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Microsoft Dynamics™ GP

Field Service–Sample Reports

Contents

Contract Administration Sample Reports

This section includes information about and instructions for creating the most common Contract Administration reports. Samples of each report are included.

The following reports are discussed.

- *Contract Retainage Report*
- *Contract Revenue Report (by Header)*
- *Contract Revenue Report (by Line)*

Contract Retainage Report

The Contract Retainage Report displays the block time, service call, and retainage information for each equipment number on contracts. This report also includes customer information and the contract coverage dates.

Printing Instructions

1. Open the Contract Retainage Report window.
    Reports > Contract Administration > Contract Retainage

2. Select a report option to print.

3. Insert the option into the print list.

4. Click **Print**.

For more information about printing Contract Administration reports, see the Contract Administration documentation.

Contract Retainage Report

CONTRACT RETAINAGE REPORT

Ranges: From: To:
    Contract   0000002059   0000002059
    Customer ID

Sort By: Contract Number

Contract #	Customer #	Customer Name	Liability Type				
Item # Equipment #	Status	Contract Type	Block Time Actual Time Time Remaining	Max Calls Actual Calls Calls Remaining	Retainage Amount Retainage Billed Retainage Remaining	Start	End
0000002059	AARONFIT0001	Aaron Fitz Electrical	Block Time				
4-E2094A 0006822942	N	HDWR	500.00 5.10 494.90	0 1 (1)	$0.00 $0.00 $0.00	1/1/2006	12/31/2004

Contract Revenue Report (by Header)

Report Writer name

SVC_Contract_Revenue_
Report

Report tables

SVC_Contract_Revenue_
TEMP

RM_Customer_MSTR

SVC_Contract_Line_Revenue_
TEMP

Ranges

Contract Type

Start Date

End Date

Sorting options

Contract Type

Start Date

The Contract Revenue Report (by Header) shows the estimated and actual figures for revenue, cost, and profit for each selected contract. This report also shows the contract price book, contract coverage dates, and customer information.

Printing Instructions

1. Open the Contract Revenue Report window.
    Reports > Contract Administration > Contract Revenue

2. Select a report option to print.

3. Insert the option into the print list.

4. Click **Print**.

For more information about printing Contract Administration reports, see the Contract Administration documentation.

Contract Revenue Report (by Header)

```
System:    7/24/2006   6:07:58 PM              Fabrikam, Inc.                                    Page:   1
User Date: 7/24/2006                                                                            User ID: sa
                                            CONTRACT REVENUE REPORT

Ranges:                        From:                      To:
    Contract Type              HDWR                       HDWR
    Start Date                 0/0/0000                   12/31/2006
    End Date                   0/0/0000                   12/31/2006
    Check Type                 Header
    Show Lines                 No

Sort By:    Contract Type                                                          Functional Currency
```

Type	Contract # Customer #	Price book Customer Name	Start	End	Est Revenue Act Revenue	Est Cost Inv/WIP Cost	Est Profit/Loss Act profit/Loss	% %
HDWR								
	0000002033	1998-M	1/1/2006	12/31/2006	$4,560.00	$0.00	$4,560.00	100.00%
	MIDCITYH0001	Mid-City Hospital			$4,560.00	$0.00	$4,560.00	100.00%
	0000002035	1998-R	1/1/2006	12/31/2006	$3,600.00	$0.00	$3,600.00	100.00%
	CRAWFORD0001	Crawfords, Inc.			$3,600.00	$0.00	$3,600.00	100.00%
	0000002036	1999-C	1/1/2006	12/31/2006	$7,200.00	$0.00	$7,200.00	100.00%
	LASERMES0001	Laser Messenger Service			$7,200.00	$0.00	$7,200.00	100.00%
	0000002037	1999-C	1/1/2006	12/31/2006	$4,842.00	$0.00	$4,842.00	100.00%
	ADVANCED0002	Advanced Tech Satellite System			$4,842.00	$0.00	$4,842.00	100.00%
	0000002038	1998-M	1/1/2006	12/31/2006	$7,200.00	$0.00	$7,200.00	100.00%
	STMARYHO0001	St. Mary's Hospital			$7,200.00	$0.00	$7,200.00	100.00%
	0000002039	1998-M	1/1/2006	12/31/2006	$5,274.72	$0.00	$5,274.72	100.00%
	STPATRIC0001	St. Patrick's Hospital			$5,274.72	$0.00	$5,274.72	100.00%
	0000002042	1999-C	12/1/2006	5/30/2006	$484.20	$0.00	$484.20	100.00%
	COMMUNIC0001	Communication Connections			$484.20	$0.00	$484.20	100.00%
	0000002044	1998-G	11/1/2006	10/31/2006	$1,500.00	$0.00	$1,500.00	100.00%
	NORTHCOL0001	North College			$1,500.00	$0.00	$1,500.00	100.00%
	0000002045	1998-M	11/1/2006	4/30/2006	$750.00	$0.00	$750.00	100.00%
	ALTONMAN0001	Alton Manufacturing			$750.00	$0.00	$750.00	100.00%
	0000002046	1999-C	10/1/2006	9/30/2006	$6,000.00	$3,600.00	$2,400.00	40.00%
	RAINBOWR0001	Rainbow Research			$6,000.00	$0.00	$6,000.00	100.00%
	0000002048	1999-C	10/1/2006	9/30/2006	$4,370.00	$2,200.00	$2,170.00	49.65%
	CENTRALD0001	Central Distributing			$4,370.00	$0.00	$4,370.00	100.00%
	0000002049	1999-C	10/1/2006	9/30/2006	$1,500.00	$0.00	$1,500.00	100.00%
	DIRECTMA0001	Direct Marketers			$1,500.00	$0.00	$1,500.00	100.00%
	0000002051	1998-R	10/1/2006	9/30/2006	$550.00	$400.00	$150.00	27.27%
	CELLULAR0001	Cellular Express			$550.00	$0.00	$550.00	100.00%
	0000002053	1999-C	1/1/2006	12/31/2006	$4,370.00	$2,200.00	$2,170.00	49.65%
	CONTOSOL0001	Contoso, Ltd.			$4,370.00	$0.00	$4,370.00	100.00%
	0000002054	1999-C	1/1/2006	12/31/2006	$3,850.00	$0.00	$3,850.00	100.00%
	COMPUTER0001	Computerized Phone Systems			$3,850.00	$0.00	$3,850.00	100.00%
	0000002055	1999-C	12/1/2006	11/30/2006	$2,178.90	$0.00	$2,178.90	100.00%
	VISTATRA0001	Vista Travel			$2,178.90	$0.00	$2,178.90	100.00%
	0000002056	1999-C	12/1/2006	11/30/2006	$8,740.00	$4,400.00	$4,340.00	49.65%
	COMPUTEC0001	Compu-Tech Solutions			$8,740.00	$0.00	$8,740.00	100.00%
	0000002057	1999-C	12/1/2006	11/30/2006	$8,740.00	$4,400.00	$4,340.00	49.65%
	COUNTRYV0001	Country View Estates			$8,740.00	$0.00	$8,740.00	100.00%
	0000002059	1999-C	1/1/2006	12/31/2006	$1,500.00	$900.00	$600.00	40.00%
	AARONFIT0001	Aaron Fitz Electrical			$1,500.00	$367.92	$1,132.08	75.47%

```
                    Contract Type  HDWR     Functional Totals:   $77,209.82   $18,100.00   $59,109.82    76.55%
                                                                 $77,209.82      $367.92   $76,841.90    99.52%
======================================================================================================================

                    Functional Report Totals:                   $77,209.82   $18,100.00   $59,109.82    76.55%
                                                                 $77,209.82      $367.92   $76,841.90    99.52%
```

