Demo User Guide

MAXIMO SERVICE PROVIDER

Functional Overview
Quick Start Tutorial

Document Location

Maximo Training documentation repository

Revision History

Version Number	Version Date	Summary of Changes	Author
1.0	10/15/2009	Initial Creation of the document	Bheema Varanasi

Associated Design Documents

Document Name	Description

Table Of Contents

OVERVIEW

IBM® Maximo® for Service Providers delivers a suite of applications that manage customer agreements, service delivery, supplier contracts, and customer billing. Maximo for Service Providers fully supports service as a business. It ensures that only authorized users can view information about your customers.

CUSTOMER AGREEMENTS

Maximo for Service Providers maintains the agreements that exist between a service provider and each customer. Customer agreements specify the maintenance services to perform. Each request for service is validated to ensure that the customer is entitled to the service under the requested conditions. The agreements also specify the prices to charge for these services. Prices are calculated based on the type of cost:

- The cost of labor, materials, services, and tools used
- The fixed quoted cost or an upper price limit
- The cost of computer use or availability
- The cost based on service performance
- The cost for a single service, such as moving or adding assets.

CUSTOMER BILLING

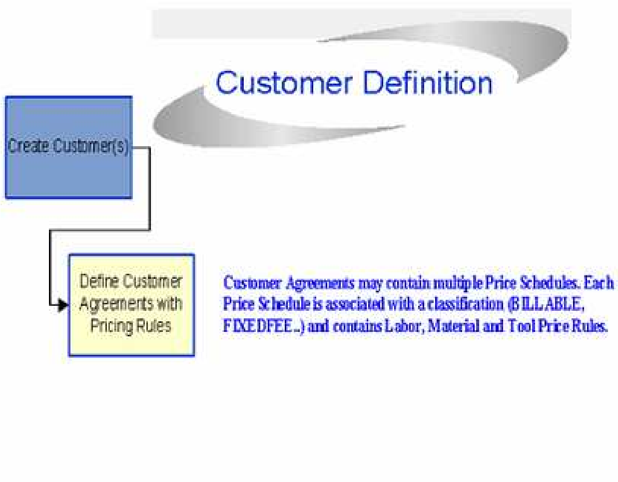
At scheduled intervals, the billing process extracts cost information from work orders, tickets, and sales orders and collects them into a billing batch. The service provider reviews the billing batch and adjusts the prices if necessary. Customers also can view parts of the billing batch so that they can pre-approve invoices that will be generated for the billing batch. After customers approve a billing batch, it is forwarded to the accounting system of the service provider to prepare the customer invoices.

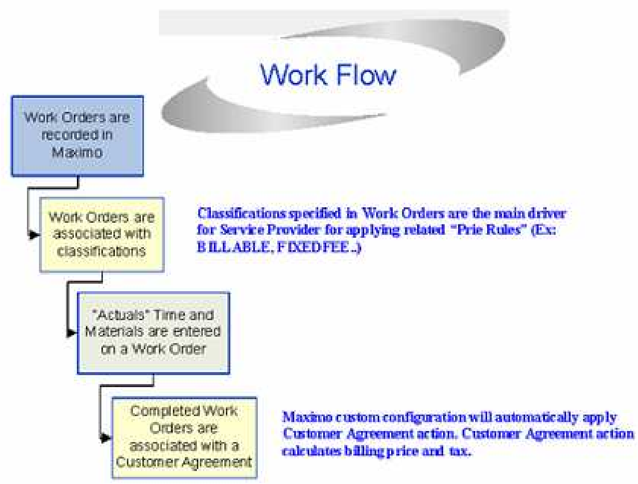
SECURITY

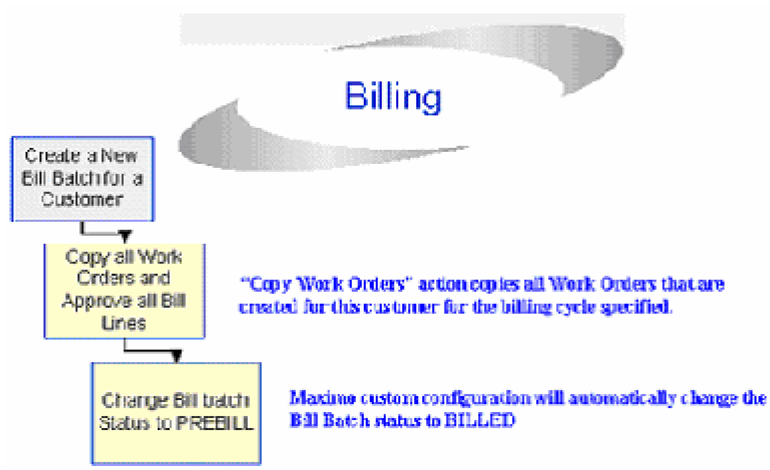
Maximo for Service Providers uses security to ensure that only authorized users can view information about customers. An employee of the service provider can see work orders for all customers of the service provider, but an employee of one of the customers can only see work orders for his or her company.

SERVICE PROVIDER PROCESS FLOW

A typical process using Maximo Service Provider industry solution is shown below.



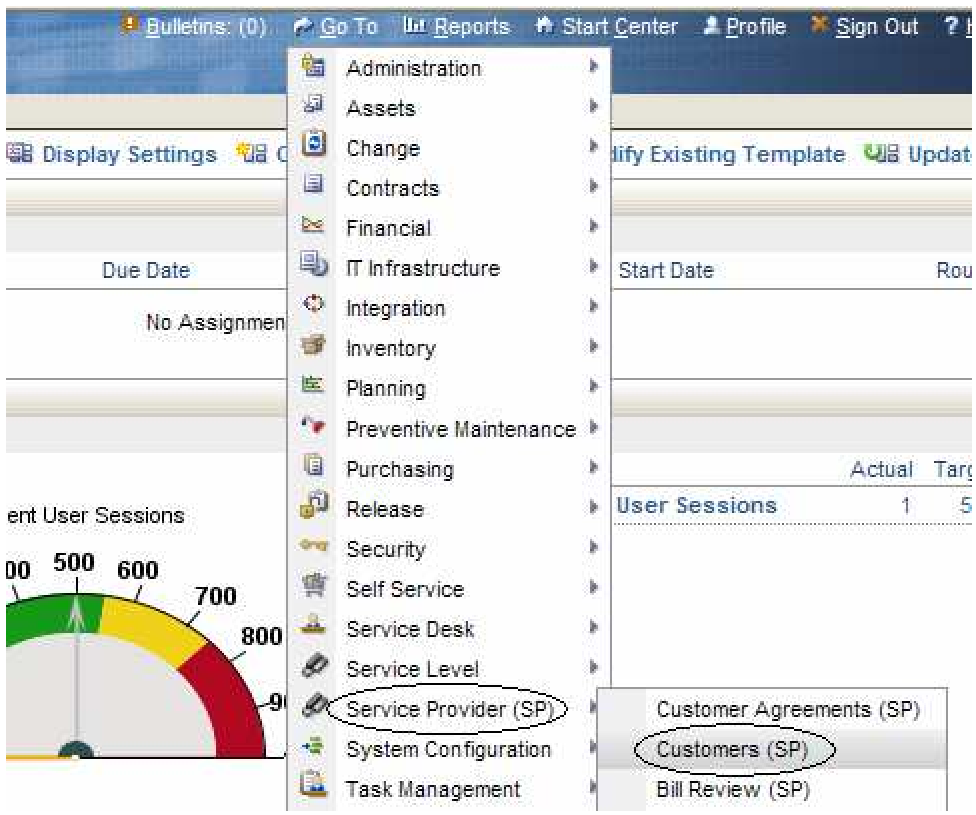




CUSTOMERS

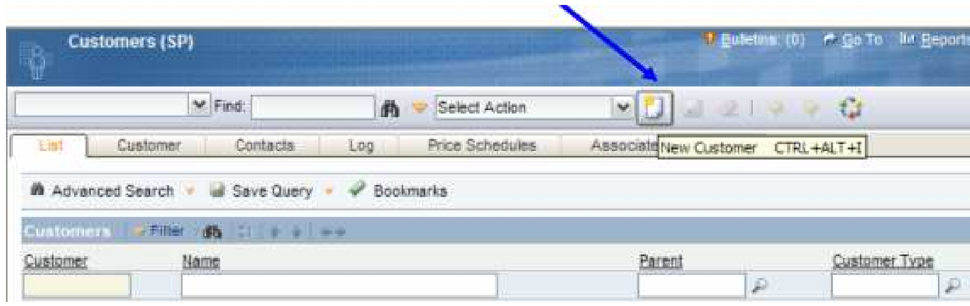
- This section guides through the process of creating a Customer using Customers (SP) application.

<table>
<tr><th></th><th></th></tr>
<tr><td>1</td><td>From the Maximo start center click on Go to → Service Provider → Customers (SP)

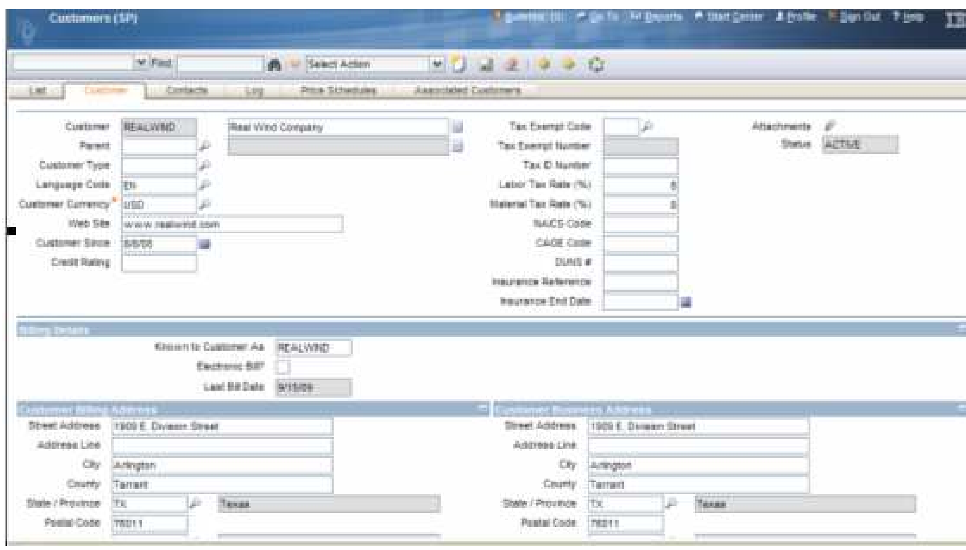


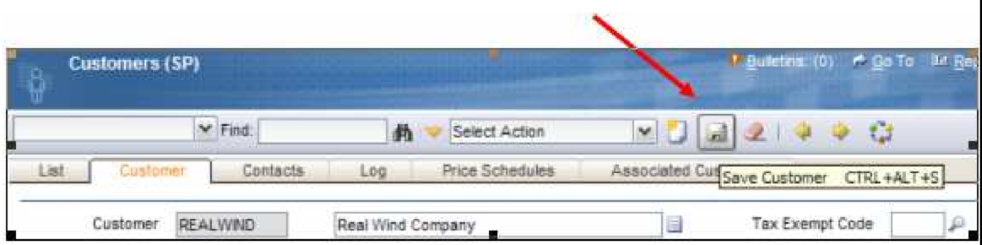
- This action will launch the Customers application
</td></tr>
</table>

<table>
<tr><td>2</td><td>Click on the “New Customer” toolbar button to create a new customer.

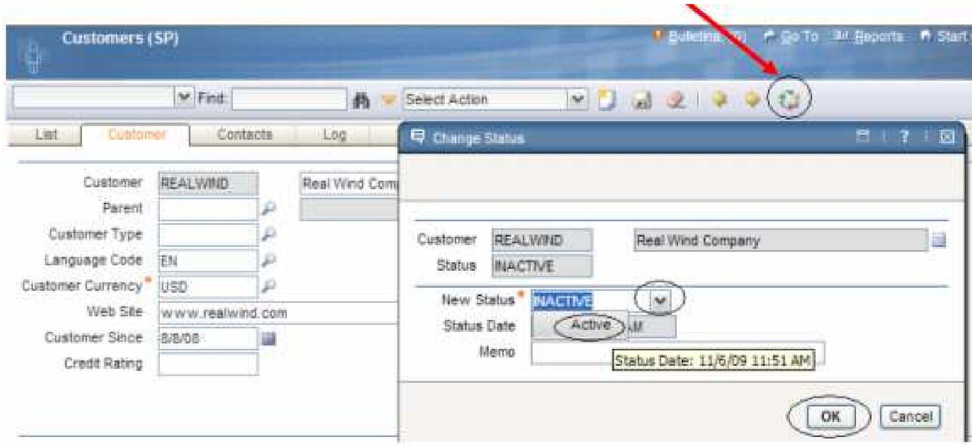


This action will launch the Main Application Screen in Customers Application.</td></tr>
<tr><td>3</td><td>Enter the Customer attributes (Customer, Description, Currency, Labor Tax, Material Tax, Address details and all other pertinent attributes.

</td></tr>
<tr><td>4</td><td>Click on the “Save Customer” toolbar button.



