

Microsoft®
Business
Solutions

Microsoft® Business Solutions–Solomon
Field Service Sample Reports
Release 6.0

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| Publication date | March, 2005 |

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Service Dispatch Sample Reports

This section includes information about the most common Service Dispatch reports. Samples of each report are also included.

- [Service Call History](#)
- [Service Call Audit](#)
- [Service Call Invoice](#)

Service Call History (SD.622.00)

Crystal Report name

SD622.rpt

The Service Call History (SD.622.00) report provides a listing of closed service calls sorted by customer. It includes site ID, customer ID, call ID, promise, start, and end dates, the call type, primary technician, invoice number, and invoice amount.

Possible Sort/Select Options

Customer
Service Call Number
Start Date

Report Formats

- n/a

Data Entry Screen

Service Call Entry (SD.200.00)
Invoice Entry (SD.202.00)

Service Call History (SD.622.00)

Date 2/10/2005 10:21am

Contoso, Ltd
Service Call History

Page 1
Report SD622

| Site ID | Name | Call ID | Promise Date | Start Date | End Date | Call Type | Primary Tech | Invoice # | Invoice Amount |
|-------------------------------------|----------------|------------|--------------|------------|----------|-----------|--------------|-----------|----------------|
| Customer: C300 - School of Fine Art | | | | | | | | | |
| DEFAULT | Randy Reeves | LAC0000004 | 01/15/00 | 01/01/00 | 01/01/00 | AC | ARNOLDM | 000087 | 226.13 |
| DEFAULT | Randy Reeves | LAC0000005 | 01/20/00 | 01/01/00 | 01/01/00 | AC | ARNOLDM | 000085 | 1,608.01 |
| Customer: C315 - The Phone Company | | | | | | | | | |
| DEFAULT | Kevin Verboort | LAC0000006 | 01/15/00 | 01/01/00 | 01/01/00 | AC | | 000086 | 763.80 |

Records Printed: 3

Service Call Audit (SD.627.00)

Crystal Report name

SD627.rpt

The Service Call Audit (SD.627.00) report provides information about invoice details, whether billable or not billable, that have been entered on service calls.

Possible Sort/Select Options

Call Status
Branch ID
Starting/Ending Dates
Service Call ID

The following call selection options are available: all calls, open calls, completed calls. It is possible to choose to report on all branches, or a single branch specified. It is also possible to specify the date range for the report and the range of contract IDs to include.

Data Entry Screen

Service Call Entry (SD.200.00)
Invoice Entry (SD.202.00)

Report Formats

- n/a

Service Call Audit (SD.627.00)

Date 2/10/2005 10:35am
--D14

Contoso, Ltd
Service Call Audit
Period: - As of: 1/31/2000

Page 1
Report SD627

Call ID Range: 01/01/2000 Through 01/31/2000

| | | | | | | | |
|-----------------------|------------|----------------------|----------|------------------|--------------------|--------------|--------------------|
| Call #: | LAC0000007 | Primary Tech: | ARNOLDM | Customer: | C315 | Site: | DEFAULT |
| Call Type: | HEATING | Fault Code: | MAINT | | The Phone Company | | Kevin Verboort |
| Call Status: | ASSIGNED | Price Level: | 01 | | P.O. Box 17866 | | P.O. Box 17866 |
| Start Date: | 01/01/1900 | Invoice Type: | Invoice | | | | |
| End Date: | 01/01/1900 | Invoice #: | 000088 | | WHEELING, WV 00011 | | WHEELING, WV 00011 |
| Complete Date: | 01/21/2000 | Invoice Amt: | \$231.15 | Class: | COMM | | |