Contract Revenue Report (by Line)

Report Writer name

SVC_Contract_Revenue_
Report_by_Line

Report tables

SVC_Contract_Line_Revenue_
TEMP

RM_Customer_MSTR

SVC_Contract_Revenue_
TEMP

Ranges

Contract Type

Start Date

End Date

Sorting options

Contract Type

Start Date

The Contract Revenue Report (by Line) shows the estimated and actual figures for revenue, cost, and profit. This report also shows the contract price book, contract coverage dates, and customer information.

Printing Instructions

1. Open the Contract Revenue Report window.
   Reports > Contract Administration > Contract Revenue

2. Select a report option to print.

3. Insert the option into the print list.

4. Click **Print**.

For more information about printing Contract Administration reports, see the Contract Administration documentation.

Contract Revenue Report (by Line)

                                          CONTRACT REVENUE REPORT

Ranges: From: To:
    Contract Type   HDWR   HDWR
    Start Date   0/0/0000   12/31/9999
    End Date   0/0/0000   12/31/9999
    Check Type   Line
    Show Lines   Yes

Sort By: Contract Type

Type Customer #	Contract # Customer Name	Price book		Start	End	Est Revenue Act Revenue	Est Cost Inv/WIP Cost	Est Profit/Loss % Act profit/Loss %	
Item #	Description	Contract Type	Price Book	Start	End	Ext Price	Ext Cost	Prifit/Loss	%

HDWR

	0000002033	1998-M		1/1/2006	12/31/2006	$4,560.00	$0.00	$4,560.00	100.00%
MIDCITYH0001	Mid-City Hospital					$4,560.00	$0.00	$4,560.00	100.00%
3-A3542A	12 GB DDS DAT Drive	HDWR	*	1/1/2006	12/31/2006	$2,400.00	$0.00	$2,400.00	100.00%
3-D2094A	591 Printer	HDWR	*	1/1/2006	12/31/2006	$1,200.00	$0.00	$1,200.00	100.00%
3-A2969A	20 MB FWD SCSI-2 Int	HDWR	*	1/1/2006	12/31/2006	$960.00	$0.00	$960.00	100.00%

                              Contract #   0000002033   Totals: $4,560.00 $0.00 $4,560.00 100.00%

	0000002035	1998-R		1/1/2006	12/31/2006	$3,600.00	$0.00	$3,600.00	100.00%
CRAWFORD0001	Crawfords, Inc.					$3,600.00	$0.00	$3,600.00	100.00%
3-A3542A	12 GB DDS DAT Drive	HDWR	*	1/1/2006	12/31/2006	$1,200.00	$0.00	$1,200.00	100.00%
3-D2094A	591 Printer	HDWR	*	1/1/2006	12/31/2006	$1,200.00	$0.00	$1,200.00	100.00%
3-A2969A	20 MB FWD SCSI-2 Int	HDWR	*	1/1/2006	12/31/2006	$1,200.00	$0.00	$1,200.00	100.00%

                              Contract #   0000002035   Totals: $3,600.00 $0.00 $3,600.00 100.00%

	0000002036	1999-C		1/1/2006	12/31/2006	$7,200.00	$0.00	$7,200.00	100.00%
LASERMES0001	Laser Messenger Service					$7,200.00	$0.00	$7,200.00	100.00%
3-A3542A	12 GB DDS DAT Drive	HDWR	*	1/1/2006	12/31/2006	$2,400.00	$0.00	$2,400.00	100.00%
3-D2094A	591 Printer	HDWR	*	1/1/2006	12/31/2006	$2,400.00	$0.00	$2,400.00	100.00%
3-A2969A	20 MB FWD SCSI-2 Int	HDWR	*	1/1/2006	12/31/2006	$2,400.00	$0.00	$2,400.00	100.00%

                              Contract #   0000002036   Totals: $7,200.00 $0.00 $7,200.00 100.00%

	0000002037	1999-C		1/1/2006	12/31/2006	$4,842.00	$0.00	$4,842.00	100.00%
ADVANCED0002	Advanced Tech Satellite System					$4,842.00	$0.00	$4,842.00	100.00%
3-A3542A	12 GB DDS DAT Drive	HDWR	*	1/1/2006	12/31/2006	$1,614.00	$0.00	$1,614.00	100.00%
3-D2094A	591 Printer	HDWR	*	1/1/2006	12/31/2006	$1,614.00	$0.00	$1,614.00	100.00%
3-A2969A	20 MB FWD SCSI-2 Int	HDWR	*	1/1/2006	12/31/2006	$1,614.00	$0.00	$1,614.00	100.00%