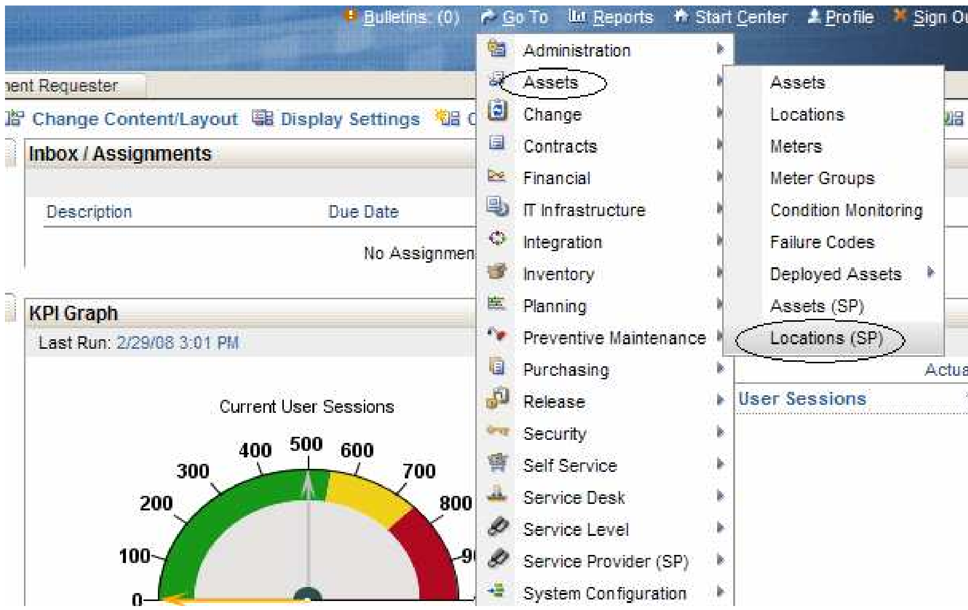
This action saves the Customer record in the Maximo database.</td></tr>
</table>

5	Click on “Change Status” toolbar button to change the status of the Customer to “Active”  • This action changes the customer status to “Active”.

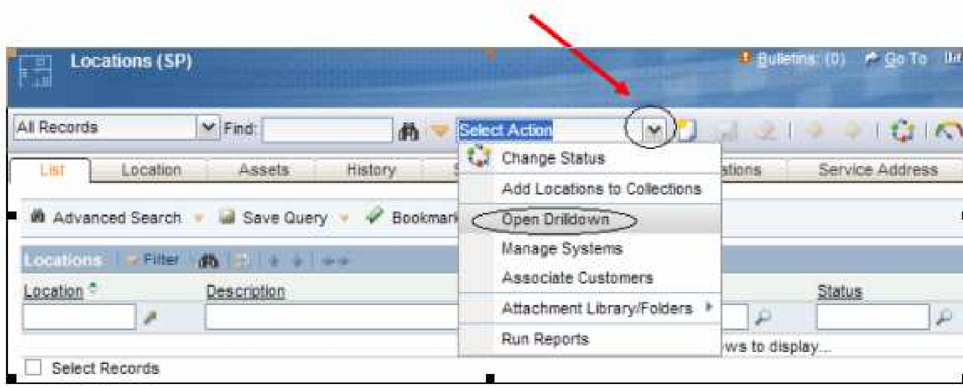
CUSTOMER ASSOCIATION

➢ This section guides through the process of associating a Customer with an existing Customer location record.

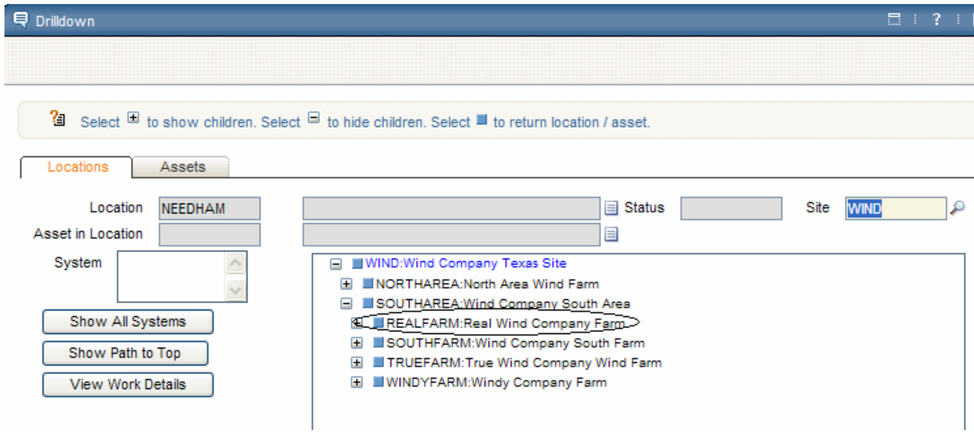
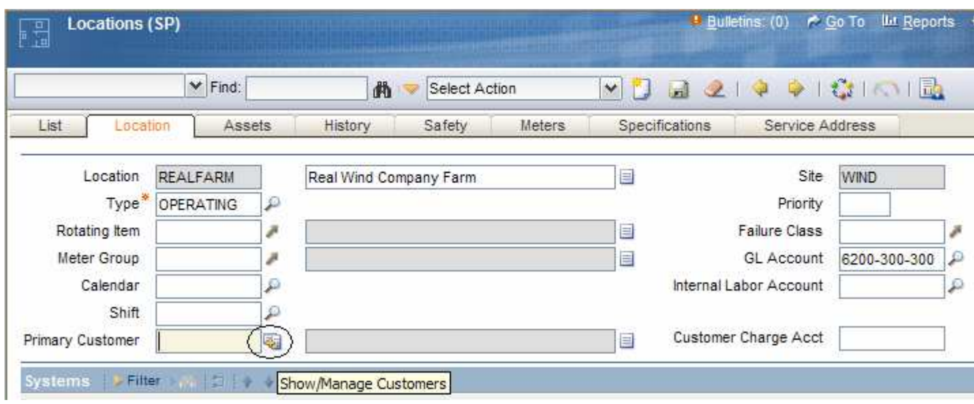
<table>
<tr><th></th><th></th></tr>
<tr><td>1</td><td>
From the Maximo start center click on Go to → Assets → Locations (SP)



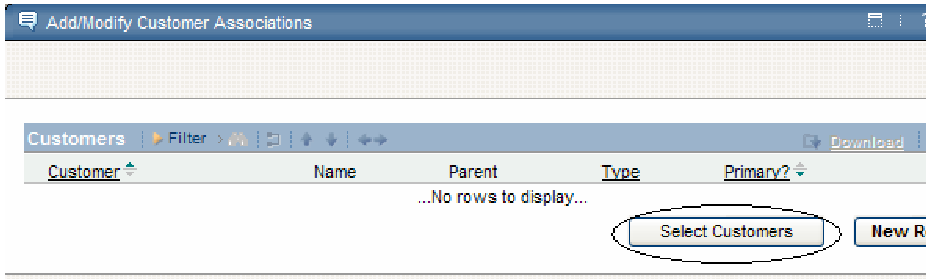
• This action launches “Locations (SP)” application.
</td></tr>
<tr><td>2</td><td>
Click on “Select Action” → “Open Drilldown”



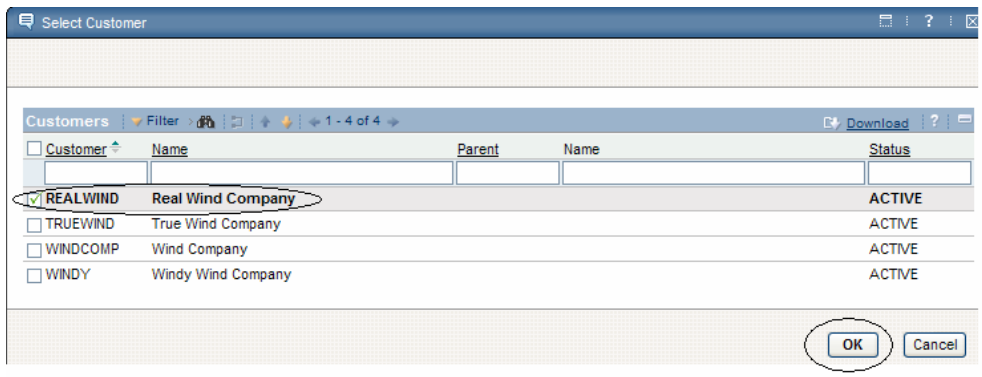
• This action opens the Maximo location drilldown window.
</td></tr>
</table>

3	In the “Drilldown” window drill down to the location for which a customer needs to be assigned and select that “customer location”.  • This action selects the “Customer Location” and retrieves the record in the Locations (SP) application.
4	Click on the “Primary Customer” link to open “Add/Modify customer associations” window.  • This action opens the “Add/Modify customer associations” window.

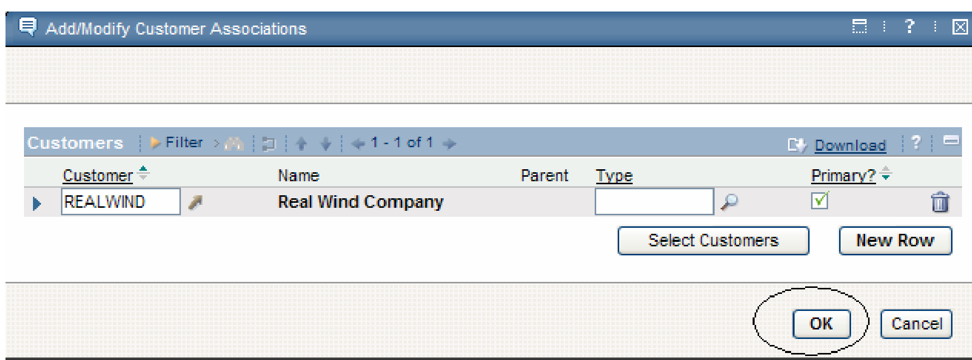
<table>
<tr><td>5</td><td>Click on “Select Customers” to open “Select Customer” window.



- This action opens “Select Customer” window.</td></tr>
<tr><td>6</td><td>Select the customer and click OK



- This action will add the Customer association.</td></tr>
<tr><td>7</td><td>Click on OK to populate the Primary Customer attribute in Locations (SP) application for the selected location record.


</td></tr>
</table>

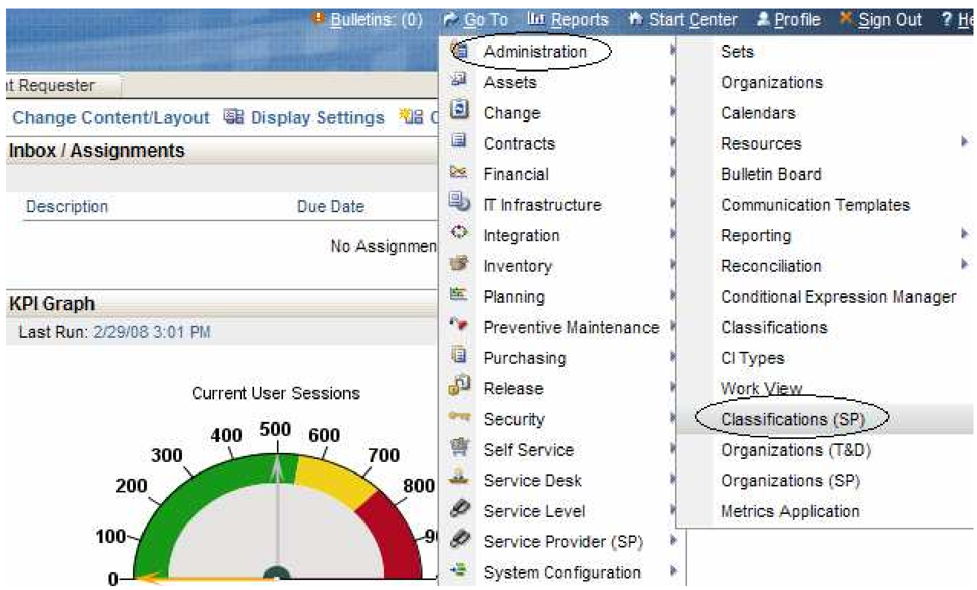
<table>
<tr><td>8</td><td>Click on the “Save Location” toolbar button to save the location record.


