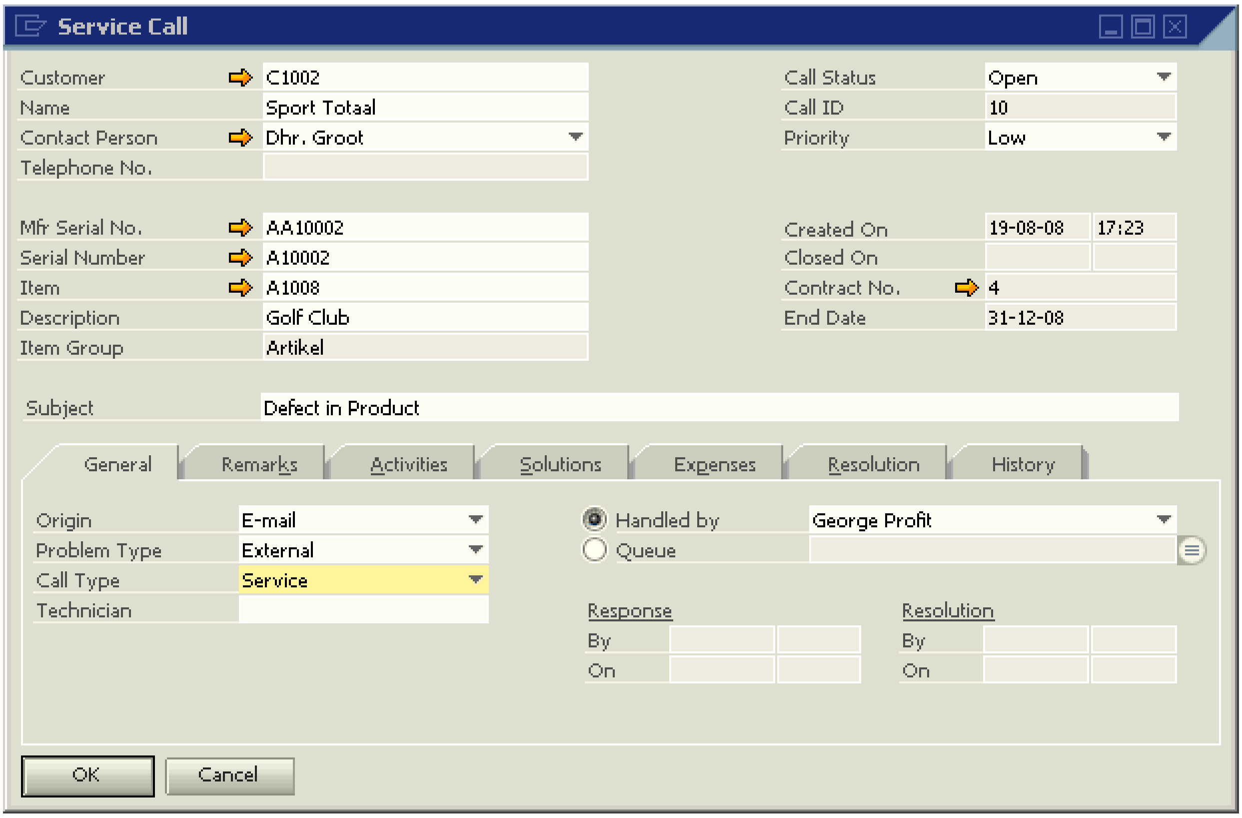
Use the *Service Call* window to do the following:

- Document whether the call was opened due to a phone call, e-mail, or fax, through the Internet, or by any other communication means.
- Manage your activities (tasks, meetings, or notes related to the service call) while solving the problem.
- Manage repairs and create invoices for expenses related to the service call.

## Procedure

1. From the SAP Business One *Main Menu*, choose *Service* → *Service Call*.

   The *Service Call* window opens.




**NOTE**

You can also use the *Business Partner Master Data* window to display the service calls recorded for the customer. Find the relevant customer and choose *Related Service Calls.*

2. View or specify the following information:

| Field | Activity/Description |
|---|---|
| *Customer* | Specify the customer code that opened the service call. If a customer deviates from his credit or commitment limits, a warning message is displayed.<br>**NOTE**<br>If you choose an item first and the customer has no valid contract for this item, SAP Business One displays a warning message before you add the item to the service call. |
| *Name* | Once the customer code is selected, this field is automatically filled. |
| *Contact Person* | Specify the contact persons defined for the customer. |
| *Telephone No.* | If a telephone number is defined for the selected contact person, it is automatically displayed. Otherwise, the telephone number defined for the customer in the *Business Partner Master Data* window is displayed. |
| *Mfr Serial No.* | Specify a manufacturer serial number related to the service call, if required. |
| *Serial number* | Specify the serial number related to the service call, if required.<br>**NOTE**<br>You can choose only serial numbers recorded in customer equipment cards having *Active* or *Loaned* statuses and which are related to the selected customer. |
| *Item* | Specify any item defined in the system, even if it has no customer equipment card related the customer.<br>**NOTE**<br>The *Description* and *Item Group* fields are automatically filled. |
| *Description* | Specify the item description. |
| *Item Group* | The name of the item group related to the selected item |
| *Call Status* | Specify the status of the service call. Select one of the default statuses or define new statuses by selecting the option *Define New*.<br>The call status influences the relevant service reports.<br>**NOTE**<br>You cannot close a service call if you have not attached a solution or entered a resolution. For information, see Solution Tab or Resolution Tab. |
| *Call ID* | The successive numbering of the service call. The *Call ID* number can have gaps. When you open a service call, this number is saved for this service call.<br>**NOTE**<br>Even if you do not add this service call to the system, SAP Business One changes the *Call ID* successive number to the subsequent number. |
| *Priority* | From the dropdown list, select the priority of the service call: *Low, Medium* or *High*. |

| Field | Activity/Description |
|---|---|
| *Created On* | The date on and time at which the service call was opened. |
| *Closed On* | The date on and time at which the service call was closed. This field is updated when the status of the service call is changed to *Closed*. If you reopen a service call, the date and time are automatically deleted. |
| *Contract No.* | The number of the service contract linked to the selected serial number. When there is no contract for the item, the field contains a value of *No Contract.*<br>If you create customer equipment cards manually, and you created a service contract after you created a service call for the same customer and the same specific item, then when you go back to the service call you get a system message asking if you want to connect the service call to the new service contract. |
| *End Date* | The last date on which the contract is valid |
| *Subject* | Specify a relevant subject for the service call. |

