



DSD Business Systems

Sage 100 Enhancements

SMSM

S/M Service Center

Version 5.20



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S/M Service Center User's Manual
Version 5.20

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Section A: Introduction

This manual contains a description and instructions for this DSD product. Operating instructions are included for the features added by this product to Sage 100. For instructions on using Sage 100, refer to the appropriate Sage 100 manual, or call your Sage 100 reseller. DSD Business Systems offers excellent Sage 100 support, at an hourly rate.

Web Resources

DSD web site: <http://www.dsdinc.com>

The Enhancement page contains:

- Current Release Schedule*
- Purchasing Information*
- Installation Instructions*
- Product Support*
- Enhancement Links*

SMSM S/M Service Center:

<http://www.dsdinc.com/enh/pages/SMSM.htm>

The product web page contains:

- Product Description*
- Web Links*
- Current Product Version Table*
- Product Installation File Download*
- Product Manual in .pdf Format*
- Revision History*
- FAQ*

Support

DSD provides product support through Sage 100 resellers. Support is provided for the current version. Older versions are supported at an hourly rate. DSD's telephone number is 858-550-5900. Fax: 858-550-4900.

For a hard error, where the program displays an error dialog, report:

- Error number.*
- Program name.*
- Line number.*
- Program version.*

*Exact sequence that caused the error, including menus and menu selections.
Other pertinent information.*

If leaving a message or faxing, please include:

Your name.

Your phone number (and fax if applicable) and extension.

It is possible to be unable to duplicate a problem, because of data corruption or because we have not exactly duplicated a particular operating environment. In such circumstances, we can only continue to try to fix the problem if we can either access the system with Symantec PCAnywhere or by some other means access or duplicate the system.

S/M Service Center Features

The Service Center module keeps your company in touch with your customers and with the products you sell and service. Service Center allows you to track warranties, return products, exchange items, and process repair orders.

The Service Item data base automatically tracks items sold from your inventory so that when a repair is required, you can see when it entered your inventory, when it was sold, to whom it was sold, who the current end-user is, what warranties cover it, and what service has been performed in the past.

If a Service Item needs to be repaired, replaced, or returned, you can create a Service Order to process the item through your operation and accounting system. At the time you create the Service Order, you can also see whether the item being repaired is under warranty, what is covered under the warranty, what repairs have been done in the past on the same item, or whether the customer is on credit hold. You can print service order forms, service item labels, picking sheets, bar code labels, and shipping labels for each order in text or graphical format. You can charge for labor and track that labor by service technician. If repair parts are needed, you can search your inventory for the parts, select from any warehouse, and utilize the special pricing options set up in your Inventory Management system for that customer.

Service Orders can move through a series of status codes that you control until the repair is complete. At that point the system can automatically create a Sales Order invoice to bill for the whole Service Order, or for just the Service Items that have been completed.

As you process Service Orders, you create a database of service history, labor analysis, failure codes and customer invoices.

Section B: Getting Started

CAUTION

- **If you reinstall or upgrade one of the Sage 100 modules listed in the following table, you must also reinstall this Enhancement.**
- Enhancements from different Sage Developers are generally not designed to work together. If installed together, problems are likely to occur.
- **Check with DSD before installing more than one Enhancement.**

Required Levels

Sage 100 Module	Module Required	Required Level
A/P	Y	5.20
A/R	Y	5.20
C/I	Y	5.20
I/M	Y	5.20
P/L	Y	5.20
P/O	Y	5.20
S/M	Y	5.20
S/O	Y	5.20
L/M	Y	5.20

Installation

1. **Back-up:** Exit all Sage 100 sessions. Back-up existing Sage 100 data.
2. **Check Levels:** Sage 100 module levels must match those listed above.
3. **Run Enhancement Setup Program:** Save the executable installation program (sent to you or downloaded from our website) in a convenient location on the Sage 100 server. Launch the program from Windows Explorer or by selecting Start/Run, and then browse for the file in the location you saved it. Follow on-screen instructions.
4. **Send your Sage Serial Number to your DSD Representative:** Send your Sage Serial Number to your DSD representative in order for us to send you back the encrypted keys to unlock your system. This serial number can be found in Library Master\Setup\System Configuration, Tab 3. Registration as Serial Number.
5. **Re-Start Sage 100:** Sage 100 will be updated.
6. **Unlock the Enhancement:** DSD Enhancements must be unlocked to run. When any part of the Enhancement is run for the first time, the **DSD Enhancement License Agreement and Activation** window will appear. Follow the steps shown on that window. *You can click the Help button for more detailed instructions.*

Note: On the next page is a screenshot of the DSD Enhancement License Agreement and Activation window.

After accepting the License Agreement, you can then select the type of unlocking that you'd prefer. The choices are File, Web, Demo and Manual Entry.

File Unlock: After receiving your encrypted serial number key file from DSD, and placing that file in the MAS90/SOA directory, selecting this option will unlock all products keys contained in the file. This means you can unlock all enhancements at once using this option.

Web Unlock: If the system that is running the DSD Enhancement *has web access* and you *have sent DSD your Sage Serial number*, you can unlock the Enhancement without assistance using Web Unlock. When this option is selected, the program will attempt to download encrypted serial number key file from DSD *and then proceed to unlock all enhancements contained in the file.*

- *The Sage 100 system that is being used must have web access for this option to be effective.*
- *You can send your Sage Serial Number to your DSD Enhancements sales representative.*

Demo Unlock: If a Demo mode is available for the Enhancement you're running, you will be able to Demo unlock the product without assistance from DSD for demo purposes.

- *Creating a Demo Unlock is a good way to temporarily unlock DSD Enhancements off-hours, if you do not have web or email access. Later, you can unlock the product fully, during business hours.*

Manual Entry Unlock: If you want to unlock a single enhancement using a single encrypted key, you can select this option and enter the 64 character key you receive from DSD by copy and paste.

*Note: You can also unlock a DSD Enhancement through the DSD Enhancement Control Panel found on the Library Master Utilities Menu. Then, select the Enhancement with your mouse from the list of Enhancements and click the **Unlock Product** button on the right side of the window.*

7. **Convert Data:** After registration, the Data Conversion window will appear. Follow on-screen instructions to complete data conversion. *You can exit the conversion program without*

converting data. The Enhancement will not proceed, however, until data is converted. If you enter an enhanced program and data has not been converted, the conversion program will run again.

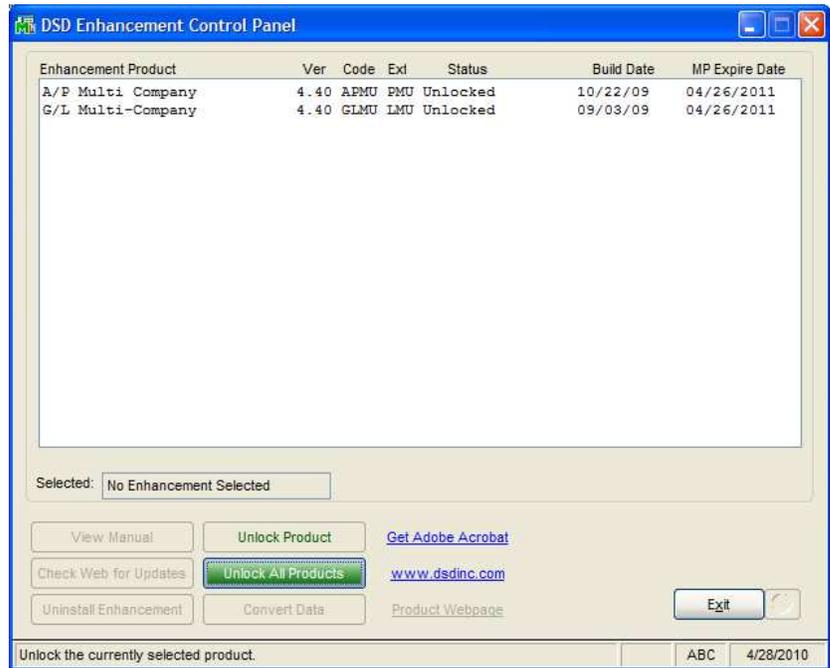
DSD Enhancement Control Panel

Starting with version 3.61, all DSD Enhancement products include DSD's Enhancement Control Panel. The DSD Enhancement Control Panel is accessed from the Library Master Utilities menu.

The DSD Enhancement Control Panel is a simple to use yet powerful system to help maintain DSD Enhancements installed on a Sage 100 system. To use it, select an Enhancement product from the list on the window and then click the button, on the right side of the window, which corresponds with the desired task.

View Manual: This button will display the product manual for the selected Enhancement using Adobe Acrobat. For this to be possible, the PDF file for the corresponding manual must be in the "MAS90/PDF" folder in the Sage 100 system. If the file is not present, and the system has web access, the correct PDF file will be automatically downloaded from the DSD website, put into the "MAS90/PDF" folder and then displayed.

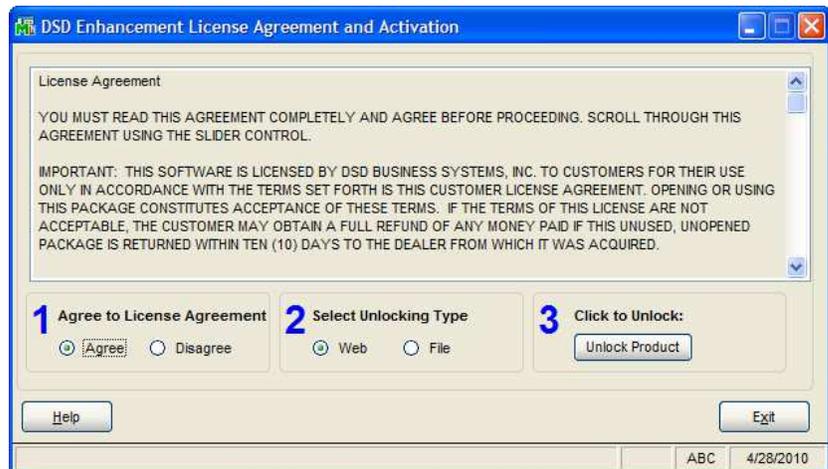
Check the Web for Updates: This button will check the DSD website to see what the current build is the selected Enhancement and alert the user if a later version is available. *This requires an FTP web connection on the Sage 100 system.*



Unlock Product: This will cause the DSD Enhancement License Agreement and Activation window to appear. Using this window is described on the previous page.

This button is disabled if the selected Enhancement is already unlocked.

Unlock All Products: This will cause the DSD Enhancement All License Agreement and Activation window to appear. This window is similar to the one described on the previous page, but has only web and file as options to unlock. *This button is never disabled.*



Convert Data: After verification, the selected Enhancements data conversion program will run. Data conversion is non-destructive, and may be triggered any number of times. Sometimes this is required to fix data records imported or updated from a non-enhancement installation.

Help: The Help button, located at the bottom right of the window, opens an HTML help file .

Get Adobe Acrobat: Opens the Adobe Acrobat website to the page where Acrobat can be downloaded and installed.

Uninstall Enhancement If this option is available, then selecting this button will start the un-install process, removing the enhancement from the system.

There are also links to the DSD website and the Enhancement page on that site.

Section C: Setup

Getting Started

You will not find fixed steps to get started with Service Center. Each company has its own procedures and uses the software differently. What this section will do is give you some things to think about when making decisions. We strongly recommend that you bring in a consultant familiar with Service Center and with service businesses in general. This person can then work with your managers to arrive at the optimal settings and procedures to make the most of Service Center.

Service Items - The fundamental concept of Service Center is that you are keeping track of individual units that may or may not carry warranties and that may need repair, exchange, or returns. We call these units Service Items. The generic name is used because Service Center applies to so many different types of service companies. A Service Item is uniquely identified by the combination of Item Code and a Serial number. The database of service items keeps track of what you know about that unit, including ownership, original sale, original purchase, warranties and service history. Think about how your company will create the service item records:

- Inventory can be set up to automatically create a service item record when the item code is sold through sales order invoice.
- A service item can be added directly through service item maintenance.
- The end user can add the service item on-the-fly while creating a service order.
- The Sales History Conversion utility can scan prior invoice history and add service items that were previously sold.

Statuses - Think about how a service item, be it a repair, exchange or a return, flows through your shop, or the different stages a service order goes through. Status Codes can be used to help you track the units or the orders and determine who is responsible or what needs to be done. There are several statuses that are built-in and permanent, but you can add your own and define them to mean different things. The basic steps indicated by the status code are:

- New - (status code "N") This is the status assigned when the unit, or service item, is first added to the service order.
- Received - (status code "R") If the customer has sent the service item back to you, you would change the status to "R" when you receive that item. This will not only indicate that the unit has been received, but it will also set the Actual Received Date on the service item entry and will stop the service order RMA from expiring.
- Vendor - (status code "V") If you decide to send the service item off to a vendor for repair, you can change the status to "V" and enter the vendor number and vendor RMA number to keep track of where that unit is and who has it. Service Center does not manage the shipment of the unit to the vendor.
- Closed - (status code "C") When all the repair or processing is complete on a unit, changing the status to "C" indicates that the entry is now ready to bill. Once the status is set to "C", no further changes can be made to that particular service item entry. It is then ready to create an invoice.

Those are the simplest statuses generally used in Service Center. You may want to add more statuses and, as part of your internal procedure, change the status every time the service item moves from one station to the next. Since every status change is logged, you can then use a custom report to show exactly how long each service item stays at a particular station or waiting for a particular operation.

Billing - When you are repairing a service item, you will use parts out of inventory or you may charge for labor or other non-inventory items. These charges and parts are entered on the service order Lines tab. Each unit, or service item entry, on the order has its own list of charges on the lines tab and can be closed and invoiced separately from any other service item entries on that same order. An entry must be closed before an invoice can be created. Closing an entry means that the status is changed to "C", or any user-defined status code that indicates all work is complete and it is ready to bill. There are several ways that invoices can be created. You must think about which method works within your organization.

- **Create Service Invoices** - This menu option will scan all the service orders looking for service item entries that are closed and ready to invoice. It will then create invoices in Sales Order Invoice for each of those, combining entries for one order when appropriate. This method is good for high-volume shops where technicians are completing repairs all day long, changing the statuses to closed as they finish. At the end of the day, a billing clerk can then create invoices for all the completed entries at once. If you wish to use Sage 100 ERP features to ship the units back to the customers, then this method is not for you. It is also important to note that if you use serialized or lot parts in the process of repair and you put those items on the lines panel in the service order, you may have to go to the invoice to distribute the lots or serial numbers.
- **Create Invoice** - A button at the top of the screen in Service Order Entry will create an invoice for one order at a time. The options for this button (see Service Center Options) will determine if it automatically closes all the entries or just creates an invoice for the entries already closed. If you wish to deal with one service order at a time and create the invoice then print it, this is an ideal approach.
- **Invoice Data Entry** - On the Sales Order Main menu, you can create an invoice for each service order much as you would for a sales order. If you like to create your own invoice numbers, this is the way to go. Keep in mind that the service item entry must be closed before it is available to invoice with this method.
- **Shipping Data Entry** - On the Sales Order Shipping menu, you can create a shipper invoice for each service order in the same way you would ship a sales order. If you wish to integrate to shipping software, print packing lists and use other shipping features of Sage 100 ERP, this is a good choice. Keep in mind that the service item entry must be closed before it is available to invoice with this method.

Warehouses - Service Center uses inventory management warehouses and will, on occasion, move item quantities or serial numbers from one warehouse to another. You should consider if your company uses the following features of Service Center and set up the warehouses appropriately in Service Center Options.

- **Demos/Loaner** - Do you send out loaners when a customer's service item is in your shop for repair? If so, you should designate a source warehouse for loaners and demos to be shipped from, and a target "virtual" warehouse that will hold those demos or loaners until the customer returns them. The units that are on demo or loaner will appear on the Demo/Loaner report and will show up on the valuation and stock status reports in inventory in the Demo/Loaner warehouse.
- **Refurbish Orders** - Do you sometimes do work on units that you own (not customer units) that are in your own inventory? Sometimes this is because the item came back from the customer and needs to be cleaned, inspected and repaired before it can be shipped back. Sometimes it is because the unit must have an upgrade performed that may even cause an item code change. Either of these can be managed with a Refurbish order. The refurbish order will lock the serial number in inventory while the repair is being performed. When the service item entry is closed and invoiced, the unit will be transferred to the refurbish target warehouse.

If you do not already have multiple warehouses, you will probably want to create them in order to realize the benefits of some of the Service Center features.

Customers - Service Center integrates closely with Sage 100 ERP A/R, so all the customers in the list will be automatically available to Service Center. There is one new customer you may need to add. Service Center requires that one customer be designated as the "company-owned customer".

This basically means you. Create a customer to use for internal billing. A refurbish order is created and processed for an internal customer. In order to relieve inventory and post costs, even a refurbish order must go through the sales order invoice process, but you will create a zero-dollar bill for that internal customer. Set up the internal customer in Service Center Options.

General Ledger Accounts - In addition to the G/L accounts that you might set up for product lines in inventory or for miscellaneous codes (like labor), you may also find the need to add a few new G/L codes to use certain features of Service Center.

Work In Process - When you refurbish a unit in your inventory, there is a feature to take the costs of the repair (from items pulled from inventory or from labor) and add them to the original cost of the unit being refurbished. This feature, called "Cost Rollup", requires that a Work In Process G/L account be designated as shown on the Service Center Option main screen.

Exchange Accounts - If you send out exchange, or warranty replacement, units, you can choose to have the outgoing unit revenue and cost book to the same accounts that the credit amount and costs book to. This is set in the Service Center Options Service Item Entry tab.

Setup Menu

The Service Center Setup menu contains the options to build and maintain the options and codes required for the operation of the Service Center module.

You can access the Service Center Setup menu at any time to modify the Service Center options. In addition, you can modify or delete the information contained in the setup files.

As a general guideline, when you begin to set up a new system, you can start at the first menu option and work your way through to the bottom.

Service Order Options

Each Module can be customized to fit your company's specific operations and accounting requirements. Service Order Options presents a series of options that allow you to select features most appropriate for your business. These options are organized into six tabs. Click on the image or the link below for more information about the options on each tab.



Main Tab

Service Center Options (PRO) 1/18/2014

1. Main | 2. Entry | 3. Svc Item Entry | 4. Line Entry | 5. Forms | 6. Message | 7. Generate PO

Customer No for Company-Owned Service Items: 04-MAXIMUS | Service Maximus Internal

Default Customer Group Code: DEFAULT

Default Warehouse for Company-Owned Refurbish: RTN

Default Target Warehouse for Refurbished Items: RFB

Default Source Warehouse for Demo/Loaner Items: RFB

Default Target Warehouse for Demo/Loaner Items: LNR

Default Warehouse for Service Parts: 000

Default Warehouse for Warranty Restocking: RTN

Default Warehouse for Credit Return Restocking: RTN

Refurbish Options

Auto-Transfer Refurbished Items:

Default Refurbish Cost Rollup Setting: Yes

Work In Process Account: 12400-00-000-000-000

Zero Refurbish Line Prices:

Inherit Warranty on Replacement:

Allow Cost Change on Returns:

Status to Use if Invoice Deleted:

Inventory Category | Use?

COLOR:

SIZE:

STYLE:

CATALOGUE REF#:

Accept | Cancel | Print | Help

Customer No for Company-Owned Refurbish Items - When a service item is returned from a customer into your company's stock, the ownership of that service item is changed to the "Company

Owned" customer. Also, if you wish to create a refurbish order to modify or repair something owned by your company, this is the customer that will be assigned to that service order. You must enter a customer number here. Use the lookup button or F2 to view a list of customers.

Default Customer Group Code - If you have chosen to use Group Codes to set up categorize customers for pricing and warranty purposes, you can designate which group is the default here. The group code you enter here will be used for any customer that is not assigned to another group. Often the default group only has a repair warranty assigned to it so that repair warranties will be assigned to repaired service items regardless of which customer. For more information about Group Codes see Group Code Maintenance.

Default Warehouse for Company-Owned Refurbish - Enter the source warehouse for service items being refurbished. The refurbish service order will allow you to repair or modify a serialized item in your own stock and transfer it from the source warehouse to a target warehouse, with a new cost if desired, upon completion. You would typically transfer the items needed modification to the Default Warehouse for Company-Owned Refurbish prior to creating the refurbish order. See Service Types in the Helpful Hints section for more information about Refurbish orders.

Default Target Warehouse for Refurbished Items - Enter the target warehouse for service items that have been refurbished. When you close and invoice a refurbish service order, the item that was modified or repaired is transferred into this warehouse. Typically it would be finished goods warehouse in preparation for sale or exchange. See Service Types in the Helpful Hints section for more information about Refurbish orders.

Default Source Warehouse for Demo/Loaner Items - Enter the warehouse you wish to use by default to ship Loaner items from. See Demos and Loaners in the Helpful Hints section for more information about sending a loaner, or take a look at the Service Order Create Loaner or Replacement option)

Default Target Warehouse for Demo/Loaner Items - Enter the warehouse where demos and loaners will be stored while out at the customer site. Remember that demos and loaners are not actually relieved from your inventory. They are instead transferred to this warehouse until they are returned from the customer via a credit memo. See Demos and Loaners in the Helpful Hints section for more information.

Default Warehouse for Service Parts - When you enter lines on a service order, this will be the default warehouse for inventory items.

Default Warehouse for Warranty Restocking - When an exchange service item entry is returned, this will be the default target warehouse for that service item when the invoice is updated.

Default Warehouse for Credit Return Restocking - When a Credit Return service item entry is returned, this will be the default target warehouse for that service item when the invoice is updated.

Auto-Transfer Refurbish Items - Check this box if you wish to automatically transfer the service item that has been refurbished from the warehouse it is currently to the Default Target Warehouse for Refurbished Items. The assumption is that an item needing repair or modification will not be available for sale, so you will keep it in a separate warehouse in your inventory, but when the

refurbish order is complete, the item needs to be automatically transferred to a finished goods warehouse ready for sale or to be sent out as a exchange or loaner.

Default Refurbish Cost Rollup Setting - If you check the Auto-Transfer Refurbish Items box, this options will be enabled. When an item is refurbished, you are modifying or repairing a serial number that is in your inventory. This option allows you to take the cost of the repairs, calculated from the parts and charge codes you enter on the lines panel for the refurbished service item entry, and add those costs to the original cost of the serial number to create a new cost. The serial number will then be put back into inventory with a new cost which includes the cost of the repair. The choices are:

Disabled - This means that you do not want to allow the cost of the repair to be rolled up into the new cost of the refurbished item.

No - This means that you will allow the cost of the repair to be rolled up when the item is refurbished, but that by default you will choose not to do it. This can be changed for each service item entry.

Yes - This means that you will allow the cost of the repair to be rolled up when the item is refurbished and that the default choice will be to do the rollup. This can be changed for each service item entry.

