Signature Service Manager Maintenance Contract Posting Flow Document

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Customer	103	COMPANY INC		8	Hold	
Location	MAIN OFFICE	COMPANY INC-5	535 S Moorland Rd	0		
Contract Number	4 1	• • • • •	Hold 🔲 (Cancel	E Leave Contract Open	E
Master Contract ID		,P				
Contract Type		P				
Currency ID		1. 1.				Contract
Contract Amount		Ren	ewal Value			
Start Date						
Expiration Date						
Anniversary Date		100				
Division		p				
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Bill To Location	MAIN OFFICE	COMPANY IN	C-5535 S Moorland P	łd		D
Service Call Day	1					Hevenue / Lo
Master Tax Schedule		p		19		Billing
P.O. Number		USE	R-DEFINED		60	Coverage
Salesperson ID	SANDRA M.	P USE	R-DEFINED	_	P 0	Sanica Histor
Primary Technician ID	DAVEG	P USE	RIDEFINED			Service Histor
Service Level ID		D USE	RIDEFINED			Invoice Histor

Section I Signature Maintenance Contract windows and Tables

The major tables used with the Maintenance Contract window in Signature Service Management are listed below.

Service Management	Table Name	Window or Button
Table Number		
SV00500	SV_Maint_MSTR	Maintenance Contract
		Window
SV00500 (Costs)	SV_Maint_MSTR	Revenue/Cost Window
SV00509 (Revenue)	SV_Contract_Revenue_Method2_	Revenue Entered Window
	MSTR	
SV00510 (Billing)	SV_Contract_Billing_MSTR	Billing Button
SV00564 (Billing)	SV_Maint_Invoice_MSTR	Invoice History Button
SV00564 (Billing)	SV_Maint_Invoice_MSTR	Invoice History Button
SV00564 (Billing) SV00400	SV_Maint_Invoice_MSTR SV_Equipment_Master	Invoice History Button Coverage Button
SV00564 (Billing) SV00400 SV00403	SV_Maint_Invoice_MSTR SV_Equipment_Master SV_Equipment_Contract_Coverage	Invoice History Button Coverage Button Coverage Button
SV00564 (Billing) SV00400 SV00403	SV_Maint_Invoice_MSTR SV_Equipment_Master SV_Equipment_Contract_Coverage _MSTR_	Invoice History Button Coverage Button Coverage Button
SV00564 (Billing) SV00400 SV00403 SV00300	SV_Maint_Invoice_MSTR SV_Equipment_Master SV_Equipment_Contract_Coverage _MSTR SV_Service_MSTR	Invoice History Button Coverage Button Coverage Button Service History
SV00564 (Billing) SV00400 SV00403 SV00300 SV00200	SV_Maint_Invoice_MSTR SV_Equipment_Master SV_Equipment_Contract_Coverage _MSTR SV_Service_MSTR SV_Location_MSTR	Invoice History Button Coverage Button Coverage Button Service History Location Window

The discussion begins with the maintenance contract window below and the information from the 5 buttons in the bottom right corner of the window, saving the Coverage button for last. (The visit Wizard and Labor Load buttons are not discussed in this document).

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Customer	103	COMPAN	Y INC			Hold	
Location	MAIN OFFICE	COMPAN	Y INC-5535 S Moor	land Rd			
Contract Number	4 000000017	EP	Hold	E C	ancel	Leave Contract Open	
Master Contract ID		2		\$	0.00		(P)
Contract Type	ULTIMATE	D L	JLTIMATE CONTRAC	T	and a decided		
Currency ID	Z-US\$						Contract
Contract Amount		\$650.00	Renewal Value		1	\$650.00	
Start Date	1/1/2017						
Expiration Date	12/31/2017 🔢						
Anniversary Date	12/31/2017 🔢						
Division	PM COM	Q					
Billing Frequency	QUARTERLY	•					
Automatically Bill						1	Visit Wigard
Invoice Billing Day	1 📰 8	il at end of month	(EOM)			[Labor Load
Bill To Customer	103	COMP/	ANY INC		- 2		
Bill To Location	MAIN OFFICE	COMP/	ANY INC-5535 S M	oorland R	d		
Service Call Day	1 First /	wait MCC Call: S	unday, 1/1/2017				Revenue / Cost
Master Tax Schedule		P					Billing
P.O. Number		100	USER-DEFINED			810	Coverage
Salesperson ID	SANDRA M.	P	USER-DEFINED			E	Contrologo
Primary Technician ID	ALICE	P	USER-DEFINED				Service History
Service Level ID	LU TIMATE	10	USER-DEFINED				Invoice History