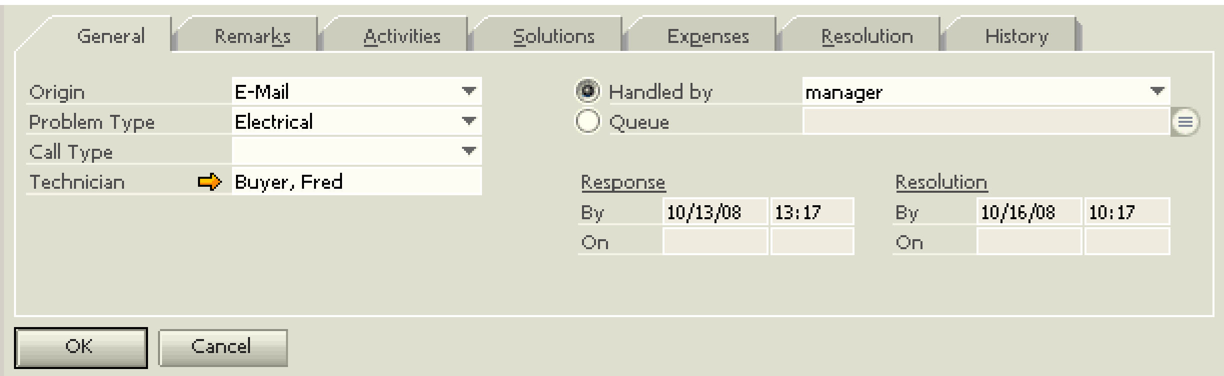
3. On the *General* tab, specify details about the origin of the problem, its type, and the employee and technicians who are responsible for the service call (see General tab).
4. On the *Remarks* tab, enter any important additional information regarding the service call (see Remarks tab).
5. On the *Activities* tab, add a new activity for the service call, if necessary (see Activities tab).
6. On the *Solutions* tab, search for the recommended solution for the problem or create a new solution (see Solutions tab).
7. On the *Expenses* tab, add a marketing document to define the expenses of the service call (see Expenses tab).
8. On the *Resolution* tab, enter a description of the resolution to the service call problem (see Resolution tab).
9. To save the service call, choose *Update*.

# Working with Tabs in the Service Call Window

To get a comprehensive state of the service call, use the different tabs in the *Service Call* window to view all the information related to the item and its serial number.

## General Tab

Use the *General* tab to specify general information about the service call.




Specify the following information:

<table>
<tr><th>Field/Button</th><th>Activity/Description</th></tr>
<tr><td>Origin</td><td>Specify the source of the service call.</td></tr>
<tr><td>Problem Type</td><td>Specify the problem type.</td></tr>
<tr><td>Call Type</td><td>Specify the service call type. Use this field to classify your service calls under different categories.</td></tr>
<tr><td>Technician</td><td>Specify a technician for the service call. You can choose any company employees defined as technicians (Human Resources → Employee Master Data → Membership tab → Roles table).</td></tr>
<tr><td>Handled by</td><td>Select this option to assign a specific user to be responsible for the service call.<br><br>As default, the assignee is the user who creates the service call. However, you can choose a different user, in case you need to forward the service call for advanced handling.<br><br>EXAMPLE<br><br>If the user who opens the service call cannot provide a satisfactory answer to the customer, he can forward the service call to another user. This user can continue working on the service call and display the related history. The new assignee receives an alert via the internal messaging system regarding the forwarded service call.</td></tr>
<tr><td>Queue</td><td>Select this option if you manage service calls using queues. In this case, select the relevant queue for this service call, if it has not been handled yet.<br><br>Define queues under Administration → Setup → Service → Queues.</td></tr>
<tr><td>Response</td><td>• By<br><br>The last date and hour you are committed to respond to the service call. This date is calculated according to the Response Time field and coverage of the service contract (Service → Service Contract → Coverage tab).<br><br>• On<br><br>The date and time of the first response to the service call. SAP Business One considers any of the following a response:<br><br>○ When you create and close a telephone call or meeting type activity<br><br>○ When you add a resolution/solution to the service call</td></tr>
</table>

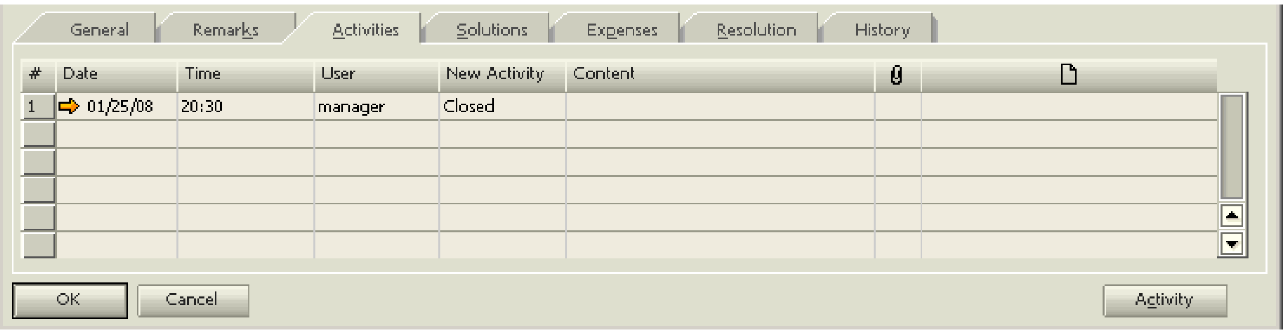
| Field/Button | Activity/Description |
|---|---|
| *Resolution* | • *By*<br>The last date and hour you are committed to provide a resolution for the service call. This date is calculated according to the *Resolution Time* field and coverage of the service contract (*Service* → *Service Contract* → *Coverage* tab).<br>• *On*<br>The date and time of the resolution provided for the service call. SAP Business One considers it a resolution when you add a resolution or a solution to the service call.<br>**NOTE**<br>Deleting the *Solution* tab or the text from the *Resolution* tab clears the *Resolution On* field. However, the *Response On* field is not cleared since you have responded to the service call but have not yet resolved it. |

## Remarks Tab

Use the *Remarks* tab to enter a detailed description and any other remarks related to the service call.

