CHAPTER 3: SERVICE ITEMS

Objectives

The objectives are:

- Create service items.
- Troubleshoot.
- View the service item history.
- Use service item reports.

Introduction

In the Service Management application area, the term “service item” refers to the equipment or item that requires servicing. When creating a service order, specify which items need to be serviced on the service item lines of the Service Order window.

In the service order, you can link a service item to:

- An item in the inventory (in which case, the service item is related to that item).
- A service item group.

If a customer often brings the same items to be serviced by your company, use the Service Management application area to:

- Record these service items as entities within the system. If service items are recorded, set up:
  - Their components and keep track of replacements.
  - Service contracts for these service items with the customers owning them.
- Keep track of the items in service for each customer.
- Maintain an overview of the services performed throughout the lifetime of these service items, which is important for valuable items requiring high quality service.

A registered service item has:

- A unique identification number and can be linked to an item.
- A serial number that is unique among all the service items linked to the same item. The owner of the service item is the customer at the specified ship-to address.

You can assign a warranty to the service item and specify the response time for its service. A service item can consist of components, such as:
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- Raw materials
- Parts
- Subassemblies

If you sell and then service certain items, the program can automatically create service items for them.

This chapter provides information for service items, and describes their:

- Concept
- Use
- Setup
- Related topics, such as how to set up and assign troubleshooting guidelines

To practice and test yourself, refer to the exercises and a final assignment at the end of the chapter.

The following diagram provides an overview of the relationships among different windows and tables.

FIGURE 3.1 WINDOWS/TABLES RELATIONSHIP DIAGRAM
Creating Service Items

You can create service items:

- Manually, in the Service Item Card window.
- Within a service order (refer to chapter 4 “Service Orders”).
- Automatically, when sold items are shipped.

When you have set up service items, you can assign them to service orders and service contracts.

Creating Service Items Manually

When receiving an unregistered item (for example, an item not sold and with no prior knowledge of) for servicing, you can record it as a service item. To create a service item in the Service Item Card window:

1. Click Home > Service Items.
2. In the Action Pane of the Service Items list place, click New. The Service Item Card window appears.
3. In the No. field, enter a number for the service item. (Alternatively, if you have set up number series for service items in the Service Mgt. Setup window, you can press ENTER to have the program enter the next available service item number.)
4. Fill in the Service Item Group Code, the Serial No., and the Response Time (Hours) fields.
5. If the service item is linked to an item, fill in the Item No. field.
6. In the Warranty Starting Date (Parts) field, enter the starting date of the spare parts warranty for this service item. The program automatically fills in the warranty related fields with the default warranty information specified in the Service Mgt. Setup window.
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FIGURE 3.2 THE GENERAL FASTTAB OF THE SERVICE ITEM CARD WINDOW

7. On the Customer FastTab, click the AssistButton in the Customer No. field, to select the appropriate customer from the drop-down list that appears.

FIGURE 3.3 THE CUSTOMER FASTTAB OF THE SERVICE ITEM CARD WINDOW

8. Fill in the relevant fields on the Shipping, Contract, Vendor, and Detail FastTabs.

Repeat steps 2 to 8 for each service item you want to create.
**Default Contract Value and Cost**

The *Default Contract Value* field on the *Contract* FastTab contains a value that is assigned to the service item when you include it in a service contract or contract quote.

To calculate the default value in this field the program takes the sales unit price or the sales unit cost of the service item, multiplies by the contents of the *Contract Value %* field in the *Service Mgt. Setup* window, and then divides by 100.

![Image](image-url)

**FIGURE 3.4 THE CONTRACT FASTTAB OF THE SERVICE ITEM CARD WINDOW**

Depending on the contract value calculation method, the *Default Contract Cost* field contains the default contract cost of the service contract which is used when the service item is included in the service contract or contract quote.

The content of this field is calculated automatically when the service item is created by multiplying its sales unit cost by the contents of the *Contract Value %* field in the *Service Mgt. Setup* window and dividing the result by 100.

**Warranty Information**

You can assign warranty discounts to service items that cover a percentage of labor and spare part costs for a specified time. These values override the default warranty discounts specified in the *Service Mgt. Setup* window.

- If a service item is created automatically when you post a sales order, the program assigns a default warranty to the service item that starts from the posting date of the sales order.
- When you service a service item, the program calculates the discount on the service by selecting the highest of the following three discounts:
  - **Contract discount**
  - **Warranty discount**
Customer/item discount

**Preferred Resources and Resource Skills**

When choosing preferred resources and resource skills:

- Select the preferred resource for a service item in the **Preferred Resource** field on the **General** FastTab of the service item card.