Maintenance Contract Window:

<u>SV00500 SV_Maint_Master</u>: When a service maintenance contract is created a single record is created in the SV00500 table. The SV00500 holds the information seen on the Maintenance Contract Window above.

The primary key fields for the SV00500 table CUSTNMBR, ADRSCODE, Contract_Number, WSCONTSQ

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- Cur	atomor	LANGE		WARE									
	ntract	SPEND	PLAN	PREMIER CO	NTRACT								
				Contract		Contract Costs	Contract Costs						
				Revenue		Actual to Date	Current Year	Estimate		Hours	Forecast	Hours	
EQ	UIPMENT			\$0.00	0.00%	<u>\$103.00</u>	\$103.00	<u>\$100.00</u>	→		\$103.00		×
MA	TERIAL			\$0.00	0.00%	<u>\$150.00</u>	\$150.00	\$150.00	⇒		\$150.00		×
SU	BCONTRA	CTOR		\$0.00	0.00%	<u>\$0.00</u>	\$0.00	\$0.00	→		\$0.00		
OT	HER			\$180.00	5.00%	<u>\$0.00</u>	\$0.00	\$0.00	⇒		\$0.00		
Lat	bor Categor	y1				\$320.00	\$320.00	\$400.00	→	10.00	\$320.00	8.00	
Lat	bor Categor	y2				\$0.00	\$0.00	\$0.00	→	0.00	\$0.00	0.00	
Lat	bor Categor	у3				\$0.00	\$0.00	\$0.00	→	0.00	\$0.00	0.00	
Lat	bor Categor	y4				\$0.00	\$0.00	\$0.00	⇒	0.00	\$0.00	0.00	
Lat	bor Categor	у5				\$0.00	\$0.00	\$0.00	⇒	0.00	\$0.00	0.00	
LA	BOR			\$3,420.00	95.00%	<u>\$320.00</u>	\$320.00	\$400.00		10.00	\$320.00	8.00	
Tot	-		[\$3,600,00	_	\$573.00	\$573.00	\$650.00	1		\$573.00		
Ho	ai ure		l	\$3,000.00	~	\$373.00	\$373.00	\$050.00			\$373.00		
Cal	uis culated Cor	stract Farm	ьd			\$3,600,00	0.00						
Cal	culated Gro	iss Profit	cu			\$3,027,00	\$627.00				Costs Life	to Date	
Ber	venue Reci	panized				\$300.00	\$300.00				Revenue 8	Intered	
Bille	ed	- 3				\$1,200.00	\$1,200.00						
Gro	ss Profit					\$627.00	\$627.00						
	_				_								

Revenue/CostsWindow:

<u>SV00500 SV Maint Master</u>: The Revenue Costs window is displaying the financial information from the SV00500 table; information for the contract billed, the contract revenue, the contract gross profit the contract actual, estimated and forecasted costs at the summary level.

The primary key fields for the SV00500 table: CUSTNMBR, ADRSCODE, Contract_Number, WSCONTSQ