Work In Process Account - If you check the Auto-Transfer Refurbish Items box and the Default Refurbish Cost Rollup is not Disabled, this field will be enabled. Enter the G/L account to be used for Work In Process. When you have chosen to roll up the cost of the repair, the original inventory item (serialized) will be relieved from inventory and the cost will be expensed to the work in process account entered here. The parts and charges used for the repair will also be expensed to this account. Then the refurbished item/serial is put back into inventory with the new cost, calculated from the total booked into the WIP account, and WIP is relieved and inventory is debited.

Zero Refurbish Line Prices - Check this box if you want to automatically set the price to zero on a refurbish order/entry line.

Inherit Warranty on Replacement - On an exchange service order, an existing service item is returned from the customer and you have the option to send out an exchange or replacement service item. Check this box to allow the replacement units to inherit the existing warranty.

Allow Cost Change on Returns - Check this box to allow the user to change the cost of a service item that is being returned to stock with an exchange or a Credit Return order.

Inventory Category Settings -

Use - Check this box if you wish to enable this Inventory Category field for use on the Service Item. See Using Inventory Categories for more information.

Status to Use if Invoice Deleted - Typically the status of a Service Item Entry is changed to "C" or Closed and an invoice is created when the work is complete. If the invoice is deleted before it is updated, the status of the service item entry is changed back to "O" or open, by default, so that it is not automatically invoiced again. If you do not wish for the status to be "O" (open) after the invoice is deleted, you can designate another status code to be assigned when the invoice is deleted.

Entry Tab

Service Center Options (SMC) 2/13/2013

1. Main | 2. Entry | 3. Svc Item Entry | 4. Line Entry | 5. Forms | 6. Message | 7. Generate PO

Next Automatic Service Order Number: 0000062

Next Automatic RMA Number: 0000001

Default Days til RMA Expiration: 30

Allow Create Invoice from Order Entry:

Create Invoice Option: Prompt to Close All

Automatic Numbering

Order Prefix	Next Order	Next Invoice	Zero Inventory Price
1. A	000001	0000001	<input checked="" type="checkbox"/>
2. B	000006	8000107	<input checked="" type="checkbox"/>
3. C	000005	0000002	<input type="checkbox"/>
4. Z	090001	0090001	<input type="checkbox"/>
5.			<input type="checkbox"/>

Do Technicians Earn Commissions:

Split Commissions Between Salespersons:

Use Shipping Code to Calculate Freight: Yes

Flag Pick Sheet Printed Only if Closed:

Accept Cancel

Next Automatic Service Order Number - When you create a new service order, you can click the '#' button or hit Alt-X on your keyboard to assign the next service order number. This is where you can determine what that number will be.

Next Automatic RMA Number - If you choose to use RMA numbers on the service order header and you wish to assign a new number automatically, this is where you can determine what the next new number will be.

Default Days til RMA Expiration - If you choose to enter an RMA number on a service order header, you will automatically set an expiration date for that RMA based upon the number of days you enter here. When the expiration date is hit, if none of the service order entries on that order have been received the order will expire and can be removed using the Expired RMA Register and Update on the Utilities menu. See Service Order Status Maintenance for more information about how to flag a service item entry as received and stop the expiration.

Allow Create Invoice from Order Entry - There is a button on the Service Order header that will allow you to create an invoice quickly for a single service order. Check this box to enable that button.

Create Invoice Option - If the Allow Create Invoice from Order Entry is checked, this option will appear. Choose whether you wish to automatically close all the service item entries and create the invoice without asking, prompt to close all the service item entries then create an invoice, or simply create the invoice for those service item entries that are already closed.

Automatic Numbering - This table allows you to set up five prefix letters or numbers to be used when creating a new Service Order. If an order number begins with any one of these five prefixes, then the remaining columns in the table will affect the invoice numbering and pricing for that order.

Order Prefix - This is a one-character field that will be used to identify types of Service Orders. If you fill in a letter or number here, you will be able to also fill in the Next Order column, Next Invoice, and the Zero Inventory Price column for that Order Prefix. If this letter or number appears at the beginning of an order number, then the invoice resulting from that order will be numbered based upon the Next Invoice column.

Next Order - If you fill in a prefix character, you can automatically assign the next order number that goes with that prefix. When you are creating a new order, you have the option of entering one of the Order Prefix characters, then pressing <ENTER> or <TAB>. The program will then look at the Next Order column to complete the Service Order number for you, then it will increment the Next Order and save it for the next time you use that prefix.

Next Invoice - When an invoice is created from a Service Order, this feature will look to see if the order number begins with one of the Order Prefix characters that you specified. If it does, the invoice number will be assigned based upon the Next Invoice column you enter here. For example, in the image above, if I create an invoice from order number B001001, the invoice number will be B000107. Once the Next Invoice Number is assigned, it is incremented and stored. Please note that if the Status Code used to close the order is set to have its own numbering sequence by marking Require Separate Invoice in Status Code Maintenance, then the Status Code next invoice number will be used instead of this one.

Zero Inventory Price - If this box is checked for a particular Order Prefix, then any inventory item added to a Service Order whose number begins with that prefix will be automatically priced at zero. In the above example, inventory items sold on order B001001 will have zero prices, but order number C009102 will not have zero prices (unless they are under warranty!).

Do Technicians Earn Commission - If this option is checked, you will be allowed to assign a sales person code to the Service Technician record (see Service Technician Maintenance)

Split Commissions Between Salespersons - If you have checked the Do Technicians Earn Commissions box, you can optionally check this box to determine if you will split commissions among salespersons on the service order header.

Use Shipping Code to Calculate Freight -

Yes to use preset shipping codes to calculate freight charges.

No to manually enter all freight charges, or if freight charges are not required.

Actual to calculate freight charges using the total weight of all items ordered; this option allows you to use ship codes and the actual weights from the Item file and is available only if the Inventory Management module is integrated with Sales Order. Individual shipping codes are defined in Shipping Rate Maintenance.

Flag Pick Sheet Printed Only if Closed - On the Service Item Entry on a Service Order, there is a flag that indicates whether the pick sheet has been printed for that service item entry. If you check this box, that flag will only be set if the service item entry was closed at the time the pick sheet was printed. The Crystal Report can be modified to only show closed service item entries and to skip those that have already been printed. In this way, the pick sheet can be used to pull completed service item entries for shipment.

Service Item Entry Tab

The screenshot shows the 'Service Center Options (PRO) 1/29/2014' window with the '3. Svc Item Entry' tab selected. The window contains several configuration options:

- Allow Service Type by Service Item**
- Allow Status by Service Item**
- Apply Status Changes to Service Item Entries**
- Allow the Same Svc Items on Order**
- Warn if Item Not Tracked in I/M**
- Auto-set Loaner/Replacement Price**
- Match Return Price to Replacement Price**
- Match Replacement Cost to Returned Item Cost**
- Set Apply To Invoice to Replacement Invoice**
- Use Exchange G/L Accounts**
- Exchange Sales Account** 40700-01-000-000-000
- Exchange Cost of Goods Sold Account** 57600-00-000-000-000
- Default Technician** (empty field)
- Set Default Technician**
- Default Technician** (empty field)

At the bottom of the window, there are buttons for **Accept**, **Cancel**, a printer icon, and a help icon.

Allow Service Type by Service Item - Check this box if you wish to allow each service item entry on a service order to have its own Service Type. This is by far the most common selection. This allows

you to have multiple service item entries where one can be a standard repair, one can be a credit return, etc.

Allow Status by Service Item - Check this box if you wish to allow each service item entry on a service order to have its own status. If you clear this box, then the status on the header of the service order will apply to all the service item entries.

Apply Status Changes to Service Item Entries - When you change the status code on the header of the service order, it has to change all the service item entries to match. This is a fast way to change all the statuses at once. If this box is cleared, then every time you change the header status, the system will ask you if you want to change all the service item entry statuses. If you check this box, all the service item entries statuses will be changed without asking you.

Allow the Same Svc Items on Order - If this box is checked, then you can enter the same service item to a service order more than once. This is useful if you have multiple phases for repair or modification and want to bill them separately or give different technicians responsibility. If you clear this box, a service item will only be allowed once on a service order. Note that if the service item entry service type is Credit Return, Refurbish or Exchange, then you will not be allowed to put it on the order more than once. All of these service types require changes in inventory that does not work well with duplication.

Warn if Item Not Tracked in I/M - When adding a new service item, you enter an item code and a serial number. If you check this box, the system will warn you if the item code you entered is not set up to track in service. Track in service is a flag in Item Code Maintenance that specifies that an item, when sold, should create a service item.

Allow Apply-To Invoice on Service Item - Check this box if you wish to be able to enter an open invoice to apply a credit memo to when you add a Credit Return or Exchange service item entry to an order. When the service item entry is completed and the credit memo for that return is created, the Apply-To invoice will automatically be on the credit memo header.

Default to Sales Invoice - If you checked the Allow Apply-To Invoice on Service Item box, this field is enabled. Check this box if you wish to automatically fill in the Apply-To Invoice field on the service item entry with the invoice number that was used to originally sell the service item. This invoice number will be found on the Service Item record (see Service Item - Main Tab)

Auto-Assign Serial Number - If you are adding service items manually through Service Item Maintenance (see Service Item Maintenance) you can enter an item code then hit enter at the blank serial number. The system will prompt to automatically create a serial number based upon the date or the service order number. If you select No, then it will not prompt to create a serial number automatically.

Auto-set Loaner/Replacement Price - When you click the Loaner/Replacement button on the Service Item Entry panel on the Service Order, the dialog pops up to allow you to enter the item code you wish to send as a loaner or a replacement for the service item entry, serial number (if applicable), warehouse and price. Check this box if you wish to automatically set the replacement/loaner price to the standard price for this item and the Service Order customer. See Create Loaner or Replacement for more information.

Match Return Price to Replacement Price - When you click the Loaner/Replacement button on the Service Item Entry panel on the Service Order, the dialog pops up to allow you to specify what item code you wish to send as a loaner or a replacement for the service item entry. Once you have filled in the item code, serial number (if applicable), warehouse and price, the system will automatically create a sales order. If you check this box, the line price for the service item being returned will be automatically set to match the replacement price.

Match Replacement Cost to Return Item Cost - Check this box if you wish the cost for the returning item to be the same as the cost posted for the replacement\loaner item being sent. See Create Loaner or Replacement for more information. Note: the cost substitution will be done during the update of the replacement/loaner invoice if the Exchange/Credit Return Service Item Entry the replacement/loaner was sent for is still in progress.

Set Apply To Invoice to Replacement Invoice - Check this box if you wish to set the Apply to Invoice field on the Exchange/Credit Return Service Item Entry to the same invoice number that was created for the replacement/loaner item sent from this Service Item Entry. Note: the Apply to Invoice field will be set during the update of the replacement/loaner invoice if the Exchange/Credit Return Service Item Entry is still in progress.

Use Exchange G/L Accounts - When you click the Replace/Loaner button on the Service Item Entry panel on the Service Order, it automatically creates a sales order and puts the loaner or replacement item you selected on that sales order. If you check this box, then the replacement item being sent and the line item for the unit being returned will use the Exchange G/L accounts (described below) for sales and cost of goods sold. If you clear this box, or the specified Exchange G/L accounts are not valid, then the standard G/L accounts for the item will be used.

Exchange Sales Account - If you check the Use Exchange G/L Accounts box, this field will be enabled. Enter the G/L account to be used as a sales account for the replacement item being sent and the line item for the unit being returned.

Exchange Cost of Goods Sold Account - If you check the Use Exchange G/L Accounts box, this field will be enabled. Enter the G/L account to be used as a cost of goods sold account for the replacement item being sent and the line item for the unit being returned.

Set Default Technician - If you would like to have a default technician automatically assigned to service items, check this box, enter or choose a technician, and it will automatically fill in on any new service item entry you create. This is for users who do not actually keep track of technician times, since Service Center requires that a technician be entered.

Line Entry Tab

Service Center Options (PRO) 1/15/2014

1. Main | 2. Entry | 3. Svc Item Entry | 4. Line Entry | 5. Forms | 6. Message | 7. Generate PO

Use Item Default Warehouse

Default Order Quantity to One

Display Unit Cost

Get Serial Numbers from Line Entry

Require Serial Number List

Lot/Serial Distribution

Enable Lot/Serial Distribution

Require Lines to be Fully Distributed

Product Line

Use Product Line from Service Item

Use Service G/L Fields from Product Line

Time Transactions

Automatically Create Labor Lines from Transaction:

Group Transaction By: No Grouping

Require Billing Code on Closed Time Transactions

Accept Cancel [Printer Icon] [Help Icon]

Use Item Default Warehouse - If you check this box, the system will ignore the default Service Parts Warehouse and will use the warehouse for that Item Code when an item is added to the lines panel of the Service Order.

Default Order Quantity to One - Check this box if you want to automatically set the quantity to 1 (one) when a new item line is added to the lines tab of a service order.

Display Unit Cost - Check this box if you wish to show the unit cost in the grid on the lines panel of the service order.

Get Serial Numbers from Line Entry - Check this box if you wish to assign serial numbers from the list to the service items when service items are automatically created for the sold non-serialized inventory items (see Service Items). The list of serial numbers can be added in Service Order Entry,

Sales Order Entry, or Invoice Entry. This applies only to inventory items that do not have a Serialized valuation and yet do have the "Track In Service" box checked (see Service Item Setup).

Require Serial Number List - Check this box to require a serial number from the serial numbers list for each sold non-serialized inventory item when a service item is automatically created for this item. If this box is checked and a non-serialized inventory item which is flagged to "Track In Service" (see Service Item Setup) is on an invoice line but the serial number list does not contain enough separate serial numbers for the quantity shipped, the user will not be allowed to update the sales journal for that invoice.

Enable Lot/Serial Distribution - Select this check box to enable the distribution of lot and serial numbers in Service Order Entry and Service item Data Entry. If this check box is selected, you can distribute and commit quantities for lot or serial items using the Lot/Serial Number Distribution window. Clear this check box if you do not want to enable lot and serial distribution in Service Order Entry and Service Item Data Entry. **Note:** If sales order distributions already exist, this check box cannot be cleared.

Require Lines to be Fully Distributed - Select this check box to require the data entry lines for lot or serial items to be fully distributed. Clear this check box if you do not want to require to fully distribute the data entry lines for lot or serial items. If this check box is cleared, all lot or serial line items can be partially distributed. This field is available only if the Enable Lot/Serial Distribution check box is selected.

Use Product Line from Service Item - Select this check box to default the line item G/L accounts to the Sales and Cost of Goods Sold accounts of the Service Item Product Line instead of the Inventory Item Product Line when a new item has been added to the grid on the lines panel of the service order.

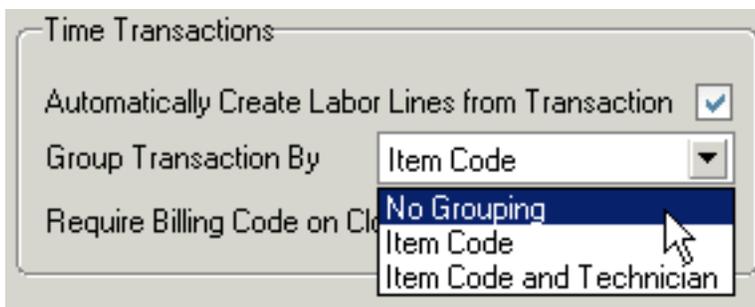
The Product Line, which is defined in Product Line Maintenance (Inventory Management - Setup menu) defines what G/L accounts will be used for the sales and cost of goods sold on the detail line of the service order for a inventory item code (miscellaneous charge, miscellaneous item code, or special item get their G/L accounts from elsewhere). Under normal circumstances, it's the product line for the item code on the detail line that is used. If this box is checked, though, instead of using the detail line item code the product line on the service item entry is used instead. If this box is checked, the service item entry product line is used for BOTH inventory item lines and labor miscellaneous item lines. If the product line on the service item entry is blank (meaning no service item code has been entered on the service item entry) then the system will fall back to the standard behavior and will use the product line from the detail line, or from the miscellaneous code. Once detail lines have been added and G/L accounts assigned (with service entry product line blank), if the product line on the service item entry is filled in, the system will change the detail line G/L accounts to the ones on the product line form the service item entry.

Use Service G/L Fields from Product Line - Select this check box to default the line item G/L accounts to the Service G/L product line accounts instead of the Sales and Cost of Goods Sold product line accounts when a new item has been added to the grid on the lines panel of the service order.

If you check this box, you are telling the system to use the special Service G/L accounts for Service Material Sales, Service Material Cost, Service Warranty Material Cost, Labor Sales, Labor Cost, Labor Warranty Cost, and Service Returns. If this Box is cleared, the system will use the standard Sales, Cost of Goods accounts. In both cases, we are talking about the G/L accounts that are automatically filled in on the detail lines. This check box works whether you check Use Product Line From Service Item or not. If you do not check Use Product Line From Service Item and do check User Service G/L Fields from Product Line, the labor G/L fields will not be used because labor is a miscellaneous item code and therefore does not have a product line on the detail line.

Automatically Create Labor Lines from Transaction - Select this check box if you want to automatically create labor lines on the service order directly from Technician Time Transactions as soon as the technician closes (enters the end time) the transaction, as long as there is a billing code.

Group Transaction by - This drop down box gives you the option of how you would like your transactions to be grouped. Your options are 'No Grouping', 'Item Code', or 'Item Code and Technician'.



If you choose to group by 'Item Code and Technician' and two different technicians enter time with the same item code, two lines will be created, one for each technician. If they come back and enter more time using the same billing item code, the program will add the new time to the existing lines. **Note:** the grouping options only affect what happens with the transactions updated after the option is changed. For example, if two technicians had lines with billing code "/Labor" and you changed the option to group by 'Item Code', then one technician added a transaction, it would find the first line using the "/Labor" code and add the transaction hours to that one even if the line was originally belonged to the different technician.

Require Billing Code on Closed Time Transaction - Select this check box if you want to require a billing code when the time transaction is closed.

Forms Tab

Service Center Options (SMC) 2/13/2013

1. Main | 2. Entry | 3. Svc Item Entry | 4. Line Entry | 5. Forms | 6. Message | 7. Generate PO

Print Service Orders

Print Picking Sheets By

Include Kit Items on Picking Sheets

Print Service Item Labels

Print Shipping Labels

Default Number of Shipping Labels per Order

Skip Quick Print Select

Accept Cancel  

Print Service Order - Check this box if you wish to be able to print service orders. If this box is cleared, no one will be allowed to print service orders.

Print Picking Sheets by -

Bin - Select if you want lines on picking sheets sorted by bin location.

Item - Select if you want lines on picking sheets sorted by item code.

Line Number - Select if you want lines on picking sheet sorted by line number.

None - Select if you do not wish to enable picking sheet printing.

Include Kit Items on Picking Sheets - Select this check box to print sales kit items and kit components on picking sheets. Clear this check box to print only sales kit components on picking sheets. This field is available only if an option other than None is selected at the Print Picking Sheets By field, or the Inventory Management module is integrated with Service Center.

Print Service Item Labels - Check this box if you wish to be able to print service item labels. Service item labels print one form for each service item entry on the service order. If this box is cleared, no one will be able to print service item labels.

Print Shipping Labels - Check this box if you wish to be able to print shipping labels. If this box is cleared, no one will be able to print shipping labels.

Default Number of Shipping Labels per Order - If you check the box to Print Shipping Labels, enter the default number of labels to print for each order. You can override this number on the service order header.

Skip Quick Print Select - There is an option to Quick Print an order which pops up a dialog to allow you to select whether to print service order, picking sheets, and service item labels, and which forms to use. If you have set up user-based quick print options (see Quick Print Preferences) then you can check this box and the user's default selections will be used and no selection dialog will pop up.

Message Text Tab

The screenshot shows the 'Service Center Options (SMC) 2/13/2013' dialog box with the '6. Message' tab selected. The dialog has a tabbed interface with seven tabs: 1. Main, 2. Entry, 3. Svc Item Entry, 4. Line Entry, 5. Forms, 6. Message (selected), and 7. Generate PO. Below the tabs, there is a checked checkbox for 'Use Standard Loaner/Exchange Messages'. Under the 'Standard' section, there are two text areas: 'Loaner Message' containing the text 'This unit is being shipped to you for use as a service loaner until repairs on your unit have been completed. Service Order: #####' and 'Exchange Message' containing 'This unit is being shipped to you for use as a replacement for a unit you are returning to us on Service Order Number: ##### Item: XXXXXXXXXXXXXXXXXXXX S/N: XXXXXXXXXXXXXXXXXXXX'. Under the 'Custom' section, there are two empty text areas for 'Loaner Message' and 'Exchange Message'. At the bottom right, there are buttons for 'Accept', 'Cancel', a printer icon, and a help icon.

Use Standard Loaner/Exchange Messages - When you click the Replace/Loaner button on the Service Item Entry panel on the Service Order, it automatically creates a sales order and puts the loaner or replacement item you selected on that sales order, along with the text selected here. Check this box to use the standard text show, or clear it to enter your own text to use on the replacement or loaner sales order. See Create Loaner or Replacement for more information.

Generate PO Tab

Service Center Options (SMC) 2/13/2013

1. Main | 2. Entry | 3. Svc Item Entry | 4. Line Entry | 5. Forms | 6. Message | 7. Generate PO

Combine Service Orders by Vendor

Use Service Order Number as Purchase Order Number

Apply Incremental Value to Purchase Order No. At Beginning ▾

Base PO Header Required Date On P/O Date ▾

Base PO Lines Required Date On P/O Date ▾

Print Auto Generate Listing Sorted by Customer Number

Print Purchase Order Number Assignment Listing

Access Purchase Order Entry After Generation

Print Purchase Orders After Generation

Enable Purchase Order Generation During Service Order Entry

Prompt to Generate Purchase Order on New Service Orders

Service Order Fields to Include

Ship-To Address Drop Ship Only ▾

Ship Via Drop Ship Only ▾

FOB Drop Ship Only ▾

Confirm To No ▾

E-mail Address No ▾

COGS Account for Drop Ship Lines

Alias Item Number for General Types

Accept Cancel

Combine Sales Orders by Vendor - Select this check box to combine multiple service orders for a vendor into one purchase order. If this check box is selected, the item lines on multiple service orders that contain the same vendor number will be generated into one purchase order. Clear this check box if you do not want to combine the service orders by vendor. **Note:** This applies only to item lines that are not drop shipped.

Use Service Order Number as Purchase Order Number - Select this check box to use the service order number as the purchase order number when automatically generating purchase orders from service orders. If this check box is selected, the order number for the generated purchase order will be the same as the service order number. If this check box is cleared, the next purchase order number can be entered in the Purchase Order Additional Options window during generation. This field is available only if the Combine Service Orders by Vendor check box is cleared.

Apply Incremental Value to Purchase Order No. At - Select an option to apply an incremental value to the purchase order number when using the service order number as the purchase order number if the purchase order number already exists or if more than one purchase order needs to be generated for the service order.