                              Contract #   0000002037   Totals: $4,842.00 $0.00 $4,842.00 100.00%

	0000002038	1998-M		1/1/2006	12/31/2006	$7,200.00	$0.00	$7,200.00	100.00%
STMARYHO0001	St. Mary's Hospital					$7,200.00	$0.00	$7,200.00	100.00%
3-A3542A	12 GB DDS DAT Drive	HDWR	*	1/1/2006	12/31/2006	$2,400.00	$0.00	$2,400.00	100.00%
3-D2094A	591 Printer	HDWR	*	1/1/2006	12/31/2006	$2,400.00	$0.00	$2,400.00	100.00%
3-A2969A	20 MB FWD SCSI-2 Int	HDWR	*	1/1/2006	12/31/2006	$2,400.00	$0.00	$2,400.00	100.00%

                              Contract #   0000002038   Totals: $7,200.00 $0.00 $7,200.00 100.00%

	0000002039	1998-M		1/1/2006	12/31/2006	$5,274.72	$0.00	$5,274.72	100.00%
STPATRIC0001	St. Patrick's Hospital					$5,274.72	$0.00	$5,274.72	100.00%
3-A3542A	12 GB DDS DAT Drive	HDWR	*	1/1/2006	12/31/2006	$1,758.24	$0.00	$1,758.24	100.00%

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 * Indicates a manual price override   Report Totals: $77,209.82 $18,100.00 $59,109.82   76.55%

Depot Management Sample Reports

This section includes information about and instruction for creating the most common Depot Management reports. Samples of each report are included.

The following reports are discussed.

- *Work Order Report*
- *Work Order Traveler Report*

Work Order Report

Report Writer name
SVC_Work_Order_Report

Report tables
SVC_Depot_MSTR
SVC_Office_MSTR
RM_Customer_MSTR
SVC_Codes_Depot_Status

Ranges
Work Order
Office
Work Order Type
Work Order Status
Entry Date
Priority

Sorting options
Work Order
Office
Work Order Status

The Work Order Report allows you to print quote, open, or historical work orders. The report includes work order number, customer information, entry and completion information, station, route, and office.

Printing Instructions
1. Open the Work Order Report window.
   Reports > Depot Management > Work Order

2. Name the option and enter information to define the option.

3. Click **Insert**.

4. Click **Print**.

You can print the Work Order Report from the Work Order Report window or from the Work Order Report Options window. You also can save the report option and print later.

For more information about printing Depot Management Reports, see the Depot Management documentation.

Work Order Report

WORK ORDER REPORT
Open Work Order

Ranges: From: To:
     Work Order Number   WRK0005001   WRK0005008
     Office ID
     Work Order Type
     Work Order Status
     Entry Date   0/0/0000   12/31/2006
     Priority   0   999

 Sorted By: Work Order Number

Work Order #	Customer	Customer Name	Origin	Reference	RMA
Status	Priority Station ID Office ID	Route ID Type Entry Date/Time	ETA Date/Time		Complete Date/Time
	Inbound Item #	Inbound Equipment #	Outbound Item #		Outbound Equipment #

WRK0005001	CENTRALD0001	Central Distributing	From RMA		RMA000000003001
Entered/Pla 50.00 STATION1 N-01	R-200 REPAIR 8/16/2006	12:43:00 PM 8/16/2006	12:45:00 PM 0/0/0000		12:00:00 AM
4-A3666A	685TR5937	4-A3666A			685TR5937

WRK0005002			None		
Work In Pro 50.00 STOCK S-01	2000 ANALYSI 8/16/2006	8:00:00 AM 8/16/2006	10:00:00 AM 0/0/0000		12:00:00 AM
3-A3542A		3-A3542A			

WRK0005004	RAINBOWR0001	Rainbow Research	None		
Entered/Pla 50.00 S-01	REFURB 8/16/2006	8:00:00 AM 8/16/2006	1:00:00 PM 0/0/0000		12:00:00 AM
4-A3351A	LM-1764	4-A3351A			LM-1764

WRK0005006			None		
Entered/Pla 50.00 S-01	REPLACE 8/16/2006	8:00:00 AM 8/16/2006	2:00:00 PM 0/0/0000		12:00:00 AM
3-E4471A		3-E4471A			

WRK0005007			None		
Work In Pro 50.00 UPGRADE-2 S-01	1000 UPGRADE 8/16/2006	8:00:00 AM 8/16/2006	2:30:00 PM 0/0/0000		12:00:00 AM
3-C2924A		3-C2924A			

WRK0005008	AARONFIT0001	Aaron Fitz Electrical	None		
Completed W 50.00 STATION1 S-01	R-200 REPAIR 6/28/2006	3:16:19 PM 0/0/0000	12:00:00 AM 6/28/2002		3:17:17 PM
4-E2094A		4-E2094A			

Total: 6   Work Orders

Work Order Traveler Report

Report Writer name
  SVC_Work_Order_Traveler

Report tables
  SVC_Depot_MSTR
  RM_Customer_MSTR
  IV_Item_MSTR
  SVC_Codes_Analysis_IB
  SVC_Codes_Analysis_OB
  SVC_Codes_Depot Route
  SVC_Depot_Note_TEMP
  SVC_Depot_Traveler_TEMP
  SY_Record_Note_MSTR

The Work Order Traveler report includes information about the item on the repair document. The information displayed on the report includes item and customer information, quantity, equipment number, a source document number, if entered, and then individual station details. The station details show technician, start and end times, and some cost information.

Printing Instructions

1. Open the Work Order Entry/Update window.
    Transactions > Depot Management > Work Ord Entry/Update

2. Select a record to display.

3. Choose **File > Print**.

For more information about printing Depot Management Reports, see the Depot Management documentation.