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🗸 ОК 🕇 А	.dd 🛛 🗙 🤅	<u>D</u> elete					
Customer ID	104			Address ID	MAI	N OFFICE	
Contract Number	SPENDPLA	٨N					
Contract Amount		\$3,600	0.00	Amount Bill	ed	\$1,200.	00
Total Revenue		\$3,600	0.00	Amount Re	cognized	\$300.	00
Difference		\$1	0.00	Difference		\$900.	00
							_
Date Docu	iment Type	Reve	nue Amount	Posted Date	Year	Period	
01012009 🎹 Sales	: / Invoice	-	\$300.00	1/31/2009	2009	1	A
2/1/2009 🏢 Sales	:/Invoice	-	\$300.00	0/0/0000	0	0	
3/1/2009 🏢 Sales	: / Invoice	•	\$300.00	0/0/0000	0	0	
4/1/2009 🎹 Sales	: / Invoice	•	\$300.00	0/0/0000	0	0	
5/1/2009 🏢 Sales	: / Invoice	•	\$300.00	0/0/0000	0	0	
6/1/2009 🏢 Sales	:/Invoice	-	\$300.00	0/0/0000	0	0	=
7/1/2009 🏢 Sales	:/Invoice	-	\$300.00	0/0/0000	0	0	_
8/1/2009 🏢 Sales	: / Invoice	-	\$300.00	0/0/0000	0	0	
9/1/2009 🧰 Sales	: / Invoice	•	\$300.00	0/0/0000	0	0	
10/1/2009 🎹 Sales	: / Invoice	-	\$300.00	0/0/0000	0	0	
11/1/2009 🏢 Sales	: / Invoice	-	\$300.00	0/0/0000	0	0	
12/1/2009 🏢 Sales	: / Invoice	-	\$300.00	0/0/0000	0	0	-
			_	_	-		

Revenue Schedule Window

The Revenue Entered Button on the Revenue/Costs window opens the Revenue Schedule Window

<u>SV00509: SV_Contract_Revenue_Method2_MSTR</u>: Holds a record for period for that contract and the amount of revenue recognized. If the Year and Period are 0 then, the revenue has not yet been recorded. In the screenshot above only period 1 of year 2009 has been posted to the GL.

The primary key fields for the SV00509 table: CUSTNMBR, ADRSCODE, Contract_Number, WSCONTSQ, DATE1, SEQNUMBR

Billing Schedule Window

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Customer ID	104		Contract	Amount		\$3,	500.00		
Address ID MAIN OFFICE Total Billing \$3,600.00									
Contract Number	SPENDPLAN		Differenc	e			\$0.00		
Date D	ocument Type	Billing Amou	nt	Posted	Year	Period	Bill To Customer	Bill To Location	
01012009 🏢 S	ales / Invoices	-	\$300.00	2/18/2009	2009	1	104	MAIN OFFICE	*
2/1/2009 🏢 S	ales / Invoices	-	\$300.00	2/18/2009	2009	2	104	MAIN OFFICE	
3/1/2009 🏢 S	ales / Invoices	-	\$300.00	2/18/2009	2009	3	104	MAIN OFFICE	
4/1/2009 🏢 S	ales / Invoices	-	\$300.00	2/18/2009	2009	4	104	MAIN OFFICE	
5/1/2009 🧱 S	ales / Invoices	•	\$300.00	0/0/0000	0	0			
6/1/2009 🔢 S	ales / Invoices	-	\$300.00	0/0/0000	0	0			
7/1/2009 🔢 S	ales / Invoices	•	\$300.00	0/0/0000	0	0			=
8/1/2009 🏢 S	ales / Invoices	-	\$300.00	0/0/0000	0	0			
9/1/2009 🏢 S	ales / Invoices	-	\$300.00	0/0/0000	0	0			
10/1/2009 🏢 S	ales / Invoices	-	\$300.00	0/0/0000	0	0			
11/1/2009 🏢 S	ales / Invoices	•	\$300.00	0/0/0000	0	0			
12/1/2009 🏢 S	ales / Invoices	•	\$300.00	0/0/0000	0	0			-
		_	_	_	_			_	

The Billing button on the Maintenance Contract Window opens the Billing Schedule Window.<u>SV00510 SV_Contract_Billing_MSTR</u>: The Billing Schedule window displays the information in the SV000510 table. The SV00510 table holds a record for each period and the dollar amount each period will be billed for the contract. The top portion of the window shows the contract amount and the total billing. In the data above, the customer will be billed every month beginning 1/1/2009. The date and period and the amount of the invoice posted are also shown.

The primary key fields for the SV00510 table: CUSTNMBR, ADRSCODE, Contract_Number, WSCONTSQ, SEQNUMBR

Billing Verses Revenue Recognition with Revenue Schedule Method:

Revenue is <u>not</u> recognized at the time of billing when the Revenue Schedule method is chosen. See Section II for the accounting and posting flow discussion.