- When determining how to allocate a resource to the service item in a service order, you can consult the **Resource Availability** window to find the preferred resource.
  - If the service item requires specific skills, it is recommended to select the resource from a list of the resources that are skilled at servicing the service item.
  - The skills are assigned either to the item linked to the service item or to the service item group to which the service item belongs.

For information on how you assign skills to items, service item groups, and resources, refer to chapter 7 “Planning Management.”

To view the resource skills required to service the items, do the following:

1. Click **Home > Service Items**.
2. In the **Service Items** list place, select the service item for which to view the required skills.
3. Double-click the selected service item to open the **Service Item Card** window.
To view the resources that are skilled to service the service item, do the following:

1. In the Action Pane of the Service Item Card window, click Related Information > Serv. Item > Skilled Resources. The Skilled Resources List window opens.
Creating Service Item Components Manually

A service item may consist of several components (raw materials, parts, or subassemblies).

A service item component is either an item or a service item.

- You can record a serial number for the component.
- When you service the service item, you can replace the component with another item.
- The program keeps track of how many times a component is replaced.

Set up these components in the Service Item Component List window:

1. In the Action Pane of the Service Item Card window, click Related Information > Serv. Item > Components. The Service Item Component List window opens.
2. In the Action Pane, click New to enter a new component.
3. In the Type field, click the AssistButton to select Item or Service Item (if the component is a registered service item).
4. In the No. field, click the AssistButton to select item or service item that is a component of the service item from the Item List window that appears, and then click OK to copy the number to the field.
5. Fill in other fields in the Service Item Component List window.

Repeat steps 2 to 5 for each component you want to set up for the service item.

**Copying Service Item Components from BOMs**

Service item components are similar to the Bill of Materials (BOM) structure for items. Therefore, to set up components for the service items related to items with a BOM structure, you can copy the assembly list from the related item and use it as a component structure for that particular service item.

1. Click Home > Service Items.
2. In the Service Items list place, double-click the service item for which to set up components from the BOM, and then click Related Information > Serv. Item > Components.
3. In the Action Pane of the Service Item Component List window that opens, click Related Information > Component > Copy from BOM. If the item that the service item represents has an assembly list associated to it, the program automatically sets up service item components for all the items in the BOM.
Creating Service Items Automatically

When shipping items either by posting sales orders or sales invoices in the Sales and Marketing application area, the program automatically creates the shipped items as service items on one condition: the items must belong to a service item group with a check mark in the Create Service Item field (in the Service Item Groups window).

Optionally, the items may have serial numbers registered in the Item Tracking Lines window.

The following procedure shows how to create service items when you ship items on sales orders:

1. Click Departments > Sales & Marketing > Order Processing.
2. Under Lists, click Sales Orders.
3. In the Sales Order list place, select the relevant sales order and double-click to open it.
4. In the Action Pane of the Sales Order window, click Post or Post and Print.

5. In the window that appears, select the Ship and Invoice option and click OK.

The program creates a service item for the items in the order belonging to a service item group that is set up to create service items.

If you registered specific serial numbers in the Item Tracking Lines window, they are assigned to the corresponding service items.

Creating Service Item Components Automatically

You can use the assembly list of a BOM item to let the program create service item components automatically from the assembly list when the BOM item is exploded. To do this, you first need to set up the assembly list.
A BOM item contains an assembly list that is a list of item components. More than one of the components that make up the assembly list can be made up of subcomponents (a set of the other components in the assembly list). For example, for the Computer Trend Package BOM item, with an assembly list containing a monitor, a mouse, an Ethernet cable, and a hard drive, you can set up an assembly list so that the monitor, the Ethernet cable, and the mouse are subcomponents of the hard drive.

When you enter the BOM item in a sales order, it can be exploded.

- The program then creates a text line with a description of the BOM item (the BOM item is not actually an item anymore on the sales order), and inserts a sales line for each of the item components.
- When you ship the items, the program automatically creates service items for each of the item components, provided the items have serial numbers or belong to a service item group that you have set up to create service items.

If the program creates a service item for an item component that contains subcomponents, the program automatically records these subcomponents as components of the service item.