Work Order Traveler Report

WORK ORDER TRAVELER

Work Order #: WRK0005008   Priority: 50.00   ETA: 0/0/0000   12:00:00 AM
                                                                              Committed: 0/0/0000   12:00:00 AM
Location: 01-N   Analysis: FAILURE   Equipment or Component Failure
Route ID: R-200   Equipment Repair   Origin: None
Item Number: 4-E2094A   Description: Laserjet 4 Printer   Equip#:   Reference:
Customer ID: AARONFIT0001   Name: Aaron Fitz Electrical   Qty: 1.00   RMA:
RMA Reason Code:

==
Station ID: STATION1   Teardown

        Est.Start: 6/28/2006   3:17:00 PM   Est.End: 6/28/2006   3:47:00 PM   ETTR: 30

Task:

Parts	Description	Location	Qty Ord	Qty Alloc	Qty B/O	Qty Used	Tech ID	Initial
			0.00	0.00	0.00	_____	_____	_____

    Tech ID:_____   Act.Start:_____   Act.End:_____   Signed:_____

_____

Station ID: REPLACE   Replace Parts

        Est.Start: 6/28/2006   3:47:00 PM   Est.End: 7/1/2006   7:17:00 AM   ETTR: 30

Task:

Parts	Description	Location	Qty Ord	Qty Alloc	Qty B/O	Qty Used	Tech ID	Initial
			0.00	0.00	0.00	_____	_____	_____

    Tech ID:_____   Act.Start:_____   Act.End:_____   Signed:_____

_____

Station ID: QA-1   Initial Testing

        Est.Start: 7/1/2006   7:17:00 AM   Est.End: 7/1/2006   7:32:00 AM   ETTR: 15

Task:

Parts	Description	Location	Qty Ord	Qty Alloc	Qty B/O	Qty Used	Tech ID	Initial
			0.00	0.00	0.00	_____	_____	_____

    Tech ID:_____   Act.Start:_____   Act.End:_____   Signed:_____

_____

- -

    Note:

Preventive Maintenance Sample Report

This section includes information about and instruction for creating the most common Preventive Maintenance report. A sample of the report is included.

The following report is discussed.

- *PM Due Report*

PM Due Report

Report Writer name
SVC_PM_Due_Report

Report tables
SVC_PM_Edit_TEMP
SVC_Maintenance_Detail_
  HDR
RM_Customer_MSTR
IV_Item_MSTR

Ranges
Item Number
Customer ID
Serial Number
Due Date

Sorting Options
Item Number

The PM Due Report shows a list of due events, based on the range information you specify. The report includes item/equipment number information, item description, customer name, service type, contract number, and PM detail.

Printing Instructions

1. Open the PM Due Report window.
    Reports > Preventive Maintenance > PM Due

2. Select an option to print.

3. Click **Insert**.

4. Click **Print**.

For more information about printing Preventive Maintenance reports, see the Preventive Maintenance documentation.

PM Due Report

PM DUE REPORT

Ranges: From: To:
    Item Number   2-A3284A   2-A3284A
    Customer
    Serial Number
    Due Date   8/6/2006

Item Number					
Equipment Number	Item Description Customer Name	Service Type	Contract Number	PM Detail	

2-A3284A	000 K460 Server w/128MB ECC Memory			
00047250	Northern Family Hospital	PM		Clean
21596752	Advanced Tech Satellite System	PM		Clean
22071904	World Enterprises	PM		Clean
350302380	Cellular Express	PM		Clean
3815791B		PM		Clean
3815791B		PM		Replace
4161822	Blue Yonder Airlines	PM		Clean
440670	Dollis Cove Resort	PM		Clean
5859654	Computer Equipment Leasing	PM		Clean
5859654	Computer Equipment Leasing	PM		Replace
586018	Compu-Tech Solutions	PM		Clean
6858800	Aaron Fitz Electrical	PM		Clean
866023	Country View Estates	PM		Clean
910900157	Nova Systems, Inc.	PM		Clean
A0409175	Central Distributing	PM		Clean
E130893		PM		Clean

Total PM Due :   16

Returns Management Sample Reports

This section includes information about and instruction for creating the most common Returns Management reports. Samples of each report are included.

The following reports are discussed.

- *Inbound Schedule Report*
- *Return Document Report*
- *Return Traveler Report*
- *Returns Authorization Form Report*
- *RMA Discrepancy Report*

Inbound Schedule Report

Report Writer name
SVC_RMA_Receiving

Report tables
SVC_RMA_Line
IV_Item_MSTR
SVC_Codes_RMA_Type
RM_Customer_MSTR
IV_Location_SETP
SVC_Codes_RMA_Status

Ranges
RMA Number
Customer ID
Item Number
ETA Date
Site ID
Office
Type

Sorting options
RMA Number
ETA Time
ETA Date
RMA Status

The Inbound Schedule Report shows the receiving information about the return record. The report includes the RMA numbers, customer information, item information, document status, office site, and return site.

Printing Instructions

1. Open the Inbound Schedule Report window.
   Reports > Returns Management > Inbound Schedule

2. Select a report option to print.

3. Click **Insert**.

4. Click **Print**.

For more information about printing Returns Management reports, see the Returns Management documentation.

Inbound Schedule Report

Inbound Schedule Report

```
Ranges:                         From:                    To:
    RMA Number                  RMA000000003001          RMA000000003005
    Customer ID
    Item Number
    ETA Date                    0/0/0000                 7/26/2002
    Return Site
    Office
    RMA Type

    Sorted By: Return Document ID
```

```
RMA Number        Customer Name                                        Office      Status
     RMA Type
     ETA Date    Entry Date    Return Item Number       Return Item Description            Return Site
---------------------------------------------------------------------------------------------------------
RMA000000003002                                                        NW-01       Awaiting Receipt of  RMA
     RMA from Service Call Entry
     0/0/0000    12/23/2006   4-E2094A                  Laserjet 4 Printer                 TWO Returns Location
RMA000000003003    Associated Insurance Company                        SE-01       Awaiting Receipt of  RMA
     RMA from Service Call Entry
     0/0/0000    12/23/2006   4-E2094A                  Laserjet 4 Printer                 TWO Returns Location
RMA000000003004    Adam Park Resort                                     NE-01       Awaiting Receipt of  RMA
     RMA for Credit
     0/0/0000    12/12/2006   3-C2924A                  SCSI Cable, 2.5m, 68-pin Hi-Density  TWO Returns Location
```

Return Document Report

The Return Document report is the shipping report for a repaired item being returned to the customer. The report includes the RMA number, invoice, service call number, and any repair charges. The report also includes item/equipment number information, miscellaneous items, customer information, and vendor information.