<u>Billing</u>: When a maintenance contract is billed, a Dynamics GP Receivable Transaction entry is created in the RM10301. The SV00510 table is read at the time that the Create Invoice routine is run and it creates the RM10301 record. The billing schedule window is viewed from Cards>Service Management>Service Manager>Choose Customer and Location>Contract> Billing Button. Section II of this document details the invoice creation routine.

<u>Revenue Recognition</u>: The Revenue Schedule method records revenue evenly over the life of the contract by dividing the contract amount by the number of months in the contract. SM creates this revenue schedule for each contract for each period. The revenue schedule can be viewed in the Revenue Schedule window by contract. Cards>Service Management>Service Manager>Choose Customer and Location>Contract> Revenue/Cost Button>Revenue Earned button. When the Recognize Revenue routine is run, the SV00509 table is read and a general ledger transaction is created for posting to the GL.

Maintenance Ir	nvoices		and the second second	100	10000		X
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Customer ID	104	Contract Number	SPENDPLAN		1		
Address ID	MAIN OFFICE	Contract Amount		\$3,600.00	-		
Master Contract ID							l
Posted Date	Document Type	Document Number	Invoice Amount	Note	Bill To Customer	Bill To Location	
4/1/2009	Sales / Invoices	SRVCE00000000148	\$300.00		104	MAIN OFFICE	*
3/1/2009	Sales / Invoices	SRVCE00000000147	\$300.00		104	MAIN OFFICE	
2/1/2009	Sales / Invoices	SRVCE00000000146	\$300.00		104	MAIN OFFICE	
1/1/2009	Sales / Invoices	SRVCE00000000145	\$300.00		104	MAIN OFFICE	
							_
							=
							_
							_
							_
							-
						-	-

Maintenance Invoice Window:

The maintenance invoice window is opened from the Invoice History button.

<u>SV00564 SV_Maint_Invoice_MSTR</u>: holds information for each invoice posted for the Maintenance Contract both current and historical. This table holds only the invoice information and no Service Call information for this billing. The invoice number Source Document (SRVCE000000000147) can be drilled into from this window by drilling down on the Document Number for each invoice. This will drill into the Dynamics GP RM table Open or History depending on the status of the invoice in GP. We also display the bill to customer and bill to location for third party billing of contracts.

The primary key fields for the SV00564 table: CUSTNMBR, ADRSCODE, Contract_Number, WSCONTSQ, DATE1, RMDNUMWK

Maintenance Serv	rice History		
Contract	000000045 ULTIMATE CONTRACT		
nclude: 🛛 🔽	Completed 🔽 Closed]	
Service Call ID	Problem Type	Call Status	Completed
)41113-0028	MAINTENANCE	CLOSED	3/5/2007
70904-0001	ELEVATOR NOT WORKING	OPEN	0/0/0000

Maintenance Service History Window

Maintenance Service History window holds the Service Call information and is opened from the Service History Button on the Maintenance Contract window or from the Equipment Master window. It is information from the SV00300 SV_Service_MSTR table.

<u>SV00300: SV_Service_MSTR</u>. The SV00300 contains a record for every service call generated for the customer and location. The service call can be drilled into from this window to open the service call window holding more detailed information about that call. (The service call window is not shown in this document).

The primary key field for the SV00300 table: Service_Call_ID



Contract Coverage Window:

The Contract Coverage window is opened from the Coverage Button and is generated from the <u>SV00401_SV_Equipment_MSTR_TEMP</u> table. The top section holding the customer information is from the SV00500 table and the Equipment number 0000000105 is pulled from the SV00400 SV_Equipment_MSTR. The tree view section of the Contract Coverage window can be expanded using the + and- buttons. This portion of the window uses the tasking tables SV00581, SV00582 explained in more detail in Section III. The contract coverage window will only contain data if an equipment record with tasks assigned to it as part of the contract. If the contract has no equipment assigned to it, then this window will be empty.