To set up BOM subcomponents, do the following:

1. Click Home > Items.
2. In the Items list place, select the relevant item.

![Bill of Materials Window](image)

**FIGURE 3.11 THE BILL OF MATERIALS WINDOW**

4. For each subcomponent, in the Installed in Item No. field, click the AssistButton to view the same Bill of Materials window (this is essentially the same window but contains the Cancel button).
FIGURE 3.12 BILL OF MATERIALS FOR A SUBCOMPONENT

5. Select the main component, and then click OK to copy the number to the field.

Repeat steps 3 and 5 for each BOM component that is a part of the main component.

To create service item components automatically when shipping items, do the following:

1. Click Departments > Sales & Marketing > Order Processing.
2. Under Lists, click Sales Orders.
3. In the Sales Order list place, select the relevant sales order containing the BOM item and double-click to open it.
4. On the Lines FastTab, select the line containing the BOM item, click the Actions button, and then click Functions > Explode BOM.
5. In the dialogue box that appears, confirm that the dimensions need to be retrieved from the components.

FIGURE 3.13 RETRIEVING THE DIMENSIONS FROM COMPONENTS

The lines now contain the item and all the components of that item.
6. In the Action Pane, click **Post** or **Post and Print**.

7. In the window that appears, select the **Ship and Invoice** option and click **OK**.

FIGURE 3.14 THE SALES ORDER WITH THE ITEM AND ALL ITS COMPONENTS
Lab 3.1 - Creating a Service Item and Service Item Components Manually

In this lab, you will practice creating a service item and service components manually.

Scenario

As a service desk receptionist at CRONUS International Ltd, you receive a call from a customer who wants a new item serviced. The customer requests that Linda Martin is assigned this servicing task and all further servicing tasks, if any. Furthermore, since the item is in bad condition (there are some scratches and bumps on the item’s surface), the customer asks for a lowered contract value for the service item.

To ensure that the service is granted to the customer, you need to register the items as a service item in the database taking into considerations all the customer requirements.

Challenge Yourself

- Create a service item in the Service Item Card window.
- Register service item components in the Service Item Component List window.

Need a Little Help

1. Create a service item manually using the following information:
   - Computer: Trendy Package
   - Item number: 8912-W
   - Serial number: 58899123
   - Response time: 12 hours
   - Customer information: No. 50000
   - Location at customer’s: On the fifth floor
   - Preferred Resource: Linda Martin.

2. Change the contract value of the item to 10 percent of the sales unit price.

3. For the service item, record the following components in the component list (be sure to specify their serial numbers – invent these):
   - 80102 17” M780 Monitor
   - 80208 Advanced Mouse
   - 80216 Ethernet Cable
   - 80218 Hard-disk Drive.

Step by Step

Create a service item.

1. Click Home > Service Items.
2. In the Action Pane of the Service Items list place, click New.
3. On the General FastTab, fill in the Description and Item No. fields.
4. Accept the message that follows.

![Image](image.jpg)

FIGURE 3.15 A CONFIRMATION MESSAGE

5. Fill in the Serial No., Response Time (Hours) and Preferred Resource fields.
6. On the Customer FastTab, fill in the Customer No. and Location of Service Item fields.

Upon filling in all the relevant fields, the service item card for this service item will look like this.

![Image](image.jpg)

FIGURE 3.16 SERVICE ITEM CARD FOR THE NEW SERVICE ITEM

Create service item components.
1. In the Action Pane of the Service Item Card window, click Components. The Service Item Component List window opens.

2. In the Type field, click the AssistButton to select Item.

3. In the No. field, click the AssistButton and select item number 80102 from the Item List window that appears.

4. In the Serial No. field, type “BH90210.”

Repeat steps 2 to 4 to create other components.

Upon filling in all the relevant fields, the Service Item Component List window will look like this.

![Image of the Service Item Component List window with items added]

FIGURE 3.17 THE COMPONENTS OF THE NEW SERVICE ITEM
Lab 3.2 - Creating a Service Item and Service Item Components Automatically

In this lab, you will practice creating a service item and service components automatically.

Scenario

A customer buys item number 8924-W and wants CRONUS International Ltd to service it. Your task is to register this in the program.

Challenge Yourself

Create a sales order for one server to further work on it.

Need a Little Help?

1. Create a sales order with customer details:
   Customer: The Cannon Group PLC
2. Create a sales line with item details:
   Item No.: 8924-W
   Quantity: 1
3. Explode BOM.
4. Record the serial number for the main component, item number 80007, with details:
   Item tracking code: FREEENTRY
   Serial number: 786454121
5. Ensure the service item group of item number 80007 creates service items automatically.
6. Item number 8924-W has some cosmetic defects, and the customer wants a discount. The discount is agreed to, and at the same time the warranty on spare parts is lowered.
   Give a 25 percent discount for each sales line.
7. Post the sales invoice.
8. On the service item, change the warranty of spare parts to 80 percent.