## Activities Tab

Use the *Activities* tab to add any new activities and to display existing activities, for example, tasks or meetings, related to the service call.




### Procedure

1. View the following information about the existing activities for the service call:

| Field | Activity/Description |
|---|---|
| *Date* | The date on which the activity was opened |
| *Time* | The hour at which the activity started |
| *User* | The user who recorded the activity |
| *New Activity* | The date on which the activity took place or is to take place |
| *Content* | The content of the activity |
| *(Attachment)* | Indicates attachments in this contact. To display the attachment, click . |
| *(Document)* | Indicates that a document is attached to the contact. To open the document, click . |

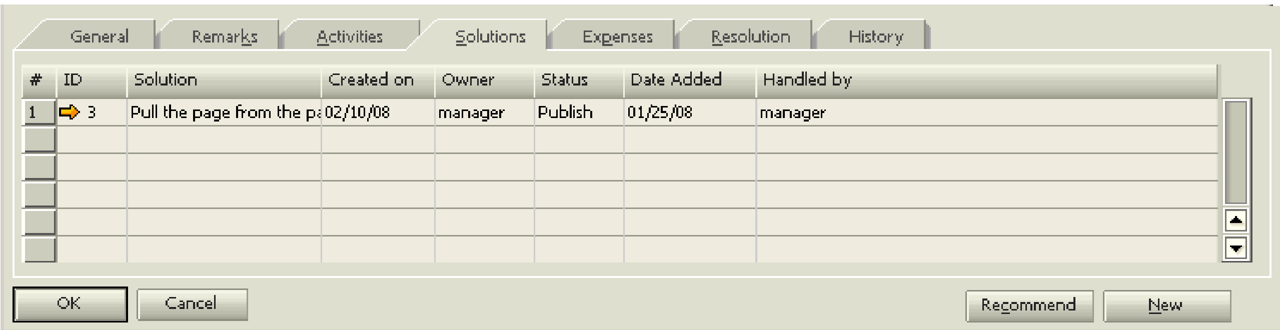
2. To record a new activity for the customer, choose the *Activity* button.

**NOTE**

- An activity can be attached to only one service call.
- Additional information regarding activities is provided in a separate document.

## Solutions Tab

Use the *Solutions* tab to record new solutions for the problem or to relate to existing ones. All the solutions are recorded in the *Knowledge Base Solution* window; therefore, the next time the problem comes up, technicians are aware of possible solutions. This means the time required to solve the problem might be reduced.




### Procedure

1. View the following information of existing solutions for the service call:

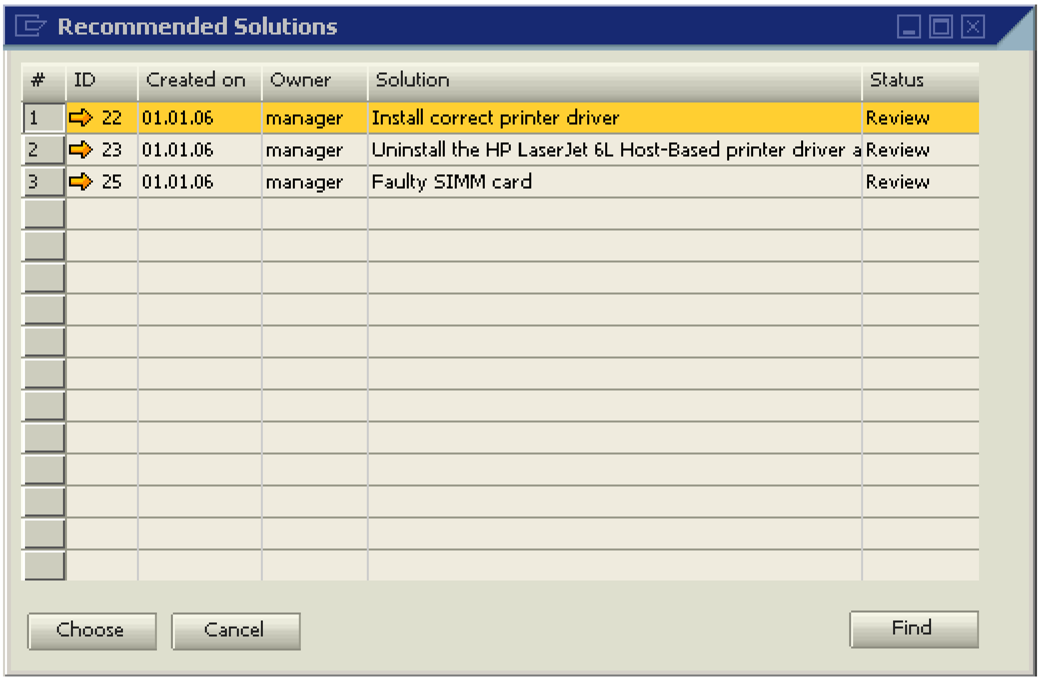
| Field | Activity/Description |
|---|---|
| *ID* | The unique number of the solution |
| *Solution* | A short description of the solution, as recorded in the corresponding field in the *Solutions Knowledge Base* window |
| *Created On* | The date on which the solution was recorded |
| *Owner* | The user who recorded the solution |
| *Status* | The status of the solution: *Internal*, *Published*, *Reviewed,* and so on |
| *Date Added* | The date on which you linked the solution to the service call<br>**NOTE**<br>If you link an old solution to a new service call, the *Created On* date and the *Date Added* date are different. |
| *Handled by* | The user who added the solution to the service call |

2. To record a new solution that relates to the service call, choose the *New* button to open the *Solutions Knowledge Base* window.