The primary key fields for the SV00401 table: ADRSCODE, CUSTNMBR, Equipment_ID, USERID

e Eait Loois	Help Debug							sa Fabrikam, Ind	:. 4/12
Equipment									
Customer	104	LANGE HARDWARE							
.ocation	MAIN OFFICE	LANGE-3512 E HOWARD A	AVE						
Contract	SPENDPLAN	PREMIER							
tart Month:	(Default)	1/1/2009 - 12/31/2009							
quipment ID	Equip	ment Type			Eq	uipment Attached to this Contr uipment ID	Equipm	ient Type	
					-				
	- ·								
	EUBN	IACE			-	Equipment for Demo	100 AM	IP SERVICE	
000000022	AIB C						10014	il oennoe	
0000000138	200 A	MP SERVICE		Insert ->					
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0000000138 0000000141 0000000143	200 A 200 A	MP SERVICE MP SERVICE		Insert ->					
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0000000138 0000000141 0000000143 104-1 EQ DEMO	200 A 200 A FIRE	MP SERVICE MP SERVICE PANEL	=	Insert -> Insert All ->> <- Remove <<- Remove All					
0000000138 0000000141 0000000143 104-1 EQ DEMO EQUIPONMULTCOM	200 A 200 A FIRE ITRACTS CHILI		=	Insert All ->> (- Remove (- Remove All					
0000000138 0000000141 0000000143 104-1 EQ DEMO EQUIPONMULTCOM Equipment for Demo	200 A 200 A FIRE VTRACTS CHILL 100 A	MP SERVICE MP SERVICE PANEL ER MP SERVICE		Insert All ->> (- Remove (- Remove All					
000000138 000000141 000000143 104-1 EQ DEMO EQUIPONMULTCON Equipment for Demo notecustom	200 A 200 A FIRE ITRACTS CHILI 100 A AIR C	MP SERVICE MP SERVICE PANEL ER MP SERVICE ONDITIONING UNIT		Insert -> Insert All ->> <- Remove					
0000000138 0000000141 0000000143 1041 EQ DEMO EQUIPONMULTCON Equipment for Demo notecustom	200 A 200 A FIRE ITRACTS CHILI 100 A AIR C		11	Insert -> Insert All ->> <- Remove					

Contract Coverage Maintenance Window

The Equipment Button from the contract coverage window opens the Contract Coverage Maintenance window which is also the SV00401 SV_Equipment_MSTR_Temp table. Notice that the column on the left holds all equipment records attached to the location and the column on the right contains all equipment that is part of the contract 0000000045.

The primary key fields for the SV00403 table: CUSTNMBR,ADRSCODE, Contract_Number, WSCONTSQ,Equipment_ID

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Customer Location Equipment ID	104 LANGE HARDWARE ∅ MAIN OFFICE LANGE-3512 E HOWARD AVE ∅ ◀ 104-1 ▶ Q, □ ∅	Contract Item
Suspend MCC Calls Main Fields Addit	Retire/Inactive ional Fields	
Equipment Type	FIRE PANEL	
Manufacturer ID		
Model Number		
Serial Number		
Sublocation ID	NEW SUBLOCATION	
Installation Date	0/0/0000	
Installation By	Q	
Warranty Expires	0/0/0000 III	
Extended Warranty		Meter Readings / Hours
Extended Warranty Expires	0/0/0000 III	Service History
Service Level ID	PREMIER	Cornee moory
Contract Number	*Multiple	Replacement Parts
Bar Code ID	114556nml-9877sdfsnmpo-90sdf - AAA	Maintenance Tasks
		D

Equipment Master window is opened from the Equipment ID drill down in the Contract Coverage Maintenance window or from the Equipment button off the Service Manager window: <u>SV00400: SV Equipment MSTR</u>: holds a record for every piece of equipment created for this customer and location. If the equipment is on multiple contracts, we will display *multiple in the contract number field. The zoom on contract number in this case will open a new lookup window to select which contract you wish to zoom to.

The primary key fields for the SV00400 table: ADRSCODE, CUSTNMBR, Equipment_ID, USERID

End Section I

Equipment Master Window

Section II: Creating Invoices and Recognizing Revenue for Maintenance Contracts

<u>Create Invoices</u>: With the Revenue Schedule method, a routine must be run to create Maintenance Contract invoices. Routines>Service Management>Maintenance Contract>Create Invoices. When this routine is run, the SV00510 table is read for the date range and Customer (Contract Owner or Bill To Customer) or Branch Range selected.