Step by Step

Create a sales order.

1. Click Departments > Sales & Marketing > Order Processing.
2. Under Lists, click Sales Orders.
3. In the Action Pane of the Sales Order list place, click New.
4. On the General FastTab:
   Sell-to Customer No.: 10000
5. On the Lines FastTab:
   Type: Item
No.: 8924-W  
Quantity: “1”  
6. Click Yes to the check availability message that follows.

After filling in all the relevant fields, your sales order will look like this.

![Figure 3.18 The New Sales Order for Customer 10000](image)

**Explode the BOM.**

1. On the **Lines** FastTab, click **Actions**, and then click **Functions > Explode BOM**.
2. In the dialogue box that appears, confirm that the dimensions need to be retrieved from the components.
3. Click Yes to the check availability messages that appear.

The lines now contain the item with all its components.
Chapter 3: Service Items

FIGURE 3.19 THE SALES ORDER LINES WITH THE ITEM’S COMPONENTS

4. Click the line for item number 80007, and then click Actions > Line > Item Tracking Lines.

5. In the Item Tracking Lines window that opens, fill in the following fields:
   - Serial No.: “786454121”
   - Quantity (Base): “1”

To ensure that the service item group of item number 80007 creates service items automatically:

6. Go to Home > Items.
7. In the Items list place, double-click item number 80007 to open the Item Card window.
8. On the General FastTab, click the AssistButton in the Service Item Group field.
9. Click Advanced at the bottom of the drop-down list that appears.
10. In the Service Item Groups window, for line with service item group code SERVICE, verify that the Create Service Item check box is selected.
11. Close the Service Item Groups and Item Card.
12. Open the **Item Card** window for item number 80007.
13. In the Action Pane, click **Related Information > Item > Assembly List > Bill of Materials**.
14. In the **Bill of Materials** window that appears, fill in the **Installed in Item No.** field with “80007” (Do it for all the lines, except the line with No. 80007.)
15. Close the windows to return to the sales order.
16. On the **Lines** FastTab, for each sales order line, type “25” in the **Line Discount %** field.

*Post the sales invoice.*

1. In the Action Pane of the **Sales Order** window, click **Post**.
2. In the window that appears, select the **Ship and Invoice** option and click **OK**.

To verify the created service item:

3. Go to **Home > Service Items**.
4. In the **Service Items** list place, double-click the item with **Serial No. 786454121**. The **Service Item Card** window opens.
5. On the **General** FastTab, change the value in the **Warranty % (Parts)** field to “80”.

Upon completion of this exercise, the service item card will look like this.

![FIGURE 3.20 THE NEWLY CREATED SERVICE ITEM](image-url)
Troubleshooting

The troubleshooting feature in Microsoft Dynamics® NAV helps service representatives be efficient when managing service orders.

You can set up troubleshooting guidelines in the Troubleshooting window for service items to help:

- Technicians to solve problems that relate to the repair of particular service items.
- Service desk personnel to solve customers’ problems.
- To formulate a list of questions that you must ask when you receive a service item. Often, a standard list like this one can help you determine what the problem or issue consists of.

When you look up the troubleshooting guidelines for a service item, the program starts searching for it. The program:

- First looks for troubleshooting guidelines directly assigned to the service item.
- If it cannot find any, the program then looks for troubleshooting guidelines assigned to an item linked to the service item.
- If the program still cannot find any guidelines, it finally looks for troubleshooting guidelines assigned to the service item group.

You can set up more than one set of troubleshooting guidelines for each service item, item, or service item group.

**Setting Up Troubleshooting**

To set up troubleshooting guidelines, follow this procedure:

1. Click Departments > Service > Administration.
3. In the Action Pane, click **New** to enter new troubleshooting guidelines.

4. On the **General** FastTab:
   - In the **No.** field, enter a number for the troubleshooting
   - Fill in the **Description** field

5. On the **Lines** FastTab:
   - In the **Comment** field, enter the relevant questions or steps for your troubleshooting.

![FIGURE 3.21 THE TROUBLESHOOTING LIST WINDOW](image)
Assigning Troubleshooting to Items, Service Items, and Service Item Groups

From the Troubleshooting window, you can assign troubleshooting to:

- Items
- Service items
- Service item groups

You can also assign troubleshooting by first opening the relevant card (service item, item, or service item group) and from there opening the Troubleshooting Setup window.