Printing Instructions

To print the Return Document report for a single return document:

1. Open the RMA Closing window.
   Transactions > Returns Management > RMA Closing

2. Select a return document to post.

3. Click **Post**.

To print the Return Document report for a range of return documents:

1. Open the Product Turnaround Report window.
   Reports > Returns Management > Product Turnaround

2. Select a report option to print.

3. Click **Insert**.

4. Click **Print**.

For more information about printing Returns Management reports, see the Returns Management documentation.

Return Document Report

Fabrikam, Inc.

RETURN DOCUMENT

RMA Number: RMA000000003001   **Date:** 7/26/2007

To: Central Distributing   **Attn:** Don Roessler

Return Item Number	Return Item Description	U of M	Quantity
		Invoice	Repair Charge
Equipment Number			
Misc. Item Number/Description		Serial Number	Quantity
4-A3666A	4.2GB LP Disk Drive	EACH	1.00
			$0.00
685TR5937			

To: Central Distributing
Suite 13
2399 Westwood Dr.

La Crosse
WI   54601-9975

From: Fabrikam, Inc.
4277 West Oak Parkway

Chicago
IL   60601

Return Traveler Report

Report Writer name
SVC_Return_Traveler

Report tables
SVC_RMA_Traveler_Header_
TEMP
RM_Customer_MSTR
SVC_RMA_Traveler_Line_
TEMP
SVC_RMA_Serial_Misc_TEMP

Ranges
RMA Number
Customer ID
Item Number
ETA Date
Site ID
Office
Type

Sorting options
RMA Number

The Return Traveler report is a summary of item information for a return record. The report includes document number, return date, and source document information. It also includes item information, quantity, and miscellaneous item information.

Printing Instructions

1. Open the Return Traveler Report window.
   Reports > Returns Management > Return Traveler

2. Select a report option to print.

3. Click **Insert**.

4. Click **Print**.

For more information about printing Returns Management reports, see the Returns Management documentation.

Return Traveler Report

Return Traveler

RMA Number: RMA000000003001   **Received Date:** 8/6/2007

Return From: CENTRALD0001   **Return Site ID:** RETURNS
                  PRIMARY

Suite 13
2399 Westwood Dr.

La Crosse   WI 54601-9975

Don Roessler

Return Item Number	Return Item Description		U of M	Quantity
Reason Code Description		Repair Charge	Invoice Number	
Return Equipment Number				
Misc. Item Number/Description			Serial Number	Quantity
4-A3666A	4.2GB LP Disk Drive		EACH	1.00
		$0.00		
685TR5937				

Returns Authorization Form Report

Report Writer name

SVC_Return_Authorization

Report tables

SVC_RMA _Traveler_Header_
Temp
SVC_Office_MSTR
SVC_RMA_Traveler_Line_
Temp
SVC_RMA_Serial_Misc_Temp

Ranges

RMA Number
Customer ID
Item Number
ETA Date
Site ID
Office
Type

Sorting options

RMA Number

The Return Authorization Form report includes Return To and Return From addresses, document number, and document entry date. This report also includes the item/equipment number information, item description, and an area for additional comments. This report is sent to the customer to include when shipping the returned item.

Printing Instructions

1. Open the Return Authorization Report window.
    Reports > Returns Management > Return Authorization

2. Select a report option to print.

3. Click **Insert**.

4. Click **Print**.

For more information about printing Returns Management reports, see the Returns Management documentation.

Returns Authorization Form Report

Returns Authorization Form

RMA Number: RMA000000003001   **Entry Date:** 12/23/2007

Return To: **Return From:**

4277 West Oak Parkway   Consolidated Messenger
                                                             Suite 13
                                                             2399 Westwood Dr.

Chicago   La Crosse
IL   WI
60601   54601-9975
                                                             Donald Roessler

Return Item Number	Return Item Description	U of M	Quantity
Reason Code Description	Equipment Number		
4-A3666A	4.2GB LP Disk Drive	EACH	1.00
	685TR5937		

Additional Comments:

Frabrikam, Inc.
4277 West Oak Parkway

_____
Signature

Chicago
IL
60601
Barbara Hoffman
(800) 555-0103 Ext. 0000

Thank you for your continued business

RMA Discrepancy Report

Report Writer name
SVC_RMA_Discrepancy

Report tables
SVC_RMA_Line
RM_Customer_MSTR
SVC_Codes_RMA_Type
SVC_RMA_Serial_Lot_Work

Ranges
RMA Number
Customer ID
Item Number
Type

Sorting options
RMA Number

The RMA Discrepancy Report displays a list of all received RMA documents that have a difference between the original item and the returned item, the original equipment number and return equipment number, or the original quantity and the returned quantity. The report includes the document number, customer information, original item/equipment information, return item/equipment information, origin, and record type. The report also includes the original and return quantity.

Printing Instructions

1. Open the RMA Discrepancy Report window.
    Reports > Returns Management > RMA Discrepancy

2. Select a report option to print.

3. Click **Insert**.

4. Click **Print**.

For more information about printing Returns Management reports, see the Returns Management documentation.

RMA Discrepancy Report

RMA Discrepancy Report

Ranges: From: To:
  RMA Number   RMA000000003001   RMA000000003005
  Customer ID
  Return Item Number
  RMA Type

Sort By: Return Document ID

RMA Number	RMA Type	Origin	Customer ID	Customer Name
	Original Item	Original Qty		Original U of M
	Return Item Number	Return Qty		Return U of M
		Original Equipment		Return Equipment
RMA000000003002	RMA from Service Call Entry	0000002143	SPECIALI0001	
	4-E2094A	1.00		EACH
	4-E2094A	1.00		EACH
RMA000000003003	RMA from Service Call Entry	0000002149	ASSOCIAT0001	Associated Insurance Company
	4-E2094A	1.00		EACH
	4-E2094A	1.00		EACH
RMA000000003004	RMA for Credit	INV1032	ADAMPARK0001	Adam Park Resort
	3-C2924A	2.00		EACH
	3-C2924A	2.00		EACH
RMA000000003007	Repair & Return RMA	INV1033	FOURTHCO0001	Fourth Coffee
	3-E4592A	3.00		EACH
	3-E4592A	3.00		EACH

Total: 4 Return Documents

Service Call Management Sample Reports

This section includes information about and instruction for creating the most common Service Call Management reports. Samples of each report are included.

