

Overview & Objective – The purpose of this O M & U is to provide guidance on Adding Service Types. Service Types are created to allow for the categorization of work types, and are generally maintain in association with a company's departments/verticals. With the addition of new Service Types adjustments to **filter sets**, **billing rules**, and **reporting** are required.

Note: As presented, these procedures do not necessarily fit the business rules/requirements of every company using OpenAir. In addition, certain terminology presented provides only a sampling of possible names that could be applied.

Initial Navigation – Navigation for each function is listed separately below.

ADDING A SERVICE TYPE – Service Type(s) are completed at the inauguration of an implementation or as additional departments/verticals are added. They are also added at management's direction. This procedure outlines how to add a new Service Type:

1. Go to the Applications dropdown (upper right hand corner)
2. Select the Time & Billing Module
3. Go to the Records dropdown (middle of the menu bar)
 - I. Select the Record, "Service Type"
 - II. Click the "Add" link in the upper right hand corner of the screen
 - III. The form "Service Type" should appear...from here the following information is required:
 - **Item ID** – Select an abbreviation for the new Service Type
 - **Name** – Provide a name for the new Service Type
 - **Extended Description** – Provide an extended description of the new Service Type
 - **Service Group ID** – A Service Group ID must be selected. Service Group IDs correspond to current departments/verticals used across the system.
 - All other fields in the Service Type List should be left blank
 - Click, "Save"

⇒ This completes the procedure for the addition of new Service Types.

MODIFYING FILTER SETS – This procedure outlines how to modify a Filter Set for the inclusion of a new Service Type:

1. Go to the Applications dropdown (upper right hand corner)
2. Select the Professional Service Automation Module
3. Go to the Activities dropdown (upper left hand corner)
4. Select the Activity "Dashboard"
 - I. Click on the <Account> tab
 - II. Click on the "Filter Sets" link in the Account Data Group
 - III. Drill down on the specific Filter Set that will be modified (IE the Filter Set that will be updated to include the newly added Service Type).
 - IV. Click on the <<Access Control>> sub-tab
 - V. Once in the Access Control page scroll down to view the "Service Access" link
 - If the Status column (to the right of the "Service Access" link) reads, "Access to all Services" **no further adjustments are required**. Please proceed to "Modifying Billing Rule Filters" (see below).
 - If the Status column (to the right of the "Service Access" link) already lists specific Service Type(s), drill down on the "Service Access" link and **select the newly added Service Type** for inclusion.

⇒ This completes the procedure for Modifying a Filter Set.

MODIFYING BILLING RULE FILTERS – This procedure outlines how to modify a Billing Rule for the inclusion of a new Service Type:

1. Go to the Applications dropdown (upper right hand corner)
 2. Select the Professional Service Automation Module
 3. Go to the Activities dropdown (upper left hand corner)
 4. Select the Activity “Projects”
- I. Drill down on the specific Project(s) that need to utilize the newly added Service Type
 - II. Click on the <<Billing>> sub-tab
 - III. Drill down on the specific Billing Rule that needs to be updated
 - IV. Scroll down to the Billing Rule Filters section
 - V. Click on the Service “Edit” link
 - VI. Select the newly added Service Type for inclusion in the Billing Rule Filter
 - VII. Click, “Save”

⇒ This completes the procedure for updating a Billing Rule Filter.

MODIFYING REPORTS – This procedure outlines how to modify Reports for the inclusion of a new Service Type:

1. Go to the Applications dropdown (upper right hand corner)
 2. Select the Professional Service Automation Module
 3. Go to the Reports dropdown (right of the menu bar)
 4. Select the Activity “Analysis”
- I. Click on the <<Saved Reports>> sub tab
 - II. Each company will have its own library of reports that will need to be modified to allow for newly added Service Types. Please consult your Account Representative for information regarding these reports. Once these reports are identified proceed as follows:
 - Click on the “Modify” link for any of the reports
 - Click on the Service “Edit” link
 - Select the newly added Service Type for inclusion in the Report
 - Click, “Save”

⇒ This completes the procedure for updating a Report.

Further Instruction & Use – For further information regarding Adding Service Types contact your Account Executive or call The NDH Group, Ltd. at 312.461.0505.