The following procedure is for assigning troubleshooting to service items from the service item card/the Service Items list place.

1. Click Home > Service Items.
2. Select the service item to which to assign troubleshooting, and double-click to open it.
3. In the Action Pane of the Service Item Card window, click Related Information > Serv. Item > Troubleshooting. The Troubleshooting Setup window opens.
4. In the Troubleshooting No. field, click the AssistButton to select the relevant troubleshooting number.
Repeat steps 2 and 4 for each set of troubleshooting guidelines you want to assign.
Lab 3.3 – Creating and Assigning Troubleshooting Guidelines

In this lab, you will practice creating and assigning troubleshooting guidelines.

Scenario

As a technician working at CRONUS International Ltd, create and assign troubleshooting guidelines for service items.

Challenge Yourself

Create and assign troubleshooting guidelines for a service item group, an item, and a service item.

Need a Little Help?

1. Create a new set of troubleshooting guidelines for the Monitor service item group. The details are:
   Description: Basic Monitor Questions
   The troubleshooting steps are:
   o Is the monitor plugged in?
   o Is the monitor connected to the computer?
2. Assign the troubleshooting guidelines to the service item group Monitor.
3. Create new troubleshooting guidelines to apply exclusively to a monitor, item 80102. The details are:
   Description: Reminder for 17" M780 Monitor
   The troubleshooting information is: Remind the customer to plug in cables and power supply.
4. Assign the troubleshooting to item 80102.
   Show the basic monitor questions created in step 1 for item 80102.
5. Assign the Basic Monitor Questions guidelines to item 80102.
6. Create new troubleshooting guidelines to use for service item number 9, owned by John Haddock. The details are:
   Description: John Haddock – Computer Questions
   The troubleshooting steps are:
   o Is the socket the computer uses switched on?
   o Is the socket marked CM?
7. Assign the troubleshooting guidelines to service item 9.

Step by Step

Create and assign troubleshooting guidelines for the Monitor service item group.

1. Go to Departments > Service > Administration.
3. In the Action Pane, click **New** to enter new troubleshooting guidelines.
4. On the **General** FastTab, type “Basic Monitor Questions” in the **Description** field.
5. On the **Lines** FastTab, enter the following two comments:
   “Is the monitor plugged in?”
   “Is the monitor connected to the computer?”

![Image](image_url)

**FIGURE 3.24 BASIC MONITOR QUESTIONS TROUBLESHOOTING**

6. In the Action Pane, click **Related Information** > **Troublesh.** > **Setup**. The **Troubleshooting Setup** window opens.
7. Fill in the fields as follows:
   **Type**: Service Item Group
   **No.**: MONITOR
Create and assign troubleshooting guidelines for item number 80102.

1. Go to Departments > Service > Administration.
2. Under Order Processing, Setup, click Troubleshooting.
3. In the Action Pane of the Troubleshooting List window, click New to enter new troubleshooting guidelines.
4. On the General FastTab, type “Reminder for 17” M780 Monitor” in the Description field.
5. On the Lines FastTab, enter the following comment:
   “Remind the customer to plug in cables and power supply”
7. Go to Home > Items.
8. Open the Item Card window for item number 80102.
9. In the Action Pane, click Related Information > Item > Troubleshooting.
10. In the Troubleshooting Setup window that opens:
    For the first line, click the AssistButton in the Troubleshooting No. field and select TR00006.
    For the second line, select TR00007.
Create and assign troubleshooting guidelines for service item number 9.

12. Open the Service Item Card window for service item number 9.
13. In the Action Pane, click Related Information > Serv. Item > Troubleshooting.
14. In the Troubleshooting Setup window, click the AssistButton in the Troubleshooting No. field, and then click Advanced at the bottom of the drop-down list.
15. In the Action Pane of the Troubleshooting List window that opens, click New.
16. In the Troubleshooting window, fill in the fields as follows:
   On the General FastTab:
   Description: “John Haddock – Computer Questions”
   On the Lines FastTab:
   “Is the socket the computer uses switched on?”
   “Is the socket marked CM?”
17. Click OK twice.
FIGURE 3.27 ASSIGNING TROUBLESHOOTING TO THE SERVICE ITEM
Service Item History

Service Item Statistics

In the Service Management application area:

- You have access to the history of a service item from the day it is created.
- You can view the service item lines and service lines that contain the service item before and after posting service orders.
- You can view information in the Service Item Statistics window, which contains the status of the service item on the current date based on the posted service invoice lines.