</td></tr>
<tr><td></td><td></td></tr>
</table>

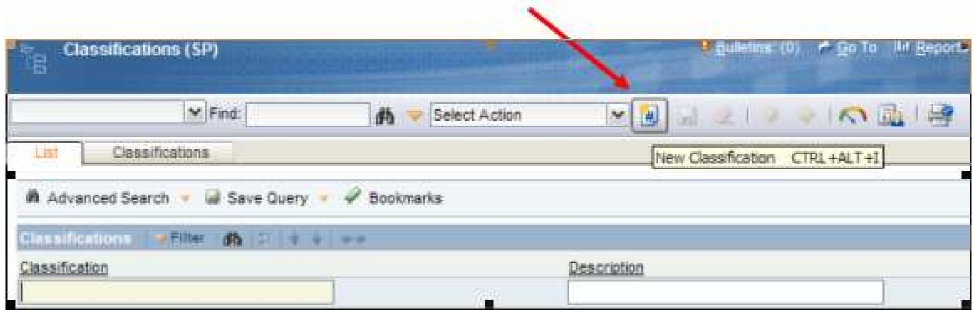
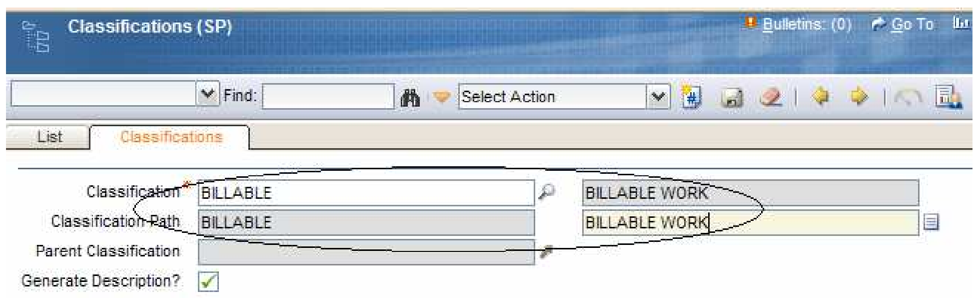
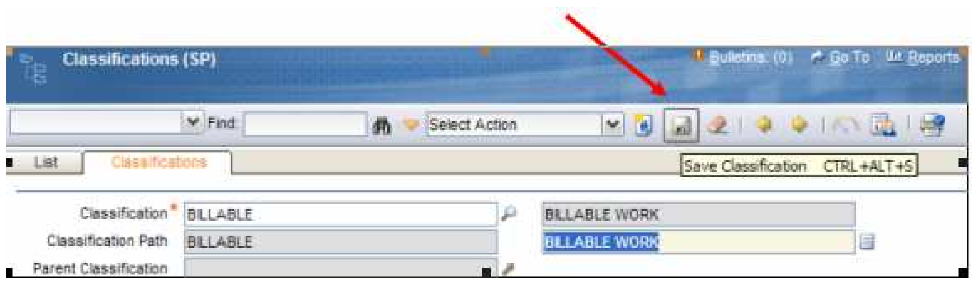
CLASSIFICATIONS

➢ This section guides through the process of creating classifications.

<table>
<tr><th></th><th></th></tr>
<tr><td>1</td><td>From the Maximo start center click on Go to → Administration → Classifications (SP)



• This action launches “Classifications (SP)” application.</td></tr>
</table>

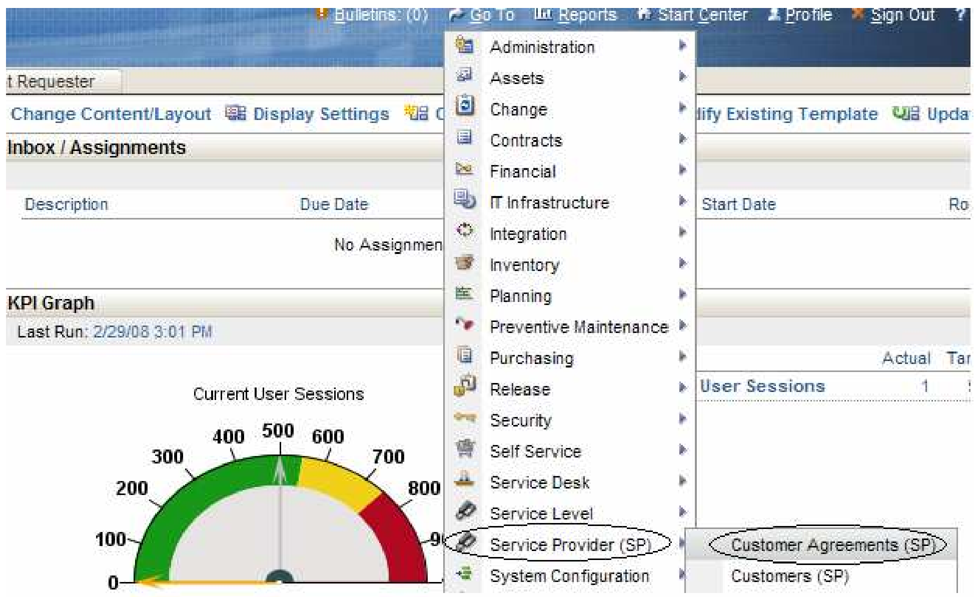
2	Click “New Classification” toolbar button.  • This action opens the Classifications (SP) application
3	Enter the “Classification” and “Classification Path” along with description as shown here. 
4	Click on the “Save Classification” toolbar button to save the classification.  .

CUSTOMER AGREEMENTS

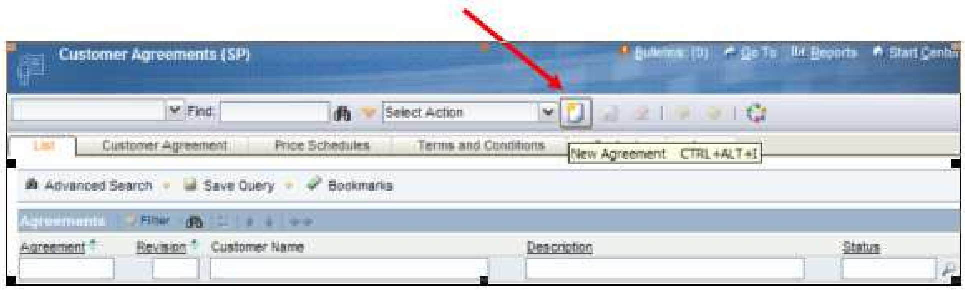
➢ This section guides through the process of creating a Customer Agreement. This section is divided into the following sub sections to guide through the process.

CUSTOMER AGREEMENT HEADER

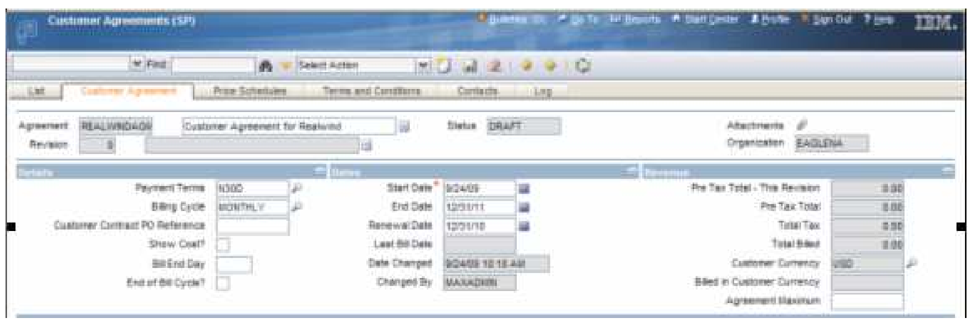
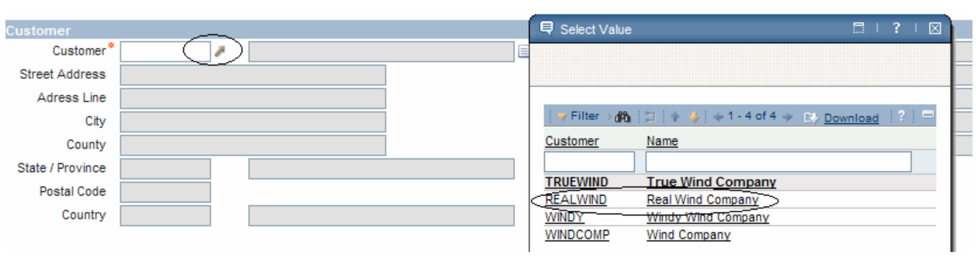
<table>
<tr><th></th><th></th></tr>
<tr><td>1</td><td>From the Maximo start center click on Go to → Service Provider (SP) → Customer Agreements (SP)



• This action launches "Customer Agreements (SP)" application.</td></tr>
</table>

<table>
<tr>
<td>2</td>
<td>Click “New Agreement” toolbar button to start creating a New customer Agreement.


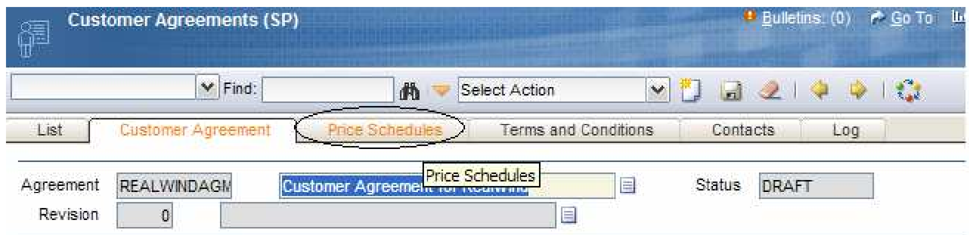
This action opens the Main application screen in Customer Agreements application.</td>
</tr>
<tr>
<td>3</td>
<td>Enter the “Customer Agreement” Attribute (Agreement and Description)

In the Details Section Enter Payment Terms, Billing Cycle, Start Date, End Date, Renewal Date and any other pertinent attributes. As shown here.

In the Customer Section, click on the customer link and select a Customer.

</td>
</tr>
</table>

4	Click on the “Save Agreement” toolbar buton.  • This action saves the Customer Agreement in Maximo.

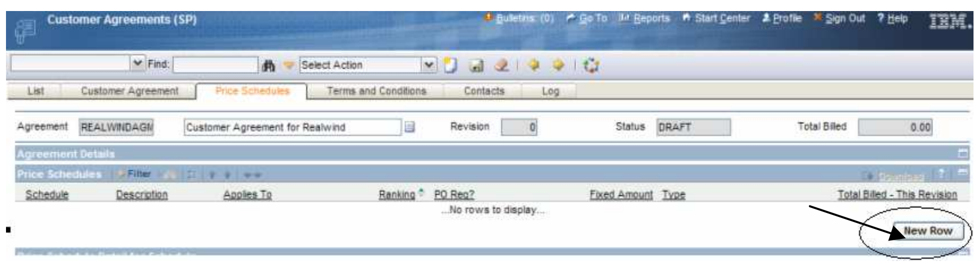
CREATING PRICE SCHEDULES

1 From the “Customer Agreements” Main Screen, Click on the “Price Schedule” tab.



- This action opens the “Price Schedules” screen..

2 Click “New Row” button to start creating a New Price Schedule.

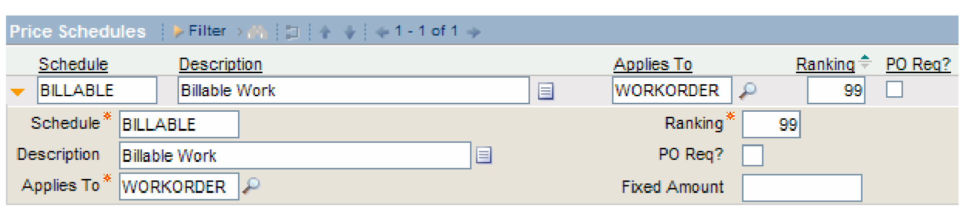


3 In the Agreement Details section / Price Schedules section

Enter the Price Schedule details (Schedule, Description)

Enter the text WORKORDER IN THE “Applies To” attribute

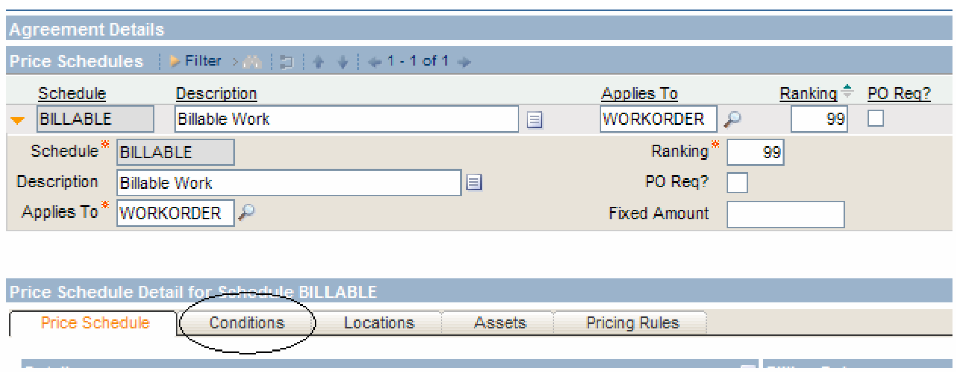
Enter a numerical number in the Ranking Attribute

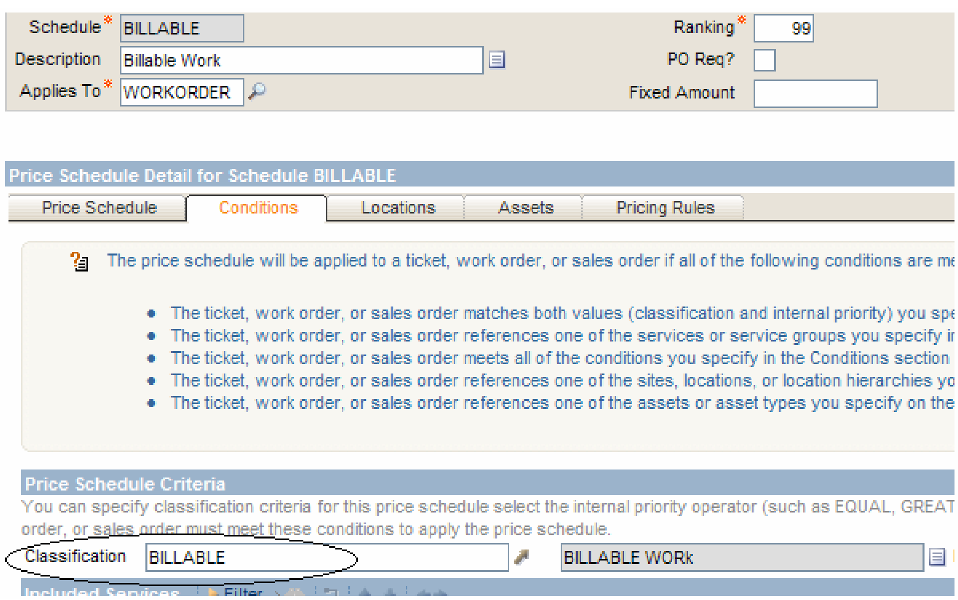


In the Details Section Enter Payment Terms, Billing Cycle, Start Date, End Date, Renewal Date and any other pertinent attributes. As shown here.

