

Service Management

 **AGIDON** Course book
Streamline your procedures!

CHAPTER 2: SERVICE MANAGEMENT SETUP

Objectives

The objectives are:

- Set up Service Management.
- Set up default service hours.
- Create work-hour templates.
- Define service zones and skill codes.
- Define service order and repair status.
- Set up fault reporting codes.
- Set up service item groups, loaners and shelves.

Introduction

Before you can start creating service orders, signing contracts, adjusting service prices, and so on, you need to set up the Microsoft Dynamics® NAV 2009 Service Management application area. You can set up the program in the **Service Mgt. Setup** window according to the way your company runs its service management. There are also other areas you need to set up, and which relate to the way your company has its service issues organized. For example:

- Service hours
- General planning
- Service types
- Fault reporting
- Service order handling

Role Center Setup

The RoleTailored client in Microsoft Dynamic NAV 2009 provides you with a quick overview of the information relevant to your job and gives you the ability to focus on your own tasks over all others.

The new user interface (UI) design enables you to:

- Focus, prioritize and apply your expertise.
- Visualize and understand the key data pertaining to your job.
- Reduce the amount of time you spend navigating in the program.

For working within the Service Management application area, the recommendation is that you perform the following setup:

1. In the navigation pane, click **Departments > Administration > Application Setup > RoleTailored Client**.
2. Under **Lists**, click **Profiles**.
3. Right-click **Dispatcher** and then click **Edit**.
4. Select the **Default Role Center** check box and click **OK**.
5. Restart the RoleTailored client.

The layouts of the navigation pane and the Role Center have changed so that they contain the links to most of the objects the dispatcher will require while working with services.

The Service Management Setup Window

In the **Service Mgt. Setup** window, you can specify the way the program will perform the service management. To open the **Service Mgt. Setup** window:

1. Click **Departments > Service > Administration**
2. Under **Setup**, click **Service Setup**

The **Service Mgt. Setup** window contains five FastTabs:

- General
- Mandatory Fields
- Defaults
- Contracts
- Numbering

General

The **General** FastTab in the **Service Mgt. Setup** window offers a number of features that can help you manage your services. For example, you can set up:

- Automatic e-mail warnings for the response time that you define for your service orders.
- Service zones and resource skills for managing planning.
- Multidimensional fault reporting for service items.
- Whether you assign one or more service items to a service order.
- Whether the program copies comments from a service order to the correspondent service shipment and invoice.

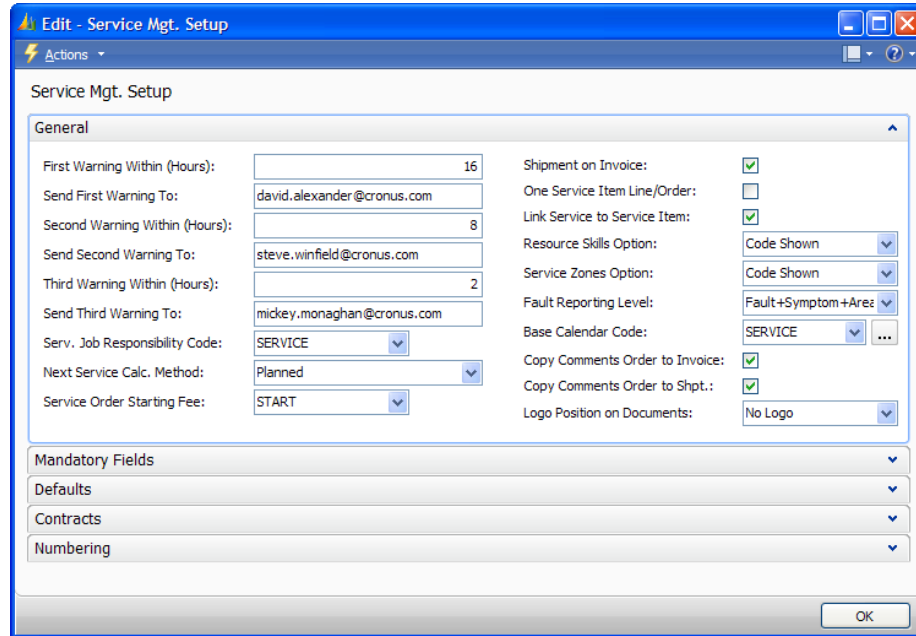


FIGURE 2.1 THE GENERAL FASTTAB IN THE SERVICE MGT. SETUP WINDOW

Warnings About Response Time Approaching

You can set up the program to send e-mail warning messages automatically. If the response time for service orders or quotes is approaching and service has not started yet, the program will send an e-mail to alert the responsible people.

You can have the program send up to three warnings for each service order. For example, the first warning is sent eight hours, the second warning – five hours, and the third one – an hour before the response time. You specify this data in the following fields:

- First Warning Within (Hours)
- Second Warning Within (Hours)
- Third Warning Within (Hours)

The program sends each warning to the e-mail address of the responsibility center assigned to the service order (you specify this information in the **Responsibility Center** field of the **Service Order** window). If you have not specified the e-mail address for the responsibility center, the program sends the warning to the e-mail address you have specified in the following fields:

- Send First Warning To
- Send Second Warning To
- Send Third Warning To

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