Maintenance Invoicing	2 L L L 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	
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💋 Clear Preview 🎒	Pri <u>n</u> t 🦓 Create	User Profile 🗸
Date:		
From	Beginning of Month = 2017 4/1/2017	Branch
То	End of Month - 2017 4/30/2017	
- Invoice:		
All	Individual Customer	
Branch Hange:	V	
From		
10		
Individual Customer:	Contract Owner Bill To Customer	
Customer Name	LANGE HARDWARE	
Location Name	LANGE-3512 E HOWARD AVE	
Bill To Customer	LANGE HARDWARE	
Bill To Location	LANGE-3512 E HOWARD AVE	
Contract Number	SPENDPLAN	
Options:	Calculate Taxes 🛛 Calculate Commissions	
		\Box

For every record in the SV00510 SV_Contract_Billing_MSTR that falls within the date range, selected, an invoice is generated in the Dynamics GP Receivables Module (RM series). The invoice record can be viewed by going to the Transactions>Sales>Transaction Entry and finding the Sales/Invoice document number. The Dynamics GP work table is the RM10301. During the Create Invoice routine a receivables batch is created and saved. The Batch created is hard coded with the name MAINTENANCE ### with the ### field coming from the Period2 field in the SV00510 table. The invoices created are saved in a batch to be posted from Receivables Batches, or Sales Series Post or from Master Posting.

The primary key fields for the SV00510 table: CUSTNMBR, ADRSCODE, Contract_Number,WSCONTSQ,SEQNUMBR

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Progress Billings	000 - 1280 - 04	Rogress Billings Service-RE	SIDENTIAL
WIP Labor			
WIP Material			
WIP Equipment			
WIP Subcontractors			
WIP ODJC (Other)			
Billings in Excess of Cost			
Unbilled Receivables		(***	
Prior Year Retained Earnings Offset		<u></u>	
Contract Farned CY	000 -4100 -04	C Sales-Service-BESIDENTIA	I
Labor CY			
Material CY			
Equipment CY	· ·		
Subcontractors CY	· ·		
ODJC (Other) CY	· ·	(
	Divisions		Cost Dynamics GP Costing (Manual) Other Costs

Maintenance Accounts Window

Billing Routine where do the accounts come from?:

SV00511: *Field:* WennSoft_Account_Index_1=the Progress Billings field in the screenshot above.

All accounts but the Sales account are pulled from the Customer Account Maintenance window under Cards>Sales>Customer>Accounts in Dynamics GP. The Sales account for the invoice is taken from the Progress Billings field from the division the Maintenance Contract is attached too. This can be seen in the Maintenance Accounts window for each division from Setup>Service Management>Maintenance Setup>Accounts.

The Primary Key field for the SV00511 table: Divisions

<u>Recognizing Revenue</u>: With the Revenue Schedule option, a routine is run to recognize revenue for each contract separate from the billing of each contract.

Routines>Service Management>Maintenance Contract>Recognize Revenue.

For each record in the SV00509 SV_Contract_Revenue_Method2_MSTR table, a journal entry is created to record the sale for the period selected. A Financial batch called RECOGNITION is created and a record is inserted in the GL10000 GL_Transaction_Work. These transactions can be viewed in the Dynamics GP general journal entry window under Finance Transactions and entering the journal entry. They will have a posting date as of the last day of the month. The reference field will contain the contract number.

<u>Revenue Recogniton routine, where do the accounts come from?</u>: Only 2 accounts per division are used for the recognition account entry. The accounts for the RECOGNITION batch come from the same Service Management table that the billing routine looks to for the sale account.(SV00511 SV_Maintenance_Setup_MSTR) At recognition, the Progress Billings or deferred revenue account is reduced (debited) and the account in the Contract Earned CY field is increased (credited). Typical setup is to make the Progress Billings account a balance sheet current liability account and the Contract Earned CY account an income statement sales account. The accounts can be seen in the Maintenance Accounts window for each division from Setup>Service Management>Maintenance Setup>Accounts. (*Table:* SV00511 *Field:* WennSoft_Account_Index_10=Contract Earned CY in the Maintenance Accounts window).