**NOTE**

For information, see The Solutions Knowledge Base Window.

3. To display all the prior solutions of previous service calls that relate to the same item or item group, or which have the same *Problem* type, choose the *Recommend* button. You can attach those solutions to the current service call.




View the following information:

| **Field/Button** | **Activity/Description** |
|---|---|
| *ID* | The solution number. Click ⇨ to display the solution. |
| *Created On* | The date on which the solution was recorded |
| *Owner* | The user who recorded the solution |
| *Solution* | A short description of the solution, as recorded in the corresponding field in the *Solutions Knowledge Base* window |
| *Status* | The status of the solution: *Intern*, *Publish*, *Review,* and so on. |
| *Find* | To open the *Solutions Knowledge Base* window in find mode, choose the *Find* button. You can search for additional solutions other than the recommended ones. |

To link a solution to the service call, select a row or a number of rows and choose the *Choose* button.

**NOTE**

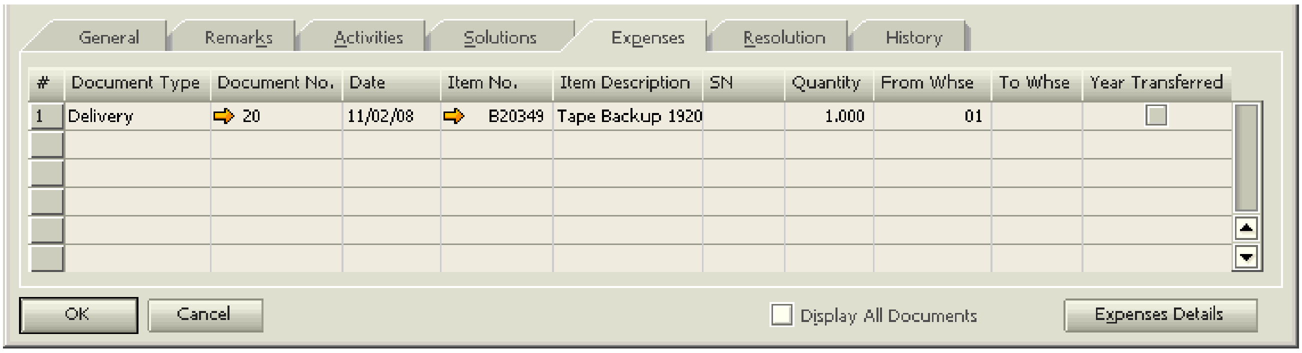
You can remove a solution from a service call using one of the following alternatives:

- Right-click a solution row and choose *Delete Row.*
- Select a row, and from the menu bar, choose *Data* → *Delete Row.*

## Expenses Tab

Use the *Expenses* tab to record all the expenses that refer to the service call, such as parts (items), working hours (labor), and travel hours.

- You can record the following item types:
  - Items used for repairing broken parts
  - Items that are returned by the customer
  - Items which were transferred to the technicians in order to solve the problem
  - Items the technician returned to the warehouse
- You can also record working hours for the time the technician worked at the customer's site and the travel hours required for the technician to get to the customer's site and back to the office.




### Procedure

1. View the following information about the existing expenses for the service call:

| Field | Activity/Description |
|---|---|
| *Document Type* | The type of the document |
| *Document No.* | The document number and a link to the document |
| *Date* | The posting date of the document |
| *Item No.* | The item number and a link to the *Item Master Data* window |
| *Item Description* | The item description |
| *SN* | If an item with a serial number was provided to the customer, this field displays this serial number and a link to the *Serial Number Transaction Report* window. |
| *Quantity* | The quantity of the item in the document |
| *From Whse* | The warehouse from which the item was transferred |
| *To Whse* | The warehouse to which the item was transferred |
| *Year Transferred* | This checkbox is selected if the document was transferred from one database to another.<br>**NOTE**<br>This checkbox is relevant for Israeli and Dutch companies, which open a new database each calendar year. |
| *Display All* | Select this checkbox to view all the documents related to the service call. |

| Field | Activity/Description |
|---|---|
| *Documents* | Deselect this checkbox if you want to view only A/R invoices and deliveries. |

2. To add new expenses documents or to view additional details regarding the expenses related to the service call, choose the *Expenses Details* button. The *Service Call Expenses* window opens.

   To add expenses, choose *New Document*. For information, see The Service Call Expenses Window.

## Resolution Tab

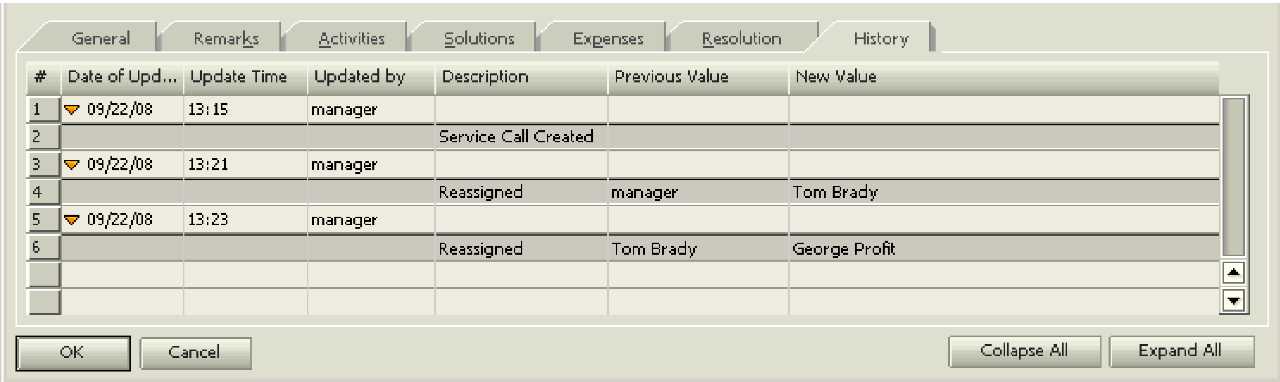
Use the *Resolution* tab to add free text regarding the solution of the problem.