1. Click **Home > Service Items**.
2. In the **Service Items** list place, select the service item to view statistics for.
3. In the Action Pane, click **Statistics**. The **Service Item Statistics** window appears.

![Service Item Statistics Window](image)

**FIGURE 3.28 THE SERVICE ITEM STATISTICS WINDOW**

Service Item Trendscape

Use the **Service Item Trendscape** window to view a detailed account of service item transactions by time intervals.
To open the Service Item Trendscape window from the service item card:

1. In the Action Pane of the Service Item Card window, click Related Information > Serv. Item > Statistics > Trendscape. The Service Item Trendscape window opens.

![Service Item Trendscape Window](image)

**FIGURE 3.29 THE SERVICE ITEM TRENDSCAPE WINDOW**

The Service Item Trendscape window gives you a financial overview of the service item using the data from its service ledger entries. This overview is generated for a specific time period that you set in the Period field.

The Period Start and Period Name columns contain a series of dates that are determined by the time interval you have selected.

You can change the time interval by clicking the AssistButton in the View by field:

- Day
- Week
- Month
- Quarter
- Year
- Period
When you scroll up and down, the program calculates the amounts (in LCY) according to the time interval you have set in the **Service Item Trendscape** window.

You can specify which service item is included in the trendscape by setting a filter in the **Service Item No.** field at the top of the window.

The columns in the window display the following:

- **Prepaid Income** – The total income (in LCY) that has been posted to the prepaid account for the service item in the periods specified in the **Period Start** column.
- **Posted Income** – The total income (in LCY) that has been posted to the G/L for the service item in the periods specified in the **Period Start** column.
- **Parts Used** – The cost of spare parts used for the service item in the periods specified in the **Period Start** column.
- **Resources Used** – The cost of resources used for the service item in the periods specified in the **Period Start** column.
- **Cost Used** – The service cost used for the service item in the periods specified in the **Period Start** column.
- **Profit** – The profit (posted income minus posted cost in LCY) for the service item in the periods specified in the **Period Start** column.
- **Profit %** – The profit percentage for the service item in the periods specified in the **Period Start** column.

**Service Item Log**

In addition, the **Service Item Log** window contains information about:

- The creation of service items.
- The events concerning the service items.
- The values before and after these events, and the time when they occurred.

To view the service item log:

1. In the Action Pane of the **Service Item Card** window, click **Related Information > Serv. Item > Service Item Log**. The **Service Item Log** window appears.
FIGURE 3.30 THE SERVICE ITEM LOG WINDOW

The program creates entries when the following events occur:

- The service item is created.
- The service item is added to or removed from a contract.
- The service item is added to a service order/quote or removed from a service order/quote.
- A service item component is removed from this service item.
- The service item is replaced.
- The customer or ship-to address is changed.
- The item number or serial number is changed.

The **Replaced Component List** window contains a list of the components of the service items that are defective and are replaced.

1. In the Action Pane of the **Service Item Card** window, click **Components**. The **Service Item Component List** window appears.
2. In the Action Pane of the **Service Item Component List** window, click **Related Information > Component > Replaced List > All Lines**. The **Replaced Component List** window appears.

FIGURE 3.31 THE REPLACED COMPONENT LIST WINDOW
Service Item Reports

You can use the reports in the Service Management application area to view and print information covering service items.

There are five service item-specific reports:

- Service Items
- Service Item Line Labels
- Service Item – Resource Usage
- Service Items Out of Warranty
- Service Profit (Service Items)

The Service Items Report

This report prints a list of registered service items, grouped by customers.

The report contains:

- Item descriptions
- Customer numbers
- Serial numbers
- Service item group codes
- Variant codes
- Contract numbers
- Contract amounts

The Service Item Line Labels Report

This report prints a list of the service items in the service orders.

The report shows the following:

- Order number
- Service item number
- Serial number
- Name of the item

The Service Item – Resource Usage Report

This report prints information about resource usage of service items.

The report shows the details on:

- Total quantity
On the Options FastTab, select whether you want the report to show details for resource usage.

**The Service Items Out of Warranty Report**

This report prints a list of service items that are out of warranty.

The report contains information on:

- Warranty end dates
- Serial numbers
- Active contract numbers
- Item descriptions
- Customer names

**The Service Profit (Service Items) Report**

This report prints information about service profit for service items.