| Work Hours | Bill Hours | Non-Bill Matl Qty | Bill Matl Qty | Extended Price | Tax Amt | Invoice Amount | Total Cost | Non-Bill Lbr Cost | Non-Bill Matl Cost | AR Batch | IN Batch | PR Batch |
|---------------------------|-------------|-------------------|---------------|-------------------------|-------------|----------------|--------------|-------------------|--------------------|----------|----------|----------|
| 0.00 | 0.00 | 0.00 | 3.00 | 30.00 | 0.15 | 30.15 | 10.50 | 0.00 | 0.00 | 000128 | 000029 | |
| FILTERS Filters | | | | Line Type: Billable | | GM: 19.50 | GM: 65.00 | Vendor: | | PO#: | | |
| 2.00 | 2.00 | 0.00 | 0.00 | 200.00 | 1.00 | 201.00 | 50.00 | 0.00 | 0.00 | 000128 | 000029 | |
| INSTALLATION Installation | | | | Line Type: Billable | | GM: 150.00 | GM: 75.00 | Vendor: | | PO#: | | |
| 0.00 | 0.00 | 1.00 | 0.00 | 0.00 | 0.00 | 0.00 | 3.50 | 0.00 | 3.50 | | 000029 | |
| FILTERS Filters | | | | Line Type: Non-Billable | | GM: -3.50 | GM: 0.00 | Vendor: | | PO#: | | |
| 2.00 | 2.00 | | | 230.00 | 1.15 | 231.15 | 64.00 | 0.00 | 3.50 | | | |
| 2.00 | 2.00 | | | 230.00 | 1.15 | 231.15 | 64.00 | 0.00 | 0.00 | | | |

Service Call Invoice (SD.640.00)

Crystal Report name

SD640.rpt

Possible Sort/Select Options

Service Call ID
Branch ID
Call Type
Customer

The Service Call Invoice (SD.640.00) report is one way to print one or more invoices for completed service calls. The Print or Print Preview in Service Call Invoice opens the Service Invoice Selection (SD.641.00) dialog box. This provides many options so that the user can specify exactly what invoices to print.

Report Formats

- n/a

Data Entry Screen

Service Call Entry (SD.200.00)
Invoice Entry (SD.202.00)

Service Call Invoice (SD.640.00)

Contoso, Ltd

SERVICE INVOICE: 000083

BILL TO:
 C376
 Graphic Design Institute
 108 Main
 Cuyahoga Falls, OH 55555

SHIP TO:
 DEFAULT
 108 Main
 Cuyahoga Falls, OH 55555

| INVOICE DATE | CUSTOMER PO | PAYMENT TERMS | REFERENCE # | WORKORDER # |
|--------------|-------------|---------------|-------------|-------------|
| 01/20/2000 | | 2/10 Net 30 | | |

| ITEM ID | DESCRIPTION | QTY | UNIT PRICE | EXT PRICE |
|--------------|---|------|------------|-----------|
| HON-672L-L | 600 Series Wide Lateral Two Drawer File | 7.00 | 380.00 | 2,660.00 |
| INSTALLATION | Installation | 2.00 | 100.00 | 200.00 |

| | |
|--------------|----------|
| Sales Total | 2,860.00 |
| Disc. Amount | 0.00 |
| Tax Total | 14.30 |
| Net Amount | 2,874.30 |

Service Contracts Sample Reports

This section includes information about the most common Service Contracts reports. Samples of each report are also included.

- [*Service Contract List*](#)
- [*Service Contract Profitability*](#)
- [*Contract Revenue Recognition*](#)

Service Contract List (SN.603.00)

Crystal Report name

SN603.rpt

The *Service Contract List* (SN.603.00) report displays Service Contract details. Service Contracts can be entered on *Service Contract Entry* (SN.001.00).

Possible Sort/Select Options

Branch
Customer
Master Agreement

Report Formats

Data Entry Screen

Service Contract Entry
(SN.001.00)

- Standard – Generates a report showing extensive information regarding each existing Service Contract. Details include customer information, Contract History, Contract Type, Amortization and Billing Frequency and Coverage Hours.
- Svc Contract – Equipment – Generates a report showing the equipment associated with a specific service contract.
- Svc Contract – Billing Schedule – Generates a report showing the Billing Schedule for each service contract.
- Svc Contract – Revenue Schedule – Generates a report showing the Billing Schedule for each service contract.

Service Contract List (SN.603.00)

Date 9/10/2003 11:26am

Contoso, Ltd

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Service Contract List - Standard