## History Tab

Use the *History* tab to display the updates and the changes made in the service call. All the updates made for a certain instance are sorted by their corresponding date and time.

**NOTE**

If several updates were made on the same date but at different times, several instances will be displayed on this tab under the same date.




View the following information:

| Field/Button | Activity/Description |
|---|---|
| *Date of Update* | The date the service call was updated |
| *Update Time* | The time the service call was updated |
| *Updated by* | The name of user who updated the service call |
| *Description* | A description of the update, for example, *Service Call Created*, *Activity added,* and so on |
| *Previous Value* | If the value of a certain field was updated, the previous value is displayed here. |
| *New Value* | The new value recorded in the field |
| *Collapse All* | Choose this button to aggregate all expanded rows. |
| *Expand All* | Choose this button to expand all grouped rows. |

The *History* tab displays updates regarding the following actions and fields:

- *Service Call* Created
- *Response* due by
- *Response* added
- *Resolution* due by
- *Resolution* added
- Reassigned
- *Status* changed
- *Priority* changed
- *Solution* added
- *Solution* removed
- *Activity* added
- *Service Call* closed
- *Expenses* document added.

**NOTE**

The number of updates displayed in the *History* tab is determined by the setting of the *History / Log* field, under *Administration* → *System Initializations* → *General Settings* → *Services* tab.

## Printing Service Calls for Technicians

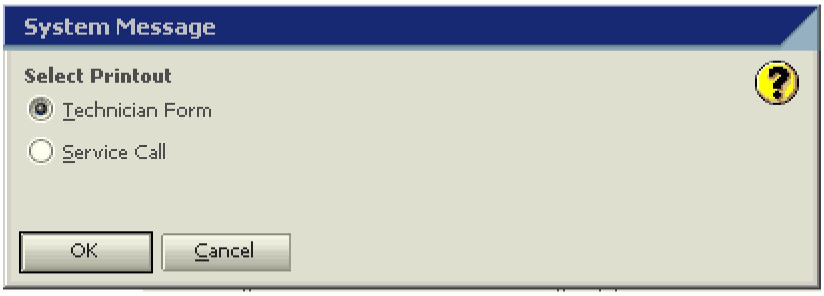
With SAP Business One you can print service calls and technician forms using default print templates.

This special layout includes the details of the service call and lets you write the solution, the items that you have replaced at the customer site, and the travel and labor hours at the customer site. The technician can also obtain the customer's signature on this document as a reference for the visit.

### Procedure

1. From the SAP Business One *Main Menu*, choose *Service* → *Service Call*.

   The *Service Call* window opens.
2. View the relevant service call.
3. From the *Tools* menu, choose *Print Layout Designer*, or click in the toolbar.
4. Choose the preferred printing template.
5. Print the service call. The following system message appears:




6. Select which document to print: *Technician Form* or *Service Call*, and choose *OK*.

## Creating Service Call Expenses

Use the *Service Call Expenses* window to add and display the detailed expenses associated with the service call: the expenses related to the items and to labor and travel.

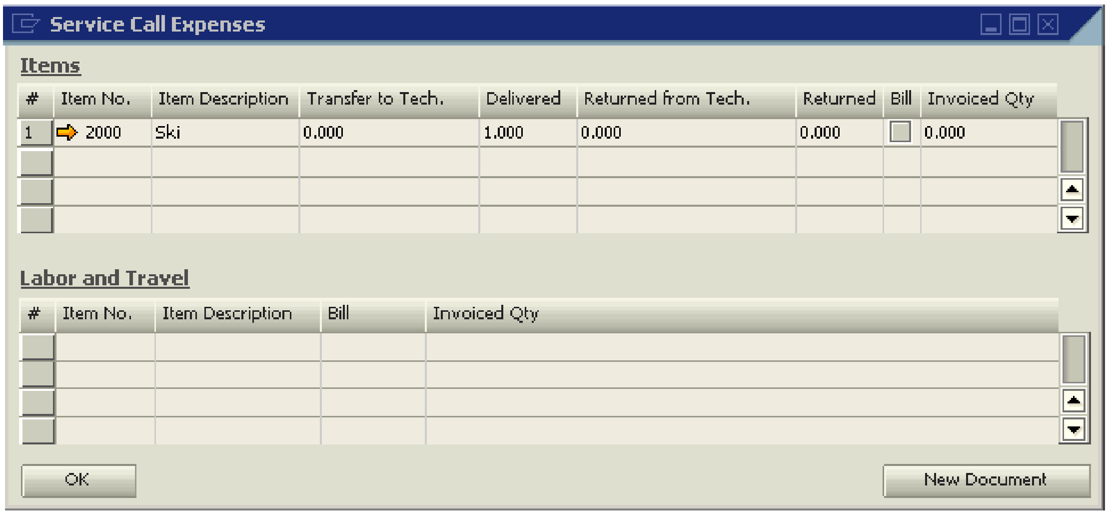
### Procedure

1. From the SAP Business One *Main Menu*, choose *Service* → *Service Call*. The *Service Call* window opens.

2. Choose the *Expenses* tab. To add and display the detailed expenses, choose *Expenses Details.*

   The *Service Call Expenses* window opens.




3. In the *Items* table you can view all the items defined as *Items* type in the documents related to the service call (*Inventory* → *Item Master Data* window → *Type* field).

