



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

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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

Possible Sort/Select Options

Customer
Service Call Number
Start Date

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.

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.
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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.
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Data Entry Screen Service Call Entry (SD.200.00) Invoice Entry (SD.202.00)	Report Formats
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- 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

Data Entry Screen

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

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

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

Page 2

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
		Calculated Amt:	0.00	Renewals Used:	0
Contract History		Min Rev/Call:	0.00	Response Time:	0200
Original Contract ID:		Min Hrs/Call:	0.00	Primary Tech:	ARNOLDM
Previous Contract ID:		Quote Expires:	01/01/00	Secondary Tech:	
Next Contract ID:		Start Date:	01/01/03	Salesperson ID:	BW
		Exp. Date:	12/31/03	Master Contract ID:	
Contract Billing Address		Amortization Frequency		Billing Frequency	
Name: School of Fine Art		Amortization Freq:	Monthly	Billing Freq:	Monthly
Attentions:		Start Date:	01/01/03	Last Billing:	04/08/03
Address: 222 Ridge Trail		Last Amortization:	12/01/01	Last Call:	01/01/00
City: Chicago		Contract Coverage Hours			
State, Zip: IL 23333		Day	Starting Time	Ending Time	24 Hours
Country/Region: US		Monday	08:00 AM	05:00 PM	No
Phone #: (555) 555-0120		Tuesday	08:00 AM	05:00 PM	No
Fax #: (555) 555-0120		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

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Service Contract Profitability Report

Report SN612

Branch:LA

Contract ID	Customer Information	Start/End Dates		Revenue	Calls	Hours	Labor	Material	Profit	Margin
LAC0000001	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%
		12/31/03	Act:	12,000.00	3	10.00	330.00	67.49	11,602.51	96.69%
			Diff:	0.00	-3	-10.00	-330.00	-67.49		

Contract Revenue Recognition (SN.614.00)

Crystal Report name SN614.rpt	The <i>Contract Revenue Recognition</i> (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 <i>Contract Revenue Process</i> (SN.303.00), Open Revenue – the amount of Revenue that hasn’t been recognized through the Service <i>Contract Revenue Process</i> (SN.303.00) and Accrued Amt – the amount of revenue that has been accrued through the <i>Service Contract Accrual Process</i> (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	Calculated Amt
Monthly	\$11,000.00	\$1,000.00	\$12,000.00	\$12,000.00	\$0.00
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	Calculated Amt
Monthly	\$12,000.00	\$0.00	\$12,000.00	\$12,000.00	\$0.00

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

Possible Sort/Select Options

Equipment ID
Customer
Location

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

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				Other Information			
Customer ID:	C300	School of Fine Art		Location:	Equipment Location 1		
Service Site:	001			Manufacturer ID:	MANUFACT01 - Manufacturer 1		
Contact:	John Doe			Model ID:	MODEL01 - Model 1		
Contact Phone:	(999) 999-9999			Serial #:			
				Parent Equip ID:			
Warranty Information				Quantity:	0.00		
Status:	Active	Year: 2003		Condition:	New		
Effective:	01/01/2003	Expire: 01/01/2004		Date Installed:	01/01/2003		
Primary Tech:	ARNOLDM			Enhancement Level:	01/01/1900		
Secondary Tech:	JONESJ			Asset ID:			
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 Address: 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	21.16
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			
				Date Printed:	01/01/00	Est. Duration:	1.00			
				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	MARKUP1	No	1.00	380.00	1.90	380.00	380.00	361.00	95.00
labor										
FLATRATE	FILCAB	MARKUP1	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