<table>
<tr><td>4</td><td>Click on the “Save Agreement” toolbar button.

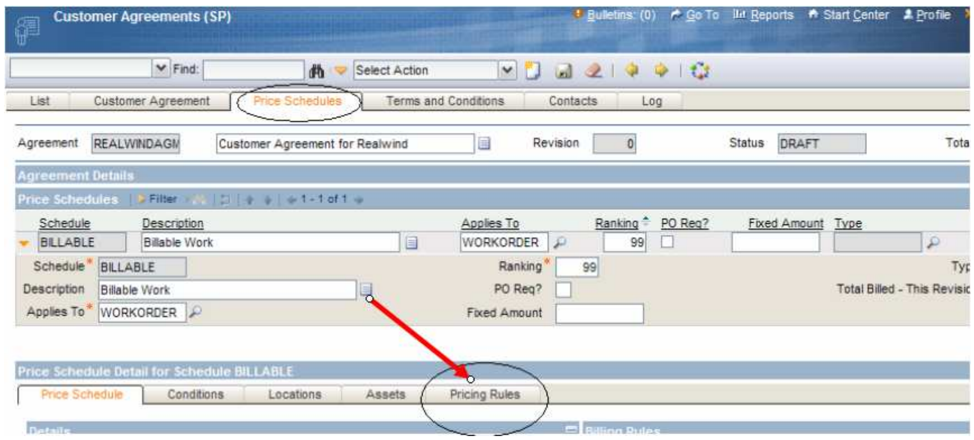
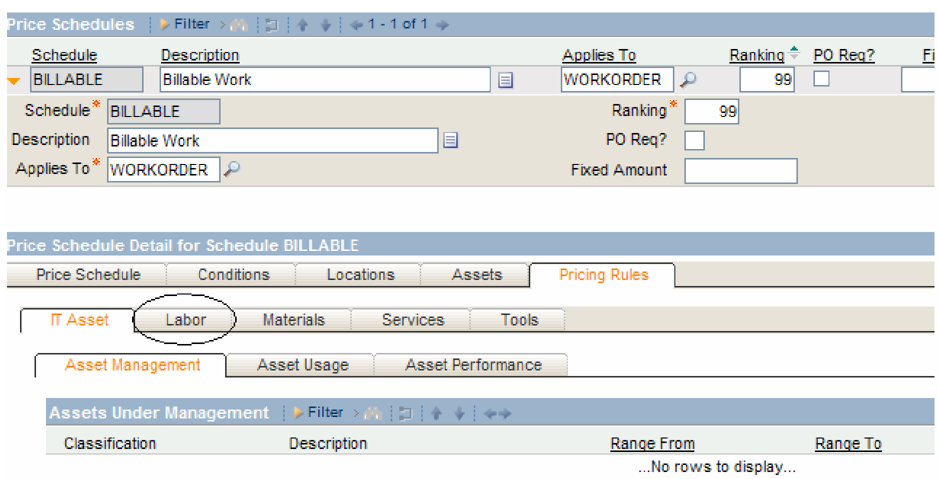

</td></tr>
<tr><td>5</td><td>Click on the “Conditions” tab in the “Price Schedule Details” section.

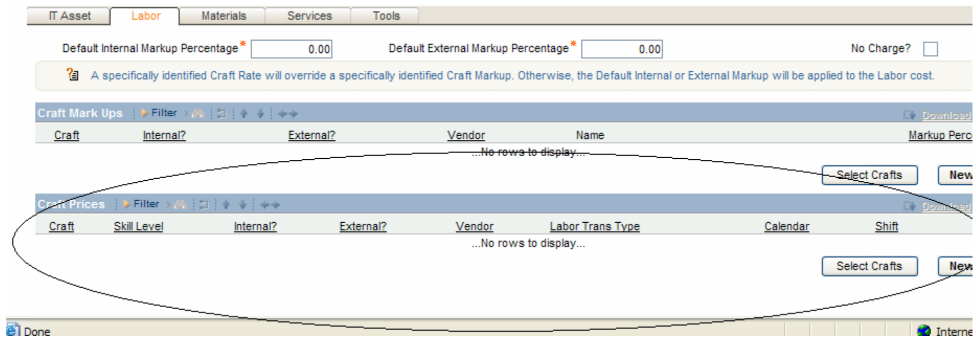
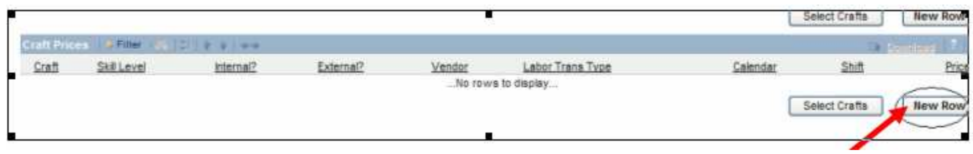
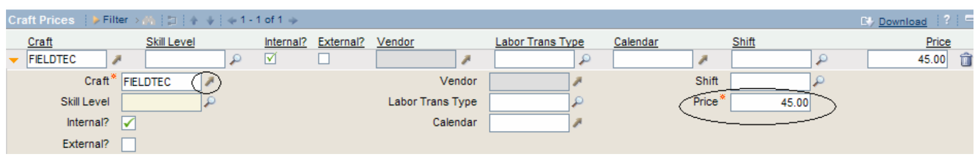
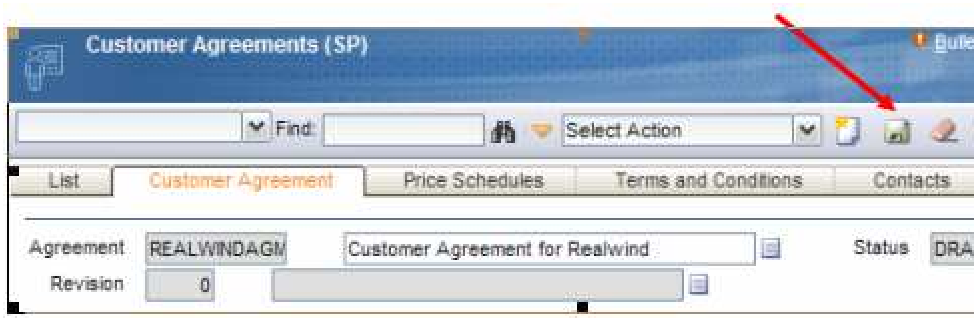

</td></tr>
<tr><td>6</td><td>Enter the classification that is related to the Price Schedule.

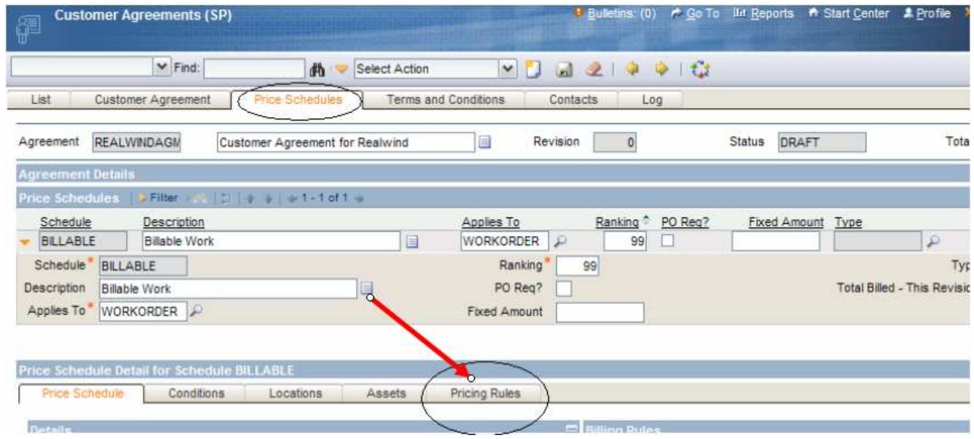
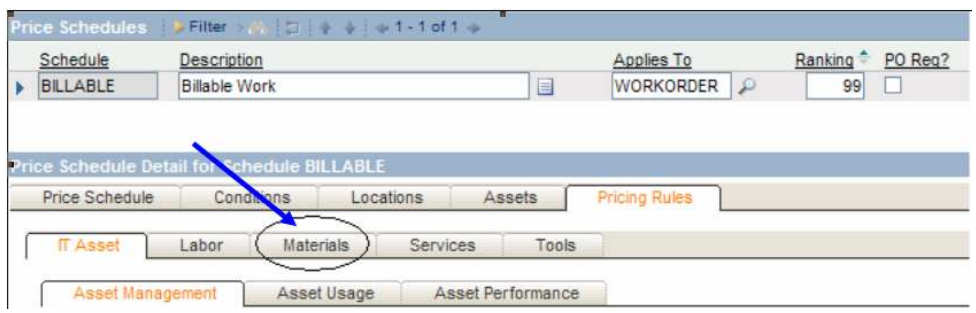

</td></tr>
</table>

7	Click on the “Save Agreement” toolbar button. 

CREATING PRICE RULES -- LABOR

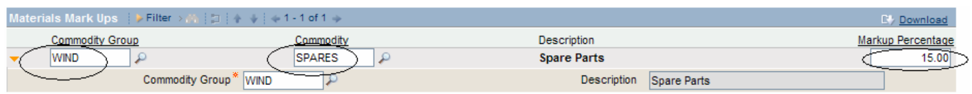
1	From the "Customer Agreements" "Price Schedule" tab, Click on the "Price Rules" tab. 
2	Click on the "Labor" tab to open the Labor Price Rules section. 

3	To enter the Fixed Price Billing for Crafts use the “Craft Prices” section to populate details. 
4	Click on the “New Row” button in the “Craft Prices” section. 
5	Enter the Craft and Price as shown below. (Use the Select value list to select a Craft from existing crafts in Maximo). 
6	Click on the “Save Agreement” toolbar button. 

<table>
<tr><th></th><th></th></tr>
<tr><td>1</td><td>From the “Customer Agreements” “Price Schedule” tab, Click on the “Price Rules” tab.

</td></tr>
<tr><td>2</td><td>Click on the “Materials” tab to open the Materials Price Rules section.

</td></tr>
<tr><td>3</td><td>To enter the Markup Percentage of Materials for Billing, use the Materials Markup section as shown.

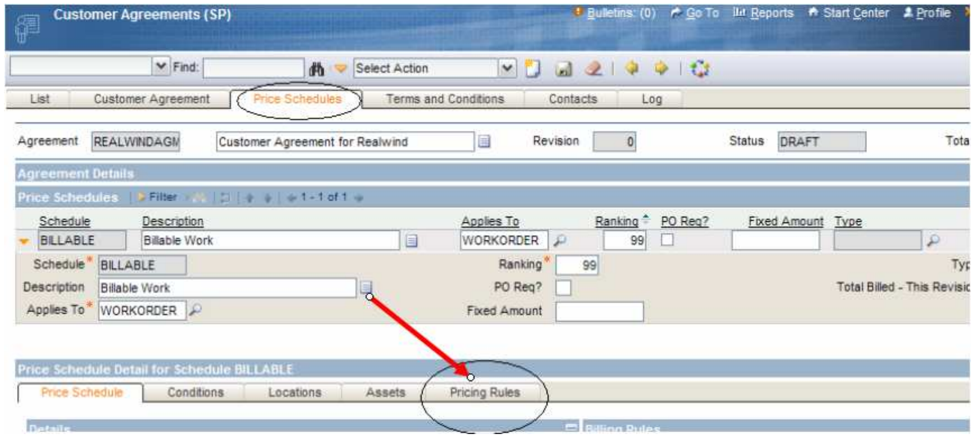
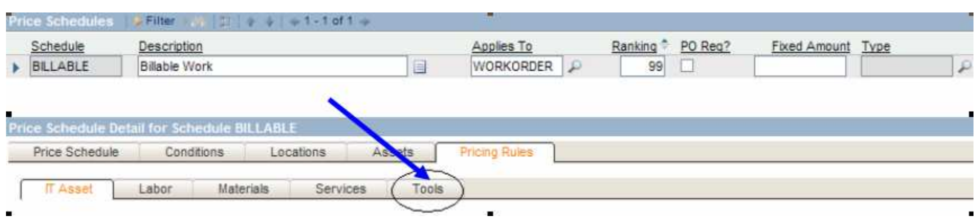
</td></tr>
</table>

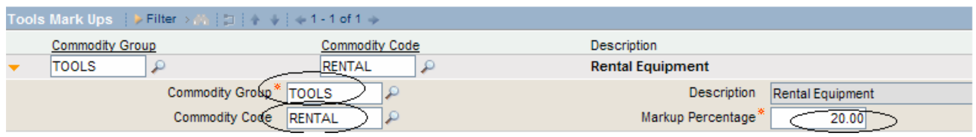
<table>
<tr><td>4</td><td>Click on the “New Row” button in the “Material Markup Prices” section.

