# ODT Service 365

Release Notes V1.1.0.0

**Open Door Technology**
200, 7710 5 Street SE
Calgary, Alberta T2H 2L9
877.777.7764

www.opendoorerp.com

# What's New

- **The ODT Service App has been published for Business Central North America.**
  ODT Service extends the power of Dynamics 365 Business Central, Jobs, by providing you with specialized tools that streamline daily business operations for servicing equipment.

  ODT Service can be used for both internal and external customer equipment servicing.

  The following functionality is included in the ODT Service app:
  - Service unit, which track service work performed on customer or internal units. Internal equipment service units, can optionally be linked to Items and Fixed Assets for informational purposes. From the Service Unit, the Service History and Service Ledger Entries are provided for tracking and analysis purposes.
  - Service templates are user defined service templates, which can be used to set up predefined service. A combination of service templates can be defined for a service plan for a group of equipment.
  - Service Checklists can be created on a service template, which flow through to the Service Quote and/or Service Ticket, when the Service Template is assigned to the lines. Technicians can print the checklist and/or populate checklist findings.
  - Service Quote can be used when servicing external customer equipment. The Service Quote is suitable for front line staff to create and modify service work, and create a service ticket. Upon creation of a Service Quote, a Job is automatically created.
  - Service Tickets can be used for either internal or external equipment servicing. The Service Ticket is suitable for front line staff and/or service technicians to create and modify service work in a simple work order format. Upon creation of a Service Ticket, a Job is automatically created.

**NOTE:**
For additional details on the above, please review the ODT Service Online Help. The help can be accessed from the Business Manager profile, under Service Management, in the Actions section of the role centers. When a user has been assigned the Sales Order Processor Profile,

# Issues Resolved

# Known Issues

- When a G/L Account is used in either a Service Template or entered manually on the Service Ticket Details, the unit cost and unit price are not transferred to the Job Journal when Confirm Actuals is ran. As a work around until the next release, the user can enter the unit cost and unit price on the Job Journal lines, when the journal opens after running the Confirm Actuals.

- When printing the Service Template Checklist from a Service Ticket, the Service Date does not print, unless on the General Tab of the ticket the Assigned Technician field is populated.

# UPCOMING Releases – Planned Modifications and New Features

- **Planned Maintenance**

The Planned Maintenance feature includes a planning engine, which allows service managers to require preparation inspections, return inspections, equipment repairs, and scheduled maintenance based on time or usage intervals. Planned Maintenance Quotes and Tickets are used for processing planned maintenance tasks, which are similar to the Service Quotes and Tickets.