Infor Service Management Release Notes

October 2022 Production Update

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About this document

This document provides information about the enhancements and changes in Service Management. See the Resolved Issues document for the list of fixed issues that are included in this update.

Details of previous updates for this year are also included in these documents.

Contacting Infor

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The latest documentation is available from docs.infor.com or from the Infor Support Portal. To access documentation on the Infor Support Portal, select **Search > Browse Documentation**. We recommend that you check this portal periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Chapter 1: Compatibility information

See the Online Compatibility Matrix on the Infor Support Portal.

Chapter 2: October 2022 Production Update

These updates are available as of October 2022.

Mongoose updates

Service Management 2022.10.00 is on Mongoose 2022.10.

See the *Infor Mongoose Release Notes* for more information.

General application updates

Consolidating invoice lines for contract invoicing

We added a new **Consolidate Partial Lines** check box on the **Rental Check Out/In** form and the **Contract Invoicing** form. Selecting this check box will consolidate any partial invoice lines on the report outputs. A new section is displayed on the output showing the rate and unit of rate for partial lines.

This check box is useful if you want to clearly view net results on the report output during a partial line check-in.

When this field is selected, the **Print Rate Details**, **Print Check-out Date**, and **Print Min Bill Thru** fields are cleared and disabled.

Distribution SX.e integration updates

Distribution SX.e-style forms in Service Management

New versions of these service forms were created in the style of Distribution SX.e forms:

- **Task Selection**
- **Multi-Day Scheduling**

- **Color Coding**
- **Global Scheduling Parameters**

These forms use the appearance and flow of screens found in Distribution SX.e. The names of the forms are annotated with a .sxe suffix, for example, **Partner Selection.sxe**.

In most cases, you will access these forms in Distribution SX.e, where they are accessible from the previously added Service Management. Accessing the forms in Distribution SX.e provides a more efficient workflow that eliminates toggling between applications.

Documents indicator on Service Orders.sxe form

We added a Documents indicator on the **Service Orders.sxe** form. This indicator is displayed when there are documents attached to the current service order.

Chapter 3: September 2022 Production Update

These updates are available as of September 2022.

Mongoose updates

Service Management 2022.09.00 is on Mongoose 2022.09.

See the *Infor Mongoose Release Notes* for more information.

General application updates

Quick SRO Create form enhancements

We made these enhancements to the **Quick SRO Create** form to improve the creation process:

- A new **PO Required** check box indicates if a purchase order number is required by the customer before work is performed.
- A new **Unit Description** field is now available.

Approve Estimate SRO form enhancements

We added two new fields on the **Approve Estimate SRO** form, to enhance the approval process for estimate service orders:

- The **PO Required** check box is automatically selected when the approval type is **Service Order** and a SRO number is populated. If the approval type is **Change Order**, then the **PO Required** field is hidden.
- When the **PO Required** check box is selected, then the new **Customer PO** field is required. Specify the customer PO number.

Void manual checks

You can now void manual checks on the **Void A/P Posted Payments** form. In the **Type** field, select the new option for **`Manual`** to view the manual checks and the select the check that you want to void.

Chapter 4: August 2022 Production Update

These updates are available as of August 2022.

Mongoose updates

Service Management 2022.08.00 is on Mongoose 2022.08.

See the *Infor Mongoose Release Notes* for more information.

General application updates

Improved visibility on rental contract reporting

We added new options on the **Contract Invoicing** and **Rental Check Out/In** forms. Select these new check boxes to include additional information on the report outputs:

- **Print Min Bill Thru**
- **Print Check In Date**
- **Print Rate Details**

Infor Document Management template for Rental Pick List Report

The **Rental Pick List Report** form can now use an Infor Document Management (IDM) report output instead of the Mongoose report output. The IDM report consists of an XML that is generated from Service Management and a report template Microsoft Word document, which is stored in a folder in IDM.

The **Rental Pick List Report** will no longer function like a Mongoose report, with reporting options and output files. Instead, the report file is routed to IDM in a predefined document type. The report document is created with attributes that enable it to be used in related documents from forms or in other applications, such as Distribution SX.e or Infor Ming.le.

Chapter 5: July 2022 Production Update

These updates are available as of July 2022.

Mongoose updates

Service Management 2022.07.00 is on Mongoose 2022.07.

See the *Infor Mongoose Release Notes* for more information.

General application updates

Email template for the Rental Contract Agreement Report

We added a new email template to be used with the **Rental Contract Agreement Report** when using a customer document profile. You can use this email template to send an automated email to customers.