The following reports are discussed.

- *History Service Call Report*
- *Inventory Requirements Report*
- *Parts Usage Report*
- *Service Call Report (open)*
- *Service Inventory Packing List Report*
- *Service Work Order Report (history)*
- *Service Work Order Report (open)*

History Service Call Report

Report Writer name

    SVC_Service_Call_Report_
      HIST

Report tables

    SVC_Service_MSTR_HIST
    SVC_Codes_Status
    SVC_Office_MSTR
    SVC_Tech_MSTR

Ranges

    Service Call
    Tech ID
    Office
    Customer ID
    Entry Date
    Service Status

Sorting options

    Service Call
    Tech ID
    Office
    Customer ID
    Service Status
    Contract Number

The History Service Call Report displays a list of service calls that have been moved to the history tables. The report includes the service call number, entry date and time, completion date and time, office, and technician. The report also includes customer name, contract number, and customer reference.

Printing Instructions

1. Open the Service Call Reports window.
    Reports > Service Call Management > Service Call

2. Select **Service Call Report** in the reports list.

3. Select an option to print.

    *Be sure the option includes the **Print History** check box.*

4. Click **Insert**.

5. Click **Print**.

For more information about printing Service Call Management reports, see the Service Call Management documentation.

History Service Call Report

HISTORY SERVICE CALL REPORT

Ranges:	From:	To:
Service Call Number	0000002010	0000002021
Tech ID		
Office ID		
Customer ID		
Entry Date	0/0/0000	12/31/9999
Service Call Status		
Conrtact Number		

Sorted By: Tech ID
Record Type: Invoiced

Service Number	Customer		Entry Date/Time	Complete Date/Time	Office	Customer Ref.
Record Type	Status	Contract	Description		Technician	
0000002010	Compu-Tech Solutions		9/5/1999 2:00:00 PM	9/6/1999 4:30:00 PM	TWO North	
Invoiced	Invoiced	0000002027			Bob Hohman	
0000002011	Country View Estates		9/5/1999 12:00:00 PM	9/6/1999 1:30:00 PM	TWO Southeast	
Invoiced	Invoiced	0000002026			Bob Hohman	
0000002013	Hutchinson State University		9/5/1999 12:00:00 PM	9/6/1999 1:30:00 PM	TWO Central	
Invoiced	Invoiced	0000002021			Bob Hohman	
0000002020	Rainbow Research		9/5/1999 1:00:00 PM	9/6/1999 2:30:00 PM	TWO Central	
Invoiced	Invoiced	0000002020			Bob Hohman	
0000002021	Northern Family Hospital		9/5/1999 8:00:00 AM	9/6/1999 2:30:00 PM	TWO Northeast	
Invoiced	Invoiced	0000002011			Bob Hohman	
0000002012	Dollis Cove Resort		9/5/1999 12:00:00 PM	9/6/1999 1:30:00 PM	TWO Northeast	
Invoiced	Invoiced				Bob Hohman	
0000002014	McConnell A.F. B.		9/5/1999 12:00:00 PM	9/6/1999 1:30:00 PM	TWO Central	
Invoiced	Invoiced				Bob Hohman	
0000002015	Specialized Office Equipment		9/5/1999 12:00:00 PM	9/6/1999 1:30:00 PM	TWO Northwest	
Invoiced	Invoiced				Bob Hohman	
0000002016	McConnell A.F. B.		9/5/1999 12:00:00 PM	9/6/1999 1:30:00 PM	TWO Central	
Invoiced	Invoiced				Bob Hohman	
0000002017	Aaron Fitz Electrical		9/5/1999 12:00:00 PM	9/6/1999 1:30:00 PM	TWO North	
Invoiced	Invoiced				Bob Hohman	
0000002018	Nova Systems, Inc.		9/5/1999 2:00:00 PM	9/6/1999 2:30:00 PM	TWO North	
Invoiced	Invoiced				Bob Hohman	
0000002019	Specialized Office Equipment		9/5/1999 1:00:00 PM	9/6/1999 2:30:00 PM	TWO Northwest	
Invoiced	Invoiced				Bob Hohman	

Total: 12   Service Calls

Inventory Requirements Report

Report Writer name
SVC_Inventory_
   Requirements_Report

Report tables
SVC_Inv_Report_TEMP

Ranges
Site ID
Item Number
Tech ID
Main Location

Sorting options
by Item Number
by Site ID

The Inventory Requirements report displays items required at various locations. The report includes the item numbers and descriptions, source service call document numbers, and the ID of the technician who needs the items. The report also includes the origin and destination locations, quantity available at the source site, quantity ordered, quantity back ordered, and quantity allocated.

Printing Instructions

1. Open the Inventory Requirements Report window.
   Reports > Service Call Management > Inventory Requirements

2. Select an option to print.

3. Click **Insert**.

4. Click **Print**.

For more information about printing Service Call Management reports, see the Service Call Management documentation.