Report SN603S

| Contract / Service Site | | Setup / Frequency / Contract Coverage Hours | | | |
|---------------------------------|--------------------|---|---------------|--------------------------|------------|
| Contract ID: LAC0000001 | | Setup Information | | | |
| Customer ID: | C300 | Status: | Active | Customer P.O.: | |
| Cust Name: | School of Fine Art | Cancellation Code: | | Renewal Type: | Multi Year |
| Site ID: | DEFAULT | Contract Type: | ANNUAL | Escalation Code: | ESCCODE1 |
| Site Name: | Randy Reeves | Contract Amt: | 12,000.00 | # of Renewals: | 5 |
| Contract History | | Calculated Amt: | 0.00 | Renewals Used: | 0 |
| Original Contract ID: | | Min Rev/Call: | 0.00 | Response Time: | 0200 |
| Previous Contract ID: | | Min Hrs/Call: | 0.00 | Primary Tech: | ARNOLDM |
| Next Contract ID: | | Quote Expires: | 01/01/00 | Secondary Tech: | |
| Contract Billing Address | | Start Date: | 01/01/03 | Salesperson ID: | BW |
| Name: | School of Fine Art | Exp. Date: | 12/31/03 | Master Contract ID: | |
| Attention: | | Amortization Frequency | | | |
| Address: | 222 Ridge Trail | Amortization Freq: | Monthly | Billing Frequency | |
| City: | Chicago | Start Date: | 01/01/03 | Billing Freq: | Monthly |
| State, Zip: | IL 23333 | Last Amortization: | 12/01/01 | Last Billing: | 04/08/03 |
| Country/Region: | US | Contract Coverage Hours | | | |
| Phone #: | (555) 555-0120 | Day | Starting Time | Ending Time | 24 Hours |
| Fax #: | (555) 555-0120 | Monday | 08:00 AM | 05:00 PM | No |
| | | Tuesday | 08:00 AM | 05:00 PM | No |
| | | Wednesday | 08:00 AM | 05:00 PM | No |
| | | Thursday | 08:00 AM | 05:00 PM | No |
| | | Friday | 08:00 AM | 05:00 PM | No |
| | | Saturday | | | No |
| | | Sunday | | | No |

Service Contract Profitability (SN.612.00)

Crystal Report name

SN612.rpt

Possible Sort/Select Options

Branch

The *Service Contract Profitability* (SN.612.00) report provides Revenue, Expense and Profit information for existing Service Contracts. Details include Hours, Labor Cost, Material Cost and Profit Margin. In order to be included on the Profitability Report, Service Call Invoices must be entered with a Line Type of Svc Contr on *Invoice T & M Details* (SD.203.00).

Report Formats

Data Entry Screen

Invoice T & M Details
SD.203.00

- n/a

Service Contract Profitability (SN.612.00)

Date 9/10/2003 11:50am

Contoso, Ltd

Page 1

Service Contract Profitability Report

Report SN612

Branch:IA

| Contract ID | Customer Information | Start/End Dates | | Revenue | Calls | Hours | Labor | Material | Profit | Margin |
|-------------|--|-----------------|-------|-----------|-------|--------|---------|----------|-----------|---------------------|
| LAC000001 | C300 School of Fine Art 222 Ridge Trail Chicago IL 23333 | 01/01/03 | Est: | 12,000.00 | 0 | 0.00 | 0.00 | 0.00 | 12,000.00 | 100.00 ⁰ |
| | | 12/31/03 | Act: | 12,000.00 | 3 | 10.00 | 330.00 | 67.45 | 11,602.51 | 96.69 ⁰ |
| | | | Diff: | 0.00 | -3 | -10.00 | -330.00 | -67.49 | | |

Contract Revenue Recognition (SN.614.00)

Crystal Report name

SN614.rpt

The *Contract Revenue Recognition* (SN.614.00) report displays contract revenue for existing Service Contracts.

Possible Sort/Select Options

Contract ID
Contract Type
Customer ID

Key fields include Contract ID, Customer and Site. Details include Processed Revenue - the amount of Revenue that has been recognized through the *Service Contract Revenue Process* (SN.303.00), Open Revenue – the amount of Revenue that hasn't been recognized through the *Service Contract Revenue Process* (SN.303.00) and Accrued Amt – the amount of revenue that has been accrued through the *Service Contract Accrual Process* (SN.300.00).