</td></tr>
<tr><td>5</td><td>Enter the Commodity Group, Commodity and Markup Percentage as shown below. (Use the Select Value Lists to select Commodity Groups and Commodity from the system).

</td></tr>
<tr><td>6</td><td>Click on the “Save Agreement” toolbar button.

</td></tr>
<tr><td></td><td></td></tr>
</table>

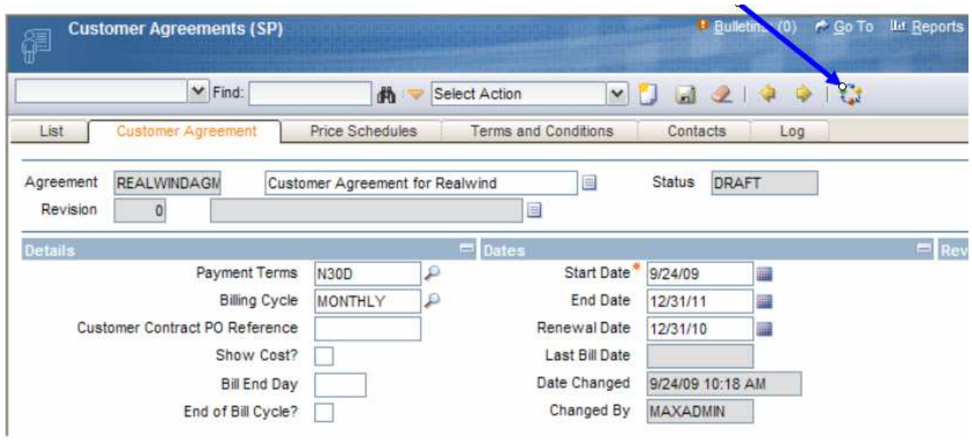
CREATING PRICE RULES -- TOOLS

1	From the “Customer Agreements” “Price Schedule” tab, Click on the “Price Rules” tab. 
2	Click on the “Tools” tab to open the Tools Price Rules section. 
3	To enter the Markup Percentage of Tools for Billing, use the Tools Markup section as shown. 

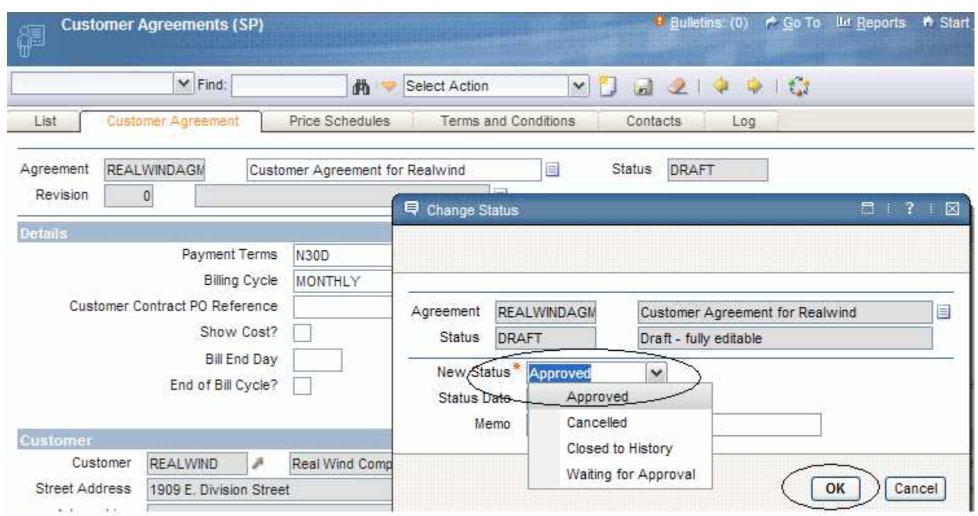
4	Click on the “New Row” button in the “Tools Markup Prices” section. 
5	Enter the Commodity Group, Commodity and Markup Percentage as shown below. (Use the Select Value Lists to select Commodity Groups and Commodity from the system). 
6	Click on the “Save Agreement” toolbar button. 

CUSTOMER AGREEMENT – CHANGE STATUS

1 From the “Customer Agreements” “Main Screen”, click on the “Change Status” button to



2 From the “Change Status” drop down list, select “Approved” and click OK



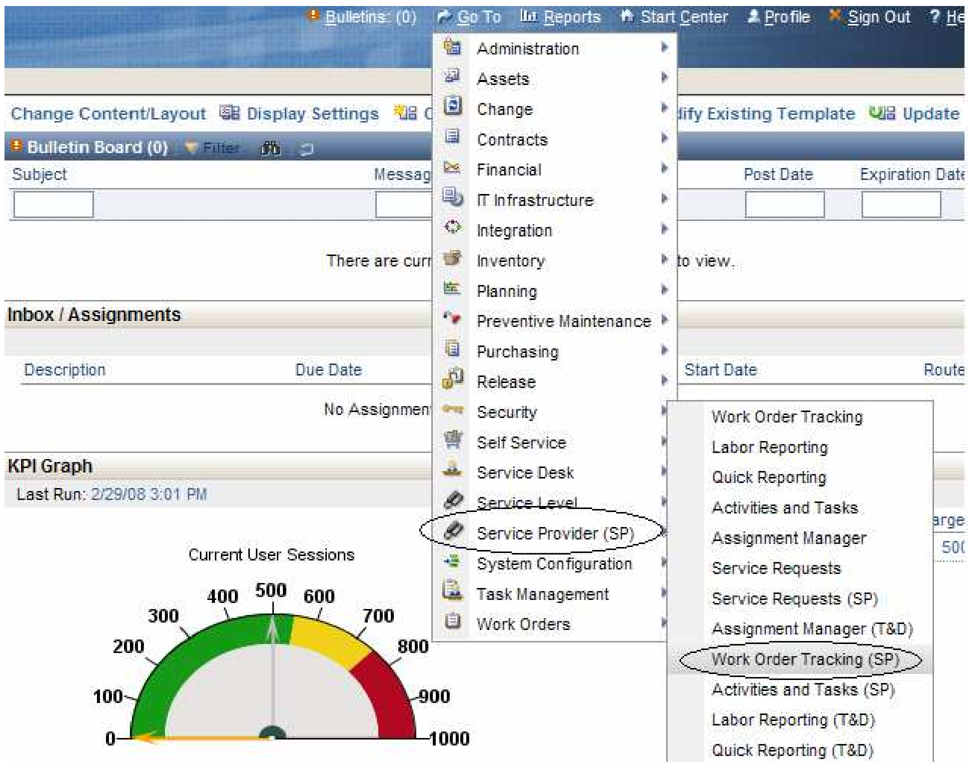
3	Click on the “Save Agreement” toolbar button. 

WORKORDERS

- This section (containing following subsections) guides through the process of creating a Work Order and Applying a Customer Agreement.

WORKORDER -- MAIN

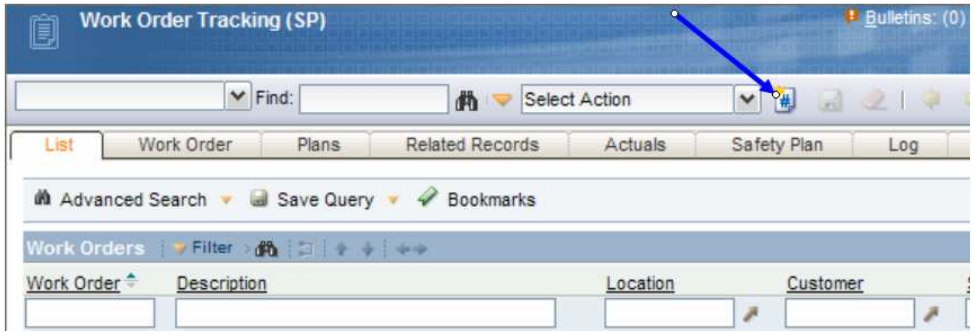
1 From the Maximo start center click on Go to → Service Provider → Work Order Tracking (SP)



- This action opens the “Work Order Tracking (SP)” application Main Screen.

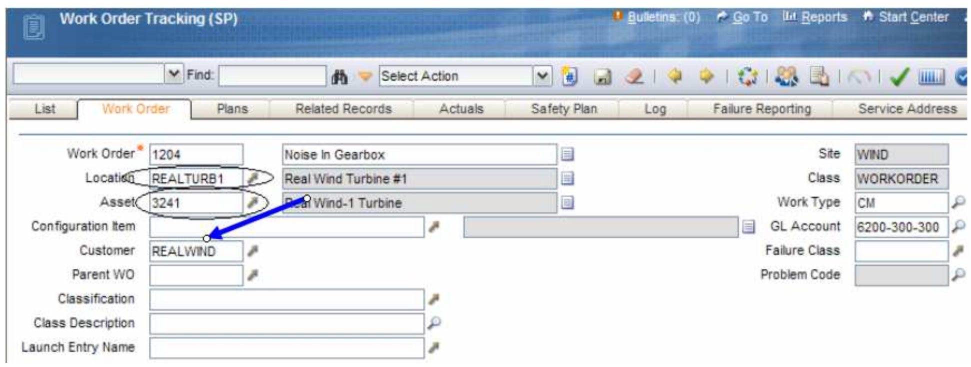
<table>
<tr><td>2</td><td>

Click on the “New Workorder” toolbar button.



</td></tr>
<tr><td>3</td><td>

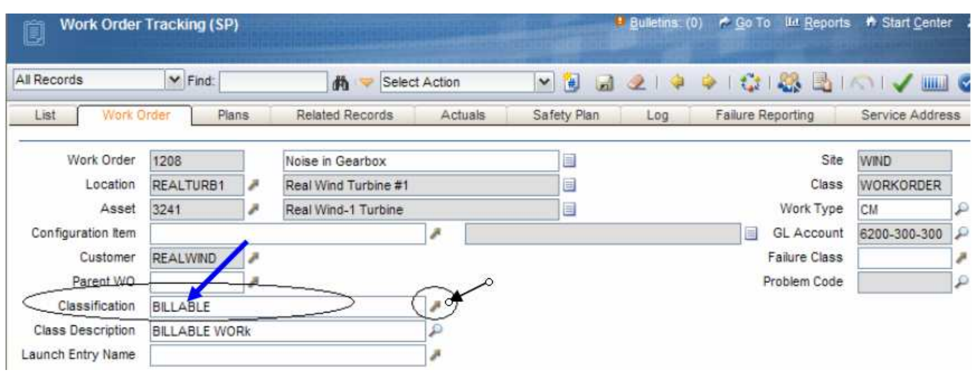
Enter the Work Order details as shown. Use the Location drilldown to select the Customer Location/Asset.



** Note that the Customer is automatically populated by the asscociation of location record with the Customer.

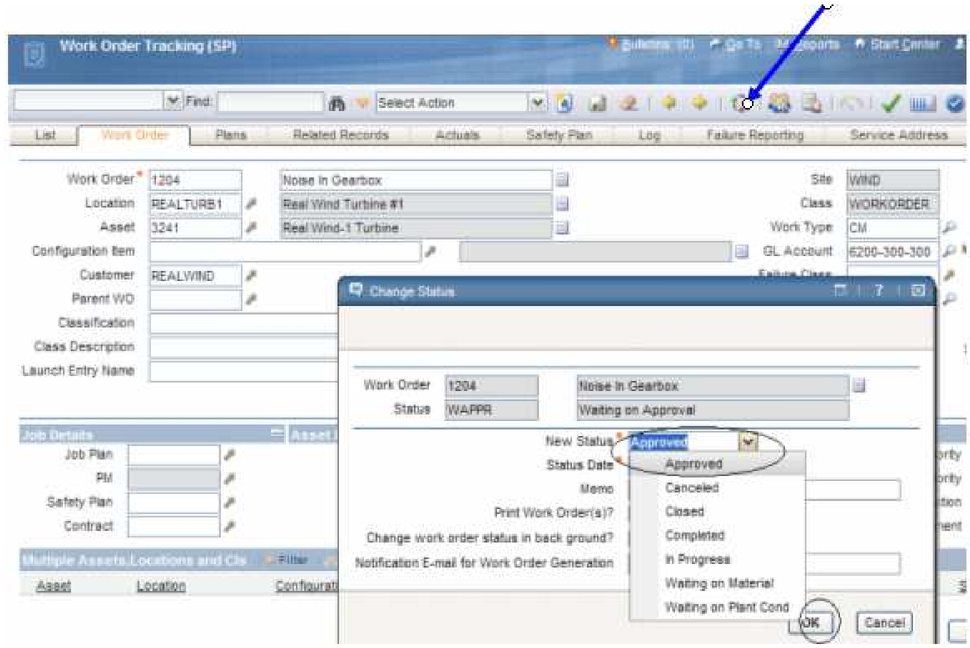
</td></tr>
<tr><td>4</td><td>

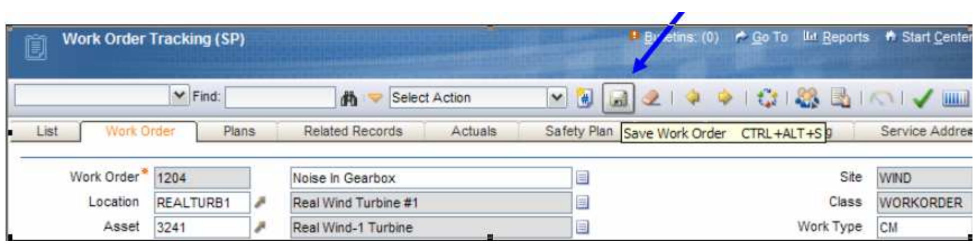
Enter the Classification (Ex: BILLABLE) as shown. You may use the Select Value list link to select a classification from the classification hierarchy..