Inventory Requirements Report

Ranges: From: To:
        Main Location
        To Location   01-N   104G
        Item Number
        Tech ID

 Sorted By: Item Number
         To Location

Item Number   Description
                                                              ----------------- Quantity -----------------
        Source Document   Tech ID   Main Location Avail   To Location Ordered   B/O   Alloc   Transfer
----

 1-A3483A   256MG SIMM Fr K Series

        0000002220   T0102   WAREHOUSE   0.00   102G   1.00   1.00   0.00   _____
        0000002222   T0102   WAREHOUSE   0.00   102G   1.00   1.00   0.00   _____
        0000002223   T0102   WAREHOUSE   0.00   102G   1.00   1.00   0.00   _____

 3-C2924A   SCSI Cable, 2.5m, 68-pin Hi-Density

        0000002209   T0102   WAREHOUSE   14.00   102G   1.00   1.00   0.00   _____
        0000002058   T0103   WAREHOUSE   14.00   103G   1.00   1.00   0.00   _____
        0000002064   T0104   WAREHOUSE   14.00   104G   1.00   1.00   0.00   _____

 3-D2657A   DB 15 Male Adapter

        0000002209   T0102   WAREHOUSE   0.00   102G   1.00   1.00   0.00   _____

 3-D2659A   DB25 Female Adapter

        0000002209   T0102   WAREHOUSE   0.00   102G   1.00   1.00   0.00   _____

 4-A3351A   2 GB FWD SCSI-2 Disk Drive

        0000002226   T0102   WAREHOUSE   0.00   102G   1.00   1.00   0.00   _____
        0000002227   T0102   WAREHOUSE   0.00   102G   1.00   1.00   0.00   _____

 Total: 10   Items

Parts Usage Report

Report Writer name
    SVC_Parts_Usage_Report

Report tables
    SVC_Parts_Usage_HDR_
        TEMP
    IV_Item_MSTR
    SVC_Parts_Usage_TEMP

Ranges
    Item Number
    Customer ID
    Install Date

Sorting options
    Item Number

The Parts Usage Report displays a list of items and the current/projected usage of the listed items. The report includes the item numbers and descriptions, items used for each item, quantity used, average monthly consumption, quantity on hand, and three-month and six-month use projections.

Printing Instructions

1. Open the Parts Usage Report window.
   Reports > Service Call Management > Parts Usage

2. Select an option to print.

3. Click **Insert**.

4. Click **Print**.

For more information about printing Service Call Management reports, see the Service Call Management documentation.

Parts Usage Report

                                        PARTS USAGE REPORT

                          From: 1/1/1999   To: 12/31/2000

Ranges: From: To:
     Item Number
     Customer Number

| Item Number | Description | | # Installed | | | |
| Item Used | Description | | Monthly | | Projected | |
		Qty	Avg.Usage	Qty On Hand	3 Mo.	6 Mo.
2-A3284A	000 K460 Server w/128MB ECC Memory			20		
1-A3483A	256MG SIMM Fr K Series					
		0.00	0.00	0.00	0.00	0.00
3-C2924A	SCSI Cable, 2.5m, 68-pin Hi-Density					
		1.00	0.04	15.00	0.12	0.24
3-D2657A	DB 15 Male Adapter					
		1.00	0.04	0.00	0.12	0.24
3-D2659A	DB25 Female Adapter					
		1.00	0.04	0.00	0.12	0.24
4-A3351A	2 GB FWD SCSI-2 Disk Drive					
		0.00	0.00	0.00	0.00	0.00
4-A3351A	2 GB FWD SCSI-2 Disk Drive			17		
4-A3666A	4.2GB LP Disk Drive					
		0.00	0.00	0.00	0.00	0.00
4-E2094A	Laserjet 4 Printer					
		0.00	0.00	0.00	0.00	0.00

Service Call Report (open)

Report Writer name

   SVC_Service_Call_Report

Report tables

   SVC_Service_MSTR
   SVC_Tech_MSTR
   SVC_Office_MSTR
   RM_Customer_ MSTR
   SVC_Codes_Status

Ranges

   Service Call
   Tech ID
   Office
   Customer ID
   Entry Date
   Service Status
   Contract Number

Sorting options

   Service Call
   Tech ID
   Office
   Customer ID
   Service Status
   Contract Number

Include

   Include History
   Print Details
   Print Currency (functional or
     originating)

The Service Call Report displays service information for open service calls. You can choose to print details to view information about the parts included on the service call. You may find this report useful for analyzing detailed service call information. The report includes document number, customer information, date and time information, record type, status, and contract information.

Printing Instructions

1. Open the Service Call Report window.
    Reports > Service Call Management > Service Call

2. Select **Service Call Report** in the reports list.

3. Select an option to print.

4. Click **Insert**.

5. Click **Print**.

For more information about printing Service Call Management reports, see the Service Call Management documentation.

Service Call Report (open)

                                                   SERVICE CALL REPORT
                                                   (Open Calls   )

Ranges: From: To:
     Service Call Number   0000002001   0000002009
     Tech ID
     Office ID
     Customer ID
     Entry Date   0/0/0000   12/31/9999
     Service Call Status
     Conrtact Number

 Sorted By: Tech ID
 Record Type: Open

| Service Number | Customer | Contract | Entry Date/Time | Complete Date/Time | Office | Customer Ref. |
Record Type	Status		Description		Technician	
0000002006	Cellular Express		9/5/1999 12:00:00 PM	9/6/1999 11:00:00 AM	TWO North	
Open	Ready To Invoice	0000002015			John Wood	
0000002007	Central Distributing		9/5/1999 12:00:00 PM	9/6/1999 1:00:00 PM	TWO North	
Open	Ready To Invoice	0000002018			Bob Hohman	
0000002005	Fourth Coffee		9/5/1999 12:00:00 PM	9/6/1999 10:00:00 AM	TWO Central	
Open	Ready To Invoice				Bryan Walton	
0000002009	Central Distributing		9/5/1999 12:00:00 PM	9/6/1999 10:00:00 AM	TWO North	
Open	Ready To Invoice	0000002018			David Simpson	
0000002008	World Enterprises		9/5/1999 1:00:00 PM	9/6/1999 10:00:00 AM	TWO North	
Open	Ready To Invoice				Kathie Flood	

 Total: 5   Service Calls

Service Inventory Packing List Report

Report Writer name
  SVC_Transfer_Pack

Report tables
  SVC_Transfer_HDR
  SVC_Tech_MSTR
  SVC_Office_MSTR
  IV_Location_SETP
  SVC_Transfer_Line
  SVC_Transfer_Line_Serial_Lot

The Service Inventory Packing List displays the item number and description, serial number, unit of measure, quantity ordered, quantity shipped, and source document.