- Select Beginning to replace the leading zero of the order number with a numeric character beginning with 0 through 9, and then alpha characters (A through Z) when more than 10 purchase orders are generated.
- Select End to remove the leading zero of the order number and apply an alpha character (A through Z) to the end of the purchase order number.

If a purchase order with the same number as the sales order already exists, the purchase order number will be incremented or appended for any additional purchase orders. This field is available only if the Use Service Order Number as Purchase Order Number check box is selected.

Base PO Header Required Date On - Select an option to use for the required date on the Header tab in Purchase Order Entry.

- Select Svc Order Date to use the service order date.
- Select P/O Date to use the Purchase Order module date.
- Select System Date to use the software system date.
- Select Prompt to be prompted to select a required date when generating the purchase orders.

Note: If P/O Date is selected and the purchase order is generated from Service Order Data Entry, the Service Order module date will be used instead if no Purchase Order tasks have been accessed.

Base PO Lines Required Date On - Select an option to use for the required date on the lines in Purchase Order Entry.

- Select P/O Date to use the Purchase Order module date.
- Select System Date to use the software system date.
- Select Prompt to be prompted to select a required date when generating the purchase orders.

Note: If P/O Date is selected and the purchase order is generated from Service Order Data Entry, the Service Order module date will be used instead if no Purchase Order tasks have been accessed.

Print Auto Generate Listing Sorted by Customer Number - Select this check box to print the Auto Generate from Service Order Listing sorted by customer number. Clear this check box if you want to print the listing sorted by vendor number.

Print Purchase Order Number Assignment Listing - Select this check box to print the Purchase Order Number Assignment Listing after generating the purchase orders. Clear this check box if you do not want to print the listing.

Access Purchase Order Entry After Generation - Select this check box to open Purchase Order Entry after generating the purchase orders from service orders. Clear this check box if you do not want to open Purchase Order Entry.

Note: Purchase Order Entry can be accessed only with the appropriate security setup.

Print Purchase Orders After Generation - Select this check box to be prompted to print the purchase orders after generating them from service orders. Clear this check box if you do not want to be prompted to print the purchase orders. This field is available only if the Access Purchase Order Entry After Generation check box is cleared.

Enable Purchase Order Generation During Service Order Entry - Select this check box to enable purchase order generation in Service Order Data Entry. If this check box is selected, the Generate PO button is enabled in Service Order Data Entry to generate one or multiple purchase orders for the selected service order. Clear this check box if you do not want to enable purchase order generation for new service orders only.

Note: The Purchase Order Generation button can be accessed only with the appropriate security set up.

Prompt to Generate Purchase Order on New Sales Orders - Select this check box to be prompted to generate purchase orders after the new service order is created in Service Order Data Entry. Clear this check box if you do not want to be prompted to generate purchase orders for new service orders. This field is available only if the Enable Purchase Order Generation During Service Order Entry check box is selected.

Ship-To Address - Select an option to include on the purchase order.

- Select Drop Ship Only to use the service order ship-to address information for drop-shipped purchase orders only.
- Select All Purchase Orders to use the service order ship-to address information for drop-shipped and standard purchase orders.

Note: This field is available only if the Combine Service Orders by Vendor check box is cleared.

Ship Via - Select an option to include on the purchase order.

- Select Drop Ship Only to use the service order ship via information for drop-shipped purchase orders only.
- Select All Purchase Orders to use the service order ship via information for drop-shipped and standard purchase orders.

Note: This field is available only if the Combine Service Orders by Vendor check box is cleared.

FOB - Select an option to include on the purchase order.

- Select Drop Ship Only to use the service order FOB information for drop-shipped purchase orders only.
- Select All Purchase Orders to use the service order FOB information for drop-shipped and standard purchase orders.

Note: This field is available only if the Combine Service Orders by Vendor check box is cleared.

Confirm To - Select an option to determine whether to include the service order confirm-to information on the purchase order.

- Select Yes to include the service order confirm-to information. This option is available only if the Combine Service Orders by Vendor check box is cleared.
 - Select No to exclude the service order confirm-to information.
 - Select Drop Ship Only to include the service order confirm-to information for drop-shipped purchase orders only.
- E-mail Address** - Select an option to determine whether to include the service order e-mail address information on the purchase order.
- Select Yes to include the service order e-mail address. This option is available only if the Combine Service Orders by Vendor check box is cleared.
 - Select No to exclude the service order e-mail address.
 - Select Drop Ship Only to include the service order e-mail address for drop-shipped purchase orders only.

COGS Accounts for Drop Ship Lines - Select this check box to include the sales order cost of goods sold (COGS) account for drop-ship lines only on the purchase order. If this check box is selected, the service order COGS account will be included at the G/L Account field on the purchase order lines.

Clear this check box if you do not want to include the service order COGS account for drop-ship lines.

Alias Item Number for General Types - Select this check box to include the service order general-type alias item number. Clear this check box if you do not want to include the service order general-type alias item numbers. This field is available only if the Purchase Order and Service Order modules are integrated with Inventory Management.

Service Order Status Maintenance

Status Code - The Status Code is a ten-character code used to determine the current stage or location of a work order. The status code can apply to the whole service order, or to a specific service item on that order (see Allow Status by Service Item Entry on the Service Order Options Service Item Entry Tab). There are several status codes that are provided by the system and cannot be deleted.

- **N – New:** When an order is first entered, it is automatically assigned this status.
- **O – Open:** As soon as the order is first printed, the status automatically changes from New to Open. It can stay Open indefinitely until changed by the user.
- **C – Closed:** This status signifies that the work on this order (or Service Item) is complete and the order or item is ready to be billed and/or updated.
- **R – Received:** This status can be used to indicate that the item to be serviced has been received from the customer, or returned from the vendor. In either case, when this status is entered, the Received Date on the order or item is set.

- **V – Vendor:** When an item must be sent to a third-party for additional service, this status can be used to not only flag the item as in another location, but it also allows for entry of the vendor ID and the vendor RMA number.
- **X – Expired:** This status is automatically assigned to all expired service orders deleted using the Expired RMA Register and Update utility.

You can set up any status codes that will help you track your Service Orders through their various stages. The rest of the information on the status code maintenance screen will tell the system how to handle orders or Service Item Entries with this each status.

Status Description - This long description is for you to more fully identify the status and its usage.

Short Description - The short description is useful in some reports and on some screens where there is not enough space to print the longer description. It is important to enter a short description because some reports and screens will only print this. If it is blank, then the status information will not be visible in those situations.

Set Received Date - If this box is checked and this status is assigned to a service item entry, the Actual Received Date will be set if it is not already set.

Remove RMA Expiration Date - If this box is checked and this status is assigned to a service item entry, the RMA expiration date will be cleared and the service order RMA will no longer expire.

Sent To Vendor - If this box is checked and this status is assigned to a service item entry, the Vendor Number field and Vendor RMA Number field will be enabled, allowing you to enter which vendor the unit was sent to and what the vendor's RMA number is. This is useful for tracking which items are sent to vendor for repair.

Status Means Complete - Ready to Update - If this box is not checked, which is the default, then the service item entry is not ready to update and the Create Service Invoices feature will ignore the entry with this status. If you check this box, then the order with this status will be updated. Updating the order might mean creating an invoice or inventory transactions or simply moving the order to history.

If this box is checked, meaning that the order is ready to update, the rest of the fields will be available for change.

Create Invoice When Updated - Most of the time you will want to create an invoice (or credit memo) when a Service Order is complete. The invoice serves not only to bill the customer for the work done, but it also is the only way that parts entered on the Service Order can be relieved from inventory. There are some circumstances where you might want to close an order but not affect the accounting function at all. In these cases you will uncheck this box.

Require Separate Invoice - If you check this flag, then invoices created from orders with this status will use a different numbering sequence from the standard sales order invoice numbers. The resulting number will start with the status code and be followed by the number you specify in the next field.

If the status code is setup to require separate invoice and automatic numbering is also enabled in Service Order Options, the status code next invoice number will be used.

Next Invoice Number - Enter the next number to use for invoices created as a result of this status code.

Warranty Code Maintenance

The screenshot shows the 'Warranty Code Maintenance (SMC) 2/15/2013' window. The 'Warranty Code' is 'TYRFULL' and the 'Description' is 'One Year Extended Parts/Labor'. The '1. Header' tab is active. The 'Warranty Type' is 'Extended', 'Warranty Period Units' is 'Years', and 'Units in Period' is '1'. The 'Start After Current Warranty', 'Warranty Covers Parts', and 'Warranty Covers Labor' checkboxes are checked. The 'Coverage Description' is 'Cover all normal usage for one year, including replacement parts and labor to repair. Unit must be sent back to shop.' The 'Miscellaneous Items' list contains '/WONEYEAR' and '/WTY_TYRFULL'. The 'Accept' button is highlighted.

Warranty Code - Every service item has one or more warranties associated with it. The ten-character warranty code defines the warranty period and coverage. You can enter any ten characters you wish to identify the warranty record. This code will be stored with the Service Item.

Warranty Description - Enter a description to help you identify this warranty. It is a good idea to put enough in the thirty characters to describe the coverage since this can be used during data entry to identify the desired warranty.

Header Tab

Warranty Code Maintenance (SMC) 2/15/2013

Warranty Code: TYRFULL

Description: One Year Extended Parts/Labor

1. Header | 2. Pricing

Warranty Type: Extended

Warranty Period Units: Years

Units in Period: 1

Start After Current Warranty:

Warranty Covers Parts:

Warranty Covers Labor:

Coverage Description:

Cover all normal usage for one year, including replacement parts and labor to repair. Unit must be sent back to shop.

Miscellaneous Items:

/WONEYEAR
/WTY_TYRFULL

Accept Cancel Delete [Printer] [Help]

Warranty Type - Each service item can have up to three warranty codes in effect at one time. There are three warranty types. An “original” warranty is usually the default, or base warranty given to a unit by the manufacturer when it is made or sold. An “extended” warranty is usually sold as an option when the item is distributed. A “repair” warranty can be automatically assigned to an item (through the use of the Group Code) when a repair is completed.

Warranty Period Units - Select whether the warranty period is measured in days, months, or years. The warranty period units field is used with the number of units to calculate the ending date of a warranty.

Units in Period - Enter the number of days, months, or years this warranty is to be in effect.

Whether you use days, months, or years depends on the Warranty Period Units you selected.

Start After Current Warranty - When an extended warranty is sold after the original item is sold, this flag will determine when the new warranty starts. If this box is checked, then the replacement warranty’s start date will begin the day after the original warranty’s end date. If it is unchecked, then the new extended warranty will start on the invoice date. For more information on warranties see Warranty Processing in the Helpful Hints section.

Warranty Parts - Check this box if this warranty covers parts used to repair. If you check this box, then any inventory items you enter on the lines of a service order for repair of a service item covered by this warranty will automatically have a zero price.

Warranty Labor - Check this box if this warranty covers labor used to repair. If you check this box, then any labor charges you enter on the lines of a service order for repair of a service item covered by this warranty will automatically have a zero price.

Coverage Description - You can enter up to 300 characters to describe the coverage of this warranty. This description can be viewed when entering or maintaining a service item or service item entry.

Miscellaneous Items - This box shows the one or more Miscellaneous Item Codes that can be used to sell this warranty on a Sales Order or a Service Order. You can click the Add/Edit button to set up Miscellaneous Items or go to Miscellaneous Item Maintenance. You can also read more about this in Helpful Hints - Warranty Processing.

Pricing Tab

Warranty Code Maintenance (SMC) 2/17/2013

Warranty Code: TYRFULL

Description: One Year Extended Parts/Labor

1. Header | 2. Pricing

Quick Row: 3

	Item Code	Product Line	Calc Method	Flat Price	Percent
1	GB-MD750		Std Price %	.000	12.00
2		DC	Std Price %	.000	15.00
3				.000	.00

Accept Cancel Delete

Warranty Pricing allows you to add items or product lines that might need this warranty at the time of sale. In the Sales Order entry or Invoice Entry, if you enter one of these items, or an item in the product line, it will pop up a dialog offering to sell a warranty for the item you are selling. This tab is where you specify what items or product lines qualify for this warranty and how to price the line on the sales order. If one of the warranty lines is selected, then a new miscellaneous item is added to the sales order. If more than one Miscellaneous Item Code can be used to sell this warranty, the first one will be chosen.

Item Code - Enter the Inventory Item Number for which you wish to set up warranty pricing. This item must be valid in the Sage 100 ERP Inventory Management system, and must also have the "Track Service" flag turned on. You can use the lookup button (magnifying glass) or the F2 key to display a list of the items that can be maintained.

Product Line - Enter the Inventory Product Line for which you wish to set up warranty pricing. This item must be valid in the Sage 100 ERP Inventory Management system, and must also have the "Track Service" flag turned on. You can use the lookup button (magnifying glass) or the F2 key to display a list of the items that can be maintained.

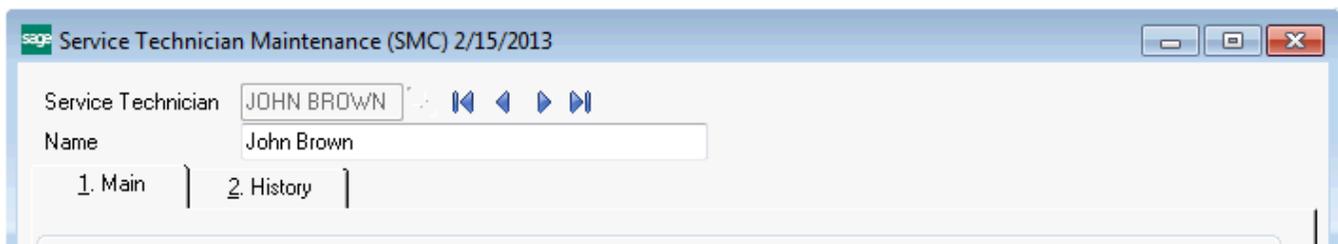
Calculation Method - Options include "

- **Flat Price** - You then enter a price for each warranty sold, and that price becomes the unit price for the sales order line
- **Act %** - Percent of Actual Price. This calculation will use the actual price you entered for the item on the sales order, then calculate the warranty price using the percentage figure that you enter. Keep in mind that if the actual price for the item is zero, the warranty will also be priced at zero.
- **Std %** - Percent of Standard Price. This calculation will use the Standard Price from the Inventory Item Masterfile and calculate the warranty price using the percentage figure you enter.

Flat Price - If the calculation method is Flat Price, enter the unit price for each warranty sold.

Percent - If the calculation method is Std % or Act %, enter the percentage of the item price to use as the warranty unit price.

Service Technician Maintenance



Service Technician Maintenance (SMC) 2/15/2013

Service Technician: JOHN BROWN

Name: John Brown

1. Main | 2. History

The Service Technician is a ten-character code used to refer to a technician or mechanic. The technician code can be assigned to a service item entry or to a labor line in Service Order entry. In Service Technician Maintenance you can setup default values specific to the service technician and see the history associated with the Technician Service information. Service Technician Code and Service Technician Name are covered on the Service Technician Maintenance - Main Tab. Click on the image above or the links below for more information about the options on each tab.

Service Technician Maintenance - Main Tab

Service Technician Maintenance (SMC) 2/17/2013

Service Technician: JOHN BROWN

Name: John Brown

1. Main | 2. History

Labor Hourly Price: 85.000

Labor Hourly Cost: 40.000

Default Whse: TJB John Brown's Truck

Labor Sales Account: 400-02-00 Service fees

Warranty Labor Cost Account: 661-00-00 Wty Expense

Service Labor Cost Account: 450-04-00 Serviceman payroll

Payroll Labor Offset Account: 450-04-00 Serviceman payroll

Accept Cancel Delete [Printer Icon] [Help Icon]

Service Technician Code - Enter up to a ten-character code to represent each service technician that will be assigned to repairs. You will also need to set up one technician to represent unassigned repairs. Every time you enter a service order and a service item to be repaired, you are required to assign a service technician using the code set up here. The program uses this to assign labor rates and to accumulate labor hours and charges for the labor analysis reporting. You also have the option of tying the technician code to an A/R salesperson code so that commissions can be paid to technicians.

During Service Order Data Entry, when you use a labor miscellaneous item code, the system will prompt for a technician code and will use the labor rate and cost that you set up here.

Name - Enter the name of the technician, limit thirty-characters.

Labor Hourly Price - Enter the hourly labor rate to charge the customer for this technician. This will be used in Service Order Data Entry when you enter a labor miscellaneous item code on a line and assign this technician. A labor miscellaneous item code starts with "R" (for Repair) and has a unit of measure of "HOURLY." If you leave this amount at zero dollars, then the data entry program will use the default rate from the Miscellaneous Item Code setup. Keep in mind that if the service item being repaired is under labor warranty, then the price on the order will be zero regardless of what you put here.

Labor Hourly Cost - Enter the hourly cost amount for this technician. This will be used in Service Order Data Entry when you enter a labor miscellaneous item code on a line and assign this technician. A labor miscellaneous item code starts with "R" (for Repair) and has a unit of measure of "HOURLY." If you leave this amount at zero dollars, then the default unit cost from the Miscellaneous Item Code setup will be used on the data entry line.

Default Whse - You may assign a specific warehouse to this technician. If this technician code is then assigned to a service item entry, any subsequent parts lines that are entered for that Service Item Entry in Service Order Data Entry, will automatically be assigned this warehouse.

Salesperson - If you chose to pay commissions to technicians in the Service Order Setup (see Entry Tab) then you will enter the A/R Salesperson Code for this technician. When an invoice is created from Service Orders where this technician is assigned, then this Salesperson Code will be assigned to that invoice.

Labor Sales Account - Enter the General Ledger account number to credit with the extended amount (sales amount) on Service Order Data Entry repair lines where this technician is assigned. This is an optional field. If you leave it blank, the sales account from the labor Miscellaneous Item Code will be used. If you fill in a valid account here, it will be used in service order line entry instead of the Miscellaneous Item Code value.

Warranty Labor Cost Account - Enter the General Ledger account number to debit with the extended cost on service order repair lines where this technician is assigned. This account will be debited if the service item being repaired is under warranty. This allows the labor analysis reports to show a separate cost for warranty repairs. This is an optional field. If you leave it blank, the "cost of sales" account from the labor Miscellaneous Item Code will be used. If you fill in a valid account here, it will be used in service order line entry instead of the Miscellaneous Item Code value.

Service Labor Cost Account - Enter the General Ledger account number to credit with the extended amount (sales amount) on Service Order Data Entry repair lines where this technician is assigned. This is an optional field. If you leave it blank, the "cost of sales" account from the labor Miscellaneous Item Code will be used. If you fill in a valid account here, it will be used in service order line entry instead of the Miscellaneous Item Code value.

Payroll Labor Offset Account - Enter the General Ledger account to credit with the cost amount of service order repair lines where this technician is assigned. This account is the offset to the cost

accounts specified in the prior two fields, and provides a method for reclassifying salary expense to cost of sales. One suggestion is to create a contra-account close to the salaries expense account and use that contra-account for this offset. In this way, you can easily see in your General Ledger reports how much of your salary expense is being applied to repair work. This is an optional field. If you leave it blank, the "inventory" account from the labor Miscellaneous Item Code will be used. If you fill in a valid account here, it will be used in service order line entry instead of the Miscellaneous Item Code value.

NOTE - Sage 100 has a standard RMA function unrelated to Service Center's RMA number. If you put an RMA number on a service invoice, it will change the "inventory" account used and will ignore the technician Payroll Labor Offset Account. It is unlikely this will ever happen, though.

Service Technician Maintenance - History Tab

Service Technician Maintenance (SMC) 2/17/2013

Service Technician: JOHN BROWN

Name: John Brown

1. Main | 2. History

2011

Period	Ending	Wty Hours	Non-Wty Hours	Wty Labor Cost	Non-Wty Labor Cost	Labor Sales
01	Jan 31	18.20	153.80	637.00	5,383.00	13,073.00
02	Feb 28	15.20	156.80	532.00	5,488.00	13,328.00
03	Mar 31	20.20	151.80	707.00	5,313.00	12,903.00
04	Apr 30	13.20	158.80	462.00	5,558.00	13,498.00
05	May 31	22.20	149.80	777.00	5,243.00	12,733.00
06	June 30	11.20	160.80	392.00	5,628.00	13,668.00
07	July 31	24.20	147.80	847.00	5,173.00	12,563.00
08	Aug 31	9.20	162.80	322.00	5,698.00	13,838.00
09	Sept 30	26.20	145.80	917.00	5,103.00	12,393.00
10	Oct 31	7.20	164.80	252.00	5,768.00	14,008.00
11	Nov 30	.00	.00	.00	.00	.00
12	Dec 31	.00	.00	.00	.00	.00
	Total	167.00	1,553.00	5,845.00	54,355.00	132,005.00

Accept Cancel Delete

The Service Technician Maintenance History Tab is similar to the Sales Person Maintenance History Tab. However, it displays information pertaining to Service Technicians.

Wty Hours - This field displays the number of Wty Hours the technician worked during the month for the defined period and fiscal year. The total or all the period Wty Hours is displayed in the Total Row.

Non-Wty Hours - This field displays the number of Non-Wty Hours the technician worked during the defined period and fiscal year. The total or all the period Non-Wty Hours is displayed in the Total Row.

Wty Labor Cost - This field displays the amount for the Wty Labor Cost for the technician during the defined period and fiscal year. The total or all the period Wty Labor Cost is displayed in the Total Row.

Non-Wty Labor Cost - This field displays the amount for the Non-Wty Labor Cost for the technician during the defined period and fiscal year. The total or all the period Non-Wty Labor Cost is displayed in the Total Row.

Labor Sales - This field displays the amount for the Wty Labor Cost for the technician during the defined period and fiscal year. The total or all the period Wty Labor Cost is displayed in the Total Row.

Miscellaneous Item Maintenance

The screenshot shows the 'Miscellaneous Item Maintenance (SMC) 2/15/2013' window. The 'Item Code' is 'SERVICE LABOR', 'Item Type' is 'Miscellaneous', and 'Description' is 'Hourly Service Labor'. The window is divided into several sections:

- Navigation:** '1. Main', '2. Accounts', '3. History' tabs. A 'Click here to set Warranty or Labor' link is present.
- Price and Unit Information:**
 - Standard Unit Price: 85.000
 - Standard Unit Cost: 40.000
 - Sales Unit of Measure: QTRH
 - Purchases Unit of Measure: (empty)
 - Sales Tax Class: TX
 - Purchases Tax Class: NT
 - Calculate Commission on Sales:
 - Image: (empty)
- Accounts Receivable:**
 - Allow Use in Accounts Receivable: (Apply button)
 - Post Sales by Division:
- Purchase Order:**
 - Allow Use in Purchase Order:
 - Allocate Landed Cost:
 - Vendor Item Code: (empty)
- Sales Order:**
 - Allow Use in Sales Order: (IT Item... button)
 - Allow Trade Discount:
 - Drop Ship Item:
 - Returns Allowed:
 - Internet Enabled:
- Buttons:** Accept, Cancel, Delete, Print, Help.