The report shows details on:

- Service amount
- Contract discount amount
- Service discount amount
- Service cost amount
- Profit amount
- Profit

On the Options FastTab, select the check box if you want the report to show the details for the posted service headers.
Lab 3.4 – Registering a Service Item

In this lab, you will practice registering a service item.

Scenario

A customer has brought in a computer for servicing. Your task is to create a service item to reflect this in the program.

Challenge Yourself

- Create a service item with a BOM structure and assign the relevant resource to the item.
- Register all the changes related to the service item and view the results in the Service Item Log window.

Need a Little Help?

1. Create a service item with the following item details:
   - Computer – TURBO Package
   - Item number: 8916-W
   - Serial number: 5485216455
   - Customer information: Selangorian Ltd.
   - Response time: default
2. The item has a BOM structure. Copy the components from the BOM list.
3. The customer wants to have the same resource carry out the service each time. Find a technician with the relevant skills and assign this person as a preferred resource.
4. The customer bought the computer a month ago (today is the system work date). Provide a full warranty on parts starting from the day of sale for ten months but with no warranty on labor.
5. Unfortunately, the serial number recorded is not correct. Change the serial number to: 54852165.
6. A month later another customer calls and states he has bought the item from Selangorian Ltd. Change the work date accordingly and change the customer information to: Customer No. 49858585.
7. Check the service item log to view the effects of these changes.

Step by Step

Create a service item.

1. Click Home > Service Items.
2. In the Action Pane of the Service Items list place, click New.
3. On the General FastTab, fill in the following fields:
   - Description: “Computer – TURBO Package”
   - Item No.: “8916-W”
   - Click Yes to the message that follows.
Serial No.: “5485216455”
Warranty Starting Date (Parts): “12/29/2009”

4. On the Customer FastTab, select 20000 in the Customer No. field.

**Copy the components from the BOM list.**

1. In the Action Pane of the **Service Item Card** window, click **Components**. The **Service Item Component List** window opens.
2. In the Action Pane, click **Related Information > Component > Copy from BOM.**
The lines are populated with the service item components.

![Figure 3.32 Copying Service Item Components from BOM](image)

**FIGURE 3.32 COPYING SERVICE ITEM COMPONENTS FROM BOM**

*Change the information on the resource, warranty, serial number and customer.*

1. On the **General** FastTab of the **Service Item Card** window, fill in the fields with the following information:
   - Serial No.: “54852165”
   - Warranty Starting Date (Parts): “1/29/2010”
   - Warranty Ending Date (Parts): “11/29/2011”
   - Preferred Resource: LINDA
   - Delete the values in the Warranty Starting Date (Labor), Warranty Ending Date (Labor) and Warranty % (Labor) fields.
2. On the **Customer** FastTab, select 49858585 in the Customer No. field.
Your service item card should now look like this.
3. To view the results of the performed changes, go to Related Information > Serv. Item > Service Item Log.
Lab 3.5 - Recording a Service Item and Creating a Component List Automatically

In this lab, you will practice registering a service item and creating a component list automatically.

**Scenario**

As a salesperson, sell an item to a customer, record this as a service item and create a component list automatically.

**Challenge Yourself**

- Set up the BOM list of the item with the main component to further create a sales order for this item.
- Explode the BOM and record a serial number for the main component.
- Post the sales order.
- Create and assign a new troubleshooting for the newly created service item.

**Need a Little Help?**

1. Set up the BOM list of item 8904-W with component no. 80001 as the main component where the other components are installed.
2. Create a sales order with the details:
   - Customer information: Guildford Water Department
   - Item number: 8904-W
3. Explode the BOM.
4. Record a serial number for the main component (80001).
5. Post the sales order.
6. The new service item created for item 80001 inherited troubleshooting from the service item group that it belongs to. In this case, the troubleshooting is not relevant to the service item. Create new troubleshooting with the following details:
   - Description: PC Basic Package Questions
   - The troubleshooting steps include:
     - Did you check the manual?
     - Did you look in the Online Help?
7. Assign the new troubleshooting to the service item.
8. Check the service item log to view the information that is automatically recorded for this service item.

**Step by Step**

*Set up the BOM list of the item number 8904-W.*

1. Go to **Home > Items**.
2. Open the **Item Card** window for item number 8904-W.

3. In the Action Pane, click **Related Information > Item > Assembly List > Bill of Materials.**

4. In the **Bill of Materials** window, fill in the **Installed in Item No.** field with “80001” (Do it for all the fields, except the field with No. 80001.)