Printing Instructions

1. Open the Inventory Transfers window.
    Transactions > Service Call Management > Inventory Transfers

2. Mark the records to post.

3. Click **Packing Slip**.

For more information about printing Service Call Management reports, see the Service Call Management documentation.

Service Inventory Packing List Report

SERVICE INVENTORY PACKING LIST

Document ID: 0000001063
From: WAREHOUSE

Ship To:
   John Wood   Tech: John Wood
   45 Long Way   Office: TWO North
                                      Location: 101G
                                                John Wood
   Peoria
   IL   61021

Item Number Description	U of M Serial Number	Order QTY	QTY Shipped Source Document
3-D2657A DB 15 Male Adapter	EACH	10.00	10.00
3-D2659A DB25 Female Adapter	EACH	10.00	10.00
3-B3813A Keyboard	EACH	5.00	5.00

Service Work Order Report (history)

The Service Work Order report (history) displays a single-page summary for each service call that has been moved to history.

The report has a header section that contains the service call number, entry date, and entry time. The body of the report contains the customer name and address, phone number, service location and address details, phone number, and technician name. The body also contains the user ID of the person who entered the call, the service type, and the date completed.

The item information contains the service call item number, equipment number, and any constituent parts, labor, quantities, and the extended prices. The extended prices are totaled by line type and also by grand total.

The footer section includes a statement of acknowledgment for services performed, an authorization signature line, and date line.

Printing Instructions

1. Open the Service Call Inquiry window.
    Inquiry > Service Call Management > Service Call

2. Select a historical service call record.

3. Choose **File > Print**.

For more information about printing Service Call Management reports, see the Service Call Management documentation.

Service Work Order Report (history)

Fabrikam, Inc.
4277 West Oak Parkway

Chicago   IL   6001
31255501010000

Service Call #: 0000002010

    Entry: 9/5/2007   2:00:00 PM
     Page: 1
Record Type: Invoiced

Company Name:	A. Datum Corporation	Service Loc:	PRIMARY
Contact:	Pengw Wu	Address:	11427 Main St. N.E.
Phone:	(414)555-0784 Ext. 0000	Address:	
Contract No:	0000002027	City:	Green Bay
Technician:	Bob Hohman	State, Zip:	WI 54305-5303

OPENED BY	SERVICE TYPE	DATE COMPLETED	PURCHASE ORDER
DYNSA	PM Service Calls	9/6/2007	6110

EQUIPMENT NUMBER	ITEM NUMBER	GENERAL DESCRIPTION
586018	2-A3284A	

ITEM NUMBER	TYPE	SERIAL NUMBER	QTY	U of M	EXT. PRICE
5-STDLABOR	L		2.00	HOUR	$0.00
5-STDLABOR	L		0.50	HOUR	$0.00
5-TVLLABOR	L		0.50	HOUR	$10.00
5-STDLABOR	L		1.00	HOUR	$200.00
3-C2924A	P		1.00	EACH	$0.00
3-D2657A	P		1.00	EACH	$0.00
3-D2659A	P		1.00	EACH	$0.00

PARTS TOTAL	$0.00
LABOR TOTAL	$210.00
MISC. TOTAL	$0.00
TOTAL:	$210.00

Additional Notes:

We acknowledge that the requested services have been performed in a
satisfactory manner and are accepted by us.
We further acknowledge that the consultant spent _____ hours in
performing these services.

Authorized by _____

Date _____

Service Work Order Report (open)

Report Writer name

SVC_Service_Work_Order_W_
Note

Report tables

SVC_Work_Order_HDR_TEMP
SVC_Service_MSTR
SVC_Codes_Service_Type
RM_Customer_MSTR
SVC_Codes_Status
SVC_Tech_MSTR
SY_Record_Notes_MSTR
SVC_Service_MSTR_Line
SVC_Serial_Lot_WORK_HIST

The Service Work Order report (open) displays a single-page summary for each service call.

The report has a header section that contains the service call number, entry date, and entry time. The body of the report contains the customer name and address, phone number, service location and address details, phone number, and technician name. The body also contains the user ID of the person who entered the call, the service type, and the date completed.

The item information contains the service call item number, equipment number, and any constituent parts, labor, quantities, and the extended prices. The extended prices are totaled by line type and also by grand total.

The footer section includes a statement of acknowledgment for services performed, an authorization signature line, and date line.

Printing Instructions

1. Open the Service Call Inquiry window.
   Inquiry > Service Call Management > Service Call

2. Select a historical service call record.

3. Choose **File > Print**.

For more information about printing Service Call Management reports, see the Service Call Management documentation.

Service Work Order Report (open)

Fabrikam, Inc.
4277 West Oak Parkway

Chicago   IL   60601
80055501000000

Company Name:	Fourth Coffee	Service Loc:	PRIMARY
Contact:	Andrew Dixon	Address:	1010 Industrial Drive
Phone:	(402) 555-4744 Ext. 000	Address:	
Contract No:		City:	Beatrice
Technician:	Bryan Walton	State, Zip:	NE 68350-1010

OPENED BY	SERVICE TYPE	DATE COMPLETED	PURCHASE ORDER
DYNSA	PM Service Calls	9/6/2007	.

EQUIPMENT NUMBER	ITEM NUMBER	GENERAL DESCRIPTION
1215107002	2-A3284A	

ITEM NUMBER	TYPE	SERIAL NUMBER	QTY	U of M	EXT. PRICE
5-STDLABOR	L		2.00	HOUR	$400.00
5-STDLABOR	L		0.50	HOUR	$100.00
5-TVLLABOR	L		1.00	HOUR	$50.00
5-STDLABOR	L		1.00	HOUR	$100.00
3-C2924A	P		1.00	EACH	$140.00
3-D2657A	P		1.00	EACH	$6.00
3-D2659A	P		1.00	EACH	$6.00

PARTS TOTAL	$76.00
LABOR TOTAL	$650.00
MISC. TOTAL	$0.00
TOTAL:	$802.00

Additional Notes:

We acknowledge that the requested services have been performed in a
satisfactory manner and are accepted by us.
We further acknowledge that the consultant spent _____ hours in
performing these services.

Authorized by _____

Date _____