Distribution SX.e integration updates

Serial numbers for assembly products automatically updated

When you specify a unit for an assembly product on a service order in Service Management, the corresponding sales order in Distribution SX.e is now updated with the unit. The unit is saved as a serial number on the appropriate sales order line.

Integration supports interchange cross-references

Interchange references to inventory items that are included in ItemMaster BODs can now be consumed by Service Management. The interchange references are recorded on the **Item References** tab on the **Items** form and the new **Item References** form. Interchange references are read-only in Service Management.

When you enter an interchange reference on an order entry form in Service Management, it is automatically replaced with the inventory item if the reference is associated with only one item. If the interchange reference is associated with multiple inventory items, you can select the correct item from a list. These forms support interchange reference entry:

- **Service Order Transactions**
- **Contract Lines**
- **Rental Counter**
- **SRO Material Entry**

Chapter 6: June 2022 Production Update

These updates are available as of June 2022.

Mongoose updates

Service Management 2022.06.00 is on Mongoose 2022.06.

See the *Infor Mongoose Release Notes* for more information.

Online documentation updates

Site Search on docs.infor.com

Site-wide documentation search has been added to docs.infor.com. This is in addition to, and separate from, the existing search within each product's documentation.

To access the site search, go to the docs.infor.com home page. To return to the home page from a product's documentation, click the docs.infor.com link at the bottom of any topic.

To help you define your search terms and find the content you are looking for, search tips are provided. See https://docs.infor.com/searchtips/ .

General application updates

Rental Contract Agreement enhancements

You can now use a customer document profile on the **Rental Contract Agreement** form. Document profiles are useful when you want to send specific reporting information to a customer.

With this update, we added a **Use Profile** check box to the **Rental Contract Agreement** form and added the Rental Contract Agreement as an option on the **Customer Document Profile** form.

We also enhanced the **Rental Contract Agreement** form so that it can be used with Infor Document Management (IDM). There is a new predefined report template for the Rental Contract Agreement, which you can import using the **IDM Report Templates** form.

Chapter 7: May 2022 Production Update

These updates are available as of May 2022.

Mongoose updates

Mongoose updates

Service Management 2022.05.00 is on Mongoose 2022.05.

See the *Infor Mongoose Release Notes* for more information.

General application updates

Calculate sales tax on demand

You can now calculate sales tax on demand for quotes. Use the new **Recalculate** button on the **Quotes** form to generate a new sales tax amount after updates. The button is enabled under these circumstances:

- **Reference** is `Service Order`
- The reference number is populated
- The current quote is not the latest revision and is inactive

Integration updates

TWL integrated with Service Management

When integrated with Distribution SX.e, customers can now use Total Warehouse Logistics (TWL) to manage their service inventory stocked in TWL warehouses. Customers can now use Service Management with TWL without alternate warehouses to pick the service orders in a TWL warehouse and ship to customer for service.

If an order is for a TWL warehouse, then service order transactions cannot be added, changed, or deleted when the material transaction is already set to Picked.

A new read-only field, **WLType**, was added to the **Warehouses** form and shows the name of the TWL warehouse.

Chapter 8: April 2022 Production Update

These updates are available as of April 2022.

Mongoose updates

Service Management 2022.04.00 is on Mongoose 2022.04.

See the *Infor Mongoose Release Notes* for more information.

General application updates

Improved IDM templates

We added an **Email Template** field on the **IDM Report Templates** form where you can specify an email template for each report that is supported by the IDM integration. When an email template is set up, the template is used as the body of an email message that is sent out based on the Customer Document Profile for the specified report.

Integration updates

Support consumables in rental contracts

Consumable items are now supported for rental contracts. When working in the rental module, you can select **`Consumable`** as the unit of rate to indicate that a rental contract is for a consumable item. The corresponding lines are created in OEIO with the Consumable unit of rate.

Chapter 9: March 2022 Production Update

These updates are available as of March 2022.

Mongoose updates

Service Management 2022.03.00 is on Mongoose 2022.03.

See the *Infor Mongoose Release Notes* for more information.

General application updates

Post a rental contract invoice in the background

On the **Contract Parameters** form, there is a new parameter called **Post Rental Contract Invoice in Background**. Use this parameter if you want the posting of the rental invoice to occur in the background. This is useful to prevent customers from having to wait on a rental check out/in if the system is locked up with journal posting.