   View the following information:

| Field | Activity/Description |
| --- | --- |
| *Item No.* | The item number and a link to the *Item Master Data* window |
| *Item Description* | The item's description |
| *Transfer to Tech.* | The number of calls transferred to the technician |
| *Delivered* | The quantity of items or parts that was delivered to the customer via A/R invoice or delivery documents only. |
| *Returned from Tech.* | The quantity of items or parts that was returned from the technician. This field refers only to calls transferred to technicians. |
| *Returned* | The quantity of items or parts that was returned from the customer via returns or credit memo documents. |
| *Bill* | This checkbox is disabled. However, it is selected when the service contract does not include parts (*Service* → *Service Contract* → *Coverage* tab). This means the customer is charged for those parts. |
| *Invoiced Qty* | The quantity in the A/R invoice |

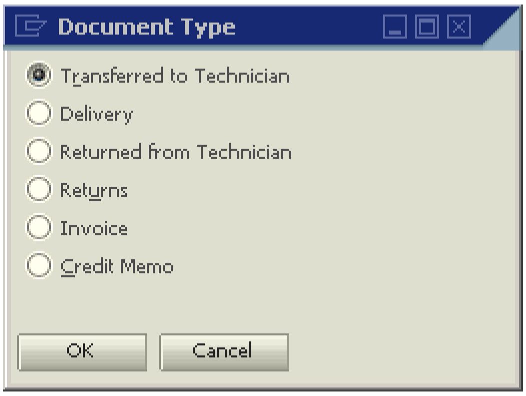
4. In the *Labor and Travel* table you can view all the items defined as *Labor* or *Travel* in the documents related to the service call (*Inventory* → *Item Master Data* window → *Type* field).

   View the following information:

| Field | Activity/Description |
| --- | --- |
| *Item No.* | The item number and a link to the *Item Master Data* window |
| *Item Description* | The item's description |
| *Bill* | This checkbox is disabled. However, it is selected when the service contract does not include labor or travel (*Service* → *Service Contract* → *Coverage* tab). |

| Field | Activity/Description |
|---|---|
| | This means the customer is charged for costs of labor and travel. |
| *Invoiced Qty* | The amount invoiced in the A/R invoice |

5. In order to record additional expenses related to the service call, choose the *New Document* button. The *Document Type* window opens.




6. Choose the transaction you wish to add to the *Expenses* tab page in the service call. Select one of the following options:

| Option | Activity/Description |
|---|---|
| *Transferred to Technician* | Opens the *Inventory Transfer* window. If you defined a warehouse for each technician and you want to document the items that you delivered to the technician for the service call, in the field *To Warehouse,* choose the warehouse of the technician. |
| *Delivery* | Opens a delivery document |
| *Returned from Technician* | Opens the *Inventory Transfer* window. If you defined a warehouse for each technician and you want to document the items that the technician returned, in the field *From Warehouse,* choose the warehouse of the technician. |
| *Returns* | Opens a returns document. If you record a returns document containing a serial number defined as *Active* in the customer equipment card, the status of this customer equipment card is changed to *Returned*. |
| *Invoice* | Opens an A/R invoice document |
| *Credit Memo* | Opens an A/R credit memo document |
| *Corrections* | Opens an A/R correction invoice document<br>**NOTE**<br>This field is relevant for the following localizations: Czech Republic, Hungary, Poland, and Slovakia. |

To open the corresponding window, choose the *OK* button.

## Result

After you add the corresponding document to the system, a new row including the document details is added to the *Service Call Expenses* window.

# Using the Solutions Knowledge Base

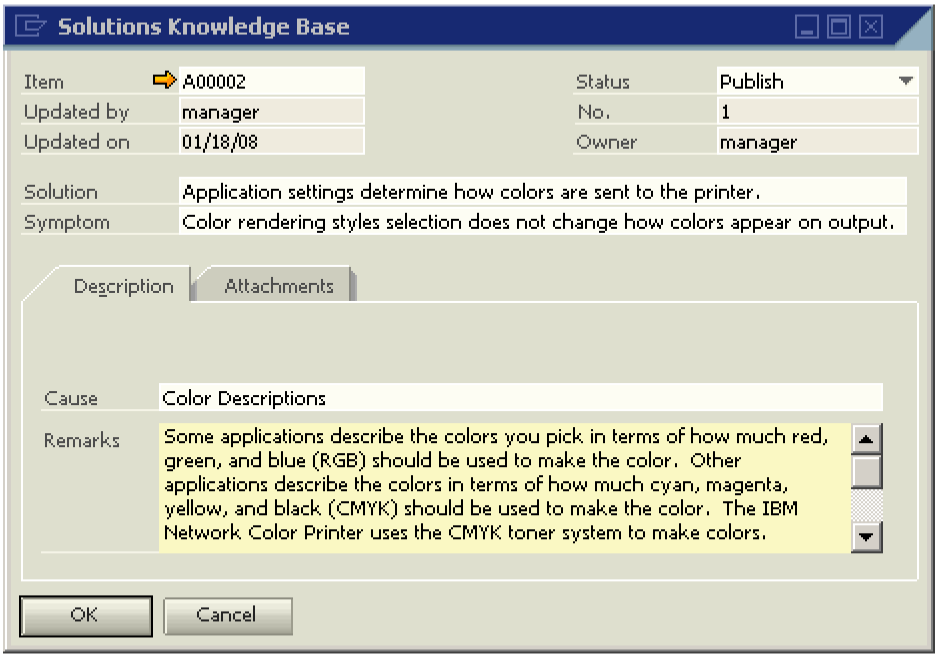
Use the *Solutions Knowledge Base* window for the following purposes:

- To create and update common solutions to customer's problems and questions
- To display all the solutions that were ever recorded in SAP Business One
- To link an existing solution to a service call or to record a new solution from a service call

## Procedure

1. From the SAP Business One *Main Menu*, choose *Service* → *Solutions Knowledge Base.*

   The *Solutions Knowledge Base* window opens.