End Section II

Section III: Creating MCC Calls for Maintenance Contracts

<u>MCC Call Definition</u>: In WennSoft Service Management, an MCC call is a special call type that is defined as a Maintenance Contract Computer-generated call. The call type MCC is hardcoded into the software and represents the service calls created for work to be performed for the Maintenance Contract.

<u>Maintenance Contract needs Equipment and Equipment needs Tasking for MCC</u>: A maintenance contract cannot be created without a customer and a location. Similarly, an equipment record cannot be created without a customer and a location. To use MCC functionality a piece of equipment must be linked to a maintenance contract. Further, a task schedule must be attached to the piece of equipment. MCC calls can be generated if, a maintenance contract is created, and a piece of equipment with task codes is linked to the contract. Keep in mind, a customer/location record can have a maintenance contract and the same record can have a piece of equipment, however if the equipment and the contract are not linked together, then no MCC calls will be generated for that contract.

<u>Tasking</u>: Task codes are created and saved as stand- alone records. They can be viewed in the Task Code Setup window -not shown:

Tools>Setup>Service Management>Lookup Setup>>Tasks>Task Codes. Tasks can also be attached to a Task_List to attach a list of tasks to a piece of equipment. Task lists can be viewed in the Task List Maintenance window –not shown- by going to: Tools>Setup>Service Management>Lookup Setup>>Tasks>Task Lists

Task codes are stored in the SV00560 SV_Task_Code_MSTR table. Primary Key: Task_Code, SV_Lanquage_ID

Task_Lists are stored in the SV00584 SV_Task_List_Type_MSTR. Primary Key: Task_List_Type

Tasks do not have to be assigned to a piece of equipment, but without a task code an MCC call will not be generated.

<u>Create MCC Calls:</u> Routines>Service Management>Maintenance Contract>Create MCC calls.

The main table read during the creation of the MCC call is the SV00585 the SV_Contract_Task_Schedule explained further in the pages that follow.

Maintenance Tasks												
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Maintenance Tasks Window

The Maintenance Tasks window displays information contained in the table: <u>SV00585 SV_Contract_Task_Schedule.</u>

The SV00585 is the main table read during the creation of the MCC call. This table is the complete list of the equipment, required visits, scheduled visit periods and tasks required per that equipment. As the MCC call is generated the Service Call is inserted into the SV00585 to create the relationship of the service call to and task.

The primary key fields for the SV00585 table:

CUSTNMBR, ADRSCODE, Contract_Number, WSCONTSQ, Equipment_ID, Task_Code, Contract_Task_List_ID, Schedule_Date

Navigation to the Maintenance Task Window is shown on the next page.

📕 Contract Task Maintenance						
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Sub 3 🔍	Description ELEVATOR TASK LIST					
Sub 4 🔍	Task List Type					
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Task Code	Description					
400	Check & Test Controllers					
A	Check controllers					
В	Test Controllers					
С	Record all readings					
401 Check & Test Selectors						
Customer: 303; Address: MAIN OFFICE; Location: DATA-2511 W COLLEGE AVENUE						

Contract Task Maintenance window

Users get to the Maintenance Tasks Window from the Contract Coverage window, then highlight a Task then hit the Tasks button, it opens the Contract Task Maintenance window above, then select the Task code(401 above) and drill into the Task Code.

Note: what table is shown here?

The Contract Task Maintenance window is the combination of 3 tables:

The SV00581:SV_Contract_Task_List_MSTR

The SV00582: SV_Contract_Task_MSTR

The SV00583: SV_Contract_Task_Sub_Task_MSTR

<u>SV00581</u> table holds a record for every piece of <u>equipment</u> assigned to the contract, and the Task List ID assigned to that piece of equipment. The SV00581 is one record per equipment per contract. The Primary Key=CUSTNMBR, ADRSCODE,Contract_Number, WSCONTSQ, Equipment_ID, Contract_Task_List_ID.