The standard Miscellaneous Item Maintenance feature of Sage 100 ERP has been modified to allow certain codes to be designated as labor and to allow the sale of extended warranties. If the Item Type is "Miscellaneous" and the "Allow Use in Sales Order" box is checked, the link "Click here to set Warranty or Labor" will appear. Click this link to set this miscellaneous item as a labor item or as an item used to sell an extended warranty.

For a more detailed description of the standard functions and usage of Miscellaneous Item Maintenance, look in the Sage 100 ERP© Sales Order help files.

Labor Miscellaneous Code Setup - If the miscellaneous code you are setting up is for labor, take a look at Miscellaneous Item Maintenance - Labor

Warranty Miscellaneous Code Setup - If the miscellaneous code you are setting up is to sell an extended warranty, take a look at Miscellaneous Item Maintenance - Warranty.

Miscellaneous Item Maintenance – Labor

The screenshot displays the 'Miscellaneous Item Maintenance (SMC)' window for the date 2/15/2013. The main window shows the following details:

- Item Code: SERVICE LABOR
- Item Type: Miscellaneous
- Description: Hourly Service Labor
- Standard Unit Price: 85.000
- Standard Unit Cost: 40.000
- Sales Unit of Measure: QTRH
- Purchases Unit of Measure: (blank)
- Calculate Commissions on Sales:

A blue link labeled 'Labor: Conv.Factor .25' is visible in the top right area of the main window. A blue arrow points from this link to a smaller 'Warranty/Labor' dialog box that is open in the foreground. This dialog box contains the following information:

- Item Code: /SERVICE LABOR
- Warranty/Labor: Labor (selected in a dropdown menu)
- Hour Conv Factor: 0.2500

Buttons for 'OK', 'Cancel', and a help icon are present at the bottom of the dialog box. The main window also features a 'Copy From...' button in the top right and a navigation bar with '1. Main', '2. Accounts', and '3. History' tabs. At the bottom of the main window, there are buttons for 'Accept', 'Cancel', 'Delete', a printer icon, and a help icon.

Item Code - This field will automatically populate with a /and the Miscellaneous Item code when the user clicks on the "Click here to set warranty or labor" link on the Miscellaneous Item Maintenance form.

Warranty/Labor - Select whether this is for a Warranty or Labor reference relative to the Miscellaneous Item code. In this example, the miscellaneous code is for Labor, so the Warranty Code field is hidden and Hour Conversion Factor appears.

Hour Conversion Factor - If the standard unit of measure is not an hour, you enter a conversion factor here. Enter the multiplier used to convert from an HOUR to your standard unit of measure. For example, if the standard unit of measure is a *quarter of an hour* (QTRH - 15 minutes), you would enter a conversion of .25, since you multiply the *hours* by .25 to arrive at the number of *quarter hours*. If the standard unit of measure is 1 hour then this setting will need to stay as the default 1.0000.

For example, if your unit of measure is QTRH and you entered a quantity of 3 on the service order line, the system would divide that by .25 to arrive at the number of hours - .75 hours. The service technician history would then show .75 hours for that line.

Miscellaneous Item Maintenance – Warranty

The screenshot displays the 'Miscellaneous Item Maintenance (SMC) 2/15/2013' window. The main form shows the following fields:

- Item Code: WTY_1YRFULL
- Item Type: Miscellaneous
- Description: One Year Warranty Parts/Labor
- Standard Unit Price: 30.000
- Standard Unit Cost: .000
- Sales Unit of Measure: EACH
- Purchases Unit of Measure: EACH

A dialog box titled 'Warranty/Labor' is open, showing:

- Item Code: /WTY_1YRFULL
- Warranty/Labor: Warranty
- Warranty Code: 1YRFULL

A blue arrow points from the 'Warranty: 1YRFULL' text in the main form to the 'Warranty Code' field in the dialog box. The dialog box also includes 'OK', 'Cancel', and a help icon.

Item Code - This field will automatically populate with a /and the Miscellaneous Item code when the user clicks on the "Click here to set warranty or labor" link on the Miscellaneous Item Maintenance form.

Warranty/Labor - Select whether this is for a Warranty or Labor reference relative to the Miscellaneous Item code. In this example, the miscellaneous code is for Warranty sale, so the Warranty Code field is shown and the Hour Conversion Factor is hidden.

Warranty Code - Warranties have to be sold as a Miscellaneous Item, this is where Warranties are attached to Miscellaneous Items.

Technician Diagnostic Lines

Miscellaneous Item Maintenance (SMC) 2/15/2013

Item Code: T_BURNED_OUT

Item Type: Comment

Description: Burned Out Wiring

1. Main | 2. Accounts | 3. History

Allow Use In:

Accounts Receivable Purchase Order

Sales Order

Comment Text:

The unit is burned out. This is a technician diagnostic comment that can be used in the Failure Analysis Report to indicate a failure.

Accept Cancel Delete

Comment codes that start with the letter "T" are treated in a special way in Service Center. In an earlier version, the only way that failures could be recorded and analyzed were with the "T" codes, also called technician diagnostic codes. The current versions have Failure Reason Codes that can be assigned to the service item entry and the lines. In order to give maximum flexibility to all users of the system, including those who have used the old "T" codes for years, the new Failure Analysis Report will recognize Miscellaneous Comment lines that start with "T" as failure codes.

Service Item Maintenance



Service Item Maintenance is the feature that allows you to add, change, and delete Service Items from your permanent database. For more information about Service Items and their important role in Service Center Management, see Service Types. One of the critical features of a good store of service information is the ability to find the equipment or items the customers own easily, and to quickly retrieve the history pertaining to that item. In Service Item Maintenance, you can find records by entering an Item Number and Serial Number, or a Serial Number by itself, or you can use the lookup feature to search for Service Items by almost any field, or a combination of fields. Click on the image above or the links below for more information about the options on each tab.

Once you have found the record, the information pertaining to that record is divided into four sections, each on a tab of its own.

The three fields shown here, Item Code, Serial Number, and Item Description all covered in more detail in Service Item Main Tab. The buttons for Service Item Memo's, Change Serial Number, and Service History are also covered in the More section under the Service Item Main Tab.

Service Item - Main Tab

Sage Service Item Maintenance (ABC) 8/21/2013

Item Code: GB-MD750
 Serial Number: B3131-5
 Description: MODEM 9600 (SYNCHRONOUS)

1. Main | 2. Warranty | 3. Sold To | 4. End User | 5. Purchase Order | 6. Service Info

Invoice Date: 1/21/2013
 Invoice Number: 1/21/20
 Sales Price: 1,091.300
 Sold As: New

COLOR: BLACK

Still In Service? Scrapped Returned to Stock

Reference:

Warehouse: 001 EAST WAREHOUSE
 Product Line: DC DATA COMMUNICATIONS
 Sold To: 02-BAYPYRO Bay Pyrotronics Corp.
 End User: 01-ABF American Business Futures

Accept Cancel Delete ?

Most of the information shown on the Main Tab is automatically filled in when an item is sold from Sales Order. For more information about this, see Service Items in the Helpful Hints section.

Item Code - Enter a valid inventory item number, which is the first part of the unique identifier for the service item.

The F2 key or standard lookup button on the left will show you the Service Items already on file, by item number. The lookup button next to standard lookup button is the Item Search button. Use this to look for valid item numbers in your inventory files.

Serial Number - Enter the serial number of the service item you are adding or changing. The serial number, when added to the item number, forms the complete unique identifier for the Service Item.

All Service Items must have a serial number to distinguish each from the other. If you have not entered an item already, you can enter the serial number only, and the program will try to find that serial number on file.

If more than one Service Item has the same serial number, you will see a list from which you can choose. If you use the F2 or lookup button here after you have entered an item number, then all the serial numbers on file for that item number will be listed. If you use the F2 or lookup button without an item number, you will see a list of all the Service Items on file, by serial number.

Item Description - This field will default to the item description from the inventory file, but it can be changed; limit thirty characters.

Service Item Memo - - Each service item can have its own set of memos. For more information see Service Item Memo.

Change Serial Number - Once a service item is created, you can change the serial number by clicking this button. For more information see Change Serial Number.

Serial Change History - If a serial number has been changed, you can see all the past serial numbers by clicking this button. For more information see Serial Change History.

Owner History - The Owner History button in the top right corner will pop up a list of all the former owners, both sold-to and end-user. Take a look at Owner History for more information.

Apply - If you have made changes to the service item you can apply those changes to open service orders by clicking the Apply button. See Apply Service Item Changes for more detail.

Invoice Date - This is the date that the service item was sold to the customer. If the record was created automatically from a Sales Order, then this will contain the sales order date for your reference. You can change it to any date you wish, or if you do not know when the item was sold, you may leave this field blank.

Invoice Number - This is the number of the invoice upon which this service item was sold. If the record was created automatically from a Sales Order, then this will contain the sales order invoice number for your reference. If you are adding this record for the first time and you do not know the invoice number then you may leave this field blank.

If you checked the "Allow Apply-To Invoice on Service Item" box on Service Order Options Service Item Entry panel, then checked the "Default to Sales Invoice", this is the invoice number to which the credit memo will be applied.

Sales Price - This is the price the customer paid for the item when it was first sold. This amount will automatically fill in if the item is sold through Sales Order. You can change this amount or leave the field blank.

Sold As - This is the condition of the item when it was sold to the customer. You can select from the drop box values "New," "Used," or "Refurbished." Typically, when an item is sold from Sales Order and automatically added to the service item database, then Sold As is set to "New." However, if this particular item and serial number already exists as a Service Item when the sales order invoice is updated, it will be set to "Used." the "Refurbished" condition is set when a Service Item is

created by a Refurbish Order (see Service Types in the Helpful Hints section for more information about order types).

Inventory Categories - If you selected to Use Inventory Categories in the Service Order Options (see Service Order Options Main Tab) the four categories from the inventory system will show up here.

Still In Service - By default, this box will be checked, meaning that the customer is still using this Service Item, as far as we know. You can uncheck the box if the customer tells you it is no longer in service. If the item is returned to stock through a Credit Return or an Exchange order, then this box will automatically be unchecked. For more information on returning items, see Service Types in the Helpful Hints section.

Scrapped - If the unit is not only out of service, but completely thrown away, you can check the Scrapped button. This button will also be checked automatically if the unit is returned using a Credit Return or a Exchange service order and the "Scrap" button is checked on the service item entry. For more information about the scrap checkbox on a service order, see Service Item Entry Columns.

Reference - Use this fifteen-character field to store any miscellaneous information that is useful. Some companies use it to show an old part number that used to apply to this item.

Warehouse - This is the warehouse from which the item was sold originally. This must be a valid warehouse in the Inventory Management system.

Product Line - Service Item Product Line. This must be a valid product line in the Inventory Management system. When the record is first created and the item code is a valid inventory item number, the product line is pulled from the Common Information Item Master file. You may override the product line on the Service Item if you wish. If the item code is not a valid inventory item number, the product line can still be entered.

Sold To - This is the customer number to whom the service item was first sold.

End User - This is the customer number who currently owns or uses the service item.

Service Item - Warranty Tab

Service Item Maintenance (SMC) 2/15/2013

Item Code: GB-MD750
 Serial Number: FS000010-NEW
 Description: GB Fancy Router and Firewall

1. Main | 2. Warranty | 3. Sold To | 4. End User | 5. Purchase Order | 6. Service Info

	Warranty Code	Start Date	End Date
Original	1YR-PARTS	2/15/2013	2/14/2014
Extended	1YR-PARTSX	2/15/2014	2/14/2015
Repair			
Next Extended	1YR-PARTSX	2/15/2015	2/14/2016

Preserve Wty?

Accept Cancel Delete ?

Warranty Code - There are three warranty codes that can apply to this service item. These codes are used to provide information about warranty coverage as well as to calculate the warranty expiration dates. For more information see Warranty Code Maintenance.

The Original Warranty is generally the manufacturer's warranty that is assigned when the item is made or sold. The Extended Warranty is generally an optional warranty that can be sold to the customer and will extend the coverage. The Repair Warranty is assigned after a repair has been made to the Service Item.

Original and Extended warranties can be automatically assigned when the Service Item is first created, based upon the customer's inclusion in a Group Code and the settings for that group. Additionally, the Repair Warranty can be automatically assigned when a service order is completed and the Group Code settings include a repair warranty. For more information, see Warranty Processing and Group Codes in the Helpful Hints section.

Warranty Zoom - Press the “eyeglass” button to see the detail settings for the specified warranty code. This drills into Warranty Code Inquiry screen to show you the Warranty Code record.

Warranty Start -This is the date the specified warranty began on this service item. For the original warranty, this date is usually when the item was first sold during a Sales Order Invoice update, and will be the same as the invoice date. For an extended warranty the date will usually match the invoice date for the invoice on which the extended warranty was sold. However, if the extended warranty is set to start after the original warranty it will begin the first day after the original warranty expires. The repair warranty start is set to the invoice date for the invoice on which the service order was updated. The warranty start date can be overridden by the user.

Warranty End -This is the last day of the specified warranty period. This date is calculated based upon the settings of the warranty code (see Warranty Code Maintenance) and the start date of the warranty. This date can be overridden by the user.

Preserve Wty - Under certain circumstances an item might be sold, returned, then sold again. If this box is checked, then the original warranty on the item from the first time it is sold will remain with the service item through subsequent returns and sales. This is useful if your company maintains a pool of items for the customer, each of which carries its own warranty, but which you stock and ship as needed to the customer.

Service Item - Sold To Tab

Service Item Maintenance (SMC) 2/15/2013

Item Code: GB-MD750
 Serial Number: FS000010-NEW
 Description: GB Fancy Router and Firewall

1. Main | 2. Warranty | **3. Sold To** | 4. End User | 5. Purchase Order | 6. Service Info

Customer No. 02-BAYPYRD

Bay Pyrotronics Corp.

Bill To Address

Name: Bay Pyrotronics Corp.
 Address: 23491 Fell Street
 Upper
 ZIP Code: 92257-0001
 City: San Francisco State: CA
 Country:
 Telephone: (415) 555-9654

Ship To Address

Ship To:

Name:
 Address:
 ZIP Code:
 City: State:
 Country:
 Telephone:

Accept Cancel Delete

Sold To Customer No - This is the customer number to whom the service item was first sold. Sometimes this is referred to as the dealer. Typically, once this code is entered, either automatically or by you, it does not change. The bill to address and phone are read from the Accounts Receivable Customer Master file during initial setup. You may, if you wish, change the address for the Sold To customer.

Ship To - When the item is first sold, this is the ship-to code to which the item was shipped. It can be changed at any time, but it must be a valid ship-to code for the Sold To Customer.

Reset Sold-To User Address - The service item record stores an address for the sold-to customer, or dealer. When the record is first created and the customer numbers are entered, the address is pulled from the Accounts Receivable Customer record. You may override the address on the Service Item if you wish. If the address on the Service Item does not match the address found for the customer in A/R, this buttons will appear. You can press the button to read the new address from the Customer record and set the Service Item record to match.

Service Item - End User Tab

Service Item Maintenance (SMC) 2/15/2013

Item Code: GB-MD750
 Serial Number: FS000010-NEW
 Description: GB Fancy Router and Firewall

1. Main | 2. Warranty | 3. Sold To | 4. End User | 5. Purchase Order | 6. Service Info

Customer No. 01-ABF

Bill To Address

Name: American Business Futures
 Address: 2131 N. 14th Street
 Suite 100
 Accounting Department
 ZIP Code: 53205-1204
 City: Milwaukee State: WI
 Country: USA United States of America
 Telephone: (414) 555-4787

American Business Futures

Current Location

Ship To: 2 Residential Address
 Name: American Business Futures
 Address: Racine Warehouse
 5411 Kendrick Place
 ZIP Code: 53120
 City: Racine State: WI
 Country: USA
 Telephone: (414) 555-4319

E-mail Address: artie@abf.com

Accept Cancel Delete ?

End User Customer No - This is the customer number to whom the service item was first sold. It can later be changed if it was subsequently sold to another customer. The bill to address and phone are read from the Accounts Receivable Customer Master file during initial setup. You may, if you wish, change the address for the End User customer.

Ship To - When the item is first sold, this is the ship-to code to which the item was shipped. It can be changed at any time, but it must be a valid ship-to code for the End User Customer.

Current Location Address - Initially the current location will be the address from the ship to code entered. If the service item is located in a different place than the end user bill to address, you can enter that other address here and make it a permanent part of the service item record.

Reset Sold-To User Address - The service item record stores an address for the end user customer. When the record is first created and the customer numbers are entered, the address is pulled from the Accounts Receivable Customer record. You may override the address on the Service Item if you

wish. If the address on the Service Item does not match the address found for the customer in A/R, this buttons will appear. You can press the button to read the new address from the Customer record and set the Service Item record to match.

Service Item - Purchase Order Tab

Service Item Maintenance (SMC) 2/15/2013

Item Code: GB-MD750
 Serial Number: FS000010-NEW
 Description: GB Fancy Router and Firewall

1. Main | 2. Warranty | 3. Sold To | 4. End User | 5. Purchase Order | 6. Service Info

Vendor No. 01-UNITED United Computers

Purchase Order	0032342	Vendor Warranty	1YR-PARTS
Purchase Order Date	2/4/2013	Expire Date	2/5/2014
Receipt No	G001712		
Receipt Date	2/6/2013		
Purchase Cost	753.230		

Accept Cancel Delete ?

Vendor Number - This is the code for the vendor who sold the item to your company originally. The number entered here must be a valid Vendor ID in Accounts Payable. This field will automatically fill in if you received the item originally through Purchase Order receipts.

Purchase Order - The original Purchase Order number goes here. If you received the item originally through Purchase Order receipts, then the purchase order number will automatically fill in here. This number is not verified against purchase orders, so you can enter whatever is useful.

Purchase Order Date - Enter the date of the original purchase order here.

Receipt No - The original Receipt number goes here. This number will automatically fill in from the Purchase Order receipt process, or you may enter whatever number you wish.

Receipt Date - This is the date that the service item was originally received into your inventory, before it was sold to the customer.

Purchase Cost - Enter the original cost of this service item when it was put into your inventory. When you return the item to your stock using a Credit Return or Exchange service order (see Service Types in the Helpful Hints section), it will be put in inventory using this cost by default.

Vendor Warranty - This field is for your information only. You can enter or use the lookup to select a valid warranty code (see Warranty Code Maintenance). This warranty code is used, along with the receipt date, to calculate the Expire Date. The code is not currently used for any other purpose in the system.

If you have set the item to Track In Service and you entered a Default Vendor Warranty, this field will be automatically filled in when the item is sold through sales order invoice entry.

Expire Date - Enter the date that the vendor warranty will expire. This date will fill in automatically based upon the vendor warranty and the receipt date.

Service Item - Service Info Tab

Service Item Maintenance (ABC) 10/15/2014

Item Code: GB-MD750
 Serial Number: REF1
 Description: MODEM 9600 (SYNCHRONOUS)

1. Main | 2. Warranty | 3. Sold To | 4. End User | 5. Purchase Order | 6. Service Info

Create Svc Order

Service O...	Order Date	Customer No	Status	Status Date	Type	Svc Tech
0000008-0...	01/31/2013	01-ABF	NEW	01/31/2013	Exch	
0000168-0...	08/08/2013	01-ABF	History	08/08/2013	Rfrb	ISK

Accept | Cancel | Delete | ?

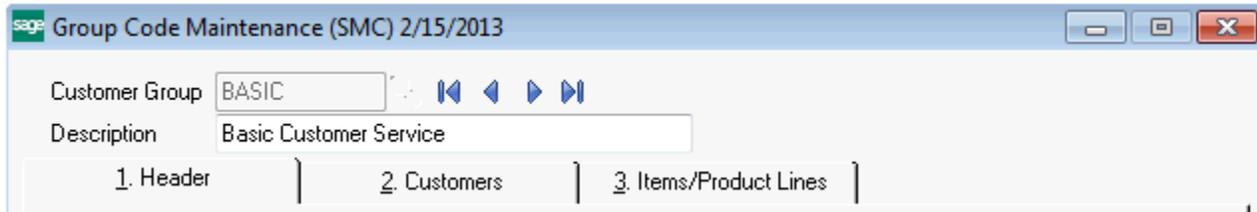
The Service Info tab lists all the service orders, current and history, that exist for this service item. You can sort the list by clicking on one of the headings at the top of the list box.

To see more information about any one of the service records, click the drill down button on the right (). If the highlighted service order is a history service order, clicking on the drill down button will start up history inquiry for that service order. If the highlighted service order is a current service order, clicking on the drill down button will start up service order entry allowing you to edit that service order.

If all you want to do is see the full text of the problem description that was entered for that service item entry, click on the problem description button ().

The button "Create Service Order" will allow you to pick a service type and then will create a new service order with one entry for this service item.

Group Code Maintenance



The Group Code allows you to group customers according to the warranties, pricing, and repair turn-around time that you provide them. Using the Group Code settings, you can provide default warranties for service items that are added “on-the-fly” during service order entry. You can also determine how quickly a repair must be completed, and set price levels for parts and pricing for specific miscellaneous items. Click on the image above or the links below for more information about the options on each tab.

In addition to setting these values for the group, you can have different values depending on the item number or product line that is being serviced.

When you are entering a service order for a customer assigned to a group, you will be able to pop up all this information about the group values while you are setting up the order and entering the lines. You can also designate a default group for all customers that are not assigned a group (see Service Order Options Main Tab). For a more detailed discussion see Group Codes in the Helpful Hints section.

Group Code Main Tab

Customer Group: BASIC

Description: Basic Customer Service

1. Header | 2. Customers | 3. Items/Product Lines

Default Warranties

Original	
Extended	
Repair	90REP

Charge Codes

Repair Labor	/SERVICE LABOR
Clean & Tune	/CALIBRATION
Flat Rate	

Default Rates

	In Warranty	Out of Warranty
Repair Labor	55.000	85.000
Clean & Tune	75.000	95.000
Flat Rate	.000	.000
Parts Limit	500.000	500.000
Price Level		

Turn-Around Days: 0

Text

This group code is applied to all customers that do not have another group assignment. It does not assign an original or extended warranty, but it does assign a repair warranty when a service order is complete, invoiced, and the invoice is updated (unless the warranty code tells it to suppress the repair warranty).

Accept Cancel Delete ?

Customer Group - This ten-character code uniquely identifies each group. You can also use the lookup button or F2 to list the group codes that are already on file.

Description - Enter the thirty-character description for this group. This is for your benefit in distinguishing groups.

Default Warranties - You can assign three warranty codes to be the default warranties when a new service item is added on-the-fly during Service Order Data Entry. If you are entering a new Service Order for a customer that is assigned to GROUP1, for example, the warranty codes for that Service Item will automatically fill in with the codes you enter here, overriding the OEM Warranty that is set up in Inventory Maintenance (see Inventory Management changes).