2. View or specify the following information:

| Field | Activity/Description |
|---|---|
| *Item* | Specify the relevant item number. A link to the *Item Master Data* window appears. |
| *Updated by* | The user who last updated the solution. This field appears in existing solutions only. |
| *Updated on* | The date on which the solution was updated. This field appears in existing solutions only. |
| *Status* | From the dropdown list select the status of the solution: *Internal*, *Publish*, *Review,* or others.<br>In order to define new statuses, from the dropdown list, select *Define New*. The *Solution Statuses – Setup* window opens. You can specify the name and description of the new status and update the window. |
| *No.* | The solution number |
| *Owner* | The user who recorded the solution |
| *Solution* | Enter a short explanation about the solution. |

| Field | Activity/Description |
|---|---|
| *Symptom* | Describe the symptom of the problem. |

3. On the *Description* tab, specify the cause and the details of the solution.
4. On the *Attachments* tab, attach a file to the solution, as needed (see Attachments tab*).*
5. Add the solution to the system.

## Printing Service Solutions

With SAP Business One you can print service solution details by using default print templates. The printed solutions can assist your service representatives in their routine work.

### Procedure

1. From the SAP Business One *Main Menu*, choose *Service* → *Solutions Knowledge Base.*

   The *Solutions Knowledge Base* window opens.
2. View the relevant solution.
3. From the *Tools* menu, choose *Print Layout Designer*, or click  in the toolbar.
4. Choose the preferred printing template.
5. Print the solution.

# Using Service Reports

Service reports let you do the following:

- Extract important information about the efficiency and performance of your service department
- Obtain details about customer service contracts and equipment
- View your own service calls in order to assess your progress and take any necessary actions

| Report | Description |
|---|---|
| *Service Calls* | Displays information on open and closed service calls and enables you to analyze all the information regarding service calls management in the company. You can see summaries of the information about service calls for each employee. |
| *Service Calls by Queue* | Displays all the service calls in each queue<br>**NOTE**<br>If you are working with queues, the correct process is for all your employees to use this report when handling the messages that are displayed under their queue. |
| *Response Time by Assigned to* | Displays the response times of all your assignees to all their related service calls<br>**NOTE**<br>If you are working with assignees, the correct process is for all your employees to use this report when handling the messages that are displayed under their name. |
| *Average Closure Time* | Displays the average closure time of your service calls using various selection criteria.<br>• *Time to Closure* equals *Resolution* (date and time) minus *Created On* (date and time).<br>• *Average Closure Time* equals the total time to closure divided by the number of closed calls. |
| *Service Contracts* | Displays all the service contracts using various selection criteria |
| *Customer Equipment Card Report* | Displays all the customer equipment cards using various selection criteria |
| *Service Monitor* | Displays two dynamic views of open calls and overdue calls in the last hour.<br>• *Open Service Calls per Minute*<br>The graph displays the rate of open service calls in SAP Business One, meaning, the number of service calls that were opened per minute during the last hour.<br>• *Overdue Service Calls per Minute*<br>The graph displays the rate of overdue calls in SAP Business One, meaning, the number of service calls that were overdue per minute during the last hour. |

| Report | Description |
|---|---|
| *My Service Calls* | Displays the service calls assigned to the user currently logged on |
| *My Open Service Calls* | Displays the service calls with an *Open* status that are assigned to the user currently logged on |
| *My Overdue Service Calls* | Displays the service calls assigned to the user currently logged on and whose defined resolution times have passed |

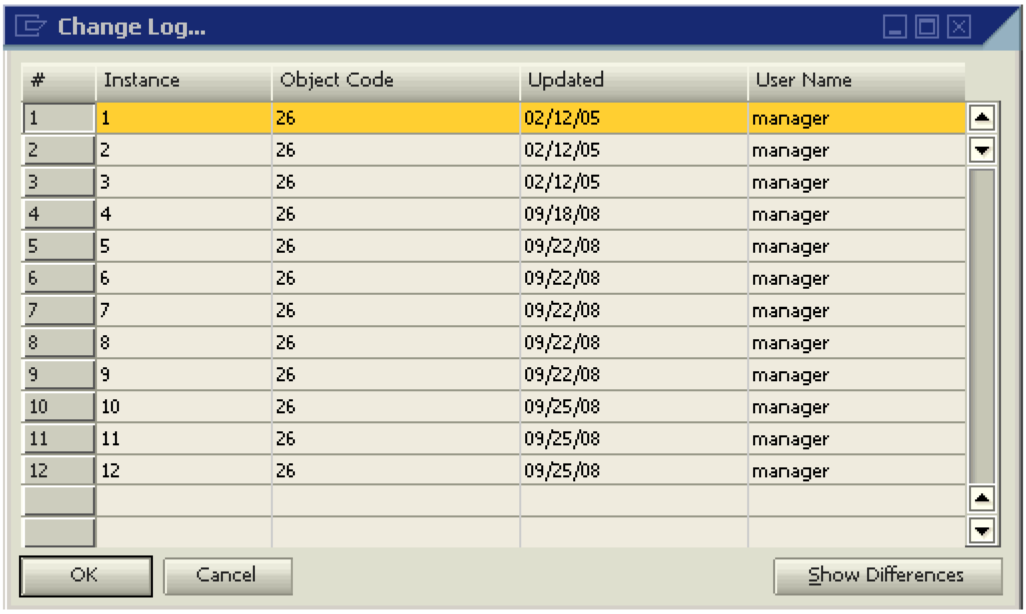
# Tracking Changes in the Service Module

SAP Business One lets you track changes and review the history of service calls and customer equipment cards by using the *Change Log* window. Each time you update one of those elements, the system tracks down the change and saves it in the *Change Log* window.

## Procedure

1. From the SAP Business One *Main Menu*, choose *Service* → *Service Call* or *Customer Equipment Card.*
2. View the relevant document.
3. From the *Tools* menu, choose *Change Log*.

   The *Change Log* window opens.