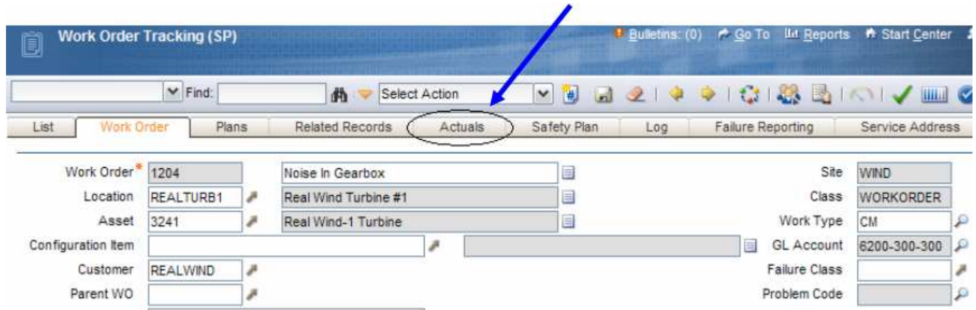
</td></tr>
</table>

<table>
<tr><td>5</td><td>Click on the “Change Status” toolbar button and Change the status of the work order to Approved.

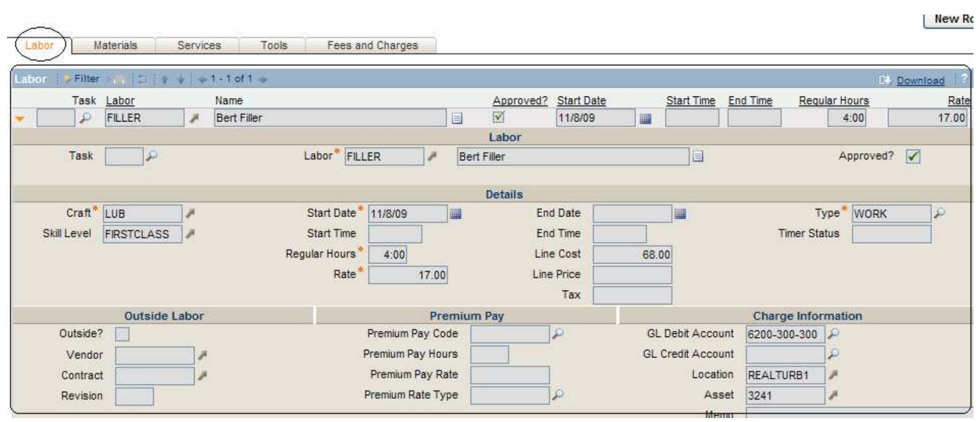

</td></tr>
<tr><td>6</td><td>Click on the “Save Workorder” toolbar button to save the work order.


</td></tr>
<tr><td></td><td></td></tr>
</table>

1 From the Work Order Tracking (SP) Main Screen, click on the “Actuals”.



2 Enter the Labor details as shown. Use the select value list for labor and craft to select from the system.

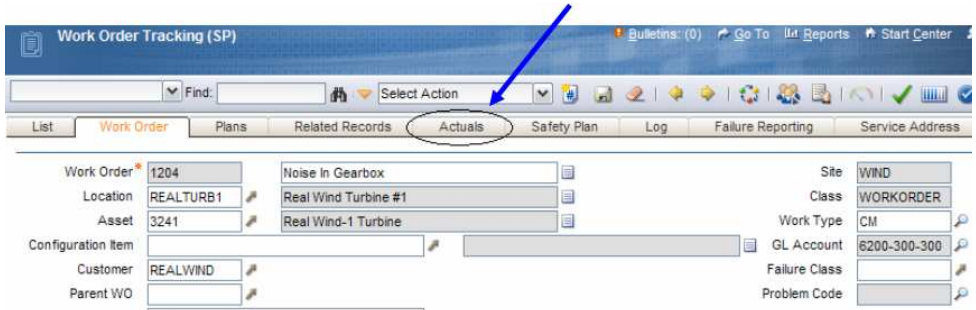


** You may enter multiple line entries depending on the type of work performed for the customer.

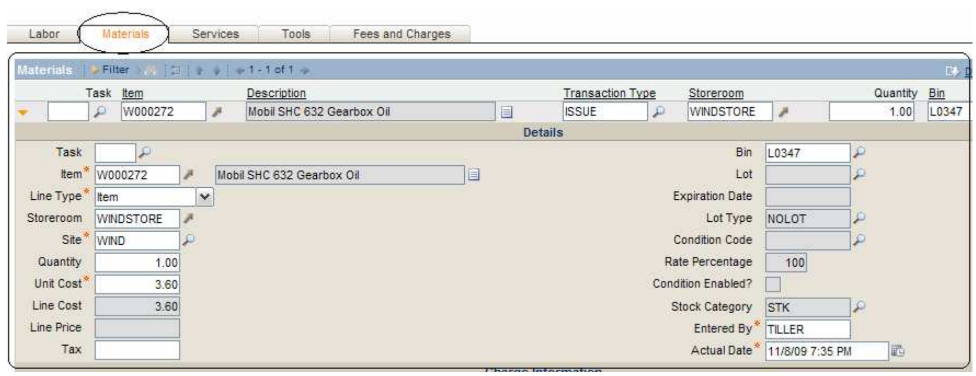
** Follow the Work Order user guide for more details on entering “Actuals” on a Work Order.

WORKORDER ACTUALS -- MATERIAL

1 From the Work Order Tracking (SP) Main Screen, click on the “Actuals” tab.



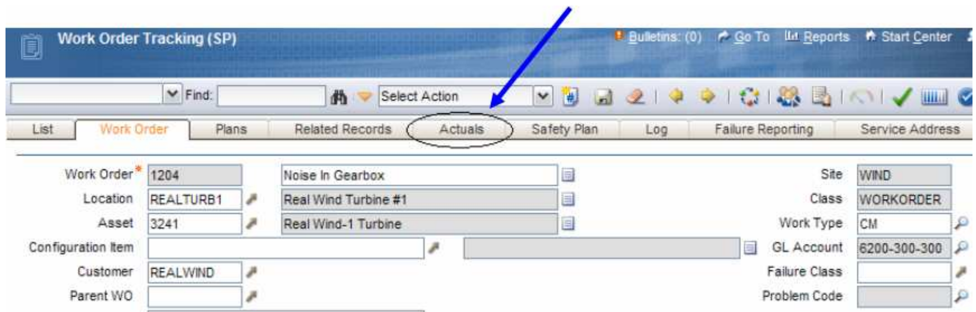
2 Enter the Material details as shown. Use the select value list for storeroom, item for selecting appropriate values and enter any additional details as required.



** You may enter multiple line entries depending on the type of work performed for the customer.

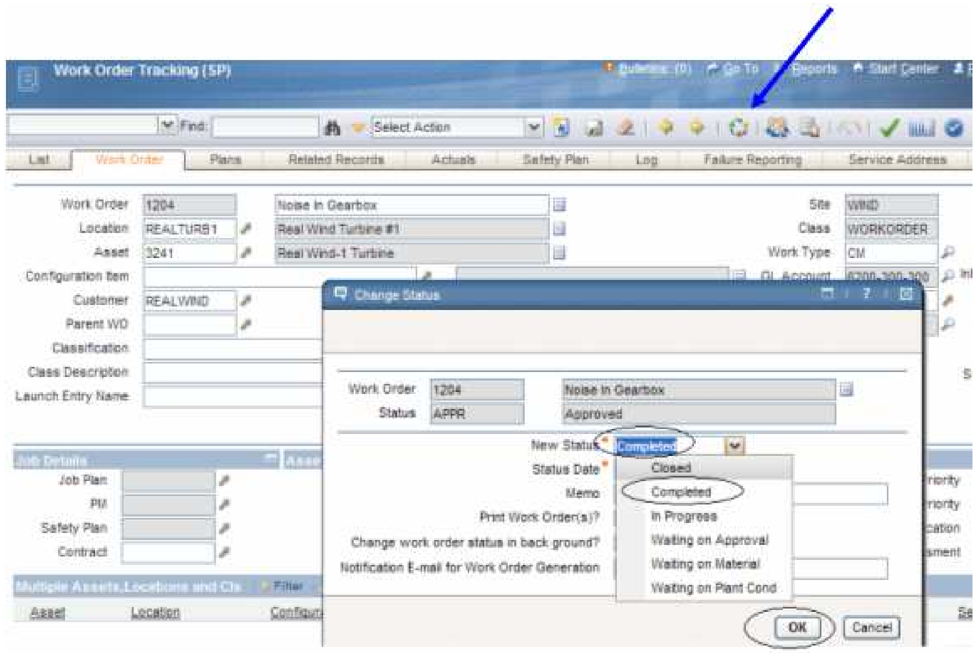
** Follow the Work Order user guide for more details on entering “Actuals” on a Work Order.

WORKORDER ACTUALS -- TOOLS

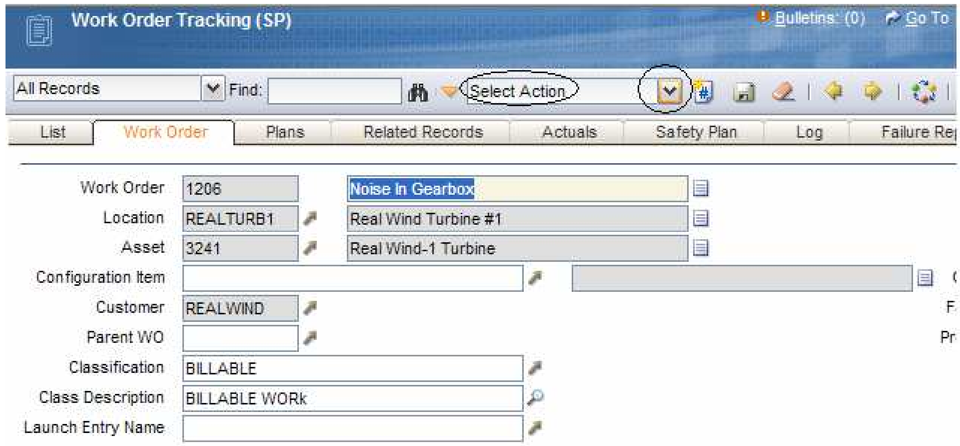
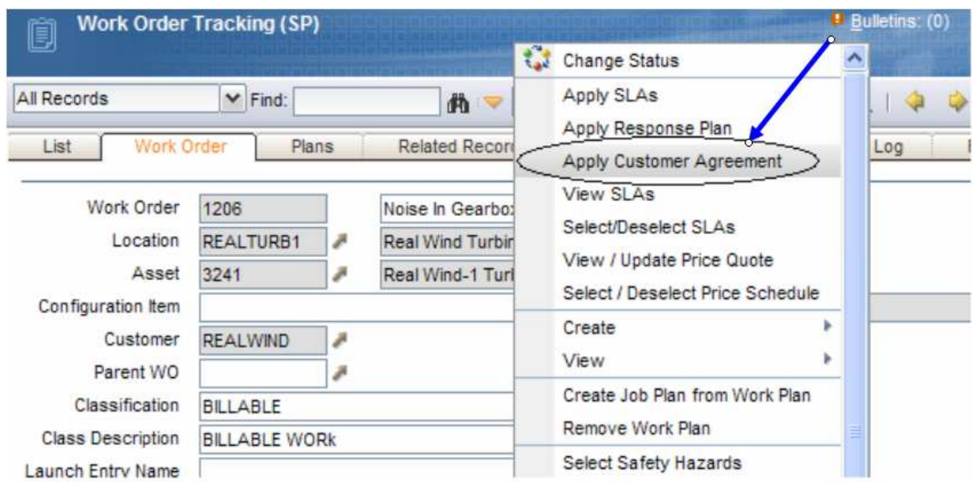
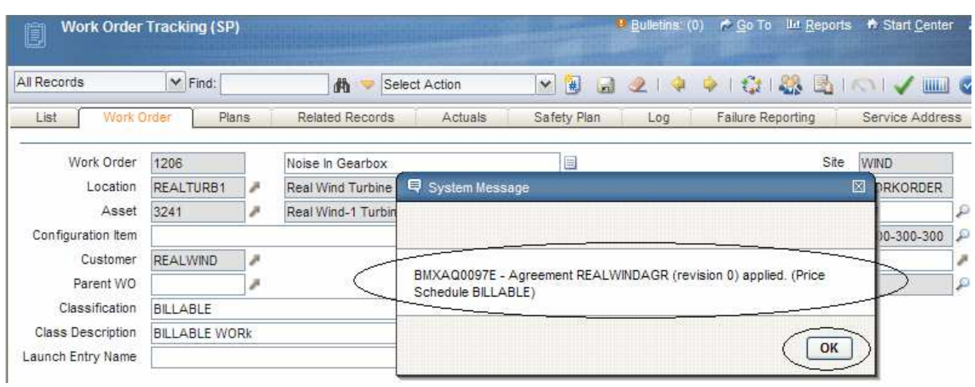
<table>
<tr><th></th><th></th></tr>
<tr><td>1</td><td>From the Work Order Tracking (SP) Main Screen, click on the “Actuals” tab.