Data Entry Screen

n/a

Report Formats

- n/a

Contract Revenue Recognition (SN.614.00)

Date 9/10/2003 03:48pm

Contoso, Ltd

Page 1

Contract Revenue Recognition

Report SN614

| | | | | | |
|-----------------------|--------------------------|------------------|---------------------|---------------------|---------------------|
| Contract ID: | LAC0000006 | Customer: | C300 | Site: | DEFAULT |
| Contract Type: | ANNUAL | | School of Fine Art | | Randy Reeves |
| Start Date: | 04/02/2003 | | 222 Ridge Trail | | 858 Hampton |
| End Date: | 04/01/2004 | | Chicago, IL 23333 | | Somewhere, CA 90001 |
| Frequency | Processed Revenue | | Open Revenue | Contract Amt | Accrued Amt |
| Monthly | \$11,000.00 | | \$1,000.00 | \$12,000.00 | \$12,000.00 |
| Contract ID: | LAC0000007 | Customer: | C300 | Site: | DEFAULT |
| Contract Type: | ANNUAL | | School of Fine Art | | Randy Reeves |
| Start Date: | 01/01/2003 | | 222 Ridge Trail | | 858 Hampton |
| End Date: | 12/31/2003 | | Chicago, IL 23333 | | Somewhere, CA 90001 |
| Frequency | Processed Revenue | | Open Revenue | Contract Amt | Accrued Amt |
| Monthly | \$12,000.00 | | \$0.00 | \$12,000.00 | \$12,000.00 |

Equipment Maintenance Sample Reports

This section includes information about the most common Equipment Maintenance reports. Samples of each report are also included.

- [Equipment Information](#)
- [Job & Warranty Service Report](#)

Equipment Information (SE.601.00)

Crystal Report name

SE601.rpt

The *Equipment Information* (SE.601.00) report displays detailed information for existing equipment. Detail provided includes Customer Contact, Warranty and Equipment Usage as well as other information. Key fields include Equipment ID, Status, Customer/Site, Manufacturer and Model

Possible Sort/Select Options

Equipment ID

Customer

Location

Report Formats

Data Entry Screen

Equipment Entry (SE.001.00)

- n/a

Equipment Information (SE.601.00)

Date 8/25/2003 02:51pm

Contoso, Ltd

Page 1

Equipment Information

Report SE601

| Equipment ID & Description | Branch ID | Location Code | Equipment Type | Status | Status Date |
|----------------------------|-----------|---------------|----------------|--------|-------------|
| EQUIP1 - Equipment 1 | LA | LOCATION1 | Owned | Active | 06/26/2003 |

Customer/Site Information

Customer ID: C300 School of Fine Art
 Service Site: 001
 Contact: John Doe
 Contact Phone: (999) 999-9999

Other Information

Location: Equipment Location 1
 Manufacturer ID: MANUFACT01 - Manufacturer 1
 Model ID: MODEL01 - Model 1
 Serial #:
 Parent Equip ID:
 Quantity: 0.00
 Condition: New
 Date Installed: 01/01/2003
 Enhancement Level: 01/01/1900
 Asset ID:

Warranty Information

Status: Active Year: 2003
 Effective: 01/01/2003 Expire: 01/01/2004
 Primary Tech: ARNOLDM
 Secondary Tech: JONESJ

| Equipment Usage | Date | Reading | Description |
|-----------------|------------|----------|-------------|
| | 01/01/2003 | 500.00 | |
| | 02/01/2003 | 733.00 | |
| | 03/31/2003 | 1,300.00 | |
| | 04/01/2003 | 1,821.00 | |
| | 05/31/2003 | 2,200.00 | |
| | 06/30/2003 | 2,759.00 | |
| | 07/31/2003 | 3,300.00 | |
| | 08/25/2003 | 3,955.00 | |

Job Warranty Service Report (SE.612.00)

Crystal Report name

SE612.rpt

Possible Sort/Select Options

Customer

Branch

Call Type

Service Call ID

Data Entry Screen

Invoice Entry (SD.202.00)

The *Job/ Warranty Service* (SE.612.00) report displays Service Calls in progress or Quotes by Call Type and Customer. Detail provided includes contact information for the customer as well as the Service Call ID, Total Cost and Total Revenue information for each call. Total Cost and Revenue values are provide by Customer Site.

Report Formats

- n/a

Job Warranty Service Report (SE.612.00)

Date 9/3/2003 03:16pm

Contoso, Ltd

Page 1

Job / Warranty Service Report

Report SE612

Period: As of: 9/3/2003

Call Type: AC - Air Conditioning

Branch ID: LA - Los Angeles County Branch

Customer ID: C300 School of Fine Art

Site ID: DEFAULT Randy Reeves

Site Addr: 858 Hampton,

| Date | Svc Call ID | Invoice # | Post Period | Total Cost | Total Revenue |
|----------|-------------|-----------|-------------|------------|---------------|
| 09/02/03 | LAC0000119 | | | 16.87 | 337.44 |
| 09/03/03 | LAC0000124 | | | 0.00 | 0.00 |
| 09/03/03 | LAC0000125 | | | 0.00 | 0.00 |
| 07/18/03 | LAC0000040 | | | 15.33 | 550.00 |
| 07/18/03 | LAC0000041 | | | 12.50 | 350.00 |
| 04/15/03 | LAC0000010 | | | 2.12 | 21.15 |

Site Total:

46.82

1,258.65

Flat Rate Pricing Sample Reports

This section includes information about the most common Flat Rate Pricing reports. Samples of each report are also included.