<u>SV00582</u> table holds a record for every <u>task code</u> assigned to the piece of equipment for that contract. The SV00582 holds the detail of the task hours, the frequency, the scheduled visit months and the technician the skill level. The Primary Key =CUSTNMBR, ADRSCODE,Contract_Number, WSCONTSQ, Equipment_ID, Contract_Task_List_ID plus the Task_Code

<u>SV00583</u> table holds a record for the <u>sub task code</u> assigned to the piece of equipment for that contract. The Primary Key=CUSTNMBR, ADRSCODE, Contract_Number, WSCONTSQ, Equipment_ID, Contract_Task_List_ID, Task_Code, Sub_Task_Line_Number, Sub_Task_Code

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Technicians Window:

The Technician window above shows is the last piece of information needed to create the MCC call. The Technician table is needed to determine how many service calls or appointments are created during the MCC process. The important determining factor is the skill level of the technician. This information is in the <u>SV00115 SV Lookup Tech MSTR</u>. This table can be seen from the Technicians window.

The Primary Key for the SV00115 table: Technician

To navigate to the technician window the user will start from the location window, then hit the blue expansion arrow, then select a skill level and hit the lookup off the Technician ID column to view the Technician table that the MCC process will use.

Briefly stated, the MCC process uses stored procedures to match the tasks with the technician who is skilled to perform the task. If the task requires a skill level that the technician is not associated with, then 2 MCC calls may be created, one for the skills of the main technician and one for a different technician with the required skill level. If the technician's skill level is adequate for all tasks, then one Service Call is created. See the section in the user's manual called Using the Contract Coverage window for more information.

Summary of the MCC process:

As mentioned in the beginning of section III, the SV00585 must exist before an MCC call can be generated. The SV00585 is built from the following series of relationships:

Related Tables	Table Name
Master Tables	
SV00403 (Equipment Record)	SV_Equipment_Contract_Coverage_MSTR
SV00500 (Contract Record)	SV_Maint_MSTR
SV00560 (Task Code)	SV_Task_Codes_MSTR
SV00584(Task List=many Task Codes)	SV_Task_List_Type_MSTR
SV00572(Skill)	SV_Skill_Level_MSTR
SV00115(Technician)	SV_Lookup_TECH_MSTR
Contract Tasks Linking Tables	
SV00581 (Header like table linking the	SV_Contract_Task_List_MSTR
equipment to the contract to the task list	
)	
SV00582 (Line Item type table linking	SV_Contract_Task_MSTR
the task codes from the task list to the	
equipment record and then to the	
contract)	
Stored Procs for MCC Creation	
SMS_Create_PM_Temps	
SMS_PM_Assign_Service_Call_ID	
SMS_PM_Create_Calls	

Master Tables:

1)SV00403 table holds a record for every piece of equipment assigned to a customer, location and contract number. Primary Key= ADRSCODE,CUSTNMBR, Contract_Number, WSCONTSQ, Equipment_ID

2)SV00500 holds a record for every Maintenance Contract, by customer by location. One record per customer, per location per piece of equipment. Primary Key=ADRSCODE, CUSTNMBR, Contract_Number, WSCONTSQ

3)SV00560 holds a record for every task code. Primary Key=Task_Code, SV_Lanquage_ID 4)SV00584 holds a record for every task list type. Primary Key=Task_List_Type 5)SV00572 holds a record for each skill level. Primary Key=Skill_level, SV_Language_ID 6)The SV00115 associates a skill level to a technician. Primary Key=Technician

Contract Task Linking Tables

1)SV00581 table holds a record for every piece of equipment assigned to the contract, and the Task List ID assigned to that piece of equipment. The SV00581 is one record per equipment per contract. The Primary Key=CUSTNMBR, ADRSCODE,Contract_Number, WSCONTSQ, Equipment_ID, Contract_Task_List_ID.

2)SV00582 table holds a record for every task code assigned to the piece of equipment for that contract. The SV00582 holds the detail of the task hours, the frequency, the scheduled visit months and the technician the skill level. The Primary Key =CUSTNMBR, ADRSCODE, Contract_Number, WSCONTSQ, Equipment_ID, Contract_Task_List_ID plus the Task_Code

End Section III End Document