</td></tr>
<tr><td>2</td><td>Enter the Tools details as shown.


** You may enter multiple line entries depending on the type of work performed for the customer.

** Follow the Work Order user guide for more details on entering “Actuals” on a Work Order.</td></tr>
<tr><td></td><td></td></tr>
</table>

<table>
<tr><th></th><th></th></tr>
<tr><td>1</td><td>From the Work Order Tracking (SP) Main Screen, click on the “Change Status” tool bar button and select “Completed” from the dropdown list and click OK

• This action Completes the Work Order.</td></tr>
<tr><td>2</td><td>From the Work Order Tracking (SP) Main Screen, click on the “Save Workorder” tool bar button to Save the Work Order.
</td></tr>
<tr><td></td><td></td></tr>
</table>

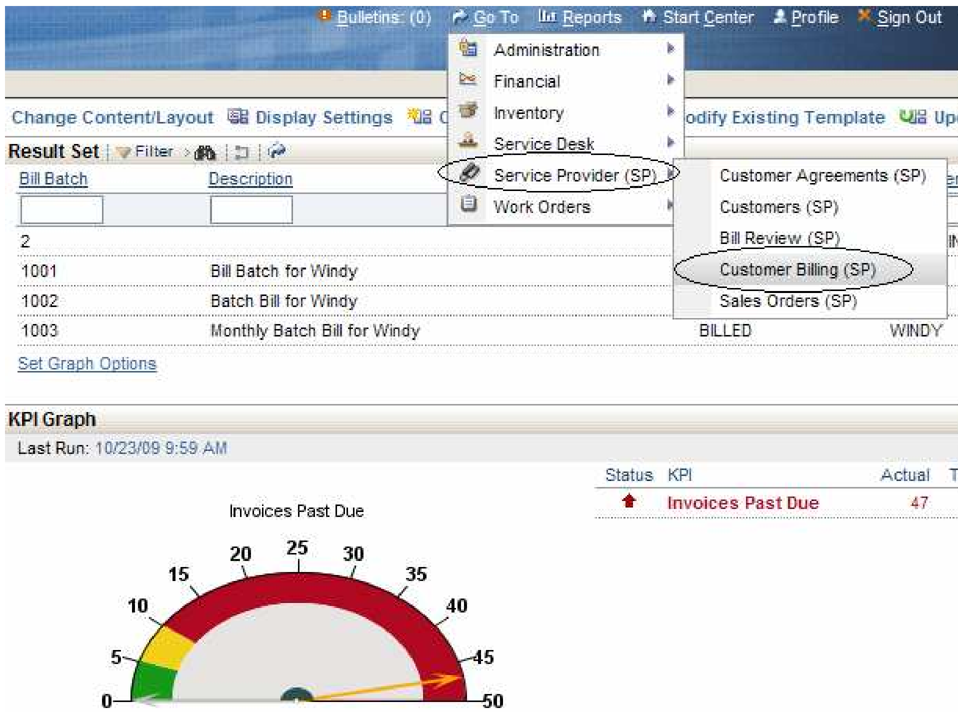
WORKORDER -- APPLY CUSTOMER AGREEMENT

<table>
<tr><th></th><th></th></tr>
<tr><td>1</td><td>From the Work Order Tracking (SP) Main Screen, click on “Select Action”

</td></tr>
<tr><td>2</td><td>From the list of Actions, select “Apply Customer Agreement”

</td></tr>
<tr><td>3</td><td>A confirmation is displayed with agreement details. Click on OK

</td></tr>
</table>

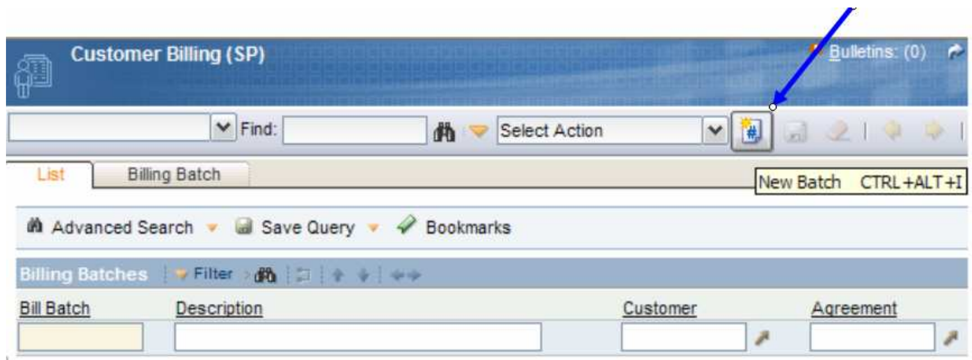
4	A custom configuration can be enabled in Maximo to automate the above step.

CUSTOMER BILLING

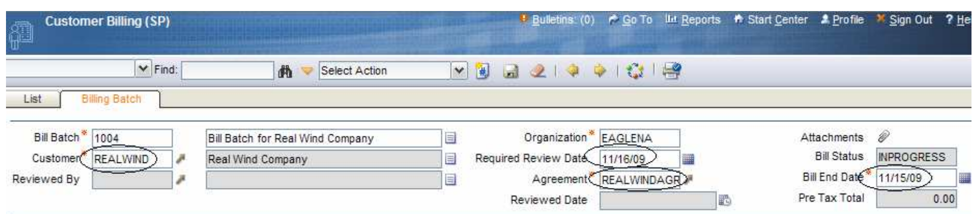
➢ This section guides through the process of creating a Batch Bill for a Customer.

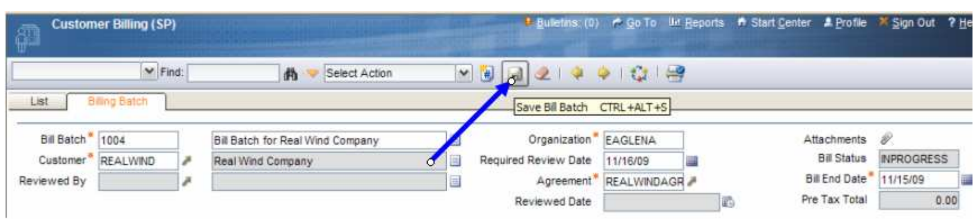
1	From the Maximo start center click on Go to → Service Provider → Customer Billing (SP)  • This action will launch the Customer Billing application

<table>
<tr>
<td>2</td>
<td>Click on the “New Batch” toolbar button to create a new bill batch.



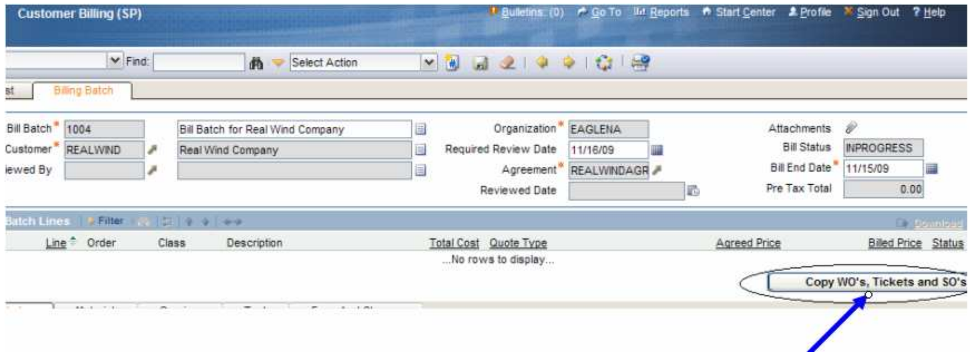
- This action will launch the Main Application Screen in Customer Billing Application.</td>
</tr>
<tr>
<td>3</td>
<td>Enter the Bill Batch attributes (Description, Customer, Agreement) and all other pertinent attributes.


</td>
</tr>
<tr>
<td>4</td>
<td>Click on the “Save Bill Batch” toolbar button.

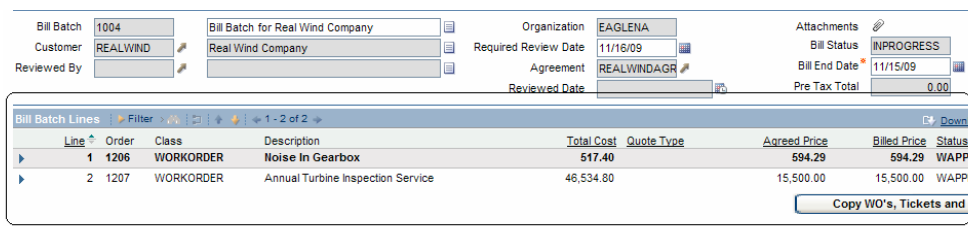


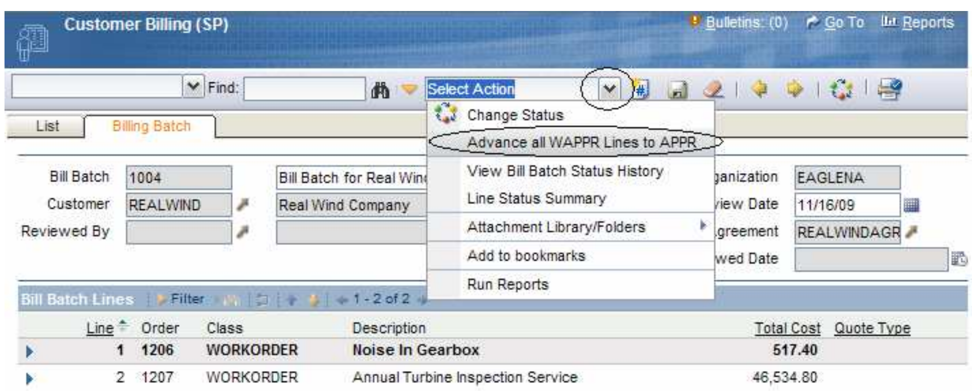
- This action saves the Bill Batch record in the Maximo database.</td>
</tr>
</table>

<table>
<tr><td>5</td><td>Click on “Copy Wo”s, Tickets, and SO”s button” button to copy the Bill Lines.

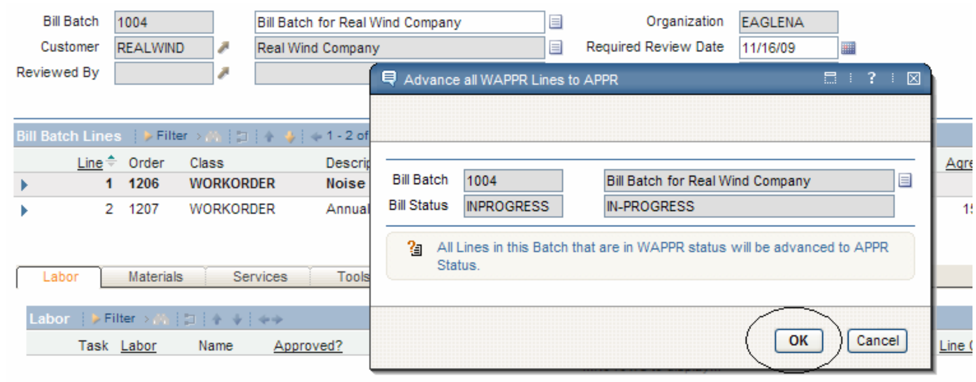


- This action copies all valid Bill Lines created for the Customer to the Bill Batch.</td></tr>
<tr><td>6</td><td>All Bill lines are copied to the Bill Batch in the Bill Batch Lines section as shown.

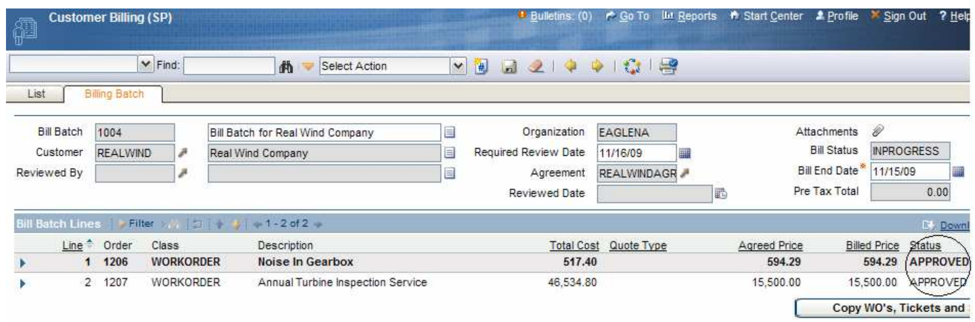

</td></tr>
<tr><td>7</td><td>Click on “Select Action” → “Advance All WAPPR Lines to APPR” action to approve all Bill Lines.