- [*Flat Rate Maintenance*](#)
- [*Flat Rate Quote*](#)

Flat Rate Maintenance (SP.602.00)

Crystal Report name

SP.602.rpt

Flat Rate Maintenance (SP.602.00) report displays the setup details for each Flat Rate ID. Key data includes pricing and profitability for the Flat Rate ID both as a total and for each item included in the Flat Rate ID.

Possible Sort/Select Options

Flat Rate ID
Category
Sub-Category

Report Formats

Data Entry Screen

Flat Rate Entry (SP.00.00)

- Standard – Generates report showing setup details of Flat Rate ID including pricing and profitability, Warranty Days, Category, Subcategory and markup percentage.
- Pricing Plan – Generates report showing Flat Rate pricing by Price Plan.
- Problem Code – Generates report showing Flat Rate ID and some details, by associated Problem Code.
- General – Generates report showing details of Flat Rate ID setup – similar to Standard format but displays standard cost of items associated with the Flat Rate ID.

Flat Rate Maintenance (SP.602.00)

Date 7/29/2003 01:47pm

Contoso, Ltd

Page 1

Flat Rate - Cost/Price Details

Report SP602S

| Flat Rate ID & Description | | | | Warranty / Pricing History | | Setup Information | | | Summary | |
|----------------------------|------------|-------------|------------|----------------------------|----------|-------------------|---------------|----------------|---------------|--------------|
| FLAT - Flat Rate 1 | | | | Parts: | 30 Days | Category: | CATEGORY1 | Markup %: | 5.00 | |
| Tax Default | | | | Labor: | 30 Days | Sub-Category: | SUBCAT1 | Total: | 612.05 | |
| Tax ID: CAIRO | Tax Basis: | Sales Price | | Date Effective: | 07/22/03 | Type: | Task | Est. Duration: | 1.00 | |
| | | | | Date Printed: | 01/01/00 | | | | | |
| | | | | Date Updated: | 07/22/03 | | | | | |
| Item ID & Descr | Class | Markup ID | Tax Exempt | Quantity | Unit Pro | Tax Amt | Taxable Amt | Ext Pro | Profit | Profit % |
| LABOR | FILCAB | MARKU1 | No | 1.00 | 380.00 | 1.90 | 380.00 | 380.00 | 361.00 | 95.00 |
| labor | | | | | | | | | | |
| FLATRATE | FILCAB | MARKU1 | No | 1.00 | 200.00 | 1.00 | 200.00 | 200.00 | 175.00 | 87.50 |
| flat rate item | | | | | | | | | | |
| Totals: | | | | | | 2.90 | 580.00 | 580.00 | 536.00 | 92.41 |

Flat Rate Quote (SP.603.00)

Crystal Report name

SP603.rpt

Possible Sort/Select Options

Service Call ID

The *Flat Rate Quote* (SP.603.00) report displays a quote letter that can be sent to customers requesting a Flat Rate Quote. Key information includes customer name and address, project name and the estimated cost of the project. Estimated cost will only be generated for those service calls that are entered as quotes and use Flat Rate Pricing. Specific quotes can be selected for printing by using the Select tab.

Data Entry Screen

Service Dispatch Call
Entry (SD.200.00)
Service Call Invoice Entry
(SD.202.00)

Report Formats

- n/a

Flat Rate Quote (SP.603.00)

07/29/03

School of Fine Art
222 Ridge Trail
Chicago, IL 23333

Dear Mr. Andrews,

Service Series is pleased for the opportunity to make the following estimate at your Randy Reeves project.

Price Estimate: \$1,927.95

This estimate includes all material, equipment, and labor needed to complete the job. Any delays at no fault of Service Series will be charged at time & material rates. If you have any questions or if I can be of further assistance, please feel free to call me at (###) ###-####.

Best regards,

Technical Sales