This feature is primarily intended for companies that do not sell the Service Items, but rather act as warranty service locations for manufacturers.

When an item comes in for repair in these companies, it is typically not already in the Service Item database, and it is therefore necessary to add the item while entering the Service Order. This feature will automatically fill in the warranty codes according to the group and the product line or item number.

For more information take a look at Group Codes and Warranty Processing in the Helpful Hints section.

Hourly Labor Charge Code - Enter a miscellaneous item code for labor that you wish to use for this group. If you are entering lines on a service order for a customer assigned to a group, and you enter a miscellaneous item code that matches the one in the Hourly Labor field, the system will recognize that and will pull the price for that line from the default rates table depending on whether the service item is in warranty or not. For more information about miscellaneous item labor codes see Miscellaneous Item Maintenance - Labor.

Clean and Tune Charge Code - This is the miscellaneous item code you use to charge for a simple inspection and cleaning, or tune-up. If you enter this code on a line of a service order for a customer in this group, the price for that line will be pulled from the default rate table for Clean & Tune depending on whether the service item being repaired is in warranty or not.

Flat Rate Charge Code - Here you can enter a kit item number that you use as a flat rate repair for this group. When you use this code on a line of a service order for a customer in this group, the price for that kit will be pulled from the default rate table for Flat Rate depending on whether the service item being repaired is in warranty or not.

Turn-Around Days - Enter the number of days that a repair for this group should take. In some cases you have agreements with customers on the length of time you will need to repair their items. You can enter that time period here in days, and the Due Date on the service order header will be automatically set when a new order is created. For more information see Service Order Header.

Hourly Labor Default Rates - You can assign an in-warranty and out-of-warranty hourly labor rate for this group. If you enter the miscellaneous item code designated as the Hourly Labor charge code (see Miscellaneous Item Maintenance - Labor) on a line on a service order for a customer in this group, the data entry program will look to see if the service item being repaired is in warranty. If it is, the line will be priced with the Hourly Labor – In Warranty price you enter. If it is not, then the program will use the Hourly Labor – Out of Warranty price.

Note that if the this is a labor charge code and the warranty covers labor (see Warranty Code Maintenance), then the price will be automatically set to zero if the Service Item is in warranty, regardless of the default rate.

Clean & Tune Default Rates - You can assign an in-warranty and out-of-warranty clean and tune rate for this group. If you enter the miscellaneous item code designated as the Clean & Tune charge code on a line on a service order for a customer in this group, the data entry program will look to see if the service item being repaired is in warranty. If it is, the line will be priced with the Clean & Tune – In Warranty price you enter. If it is not, then the program will use the Clean & Tune – Out of Warranty price.

Note that if the this is a labor charge code and the warranty covers labor (see Warranty Code Maintenance), then the price will be automatically set to zero if the Service Item is in warranty, regardless of the default rate.

Flat Rate Default Rates - You can assign an in-warranty and out-of-warranty flat rate repair price for this group. If you enter the flat rate kit item number designated as the Flat Rate Charge Code on a line on a service order for a customer in this group, the data entry program will look to see if the service item being repaired is in warranty. If it is, the line will be priced with the Flat Rate – In Warranty price you enter. If it is not, the program will use the Flat Rate – Out of Warranty price.

Note that if the warranty covers parts (see Warranty Code Maintenance), then the price will be automatically set to zero if the Service Item is in warranty, regardless of default rate.

Parts Limit - You can enter here a limit amount for the price of parts when doing a repair for a customer assigned to a group. For example, you may have an agreement or policy that you will notify the customer if the price of parts exceeds \$100.00. The Parts Limit will display on the line entry screen during Service Order Data Entry, and will turn red if the total price of inventory items for the service item exceeds the parts limit entered here.

Price Level - The Price Level is a one-character code used by Inventory Maintenance to set custom pricing for inventory items sold in Service Order Data Entry. Normally the price level on a line is assigned according to the individual customer on the order. You can simplify this by putting the Price Level on the Group Code, which will override the customer price level. A great advantage of this is that you can have a different price level if the service item being repaired is in warranty.

Note that if the warranty covers parts (see Warranty Code Maintenance), then the price will be automatically set to zero if the Service Item is in warranty, regardless of the price level.

Group Text - You can enter up to 200 characters of text to fully describe this group or special handling for customers in this group. This text can be viewed during line entry.

Group Code Customers Tab

Customer Group: SILVER
Description: Silver Service

1. Header | 2. Customers | 3. Items/Product Lines

Quick Row: 3

	Customer	Customer Name
1	02-BAYPYRO	Bay Pyrotronics Corp.
2	02-ATOZ	A To Z Carpet Supply
3		

Accept Cancel Delete Print ?

On the Customers tab of Group Code Maintenance you can add or remove customers from the list. Enter a valid A/R customer number in the field, or use the F2 key or lookup button to select a customer from the list.

A customer can only belong to one group at a time. If you enter a customer number that is already assigned to another group, you will be notified and given the option of moving the customer to the new list.

Items/Product Lines Tab

Group Code Maintenance (SMC) 2/17/2013

Customer Group: SILVER
Description: Silver Service

1. Header | 2. Customers | 3. Items/Product Lines

Quick Row: 3

	Item Code	Product Line	Original Wty	Extended Wty	Repair
1		PS&A	1YEAR	1YR-PARTSX	90REP
2	D1400		1YR-PARTS		90REP
3					

Labor Charge
Cln & Tune Chg
Flat Rate Chg
Wty Price Level
Price Level

Accept Cancel Delete Print ?

For any group you define, you can set different values for the default warranties, charge codes, default rates, and price levels, depending on the inventory item number or the product line. This panel shows the list of exceptions that have been entered. As you can see, one exception is for the product line “PS&A” and another exception is for the item number "D1400”.

When you are creating a service order for a customer assigned to this group, you add the service item entry that is being repaired. The system will look first to this list to see if that specific item number is here. If it is, it will use the values for default warranties, charge codes, default rates, and price levels that are set up for that item number. If the item number is not in the list by item number, it will look for the product line that the item number is in. Finally, if neither the item number nor the product line are found in this list, the program will look at the Group Code Maintenance Main Tab to find the values.

Group Code Listing

Report Setting: STANDARD

Description: Group Code Listing

Setting Options:

- Type: Public
- Print Report Settings:
- Number of Copies: 1
- Default Report:
- Three Hole Punch:
- Collated:

Item Types to Print:

- Include Header:
- Include Text:
- Include Customer List:
- Include Item/Product Line:

Select Field	Operand	Value
Group	All	

HP Photosmart C4600 series (redirected) | Keep Window Open After Print: | Preview: | Print | Preview | Setup | ?

When you press the Printer icon the Group Code Listing report option selection screen appears. With the options selected as above the Group Code Listing report shows all information for each Group Code.

Complaint Code Maintenance

Complaint Code: NOISY

Description: MAKES UNUSUAL NOISE

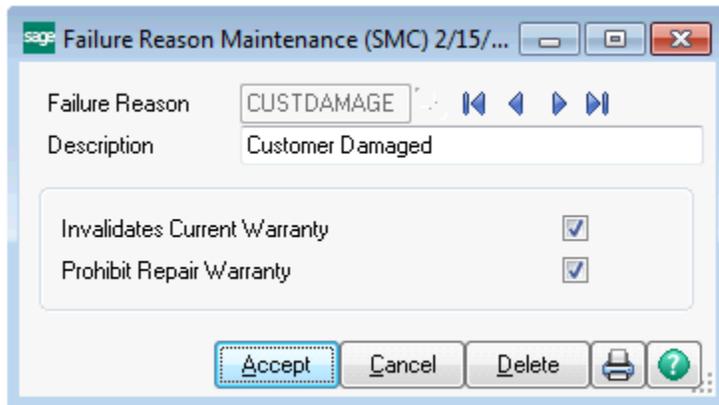
Accept | Cancel | Delete | Printer | ?

The complaint code can be entered on a service item entry or on lines to indicate the primary complaint the customer has that has prompted the service order. This information can be useful for later reporting of failures using Business Insights Reporter or for analysis with the Failure Analysis Report.

Complaint Code - This is a ten-character code that uniquely identifies this complaint. You can also use the F2 key or the lookup button to list complaint codes already on file.

Description - Enter a thirty-character description for this complaint code.

Failure Reason Maintenance



The Failure Reason allows you to assign a codified explanation of the cause of the broken service item to either the service item entry or a line on the service order. In addition to being useful for reporting using Business Insights Reporter, the failure reason can also be used to void a warranty on a line item or stop a repair warranty from being assigned after a service order is closed. For more information about repair warranties see Group Code Main Tab or Warranty Processing.

Failure Reason - This is a ten-character code that uniquely identifies the failure reason. You can also use the F2 key or the lookup button to list Failure Reasons that are already on file.

Description - Enter a thirty-character description for this Failure Reason.

Invalidates Warranty - If this box is checked, then the line item on a service order where this failure reason is used will be taken out of warranty and priced as non-warranty, regardless of the warranty coverage of the service item.

Prohibit Repair Warranty - Failure Reasons marked Prohibit Repair Warranty can be assigned in service item entry to prevent the default repair warranty defined in in Group Code Maintenance from being assigned to the Service Item after a repair has been made. Note that using a Failure Reason marked Prohibit Repair Warranty on the lines tab will not prevent the Repair Warranty from being assigned to the Service Item.

Quick Print Preferences

Program	Default Form Code	Print?
Quick Print from Order Entry		
Service Order Printing	STANDARD	<input checked="" type="checkbox"/>
Picking Sheet Printing	STANDARD	<input checked="" type="checkbox"/>
Service Item Label Printing	STANDARD	<input checked="" type="checkbox"/>
Shipping Label Printing	STANDARD	<input checked="" type="checkbox"/>

Quick-Print Preferences allows you to assign default forms and print options for the Quick Print feature of Service Order Entry. After selecting a user code, you can select a code for each of the forms that might need to be printed: Service Order, Picking Sheet, Service Item Label and Shipping Label.

For each form, check the box in the Print column to determine if you wish, by default, to print that form when the Quick Print button is selected. For more information see Service Order Data Entry Quick Print.

Demo/Loaner Record Maintenance

The screenshot shows the Sage Demo/Loaner Item Maintenance (SMC) 2/18/2013 window. The main section contains the following data:

Item Code	GB-MD789	MODEM 300
Serial Number	315-4011	
Invoice No.	0100070	Invoice History Seq. No. [Navigation Buttons]
Warehouse	000	CENTRAL WAREHOUSE
Customer No.	01-ABF	American Business Futures
Invoice Date	12/7/2011	
Shipped	1.00	
Returned	.00	
Demo or Loan	Loaner	
Service Order	0000014	Entry 000001
Sales Order	0000177	

The 'Original' section contains:

Item Code	GB-MD750	MODEM 9600 (SYNCHRONOUS)
Serial Number	14-482	

At the bottom, there are buttons for 'Return', 'Sell', 'Accept', 'Cancel', a printer icon, and a help icon.

This maintenance task allows you to view and edit items which have been sent out as demos or loaners (see Demos and Loaners in the Helpful Hints section). You can enter the full key of the unit, which includes the item code, serial number (which is the customer number in the case of non-serialized items), invoice number and invoice history sequence number. Since it is unlikely that you know all of this data, you can either use the browse buttons to move from record to record, or use the flashlight search button just to the right of the Item Code.

One use for the Demo/Loaner Record Maintenance task is to correct records that are wrong. For example, a customer may have returned a unit to you, but instead of going through the proper procedure to return a demo (a credit memo with the line flagged as a Demo), someone just did an inventory adjustment. In this case, you might have an item that is back in the proper warehouse in your inventory, but that still appears on the Open Demo/Loaner Report. To remove the item from the report, find that item in the Demo/Loaner Record Maintenance and modify the quantity returned to match the quantity shipped, which signifies that the unit has been returned and should no longer be on the report.

Return Item - The quickest way to create a credit memo to properly return a demo or loaner is to use the Return Item button. Just click the Return Item button and a new credit memo will be created for this item. The serial number of the demo or loaner unit will be automatically distributed on the line of the credit memo, avoiding possible errors. When the credit memo is updated, the demo/loaner will be flagged as returned and will no longer appear on the report.

Sell Item - On occasion a customer may request to simply keep the demo or loaner that was sent. In this case, you can create a Debit Memo in Sales Order Invoice Data Entry, enter the item and

select the Sell Demo field for that item. A better and faster way is to click the Sell Demo button, which will do all the work for you. When you click the Sell button, the program will prompt you for a price to use, and will show you the standard price and the price charged on the original invoice. By default, if the original invoice line for the shipment of the demo/loaner was not zero, then the Sell price for the demo will be zero so that the customer is not charged twice.

Section D: System Operations

Main Menu

Service Order Data Entry



Before a service order number is entered:

When you first select Service Order Entry from the menu, the cursor lands in the Service Order number field. Before the service order number is entered, the following options are available.

Service Order Number - The service order number uniquely identifies the service order. It is seven characters long, typically numeric, but it can also contain alphabetic characters. If you enter a number here, it will be automatically left justified and zeros will be added at the front to make seven characters. For example, if you enter '55', it will be automatically changed to '000055'. If you enter any alphabetic characters it will not be changed. If the order number is already on file, the record will be retrieved and the header tab will be displayed.

Lookup - Click the magnifying glass button or press F2 to pop up an advanced lookup to find the order that you are looking for.

Next New Order Number - The pound sign (or hash mark) button will assign the next order number based upon the settings in the Service Order Options Main panel. If you have set up the Automatic Numbering options on the Service Order Options Entry panel, you can enter one of the defined prefix letters and hit Alt-X or click the Next Order button () to assign the next order number for that prefix.

Service Item Entry Lookup - The first flashlight icon will pop up an advanced lookup showing all the service item entries that are currently in the service order data entry tables. This allows you to find the service order by using the serial number or item code of the unit being repaired.

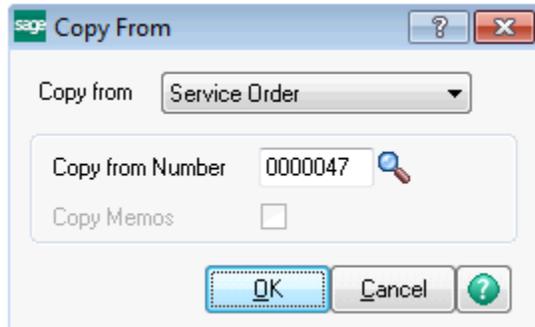
Lot Serial Lookup - The second flashlight icon will pop up an advanced lookup showing all the distributed line items that are currently in the service order data entry tables. This allows you to find the service order by using the serial number or item code.

Defaults - Click the defaults button to pop up a dialog of data entry default values as shown in the Service Order Entry Defaults topic.

When a new service order number is first entered:

If you have clicked on the Next New Order Number button or entered an order number that is not already in the file, the following buttons and fields will immediately appear on the top of this panel.

Copy From - If you are creating a new service order that is very similar to an existing service order, either in the current table or in service history, the Copy From button will allow you to select that order and copy it, in total, to the new service order number.



Since all service orders, even those still in process, are automatically stored in the Service Order History, it is easiest to select Service Order History from the Copy From box. You then can look up the Copy From Number and select a service order from history to copy into the current order.

When an existing service order number is entered:

If you have entered a service order number that is already on file, or selected one from the advanced lookup, or once you have entered a valid customer number, the following buttons and fields will immediately appear on the top of this panel.

Create Invoice - If the Allow Create Invoice From Order Entry box is checked, then this button will be enabled. Depending upon the selection made in the Create Invoice Option, the system may pop up a prompt telling you that it will close all the service item entries and create an invoice. If the Invoice Closed Only is selected in the options, then only those service item entries that have a status indicating "Complete and Ready to Update" will be invoiced. For more information about statuses, see Service Order Status Maintenance.

Customer - If you wish to pop up customer information, in abbreviated form, to review or change, you can click this button.

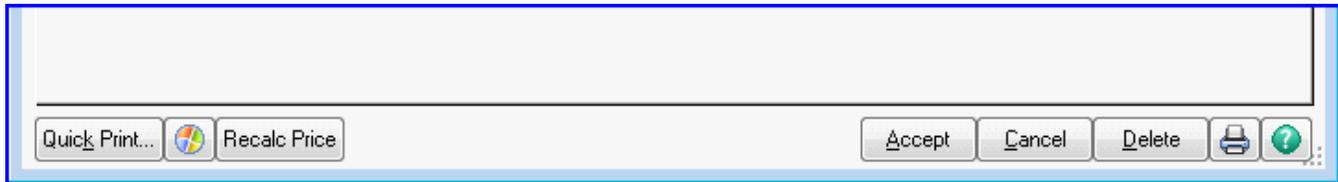
Credit - Pressing this button will pop up the credit information dialog, showing the accounts receiving and credit limit information for the customer assigned to the service order.

Once the order number is entered, you will be on the Header Panel, which is covered below.

- **Header Tab** - The general information about the order, including the customer, the contact, the sales tax, freight and salesperson information is entered here.
- **Address Tab** - The customer bill-to and ship-to address is maintained here.
- **Service Items Tab** - The list of equipment, or service items, that are being repaired, returned or exchanged on this order.
- **Lines Tab** - The parts that are used on this order and the charges to the customer are entered on this panel.

- Totals Tab -This panel shows the totals for the service order.

Other options on the Service Order panel:



At the bottom of the service order panel there are some additional options that can be used when the service order has been completely entered.

Quick Print - Clicking this button will pop up the Quick Print dialog, allowing you to print a service order, picking sheet, service item label or shipping label for the order that is on the screen. For more information about these options see Service Order Quick Print.

Recalc Price - Once an order has been entered, with line charges, the Recalc Price button will go through the lines, read the item codes again, and recalculate prices as if each line were entered new. This is useful if prices have changed since the service order was entered.

Accept - The Accept button will save all the service order information to the physical file so it can be retrieved later or used by other workstations.

Cancel - The Cancel button will abandon any changes that have been made in this most recent editing session and will leave the order as it was when first retrieved. If it is a brand new order that has never been accepted, then the whole order will be abandoned and it will not be saved.

Delete - Once an order has been Accepted at least one time, the Delete button will appear. Pressing this button will remove the order completely. It will still exist in the service history files and will be flagged as Deleted.

Print - The printer icon will pop up the Service Order Printing option to allow you to print all unprinted orders, or to select the orders that you wish to print.

Service Order Entry Defaults

The screenshot shows a dialog box titled "Default Values for Service Order Entry" with the following fields and values:

- Next Order No.: 0000062
- Order Date: 2/15/2013
- Order Type: Standard Order
- Warehouse: 099
- Print Order:
- Print Pick Sheet:
- Salesperson: 0100
- No. of Ship Labels: 1
- Ship Via: MAIL (expanded to show U.S. POSTAL SERVICE)
- FOB: DESTINATION

Buttons at the bottom: OK, Cancel, and Help.

Pressing the Defaults button on the Service Order Entry header panel before a service order number is entered will pop up this dialog to set default values for any subsequent orders that are created.

Next Order No - Entering a new value here will override the Next Automatic Order Number that was set in the Service Order Options. When you click the Next Order button, or use Alt-X to select the next new order, the system will use the order number you enter here. Changing this value will actually change the Next Automatic Service Order Number in the options record as well.

The remaining fields are described on the Service Order Header page. Entering a default value on this dialog will make that value also fill in the same field on the Service Order Header page.

Service Order Header

Service Order Entry (SMC) 2/15/2013

Service Order 0000062

Copy from... Defaults... Create Inv Customer... Credit...

1. Header | 2. Address | 3. Service Items | 4. Lines | 5. Totals | 6. Credit Card | Grp BASIC | User 29

Order Date 2/15/2013 Order Type Standard

Customer No. 01-ABF American Business Futures
Cust PD 0079134

Apply status changes to service item entries

Status R SERVICE ORDER RECEIVED Status Date 2/15/2013
Status Comment PW - received UPS Date Received 2/15/2013

RMA Number 0000001
RMA Expire Date 12/31/5999
Due Date 3/1/2013

Whse 000 CENTRAL WAREHOU:
Sales Tax
Schedule WI
Wisconsin

Ship To Addr 2 American Business Futures
Terms Code 01 Net 30 Days
Ship Via UPS BLUE FOB DESTINATION
Confirm To John Quinn
E-mail artie@abf.com
Fax No. (801)222-1111 Batch Fax
Comment

Salesperson 0100 Jim Kentley
Split Comm. No Split Comm...

Print Order
Print Orphan Detail Pick Sheets
No. of Ship Labels 1

Quick Print... Recalc Price Accept Cancel Delete

Order Date - Enter the date of the order. For a new order, this date will automatically fill in based up the date found in the Service Order Entry Defaults, which is generally the current application date. This date is used when calculating whether a service item entry is in warranty.

Order Type - The order type on the service order header will determine the service type on the service item entries. If the order type is Standard, the service item entries can be changed to any other service type. A more detailed description of the possible service types and their uses can be found in the Helpful Hints section Service Types. There are five possible order types:

- *Standard* - The typical repair and return order. The customer will send the items to be repaired. The service item will be repaired in the shop then shipped back to the customer. If the header order type is Standard, then the individual service item entries can be changed to any service type.
- *Price Quote* - The only difference between a Price Quote and a Standard order type is that with a price quote, the parts (item codes) entered on the lines panel will not be committed in inventory when you use a price quote. If you create a Price Quote order, you can later change it to Standard, but you cannot change the header order type to anything but standard. You cannot complete an order and invoice it when the order type is Price Quote.
- *Credit Return* - If the customer is going to return a service item back to your stock, or to scrap, use the Credit Return order type. If the header order type is Credit Return, all the service item entries will also be set to Credit Return and cannot be changed. You can also change the inventory item code and serial number of the unit being returned, if desired.
- *Exchange* - This will allow you to not only return the service item from the customer, but will also allow you to send a replacement service item from your inventory. The item that is returned will be flagged as "replaced" and the new service item sent will be flagged as "replaces" and will inherit the warranty from the replaced unit. You can also change the inventory item code and serial number of the unit being returned, if desired.
- *Refurbish* - When you wish to modify or repair a service item that is in your own stock, you can use the Refurbish order type. This type will commit the serial number in your inventory and allows you to roll up the cost of the repair or modification into the new inventory cost of the item. You can also change the inventory item code and serial number if desired.

Customer - Enter the customer number for the order, or click the Lookup button to list all customer numbers. If you have set up divisions in the Accounts Receivable module, the first two characters entered must be a division number. If the customer is on credit hold or has exceeded the credit limit established, the Customer Credit History window appears automatically.

Click the Next Number button to automatically increment the customer number for a new customer. The Next Number button is available only if the Auto Increment Customer Number check box is selected in Accounts Receivable Options.

Click the field hyperlink to launch this field's associated maintenance task. If a value is entered at this field, the associated data displays in the maintenance window. This maintenance task can be accessed only with the appropriate security setup.