</td></tr>
</table>

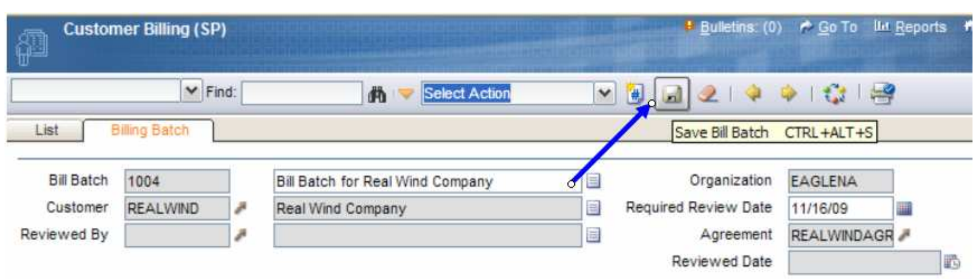
<table>
<tr>
<td>8</td>
<td>Click on OK to the “Advance All Bill Lines to APPR” confirmation message.



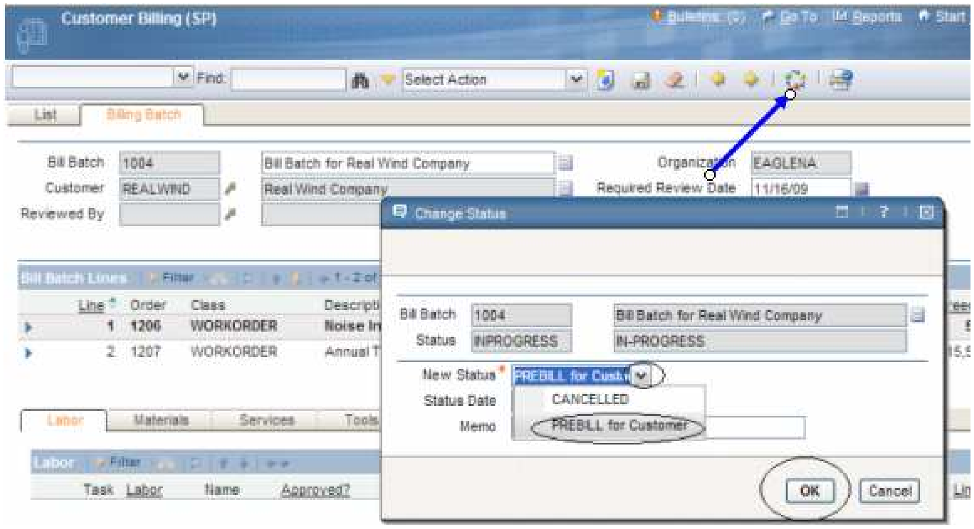
</td>
</tr>
<tr>
<td>9</td>
<td>The above action changes the Bill Line(s) status to APPROVED.



</td>
</tr>
<tr>
<td>10</td>
<td>Click on “Save Bill Batch” toolbar button to save the Bill Batch.



</td>
</tr>
</table>

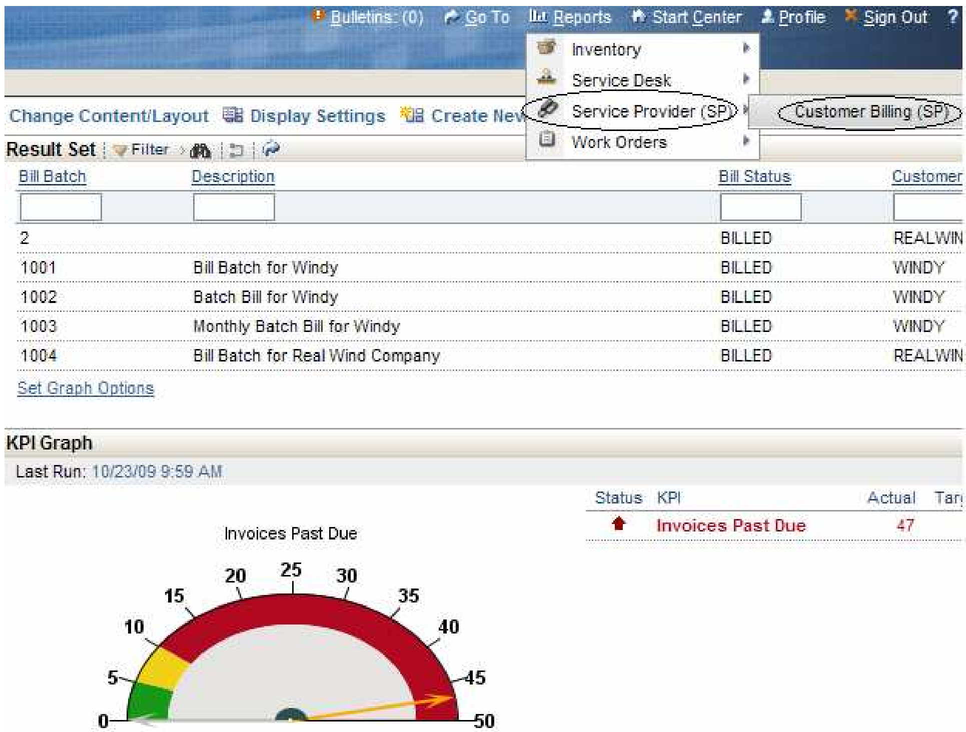
<table>
<tr><td>11</td><td>Click on the ‘Change Status” toolbar button and select “PREBILL for Customer” status → Click OK to change the Bill Batch Status.

</td></tr>
<tr><td>12</td><td>A predefined Maximo Configuration will automatically change the status of the Bill Batch to Billed.

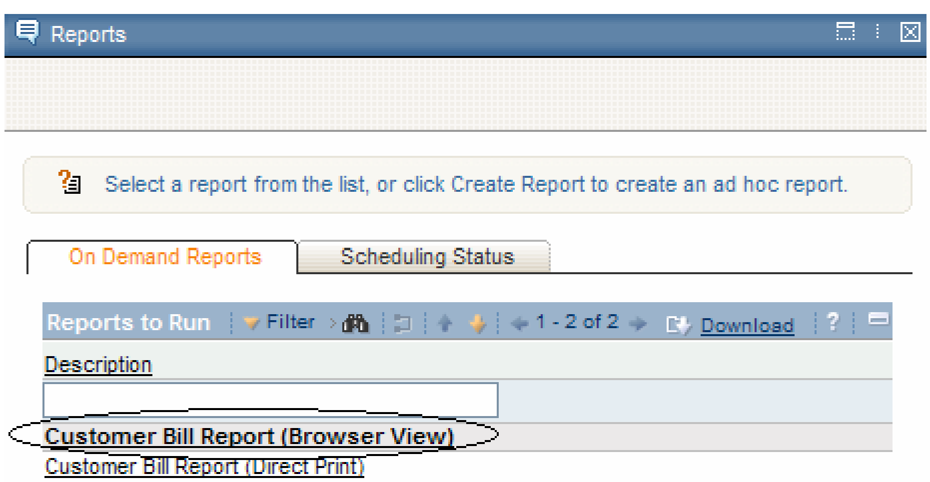
</td></tr>
<tr><td></td><td></td></tr>
</table>

CUSTOMER BILL REPORT

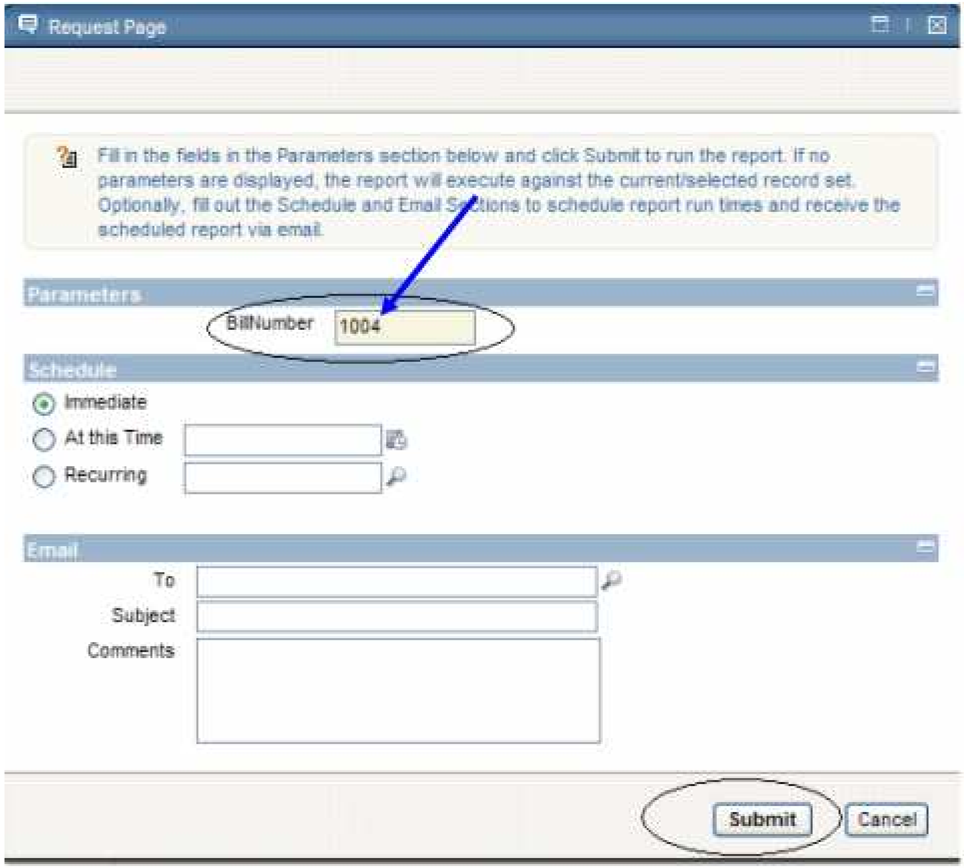
➢ This section guides through the process of generating a CUSTOMER BILL report in Maximo.

<table>
<tr><th></th><th></th></tr>
<tr><td>1</td><td>From the Maximo start center click on Reports → Service Provider → Customer Billing (SP)

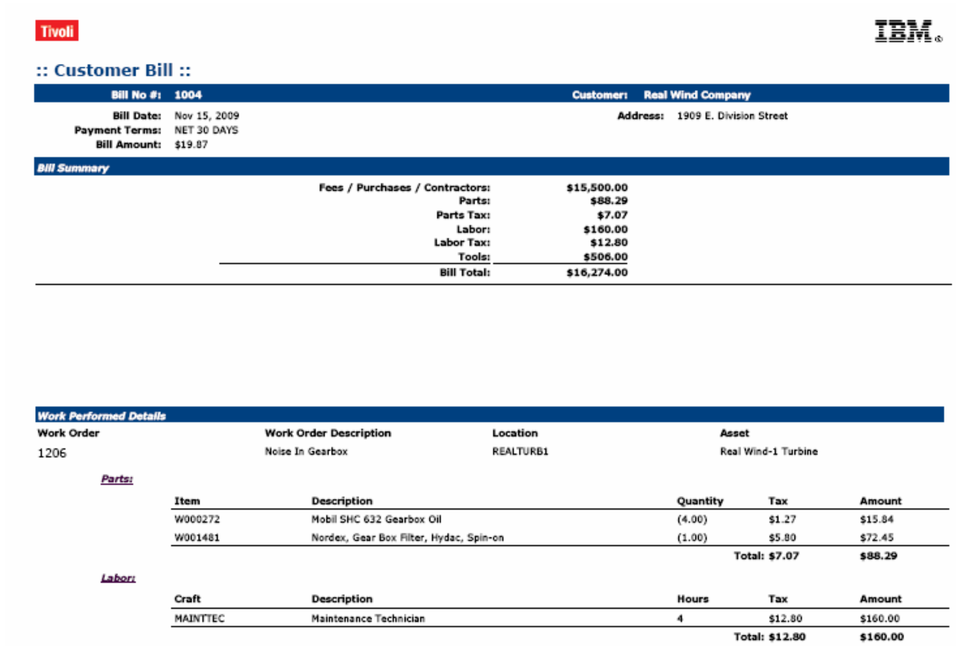

</td></tr>
<tr><td>2</td><td>Click on the “Customer Bill Report (Browser View)”


</td></tr>
</table>

3	Enter the Bill Batch Number and click on Submit as shown.



4 A sample Customer Bill report is shown here.



Tivoli IBM.

:: Customer Bill ::

Bill No #:	1004	Customer:	Real Wind Company
Bill Date:	Nov 15, 2009	Address:	1909 E. Division Street
Payment Terms:	NET 30 DAYS		
Bill Amount:	$19.87		

Bill Summary

Fees / Purchases / Contractors:	$15,500.00
Parts:	$88.29
Parts Tax:	$7.07
Labor:	$160.00
Labor Tax:	$12.80
Tools:	$506.00
Bill Total:	$16,274.00

Work Performed Details

Work Order	Work Order Description	Location	Asset
1206	Noise In Gearbox	REALTURB1	Real Wind-1 Turbine

Parts:

Item	Description	Quantity	Tax	Amount
W000272	Mobil SHC 632 Gearbox Oil	(4.00)	$1.27	$15.84
W001481	Nordex, Gear Box Filter, Hydac, Spin-on	(1.00)	$5.80	$72.45
			Total: $7.07	$88.29

Labor:

Craft	Description	Hours	Tax	Amount
MAINTTEC	Maintenance Technician	4	$12.80	$160.00
			Total: $12.80	$160.00

- This action saves the Bill Batch record in the Maximo database.

5 Click on “Print Preview in PDF” to save/print the report.