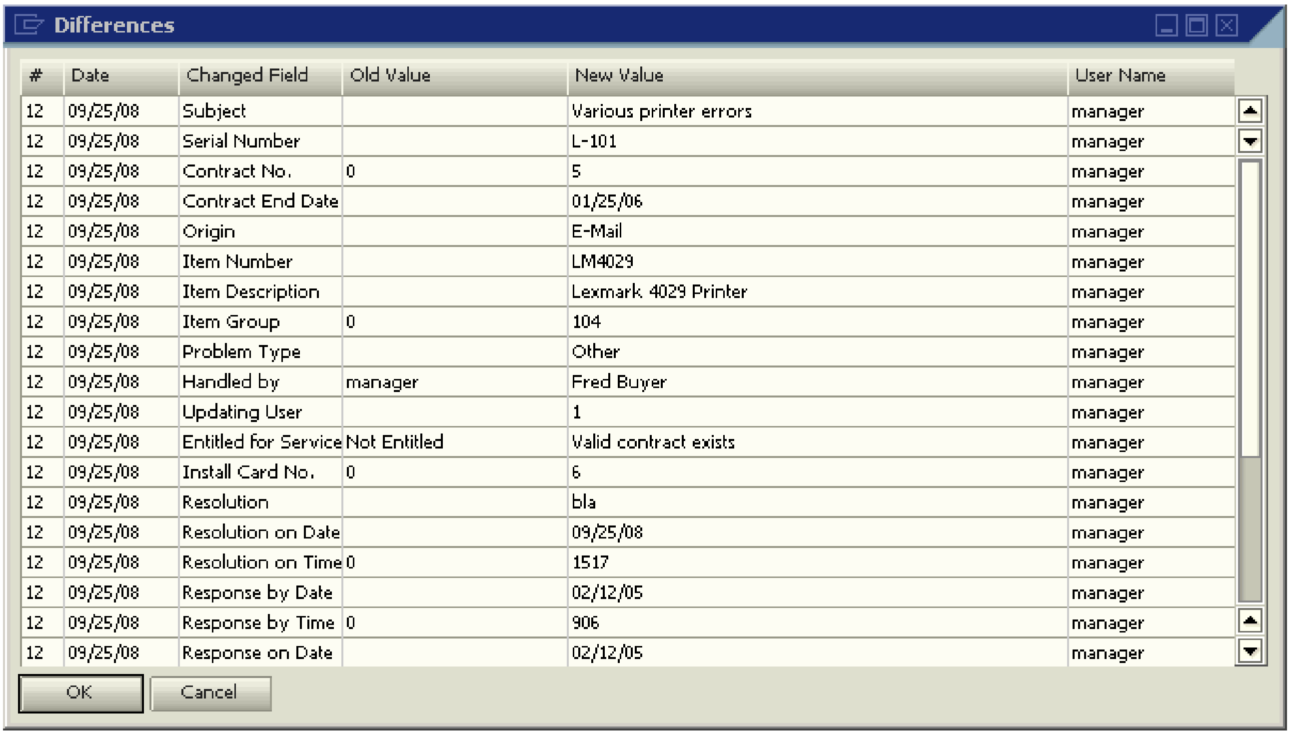

4. View the following information:

| Field | Activity/Description |
|---|---|
| *Instance* | The number of the logged change |
| *Object Code* | The element number |
| *Updated* | The date on which the element was updated |
| *User Name* | The name of the user who updated the element |

5. To review detailed information of the changes that were made in specific instances, do one of the following:
   - To view all changes since a specific instance was created, click the instance row and choose the *Show Differences button.*
   - To view changes between two specific instances, click the instance rows and choose *Show Differences.*

The *Differences* window opens.



Differences

| # | Date | Changed Field | Old Value | New Value | User Name |
|---|---|---|---|---|---|
| 12 | 09/25/08 | Subject | | Various printer errors | manager |
| 12 | 09/25/08 | Serial Number | | L-101 | manager |
| 12 | 09/25/08 | Contract No. | 0 | 5 | manager |
| 12 | 09/25/08 | Contract End Date | | 01/25/06 | manager |
| 12 | 09/25/08 | Origin | | E-Mail | manager |
| 12 | 09/25/08 | Item Number | | LM4029 | manager |
| 12 | 09/25/08 | Item Description | | Lexmark 4029 Printer | manager |
| 12 | 09/25/08 | Item Group | 0 | 104 | manager |
| 12 | 09/25/08 | Problem Type | | Other | manager |
| 12 | 09/25/08 | Handled by | manager | Fred Buyer | manager |
| 12 | 09/25/08 | Updating User | | 1 | manager |
| 12 | 09/25/08 | Entitled for Service | Not Entitled | Valid contract exists | manager |
| 12 | 09/25/08 | Install Card No. | 0 | 6 | manager |
| 12 | 09/25/08 | Resolution | | bla | manager |
| 12 | 09/25/08 | Resolution on Date | | 09/25/08 | manager |
| 12 | 09/25/08 | Resolution on Time | 0 | 1517 | manager |
| 12 | 09/25/08 | Response by Date | | 02/12/05 | manager |
| 12 | 09/25/08 | Response by Time | 0 | 906 | manager |
| 12 | 09/25/08 | Response on Date | | 02/12/05 | manager |

OK Cancel

6. View the following information:

| Field | Activity/Description |
|---|---|
| *Date* | The date of the change |
| *Changed Field* | The field that was changed |
| *Old Value* | The value of the field before the change |
| *New Value* | The value of the field after the change |
| *User Name* | The name of the user who made this change |

**NOTE**

- An information change that is automatically created by SAP Business One and does not affect any field is displayed in green, for example, the *History* tab under the *Service Call* window.
- The number of updates displayed in the *Change Log* window is determined by the setting in the *History / Log* field, under *Administration* → *System Initializations* → *General Settings* → *Services* tab.

# Database Tables Reference

For more information about the tables (fields/content), see the *Database Tables Reference Online Help* (available to all partners/customers at https://www.sdn.sap.com/irj/sdn/businessone).

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