A new customer number can be added on the fly. The Customer Maintenance (On the Fly) window appears; some nonessential fields are omitted to speed data entry. Access Customer Maintenance at a later time to complete the remaining entries for a new customer number.

Click the Memo button to view, create, or maintain memos. The Memo button is available only if the appropriate memo type has been set up in Memo Manager Maintenance for this task. If a memo already exists for this task, the Memo button appears yellow. If a memo does not exist, the Memo button appears blue. For more information, see Memo Maintenance.

Customer PO - Type the customer purchase order number assigned to this sales order. This field is available only if a valid customer number is entered at the Customer No. field.

Apply Status Changes to Service Item Entry - When you change the header status code, it will change all the service item entry statuses to match the header. This is not optional. However, if this box is cleared, the system will warn you before it changes all the service item entry statuses. If this box is checked, all the service item entry statuses will be changed without any warning when the header status is changed.

Status Code - The header status can be changed as a quick way to change all the individual service item entry statuses. When Service Center is determined whether a service item is received, at the vendor, complete or any other status, it looks at the service item entry, and not the header. The reason for having a status on the header is to give an easy way to change all the service item entry statuses at once. You can use the lookup button or F2 to display all the status codes available. See Service Order Status Maintenance for more information about status codes.

Status Date - The date the status was changed. This date will be copied to the status date of each individual service item entry and will appear in the status history log for each service item entry.

Status Comment - Enter a comment regarding the status change. This comment will be copied to the status comment of each individual service item entry and will appear in the status history log for each service item entry.

Vendor No - The vendor the service items were sent to for processing if the status code says "Sent to Vendor". This data will be copied to the individual service item entry and will appear in the status history log for each service item entry.

Vendor RMA No - The vendor RMA Number for outside processing if the status code says "Sent to Vendor". This data will be copied to the individual service item entry and will appear in the status history log for each service item entry.

Date Received - The date that the first service item entry was received into your shop. This date is set when any service item entry status is changed to a status code that says "Set Received Date". See Service Order Status Maintenance for more information about status codes.

RMA Number - If the customer is to be sending a unit in for processing, you can assign a Return Material Authorization number and give it to the customer for tracking the return. You can enter a number, hit the Next RMA button () to assign the Next Automatic RMA number as determined in Service Center Options. You can also use the service order number as the RMA number by clicking the RMA Equals Order No button ().

When an RMA number is entered, an RMA Expire Date is also entered. The date is calculated from the order date plus the number of Default Days til RMA Expiration as determined in Service Center Options. If none of the service item entries have been received by that date, the order can be expired. Expiration of RMAs is done by the Expired RMA Register and Update on the Utilities menu.

RMA Expire Date - The date the RMA is to expire. This is automatically set based upon the order date plus the Default Days til RMA Expiration as determined in Service Center Options. If none of the service item entries have been received by that date, the order can be expired. Expiration of RMAs is done by the Expired RMA Register and Update on the Utilities menu.

Due Date - The due date is when this order should be complete. It is automatically set based upon the customer Group and the turnaround days. See Group Code Main Tab for more information. This date is for your use only. The program does not need it.

Warehouse - Enter a warehouse code to use for this order, or click the Lookup button to list all warehouse codes. If there is a default warehouse defined for the customer ship-to address entered at the Ship To Address field, this field displays the customer ship-to warehouse. If there is no default warehouse defined for the ship-to address entered, this field displays the default warehouse entered at the Warehouse field in the Service Order Entry Defaults window. If a value is not saved in the Service Order Entry Defaults window, this field displays the warehouse entered at the Default Warehouse for Service Parts field in Service Center Options.

Sales Tax Schedule - Enter the tax schedule for the invoice, or click the Lookup button to list all tax schedules. This field automatically displays the tax schedule for the ZIP Code of the ship-to address entered at the Ship To Addr field.

Ship-To Address Code - Enter a location code to automatically enter a shipping address defined in Accounts Receivable Customer Ship-To Address Maintenance. Click the Lookup button to list all location codes.

The ship-to location code defaults to the ship-to location entered at the Primary Ship To field in Customer Maintenance.

Click the field hyperlink to launch this field's associated maintenance task. If a value is entered at this field, the associated data displays in the maintenance window. This maintenance task can be accessed only with the appropriate security setup.

A new location code can be added on the fly. The Customer Ship-To Address Maintenance (On the Fly) window appears; some nonessential fields are omitted to speed data entry. Access Customer Ship-To Address Maintenance at a later time to complete the remaining entries for a new location code.

Terms Code - Enter a terms code for this customer, or click the Lookup button to list all terms codes.

Click the field hyperlink to launch this field's associated maintenance task. If a value is entered at this field, the associated data displays in the maintenance window. This maintenance task can be accessed only with the appropriate security setup.

A new terms code can be added on the fly. The Terms Code Maintenance (On the Fly) window appears; some nonessential fields are omitted to speed data entry. Access Terms Code Maintenance at a later time to complete the remaining entries for a new terms code.

Ship Via - Enter a shipping code, or click the Lookup button to list all shipping codes. This field displays the shipping method entered for this customer at the Ship Code field in Customer Maintenance.

If Yes or Actual is selected at the Use Shipping Code to Calculate Freight field in Service Center Options, you must enter a shipping code defined in Shipping Rate Maintenance.

Click the field hyperlink to launch this field's associated maintenance task. If a value is entered at this field, the associated data displays in the maintenance window. This maintenance task can be accessed only with the appropriate security setup.

FOB - Type the FOB (freight on board) location. The FOB location indicates the location this order is placed on board a freight carrier at no charge to the customer. This field automatically displays the freight on board location entered at the FOB field in the Default Values for Sales Order Entry window, but can be changed.

Confirm To - Enter the name of the person to contact regarding orders for the current ship-to address, or click the Lookup button to list all contact codes.

Email - Type the e-mail address of the person to contact regarding orders for the current ship-to address. This field displays the e-mail address defined for the ship-to address entered at the Ship To Addr field. If there is no ship-to e-mail address, this field displays the e-mail address of the customer selected. Click the E-mail button to compose a new e-mail message to the address entered at this field.

Fax No - Type the customer's fax number starting with the area code. This field displays the customer fax number entered for the ship-to address or the customer.

Batch Fax - Select this check box to include the document for batch faxing. Clear this check box if you do not want to include the document for batch faxing. This field is available only if a fax number is entered at the Fax field. Note The fax number must include the area code to process a fax.

Comment - Type a comment relating to this order.

Salesperson - Enter a salesperson code, or click the Lookup button to list all salesperson codes. If divisions are defined in the Accounts Receivable module, enter a salesperson code that is in the same division as the customer entered at the Customer field. This field is available only if the Salesperson Commission Reporting check box is selected in Accounts Receivable Options.

Click the field hyperlink to launch this field's associated maintenance task. If a value is entered at this field, the associated data displays in the maintenance window. This maintenance task can be accessed only with the appropriate security setup.

A new salesperson can be added on the fly. The Salesperson Maintenance (On the Fly) window appears; some nonessential fields are omitted to speed data entry. Access Salesperson Maintenance at a later time to complete the remaining entries for a new salesperson.

This field defaults to the salesperson code selected in Customer Maintenance.

Split Commission - Select how the sales commission will be distributed. This field is available only if the Split Commissions between Salespersons check box is selected in Sales Order Options.

- Select Yes to distribute the total commission amount among up to five salespersons.
- Select Override to enter an override commission. If the Override option is selected, the standard commission will be posted to the primary salesperson. The override commission will be posted to the salesperson specified in the Override Commission Entry window.
- Select No to post the commission only to the primary salesperson on the order.

Click Split Comm to enter or maintain commission rates in the Split Commission Entry window.

Print Order - Select this check box to print a service order acknowledgment for this order. Clear this check box if you do not want a service order acknowledgment printed for this order. After a service order is printed for a new order, this check box is cleared automatically. You can reprint open service orders by clicking the Print button, or by selecting them using Service Order Printing. You can print the current service order by clicking the Service Order Quick Print button.

This field is available only if the Print Service Orders check box is selected in Service Center Options.

Print Orphan Detail Pick Sheets - Select this check box to print a picking sheet for this order orphan details. Clear this check box if you do not want a picking sheet printed for this order orphan details. After a picking sheet is printed for a new order, this check box is cleared automatically. You can reprint picking sheet for open service orders by clicking the Print button, or by selecting them using Picking Sheet Printing. You can print the current service order by clicking the Service Order Quick Print button.

This field is available only if the Print Pick Sheets check box is selected in Service Center Options.

No of Ship Labels - Enter the number of shipping labels that you want to print if you select Shipping Label Printing or choose to print shipping labels with Service Order Quick Print.

Service Order Address

Bill To - If the Enable Bill To Customer Reporting check box is selected in Accounts Receivable Options, you can create service orders and quotes for bill-to and sold-to customers. If the Enable Default Price Level by Customer check box is selected in Sales Order Options, you can specify the price level to be defaulted for a line item by customer and product line. The system will then use the

pricing logic to determine the actual price for the item. In Accounts Receivable this is referred to as National Accounts feature, but some also call it third-party billing.

Bill To Address - This address is pulled from the customer record, but can be overridden on this screen. When a Zip code is entered, it is validated against the Zip Code database in the Common Information and the city, state and country will be automatically filled in if the Zip Code is valid.

Ship To - Enter a location code to automatically enter the corresponding shipping address defined in Customer Ship-To Address Maintenance. Click the Lookup button to list all location codes. This field is not required.

Click the field hyperlink to launch this field's associated maintenance task. If a value is entered at this field, the associated data displays in the maintenance window. This maintenance task can be accessed only with the appropriate security setup.

A new location code can be added on the fly. The Customer Ship-To Address Maintenance (On the Fly) window appears; some nonessential fields are omitted to speed data entry. Access Customer Ship-To Address Maintenance at a later time to complete the remaining entries for a new location code.

If the ship-to location code is changed, the default warehouse will also change, which will optionally change all the lines. It will change the salesperson code, also. If you wish to override the salesperson, change the ship-to code first, then override the salesperson.

Copy Ship To - Click this button to copy the ship-to information to the bill-to fields.

Residential Address - Select this check box if the ship-to address is located in a residential delivery zone. Clear this check box if the ship-to address is not located in a residential delivery zone. External shipping systems such as StarShip require this information to calculate shipping rates.

Service Item Entry

Service Order Entry (SMC) 2/15/2013

Service Order: 0000062

Copy from... Defaults... Create Inv Customer... Credit...

1. Header | 2. Address | 3. Service Items | 4. Lines | 5. Totals | 6. Credit Card | Grp BASIC | User 29

Quick Row: 1

	Entry Description	Entry No	Svc Type	Item Code	Serial Number	Status Code
1	Smart Phone	000001	Standard	GB-MD791	1161	R
2	return	000002	Credit Return	1001-HON-H252	0100123-0000001	R
3						

Svc Item Desc	MODEM 9600 FAST POLL
Svc Technician	JOHN BROWN
Complaint Code	
Failure Reason	
Prohibit Rep Wty	<input type="checkbox"/>
Replace/Loaner	<input type="checkbox"/>
Loaner SO No	
Print Label	<input checked="" type="checkbox"/>
Pick Sht Printed	<input type="checkbox"/>

Warranty Code:

Warranty Start: *Out of Warranty*

Warranty End:

Quick Print... Recalc Price

Accept Cancel Delete

A unique feature of the Service Center service order is that you can list the units, or service items, you are repairing, and can enter the separate charges for each of these units. Each service item that you list on the Service Items tab of the service order is a Service Item Entry. Above you can see what a service item entry screen looks like. There is a primary grid, at the top, which has a row for each unit that is being repaired, refurbished or returned. As each row is highlighted, the secondary grid, just below the primary, will show additional fields that related to that service item entry.

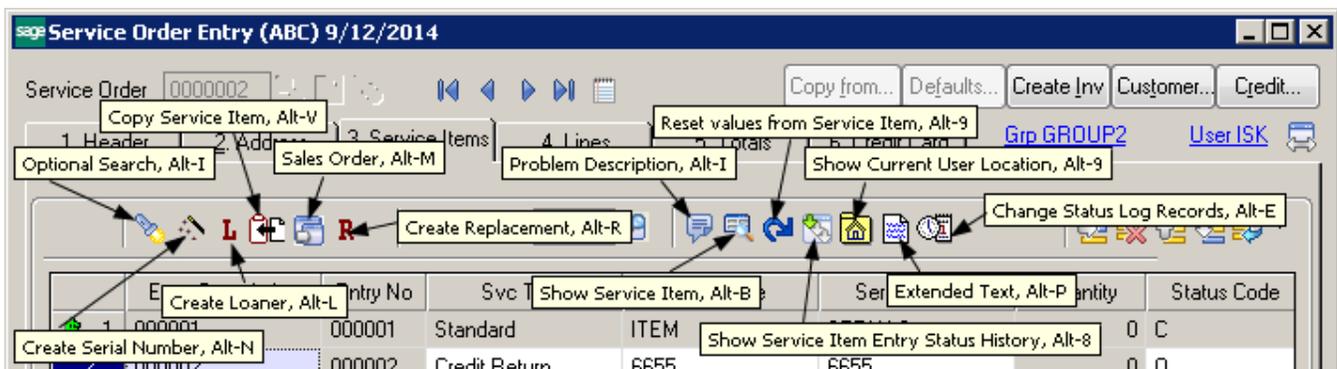
Each user can move fields from the primary to the secondary grid, or vice versa, and change the order of the fields, to suit unique needs. A new service item entry is added by entering a new Entry Description.

Entry Description - The Entry Description is a free-form field that labels a new service item entry. You can put whatever text you wish here, include spaces, to indicate that you are adding a new service item entry to the grid. Alternatively, you can click the plus sign or press F2 to automatically add a number to the Entry Description field and this start a new service item entry.

Quantity - The Quantity field is only available for Credit Returns and Exchange Service Types that have no serial number entered. This field is useful when large amounts of items are being returned or exchanged that are not being individually tracked. Replacements can also be sent out for those items since the Replacement Dialog now allows a quantity to be entered, defaulting to the quantity returned. This field is disabled if the item has a serial number entered on the Service Item Entry grid.

Grid Buttons - Just above the primary grid are a row of buttons, or icons, that can be used to do various tasks related to creating new service item entries, getting additional information about the highlighted service item entry, or performing some other task related to the service item entries on the panel. For more information about the grid buttons, take a look at Service Item Entry Grid Buttons.

Service Item Entry Grid Buttons



Just above the service item entry lines are a row of buttons that can assist in adding entries, give information about entries, or perform tasks related to the service item entries.

Optional Search - This button provides several ways to search for service items. See Optional Search for more information.

Create Serial Number - If the Service Order Options allow for automatic serial number creation (see the Auto-Assign Serial Number field in Service Order Options Service Item Entry Tab).

Create Loaner - If you wish to send out a loaner to the customer while repairs are being done, click the Create Loaner button. Take a look at Create Loaner or Replacement for more information.

Copy Service Item - Use the Copy Service Item button to quickly duplicate a service item entry as many times as you wish. A more detailed discussion can be read on the Copy Service Item page.

Sales Order - Use the Sales Order button to drill into Sales Order Entry and see the Sales Order created when you sent out a loaner or replacement.

Create Replacement - If you wish to send a replacement unit for an Exchange service item entry, click the Create Replacement button. Take a look at Create Loaner or Replacement for more information.

Quick Row - The Quick Row field is where you can enter the row number that you want to work on. It will immediately scroll to that row number and highlight it so you can begin work on that service item entry. This is useful if there are many service item entries in the grid.

Problem Description - The Problem Description is one of the grid fields, either primary or secondary, but since it is a very long field, this button will pop up a larger dialog so you can enter the description in paragraph form so you can see what you're writing.

Show Service Item - Each service item entry refers to a service item in the permanent database, as long as an item code and serial number are filled in. If you wish to see more information about that service item, such as warranty and past service history, you can click on the Show Service Item button to drill into Service Item Maintenance.

Reset Values from Service Item - If you used Show Service Item, or Service Item Maintenance, to make changes to the service item, such as warranty dates, you can bring those new values into the current service item entry row by clicking the Reset Values from Service Item.

Show Service Item Entry Status Log - Every time you change the status of a service item entry, whether on the service item entry grid or by changing the header status, a record is written to the status log. You can view that log by clicking on the Show Service Item Entry Status Log button.

Show Current User Location - Each service item has a sold to billing address, an end user billing address, and a current location for the service item. You can quickly view the current location by clicking the Show Current User Location button.

Text Editor or Extended Text - If you click on the grid cell and then on this Extended Text button, a new window will appear where you can enter text and then save it to the grid cell. The new screen will appear for text fields that allow for more than 30 characters.

Change Status Log Records - If you wish to change Status Date or Status Time on one of the status log records, click the Change Status Log Records button.

Service Item Entry Columns

The screenshot displays the 'Service Order Entry (SMC) 2/18/2013' window. At the top, the 'Service Order' field contains '0000072'. Below this, a navigation bar shows tabs for '1. Header', '2. Address', '3. Service Items', '4. Lines', '5. Totals', and '6. Credit Card'. The 'Service Items' tab is active, showing a grid with the following data:

Entry Description	Entry No	Svc Type	Item Code	Serial Number	Status Code	Problem Desc
Router	000002	Standard	GB-MD750	B4351-0	RECVD	This is a very, very long problem description where you can put lots of stuff. There is also a button just above the lines where you can pull up a new window to enter the problem description.

Below the grid, there are two main sections. On the left, a 'Vendor' section includes fields for 'RMA Number', 'Received' (checked), 'Exp Rec Date', 'Date Received' (2/18/2013), 'Est Comp Date', 'Act Comp Date', 'Replace/Loaner' (unchecked), and 'Updated' (unchecked). On the right, a 'Warranty' section shows 'Warranty Code' (1YR-PARTSX), 'Warranty Start' (2/18/2013), and 'Warranty End' (2/17/2014), with a red '*** In Warranty ***' indicator.

At the bottom of the window, there are buttons for 'Quick Print...', 'Recalc Price', 'Accept', 'Cancel', 'Delete', and a printer icon.

Each service item, equipment or unit that you are repairing, returning, or refurbishing is added to the Service Items tab in a grid. Each row on the grid is called a service item entry. To create a new row for a new service item entry, you simply have to enter a description in the Entry Description field. It does not matter what the value is, since this is simply to tell the program that a new row needs to be created.

The fields that you see on your screen may not match exactly what is shown in the picture or match the sequence of the list below because each user can modify the primary and secondary grids to match unique requirements.

There are four service types that determine which fields are open for modification and use. You can learn more about service types in the Helpful Hints section. The following fields are coded according to the service types for which they are valid: **STD**= Standard, **REF**=Refurbish, **WTY**=Warranty Replacement and **CRD**=Credit Return.

Svc Type - (STD REF WTY CRD) There are four basic service types as described in Service Types in the Helpful Hints section. Use the drop box to select the correct service type for this service item

entry. If the Service Order Header order type is "Standard", you can select any service type for the individual service item entries. If the Service Order Header order type is not "Standard", the service item entry service type is automatically set to match the header and cannot be changed.

Item Code - (STD REF WTY CRD) The Item Code is part of what identifies the unique service item that is being repaired, refurbished or returned. It is usually a valid inventory item code, but does not have to be. The item code field can be left blank initially, while waiting for the unit to arrive from the customer, for example, but before the service item entry can be closed and invoiced, the item code and serial number must be filled in. Use the lookup button or the F2 key to search the customer's service items. You can also use the Optional Search button to find service items.

Serial Number - (STD REF WTY CRD) The Serial Number is part of what identifies the unique service item that is being repaired, refurbished or returned. It can be left blank initially, but must be filled in before the service item entry can be completed and invoiced. You may type in a serial number without an item code and the system will find it if it is already on file. Use the lookup button or the F2 key to find existing service items by serial number.

Problem Description - (STD REF WTY CRD) You can enter up to 2048 characters for the problem description. This could be the explanation from the customer or the results of testing or repair. It is up to you. The problem description can also be entered in a larger box by clicking the problem description button above the grid. In Service Item Maintenance and inquiry, when you are viewing the service history, the problem description can be popped up easily for each service order.

Svc Technician - (STD REF WTY CRD) Enter the primary service technician responsible for this repair, return or modification. This field is required before the service item entry can be completed and an invoice created. The service technician is created in Service Technician Maintenance on the Setup menu, but it can also be created on-the-fly if the user's role has permission. The service technician entered here will be the default service technician on any labor lines that are added on the lines panel.

Product Line - This field displays the product line of the item selected, and can only be viewed. Once a Product Line is entered, it can be changed but it cannot be blanked out. The product line is first pulled from the Item Code when a Svc Item Code is entered. When a serial number is also entered, making it a valid Service Item, then the product line is pulled from the Service Item record. The user can override the product line on the service item entry at any time.

Complaint Code - (STD REF WTY CRD) The complaint code is a way to standardize what the customer tells you is wrong with the item. This code is used for later analysis. You can set up the code that you need in Complaint Code Maintenance. The complaint code that you enter here will be the default complaint code on the lines that are entered for this service item entry.

Failure Reason - (STD REF WTY CRD) The failure reason is a way to standardize why the product failed for later analysis. The failure reason can also tell the system that the warranty will not be honored or that a repair warranty is not to be applied. You can add the failure reason codes you need and get more information in Failure Reason Maintenance. The failure reason code you enter here will be the default failure reason code on the lines entered for this service item entry.

Prohibit Rep Wty - (STD REF WTY CRD) When a failure reason code is entered, it may have a check box that prohibits a repair warranty from being assigned. The repair warranty assignment comes

from the group code for the customer on the order. You can override the Prohibit Repair Warranty flag to either allow or disallow a repair warranty to be applied when the service invoice is updated.

Replace/Loaner - (STD REF WTY) DISPLAY ONLY If you have clicked the Create Loaner or Replacement button to send out a replacement (for Warranty Replacement service types) or a loaner (for Standard and Refurbish service types), this box will be checked. For more information about loaner processing, check out Demos and Loaners in the Helpful Hints section.

Loaner SO No - (STD REF WTY) DISPLAY ONLY If you have clicked the Create Loaner or Replacement button to send out a replacement (for Warranty Replacement service types) or a loaner (for Standard and Refurbish service types), the sales order being used to send out the loaner or replacement will be shown here. For more information about loaner processing, check out Demos and Loaners in the Helpful Hints section.

Print Label - (STD REF WTY CRD) Check this box if you wish for this service item entry to print a service item label on the next Service Item Label Printing. It is checked by default on a new service item entry.

Pick Sht Printed - (STD REF WTY CRD) If this item has been printed on a picking sheet (see Picking Sheet Printing) this box will be checked. Whether the box is checked may depend on the options setting for "Flag Pick Sheet Printed only if Closed" on the Service Item Entry Tab in Service Order Options. If that box is checked, the Pick Sheet Printed flag will not be checked when the picking sheet is printed unless this service item entry status is "Complete and Ready to Update". For more information about status codes look at Service Order Status Maintenance.