5. Click **OK.**

*Create and post the sales order.*

1. Go to **Departments > Sales & Marketing > Order Processing.**

2. Under **Lists**, click **Sales Orders.**

3. In the Action Pane of the **Sales Order** list place, click **New.**

4. On the **General** FastTab, type “50000” in the **Sell-to Customer No.** field.  
   Click **Yes** to the check credit limit message that follows.

5. On the **Lines** FastTab, fill in the fields with the following information:  
   **Type:** Item  
   **No.:** 8904-W  
   **Quantity:** “1”  
   Click **Yes** to the check availability message that follows.

6. On the **Lines** FastTab, click **Actions > Functions > Explode BOM.**

7. In the dialogue box that appears, confirm that the dimensions need to be retrieved from the components.  
   Click **Yes** to the check availability messages that appear.

Your sales order will now look like this.
FIGURE 3.35 THE SALES ORDER FOR CUSTOMER 50000 WITH THE ITEM’S COMPONENTS

8. Click the line for item number 80001, and then click Actions > Line > Item Tracking Lines.

9. In the Item Tracking Lines window that opens, fill in the fields with the following information:
   Serial No.: “8000101”
   Quantity (Base): “1”

10. Click OK.
    Accept the message that follows.

11. In the Action Pane of the Sales Order window, click Post.

12. In the window that appears, select the Ship and Invoice option and click OK.

Create and assign new troubleshooting to the service item.

1. Go to Home > Service Items.

2. Open the Service Item Card window for service item with Serial No. 8000101.
3. In the Action Pane, click Related Information > Serv. Item > Troubleshooting.

4. In the Troubleshooting Setup window, click the AssistButton in the Troubleshooting No. field, and then click Advanced at the bottom of the drop-down list.

5. In the Action Pane of the Troubleshooting List window that opens, click New.

6. In the Troubleshooting window, fill in the following fields:
   On the General FastTab:
   Description: “PC Basic Package Questions”
   On the Lines FastTab:
   “Have you checked the manual?”
   “Have you looked in the Online Help?”

The Troubleshooting window for the newly created service item should now look like this.
7. To view the information that is automatically recorded for this service item, in the Action Pane of the Service Item Card window, click Related Information > Serv. Item > Service Item Log.
Summary

This chapter describes the main aspects of working on service items. It involves the following procedures:

- Creating service items and service item components manually and automatically.
- Assigning troubleshooting guidelines to items, service items and service item groups.
- Viewing the statistics on service items.
- Using the service item-specific reports.
Test Your Knowledge

1. What are the three possible ways of creating service items?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

2. What discounts do you assign to service items that cover a percentage of labor and spare part costs for a specified time?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

3. True or False:
   You can set up only one set of troubleshooting guidelines for each service item, item, or service item group.

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

4. Complete the following sentence:
   To view the information on service items creation, the events concerning the service items, the values before and after these events, and the time when they occurred use the ______________ ______________ __________ window.

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
5. Which of the five service item-specific reports prints a list of the service items in the service orders?
   
   ( ) Service Items
   ( ) Service Item Line Labels
   ( ) Service Item – Resource Usage
   ( ) Service Items Out of Warranty
   ( ) Service Profit (Service Items)
Quick Interaction: Lessons Learned

Take a moment to write down three Key Points you have learned from this chapter:

1. 

2. 

3. 

Chapter 3: Service Items

Solutions

Test Your Knowledge

1. What are the three possible ways of creating service items?

MODEL ANSWER:

- Manually
- Within a service order
- Automatically, when sold items are shipped

2. What discounts do you assign to service items that cover a percentage of labor and spare part costs for a specified time?

MODEL ANSWER:

You assign warranty discounts to service items that cover a percentage of labor and spare part costs for a specified time.

3. True or False: You can set up only one set of troubleshooting guidelines for each service item, item, or service item group.

MODEL ANSWER:

False. You can set up more than one set of troubleshooting guidelines for each service item, item, or service item group.

4. Complete the following sentence:
   To view the information on service items creation, the events concerning the service items, the values before and after these events, and the time when they occurred use the ___________ ___________ ___________ window.

MODEL ANSWER:

To view the information on service items creation, the events concerning the service items, the values before and after these events, and the time when they occurred use the Service Item Log window.

5. Which of the five service item-specific reports prints a list of the service items in the service orders?

   ( ) Service Items
   (✓) Service Item Line Labels
   ( ) Service Item – Resource Usage
   ( ) Service Items Out of Warranty
   ( ) Service Profit (Service Items)