Integration updates

Distribution SX.e-style forms in Service Management

A new version of the **Service Serials** form was created in the style of Distribution SX.e forms.

These forms use the appearance and flow of screens found in Distribution SX.e. The names of the forms are annotated with a .sxe suffix, for example, **Service Serials.sxe**.

In most cases, you will access these forms in Distribution SX.e, where they are accessible from the previously added Service Management. Accessing the forms in Distribution SX.e provides a more efficient workflow that eliminates toggling between applications.

Mobile updates

Serial number entry in mobile app

In the past, the mobile tech could not enter the serial numbers for a serialized component in the app. The work-around was to document serial numbers in a note for the back office user to enter. Now, the mobile tech can specify which serial numbers of a serialized component were used on the service order, and the old "note and re-enter" method can be avoided.

Chapter 10: February 2022 Production Update

These updates are available as of February 2022.

Mongoose updates

Service Management 2022.02.00 is on Mongoose 2022.02.

See the *Infor Mongoose Release Notes* for more information.

General application updates

General Ledger report

Previously, the **General Ledger by Account Report** was removed from Service Management. We added a new **General Ledger** form, which lists transactions for a range of periods, accounts and unit code 1-4 combinations. You can use the form to track financial expenditures within the company and generate financial statements and reports for management, auditors, and investors. The General Ledger is tied to other parts of the system through the Chart of Accounts and the distribution journals.

Customer PO on the Service Order Automatic Generation Utility

Use the new **Cust PO** field on the **Service Order Automatic Generation Utility** to enter a customer PO when it is required. Previously, there was no place to enter a customer PO on this form, which could result in errors when **Cust PO Required** was selected. Now, you can add the customer PO and successfully generate a service order.

The **Starting Customer** number must be the same as the **Ending Customer** number to enable the new **Cust PO** field.

New parameter for A/R payment distribution

Use the new **Set Distribution Amount to Payment Amount** parameter on the **Accounts Receivable Parameters** form to enable the new button on the **A/R Payment Distributions** form. When enabled, clicking

the **Set Distribution Amount to Payment Amount** button will change the distribution amount to the payment amount when the payment amount is less than the invoice amount.

After clicking, the name of the button is changed to **Set Distribution Amount to Invoice Amount**, which you can use if you want to change the amount back to the invoice amount if a write-off distribution is needed.

Integration updates

Distribution SX.e-style forms in Service Management

A new version of the **Invoice Milestones** form was created in the style of Distribution SX.e forms.

These forms use the appearance and flow of screens found in Distribution SX.e. The names of the forms are annotated with a .sxe suffix, for example, **Invoice Milestones.sxe**.

In most cases, you will access these forms in Distribution SX.e, where they are accessible from the previously added Service Management. Accessing the forms in Distribution SX.e provides a more efficient workflow that eliminates toggling between applications.

Chapter 11: January 2022 Production Update

These updates are available as of January 2022.

Mongoose updates

Service Management 2022.01.00 is on Mongoose 2022.01.

See the *Infor Mongoose Release Notes* for more information.

General application updates

Print a hard copy of the Order Invoicing report

The **Order Invoicing** form now includes an option to print a hard copy of the report output. We modified the **Order Invoicing** form to include new fields related to printer and output selections.

Note: This enhancement is only available after enabling the IDM integration for reports on the **Integration Parameters** form and activating the report configuration on the **IDM Report Templates** form.

New Unit Maintenances form

On the new **Unit Maintenances** form, you can review all existing unit maintenance records for a customer. Previously, you had to work on units individually. Now, you can use the new form to perform bulk creation or maintenance of units. Filter on a specific customer to review all existing unit maintenance records.

SRO change orders

Previously, change orders were processed by adding a new service order and quote. Now, you can link change orders to an SRO operation, so that a new service order is not needed. Click the new **Add Change Order** button on the **Service Order Operations** form to insert a new operation for the current SRO line.

Integration updates

Distribution SX.e-style forms in Service Management

New versions of these service forms were created in the style of Distribution SX.e forms:

- **SX.e Material Availability**
- **SX.e Catalog Non-Stock Query**

These forms use the appearance and flow of screens found in Distribution SX.e. The names of the forms are annotated with a .sxe suffix, for example, **SX.e Material Availability.sxe**.

In most cases, you will access these forms in Distribution SX.e, where they are accessible from the previously added Service Management. Accessing the forms in Distribution SX.e provides a more efficient workflow that eliminates toggling between applications.