Return Whse - (WTY CRD) When a service item is returned to stock with a credit return or a warranty replacement service type, this is the warehouse where that item will end up after the service invoice is updated. It will default to the warehouse specified for returns in the Service Order Options but can be changed.

Rfrb Srce Whse - (REF) When a refurbish service item entry is complete and the invoice is updated, the item that was refurbished is transferred from the warehouse it was in to another warehouse. The Refurbish Source Warehouse is where the item being refurbished is currently found in your inventory. The system will fill this warehouse in for you and will commit that serial number in inventory so no one else can sell it while it is being refurbished.

Rfrb Targ Whse - (REF) When the refurbish service item entry is complete and the invoice is updated, the serial number that was refurbished is transferred from the Refurbish Source Warehouse to this warehouse. This target warehouse comes from Service Order Options Main Tab by default, but can be changed by the user.

Roll Up Rfrb Cost - (REF) When you complete a refurbish service item entry, you can optionally "roll up" the cost of the lines items entered for that service item entry on the lines panel to put the service item back into stock with a new cost. This Y/N flag allows you to determine whether cost roll up is to be performed for this service item entry. It is set according to the Default Rollup Refurbish Cost Setting on the Entry page in Service Center Options. For more information you can look at the Refurbish service type in the Helpful Hints.

Scrap - (REF WTY CRD) - Whenever a service item is to be put back into inventory, either when returned from a customer on a Warranty Replacement/Credit Return or when transferred to a Refurbish target warehouse, you have the option of telling the system that the service item is no good and cannot be repaired. Checking the Scrap button will flag the service item as out of service, but will put nothing back into inventory when the service invoice is updated.

Apply To Invoice - (WTY CRD) - Any time that the service item entry is being put back into stock, a credit memo will be created from the service order. In these cases you can select an invoice for that customer to which to apply the credit memo. This option is available if the Allow Apply-To Invoice On Service Item box is checked on the Entry panel in Service Center options. It is also possible that this field could be filled in automatically with the original sales invoice if you select that option.

Original Price - (STD REF WTY CRD) - DISPLAY ONLY - This is the original selling price for the service item pulled from the permanent service item record.

Price Overridden - (WTY CRD) - DISPLAY ONLY - If you change the price to be refunded to the customer on a service item being returned, this box will be checked.

Status Code - (STD REF WTY CRD) Status Codes can be used to show where in the repair process a service item entry is. Some status codes signify that a service item has been received, others that the service item has been sent to a vendor, and others that the repair process is complete and the service item entry is ready for an invoice or credit memo to be created. You can learn more about status codes in Service Order Status Maintenance.

Status Date - (STD REF WTY CRD) - Each time you change something on the service item entry, you can also change the status, status date, or status comment. When you do this, the change, along with the user code, date and time and other information is recorded in the Show Status History.

Status Comment - (STD REF WTY CRD) - Each you change something on the service item entry, you can also change the status comment. When you do this the change is recorded in the Show Status History.

Vendor - (STD REF WTY CRD) - If the status code you entered indicates the service item has been returned to vendor (see Service Order Status Maintenance) you can enter the vendor number here for your information. This will also be recorded in the Show Status History.

RMA Number - (STD REF WTY CRD) - If the status code you entered indicates the service item has been returned to vendor (see Service Order Status Maintenance) you can enter the vendor RMA number here for your information. This will also be recorded in the Show Status History.

Received - (STD REF WTY CRD) - DISPLAY ONLY - This check box indicates that the unit to be repaired or returned has been received into your shop. This flag is set when the status code entered for the service item is defined to Set Received Date. Once the service item entry is received, the RMA Expire Date will be set to a date so far into the future that the RMA will never expire.

Received Date - (STD REF WTY CRD) - This date indicates when the service item to be repaired or returned was received into your shop. It is automatically set when the status code you set

specifies to Set the Actual Received date. See Service Order Status Maintenance for more information.

Est Comp Date - (STD REF WTY CRD) - For your information only, the Estimated Completion date can be used to plan and give information to the customer.

Act Comp Date - (STD REF WTY CRD) - The actual completion date is automatically set when the status code is changed to one defined as "Complete and Ready to Update". See Service Order Status Maintenance for more information.

Updated - (STD REF WTY CRD) - DISPLAY ONLY - Once the service item entry has been invoiced and the invoice has been updated, this service item entry is considered "updated" and can no longer be changed or deleted. However, if there are other service item entries or lines on the service order that have not yet been updated, the service order will stay in the current data entry table until all service item entries are updated.

Invoice No - (STD REF WTY CRD) - DISPLAY ONLY - Once an invoice has been created for this service item entry (see Create Service Invoices) that invoice number is displayed in this field for your reference. As long there is an invoice in this field, you cannot change the service item entry or any of the lines.

New Item Code - (REF WTY CRD) - Whenever a service item is to be put back into inventory, either when returned from a customer on a Warranty Replacement/Credit Return or when transferred to a Refurbish target warehouse, you have the option of telling the system to assign a new Inventory Item Code for this service item entry. When you enter a new item code here, you will also have to accept the default New Serial No or enter a New Serial No. When the resulting invoice or credit memo is updated, the new item code and serial number will be in inventory.

New Serial No - (REF WTY CRD) - If you have assigned a New Item Code for this service item entry, the existing serial number will be filled in here. You can change the serial number, but you cannot leave it blank. When the resulting invoice or credit memo is updated, the new item code and serial number will be in inventory instead of the original item code and serial number.

New Return Cost - (REF WTY CRD) - When you choose a New Item Code and New Serial No, you can also enter a new cost to use as the basis for that item when it is put into inventory. For example, you may sell a unit that cost you \$100.00. The customer uses it for six months and returns it to you. You wish to put it back into your stock, but it is not worth \$100.00 anymore, because it is used. You can enter a new reasonable cost here and that is the cost that will be assigned in inventory when the credit memo is updated.

Svc Item Desc - (STD REF WTY CRD) - DISPLAY ONLY - This is description from the permanent service item record.

Optional Search

The screenshot displays the Service Order Entry (SMC) application window for a service order with ID 0000072. The interface includes a navigation bar with tabs for Header, Address, Service Items, Lines, Totals, and Credit Card. A table of service items is visible, with the following data:

Entry No	Entry Description	Entry No	Svc Type	Item Code	Serial Number	Svc Technician
1	Router	000002	Standard	GB-MD750	B4351-0	JOHN BROWN
2	Smart phone	000003	Standard	GB-MD791	1161	JOHN BROWN

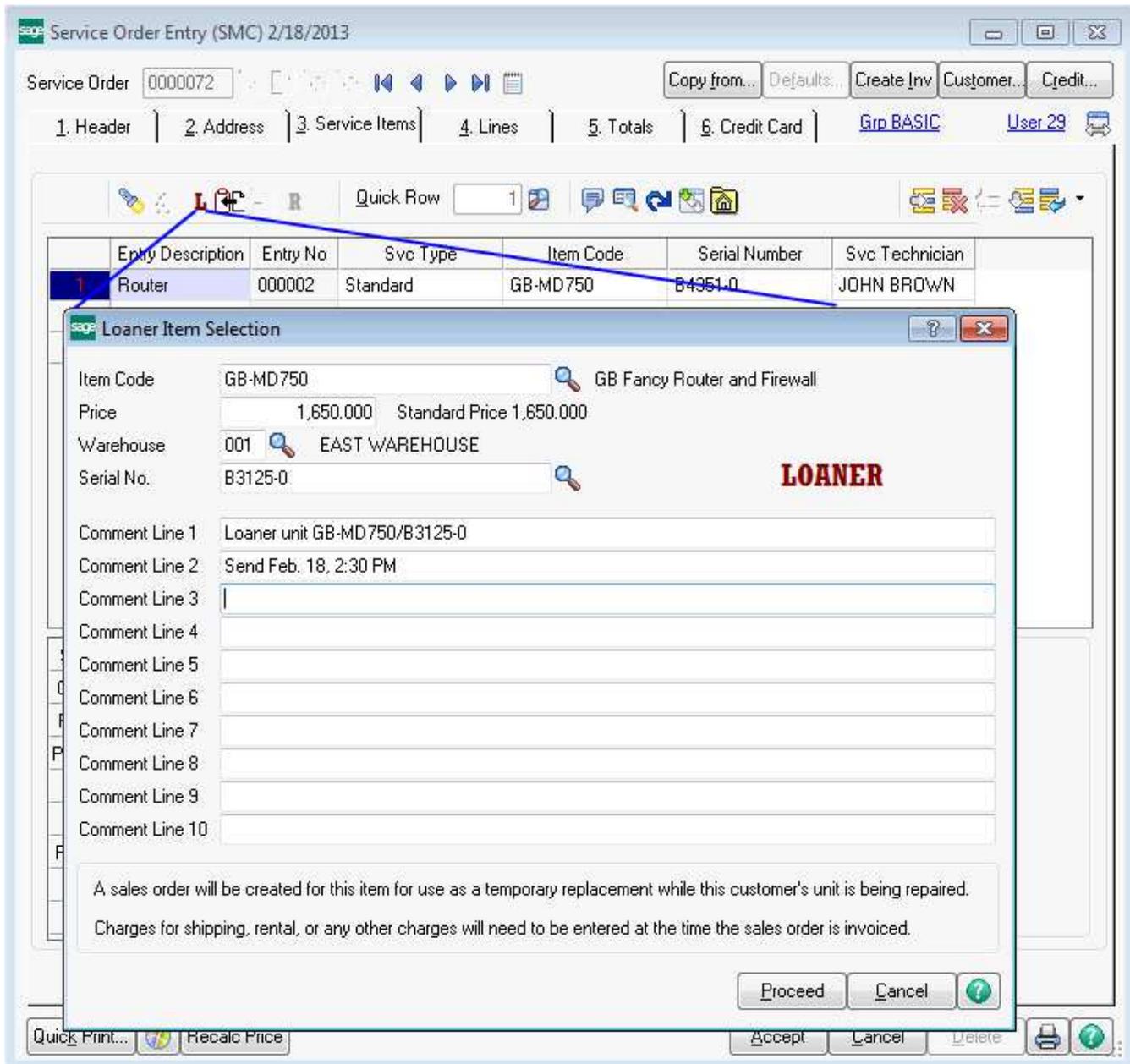
A "Service Item Search Options" dialog box is open, allowing the user to select a search option. The options are:

- Customer's Service Items
- All Service Items - By Item
- All Service Items - By Serial
- All Inventory Items
- All Inventory Items with Serial Numbers
- Serial Number Change History

The dialog box also includes "Proceed", "Cancel", and a help icon. Below the dialog box, there are fields for Warranty Code (1YRFULL), Warranty Start (2/18/2013), and Warranty End (2/17/2014). A checkbox for "Print Label" is checked. At the bottom of the window, there are buttons for "Quick Print...", "Recalc Price", "Accept", "Cancel", "Delete", and a help icon.

The optional search button allows you to find item codes in inventory and service items already on file, making it quicker to add service item entries. The default search at the Item Code field on the grid will show just the service items that are already on file for the customer. The optional search gives you that ability, along with the ability to search for all the service items on file by item code or by serial, plus the ability to search your inventory items codes and the old serial numbers. Once you select a record from any one of these search lists, the item code and serial number (if applicable) will fill in on the service item entry row.

Create Loaner



Prohibit Rep Wty	<input type="checkbox"/>
Replace/Loaner	<input checked="" type="checkbox"/>
Loaner SO No	0000205
Print Label	<input checked="" type="checkbox"/>

The Loaner button ("L") is only enabled if the service type is Standard or Refurbish. This button allows you to create a sales order to ship a unit for the customer to use while their unit is being repaired. This button is not used to send an exchange. Check out the Create Replacement feature which is triggered by the Replacement button ("R"). For more information about service types, see

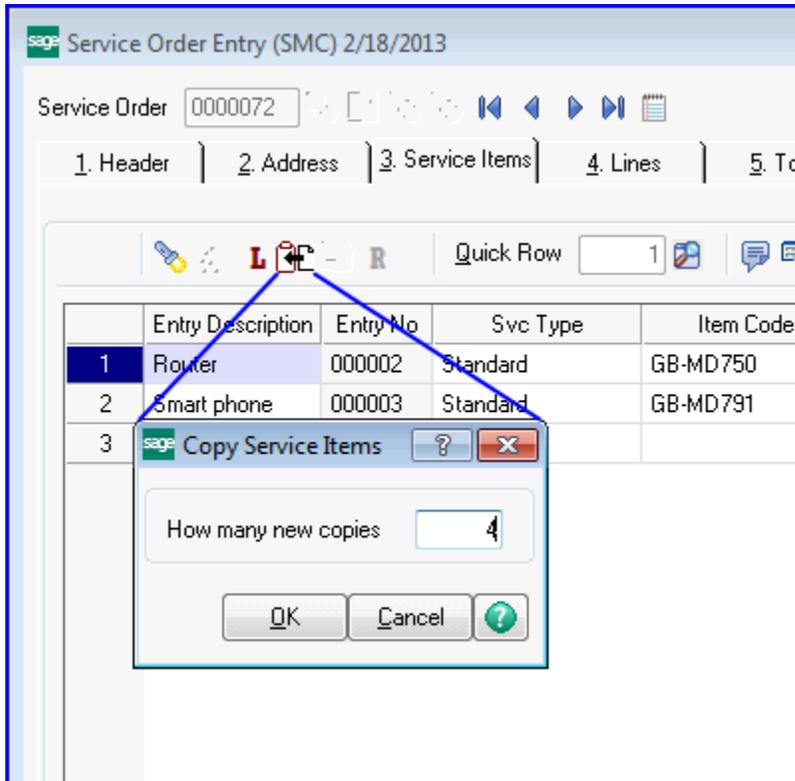
Service Types in Helpful hints. For more information about demos and loaners, check out Demos and Loaners in the Helpful hints section.

When you click on the Loaner button, this dialog pops up to allow you to specify what item code you wish to send as a loaner for the service item entry. Once you have filled in the item code, serial number (if applicable), warehouse, price and comment fields, the system will automatically create a sales order.

When you enter the item code, if the Auto-set Loaner/Replacement Price box is checked on the Service Order Options, the loaner price will be automatically set to the standard price for this item and for the Service Order customer. You will be able to enter a serial number only if the Lot/Serial Distribution is enabled in Sales Order options, and the item you are going to send is a Lot/Serial item. A separate comment line will be added to the created sales order and to the service item entry lines for each filled in comment field. Your shipping department can then go through the normal process to pick the unit and ship it to the customer.

If the service item entry is a standard service type and you are sending a loaner, the sales order line will be flagged as a "Loaner". When the resulting invoice is updated, the item shipped is not removed from your inventory, but is rather transferred to the Demo/Loaner Target Warehouse specified on the Service Order Options Main panel.

Copy Service Item

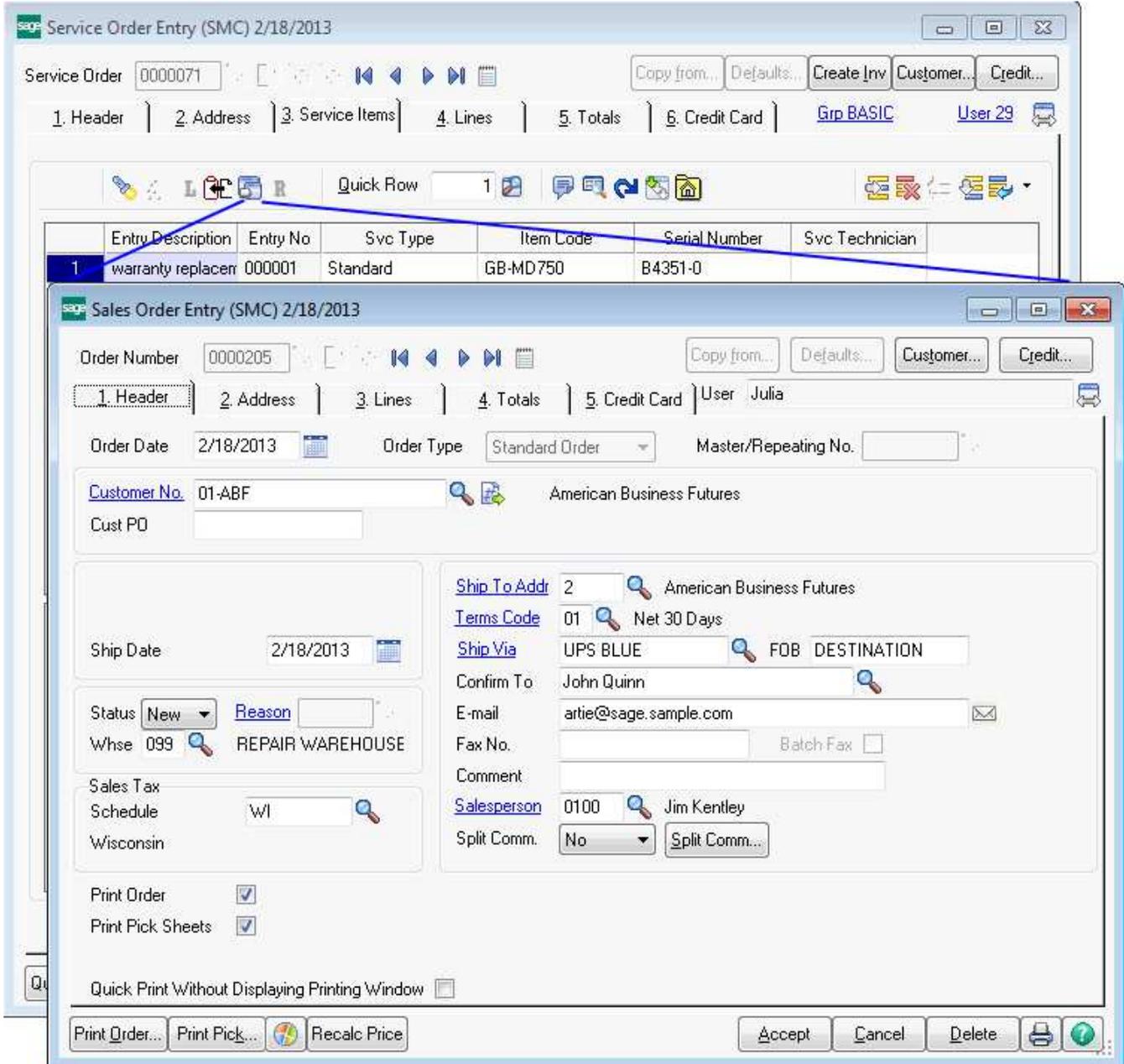


	Entry Description	Entry No	Svc Type	Item Code	Serial Number	Svc Technician
1	Router	000002	Standard	GB-MD750	B4351-0	JOHN BROWN
2	Smart phone	000003	Standard	GB-MD791	1161	JOHN BROWN
3	Router	000007	Standard	GB-MD750		JOHN BROWN
4	Router	000008	Standard	GB-MD750		JOHN BROWN
5	Router	000009	Standard	GB-MD750		JOHN BROWN
6	Router	000010	Standard	GB-MD750		JOHN BROWN
7						

If you have several service items coming in for repair, return, or refurbishment that are almost identical, you can save time by creating the first service item entry, then using the Copy Service Item button to duplicate that service item entry. When you click the button, a dialog pops up asking you how many copies you want to make. Keep in mind that you already have one, so you just want to specify how many more to make. For example, if there will be a total of six (6) service item entries, you have created one and will make five (5) copies of that one, for a total of six.

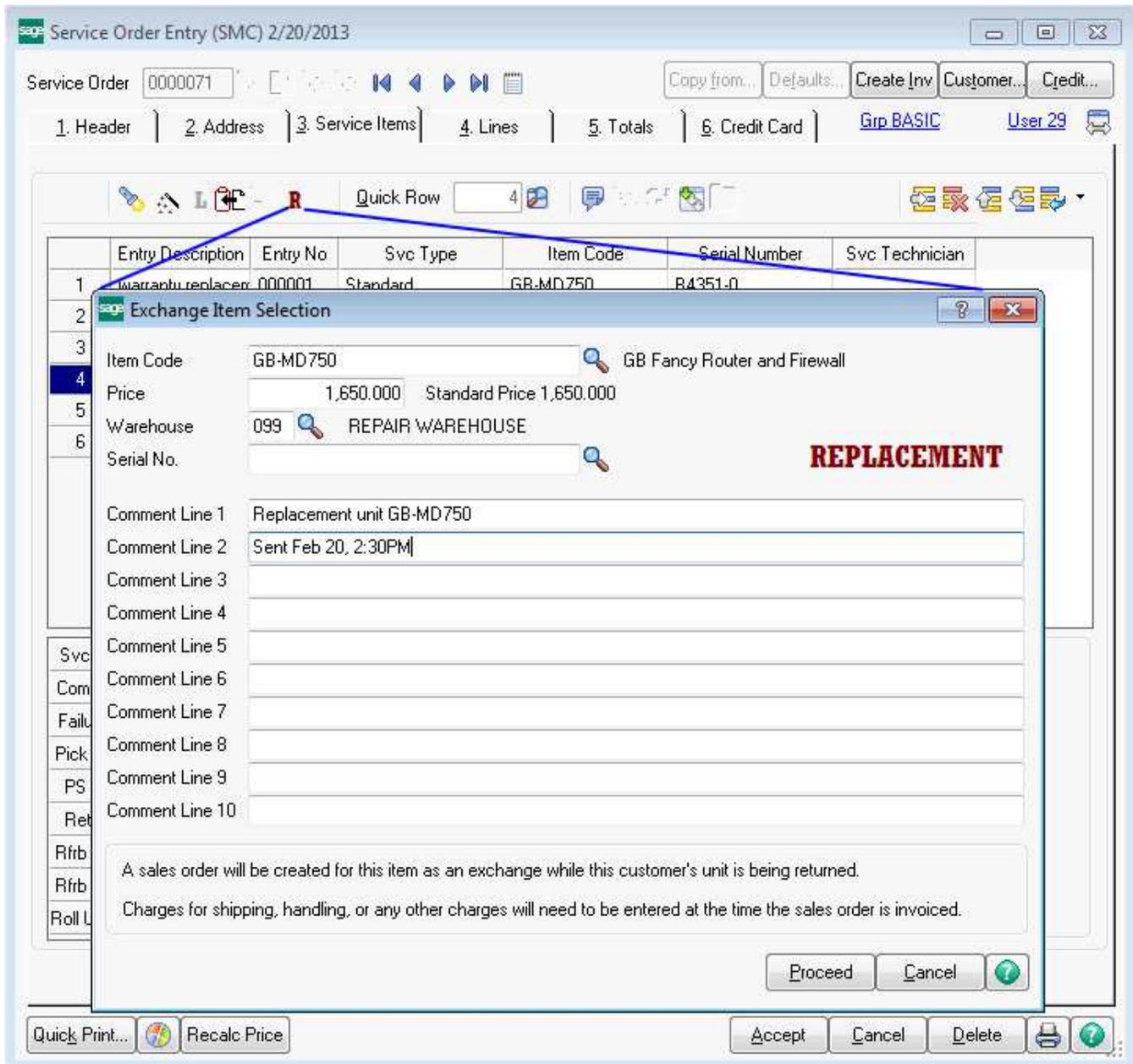
When the copies are made, everything you entered on the original service item entry will be copied to the duplicate entries except for the serial number. Obviously each service item entry will typically be for a different serial number.

Sales Order



Clicking on the sales order button will drill into the Sales Order Entry screen and allow you to see all the information about the sales order that has been created when you sent a loaner or replacement for this service item entry.

Create Replacement



Prohibit Rep Wty	<input type="checkbox"/>
Replace/Loaner	<input checked="" type="checkbox"/>
Loaner SO No	0000205
Print Label	<input checked="" type="checkbox"/>

The Loaner button ("L") is only enabled if the service type is Standard or Refurbish. This button allows you to create a sales order to ship a unit for the customer to use while their unit is being repaired. This button is not used to send an exchange. Check out the Create Replacement feature which is triggered by the Replacement button ("R"). For more information about service types, see

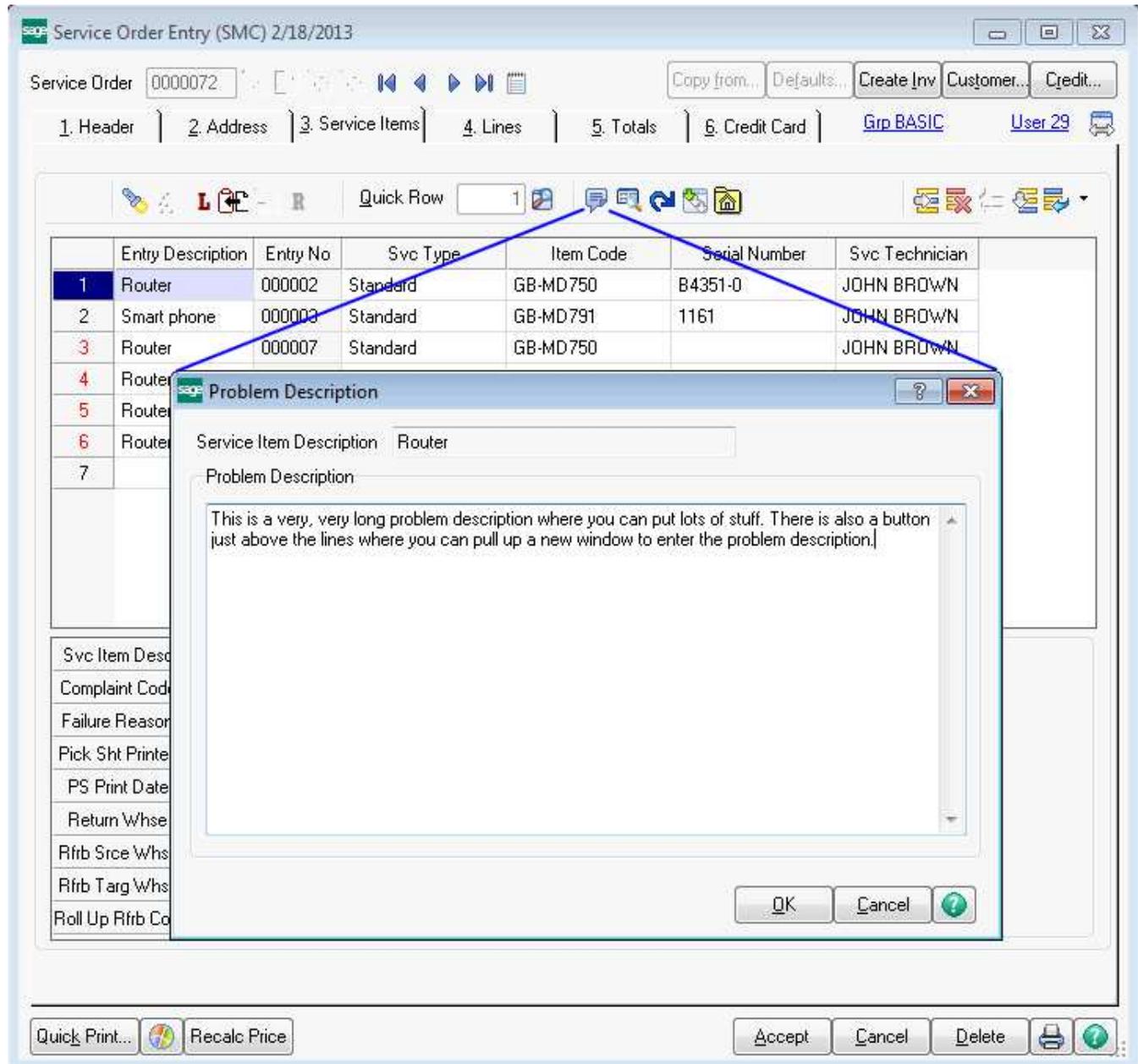
Service Types in Helpful hints. For more information about demos and loaners, check out Demos and Loaners in the Helpful hints section.

When you click on the Loaner button, this dialog pops up to allow you to specify what item code you wish to send as a loaner for the service item entry. Once you have filled in the item code, serial number (if applicable), warehouse, price and comment fields, the system will automatically create a sales order. The serial number field will be available only if Sales Order options allows you to distribute serial numbers on a sales order.

When you enter the item code, if the Auto-set Loaner/Replacement Price box is checked on the Service Order Options, the replacement/loaner price will be automatically set to the standard price for this item and the Service Order customer. You will be able to enter a serial number only if the Lot/Serial Distribution is enabled in Sales Order options, and the item you are going to send is a Lot/Serial item. A separate comment line will be added to the created sales order and to the service item entry lines for each filled in comment field. Your shipping department can then go through the normal process to pick the unit and ship it to the customer. If it is a replacement unit, a service item will be created. On the service item record in Service Item Maintenance, the returned unit will show "Replaced by" and the new item code and serial number. The new service item you sent will show "Replaces" along with the old item code and serial number that was replaced.

If the service item entry is a standard service type and you are sending a loaner, the sales order line will be flagged as a "Loaner". When the resulting invoice is updated, the item shipped is not removed from your inventory, but is rather transferred to the Demo/Loaner Target Warehouse specified on the Service Order Options Main panel.

Problem Description



Clicking on the Problem Description button gives you a lot larger space into which you can write the problem description text for the service item entry that is highlighted. This makes it easier to see what you've written.

Show Service Item

The screenshot shows the Sage Service Order Entry (SMC) interface. The main window displays a service order entry row with the following details:

Entry Description	Entry No	Svc Type	Item Code	Serial Number	Svc Technician
1. Header	0000072	Standard	GB-MD750	B4351-0	JOHN PROUL

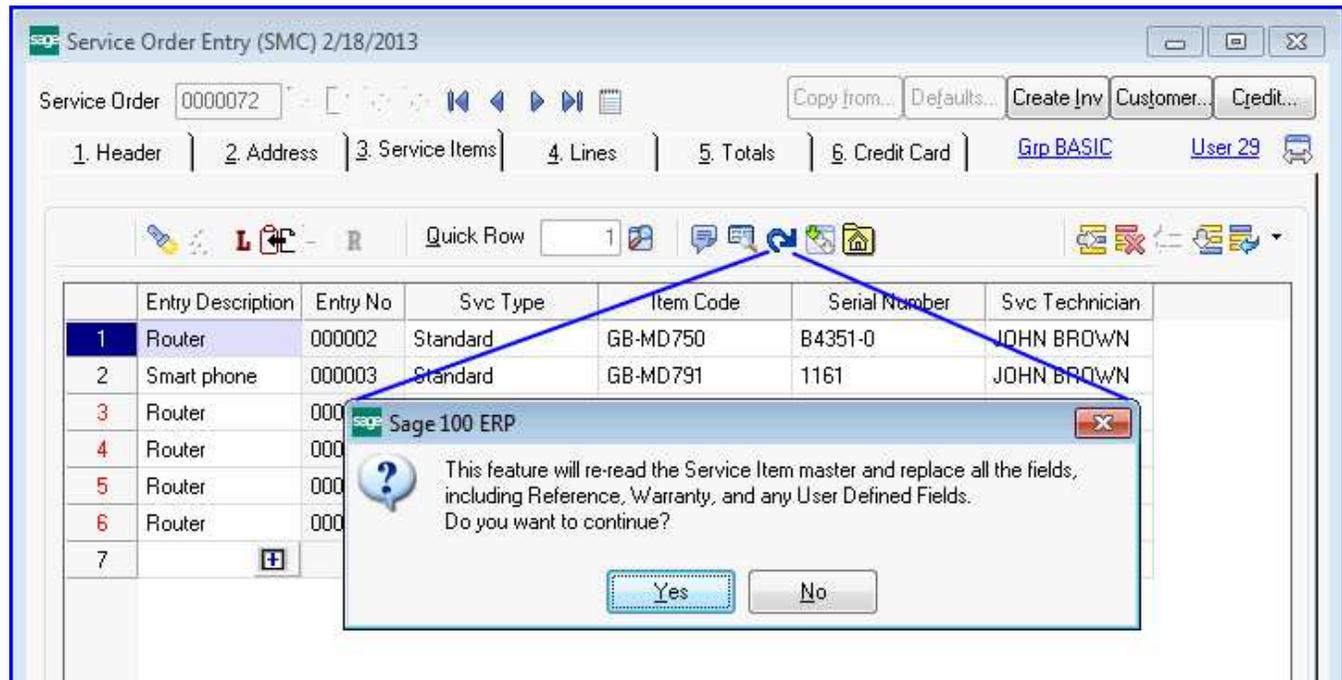
The 'Show Service Item' dialog box is open, displaying the following information:

- Item Code: GB-MD750
- Serial Number: B4351-0
- Description: MODEM 9600 (SYNCHRONOUS)
- Invoice Date: 2/15/2013
- Invoice Number: 0000003
- Sales Price: 25,000
- Sold As: New
- COLOR: BLACK
- Still In Service?: Scrapped: Returned to Stock:
- Reference: (empty)
- Warehouse: 000 CENTRAL WAREHOUSE
- Sold To: 01-ABF American Business Futures
- End User: 01-ABF American Business Futures

The dialog box has 'Accept', 'Cancel', and 'Delete' buttons at the bottom.

Clicking on the show service item button will drill into the Service Item Maintenance screen and allow you to see all the information about the service item that is on the service item entry row. If you have the role security permission, you can modify the service item from here. Once the modifications are made, you will need to press the Reset Values from Service Item button to pull the modified information into the service item entry row.

Reset Values from Service Item



Once you enter the item code and serial number on a service item entry row, certain information, including the service item description, condition, and warranty dates, are copied to that service item entry and will not change. If you have to change any of the permanent service item information, such as warranty dates, and you want that changed information to be reflected on this service item entry for this service order, you will need to click the Reset Values from Service Item.

If, for example, you created the service item entry then went to the service item maintenance for that service item to change the warranty dates, you might click the Reset Values from Service Item button to bring in the new warranty dates. As soon as this happens, the system might have to recalculate prices on the lines because the warranty status of the item being repaired might have changed.

Show Status History

The screenshot displays the Sage Service Order Entry (SMC) interface. The main window shows a service order entry for Service Order 0000072. The entry details are as follows:

Entry No	Entry Description	Svc Type	Item Code	Serial Number	Svc Technician
1	Router	Standard	GB-MD750	B4351-0	JOHN BROWN
2	Smart phone	Standard	GB-MD791	1161	JOHN BROWN
3	Router	Standard	GB-MD750		JOHN BROWN

A pop-up window titled "SM Service Item Status Log" is overlaid on the main window, showing the status history for the selected item. The status log contains the following record:

Status Code	Date Changed	Time Changed	User	Status Date	Comment
RECVD	2/18/2013	23.42561	29	2/18/2013	

The status log window also includes a search field with the text "<default>", a "Find" button, and a "Filters..." button. At the bottom of the window, it indicates "Found 1 records".

Every time the status of a service item entry is changed, a record is written to the status history log. Clicking on the Show Status History button will pop up a list of each status for this entry, showing the status it was changed to, when, who did it and what the status comment was. If a vendor number and RMA were entered, that will be displayed, also.

Show Current User Location

Service Order Entry (SMC) 2/18/2013

Service Order: 0000072

1. Header | 2. Address | 3. Service Items | 4. Lines | 5. Totals | 6. Credit Card | Grp BASIC | User 29

	Entry Description	Entry No	Svc Type	Item Code	Serial Number	Svc Technician
1	Router	000002	Standard	GB-MD750	B4351-0	JOHN BROWN
2	Smart phone	000003	Standard	GB-MD791	1161	JOHN BROWN
3	Router	000007	Standard	GB-MD750		JOHN BROWN

End User Current Location

Customer No. 01-ABF American Business Futures

Ship To: 2 Residential Address ZIP Code: 53120

Name: American Business Futures City: Racine State: WI

Address: Racine Warehouse Country: USA United States of America

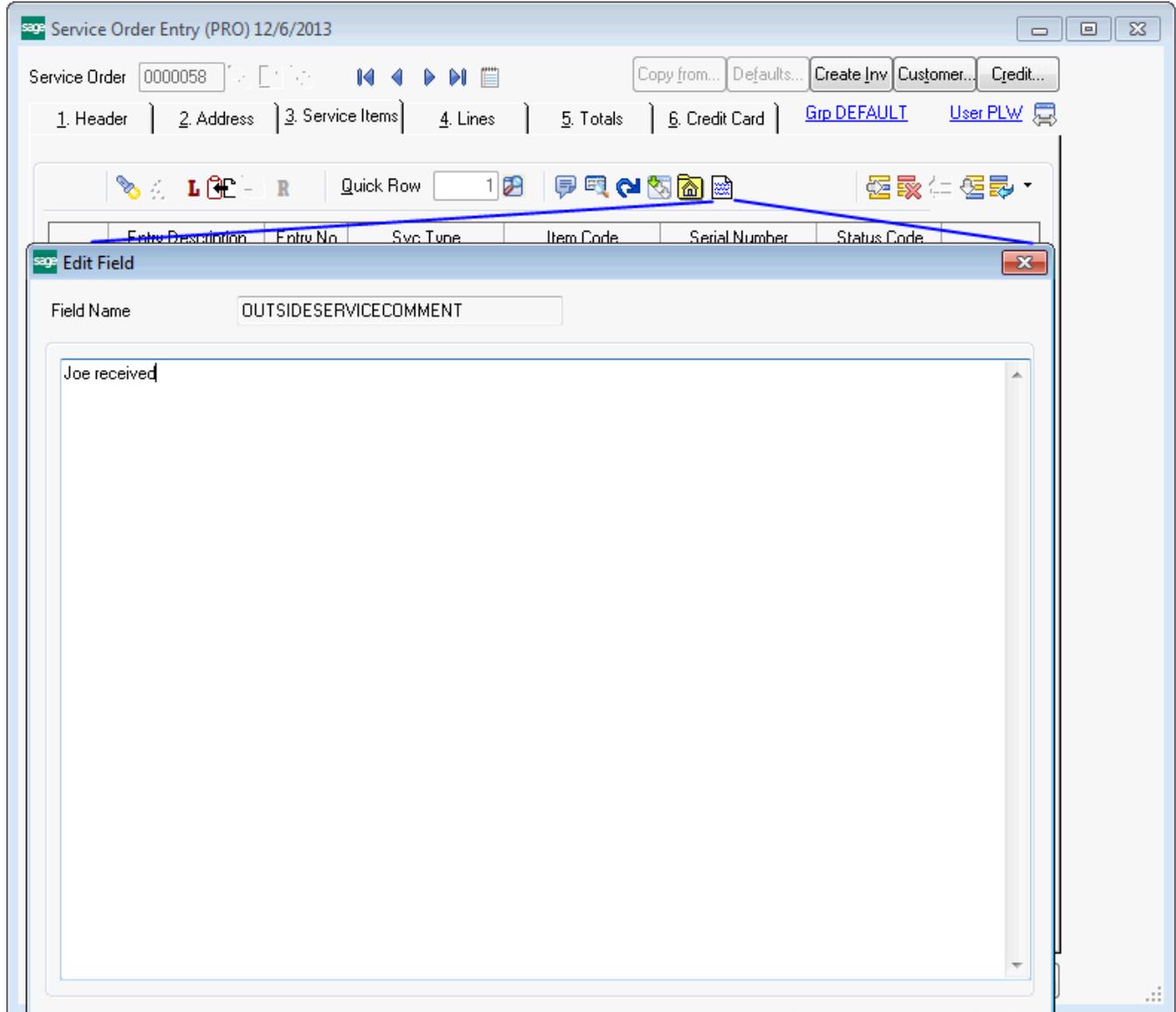
5411 Kendrick Place Telephone: (414) 555-4319

PS Print Date
Return Whse: 000
Rfrib Srce Whse
Rfrib Targ Whse
Roll Up Rfrib Cost

Quick Print... Recalc Price Accept Cancel Delete

Each service item in the permanent database has an address for the current location of the unit. If that service item is added to a row on the service item entry panel, you can click the Show Current User Location to know immediately where the service item being repaired is kept. This is useful if a technician is visiting the customer site for the repair.

Extended Text



If you click on the grid cell and then on this Extended Text button, a new window will appear where you can enter text and then save it to the grid cell. The new screen will appear for text fields that allow for more than 30 characters.

Change Status Log Records

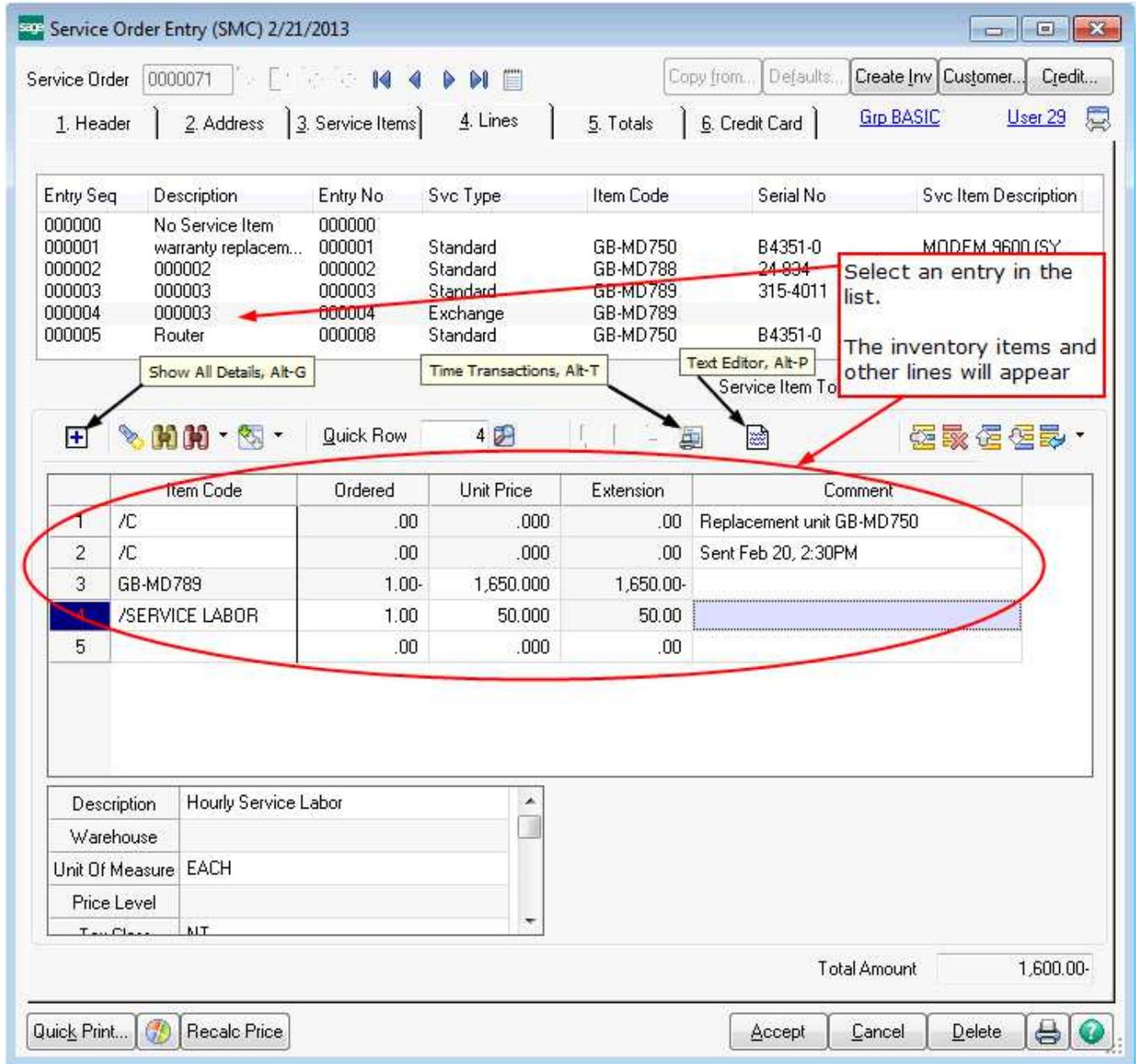
The screenshot shows the 'Service Order Entry (ABC) 9/12/2014' window. The 'Change Date / Time' dialog box is open, displaying the following data:

Status Code	Date	Time	Comment	User	Actual Date	Actual Time
N	8/25/2014	08:00 AM		ISK	8/25/2014	01:30 PM
C	8/25/2014	12:25 PM		ISK	8/25/2014	12:25 PM
D	8/27/2014	12:25 PM	Invoice 0100206 was deleted	ISK	8/25/2014	12:24 PM
C	9/2/2014	02:16 PM		ISK	9/2/2014	02:15 PM
D	9/2/2014	02:17 PM	Invoice 0100224 was deleted	ISK	9/2/2014	02:18 PM

If you click on the Change Status Log Records button, a new window will appear where you can make changes to the status date or status time of any log record. Once the change is done and the update button is pressed, the program will recalculate the status end date/time and minutes in status value on all log records for this service item entry.

Note: Status log records can be changed for the current and history service item entries. To make changes to the history service item entry log records, use the Change Status Log button in Service Order / Service Item Entry History Inquiry.

Service Order Lines



Once you have completed the header of the service order and entered the list of service item entries that you will be repairing, modifying or returning to stock, you can enter the parts and charges required to complete each service item entry. This is done on the Lines tab.

Service Item Entry List Box - The list of service item entries is shown in the list box above the primary grid. You highlight the service item entry you are entering parts and charges for, then enter those line items in the primary grid, just below the list box. You can sort the list of service item entries by clicking on the title row of the list box. If you wish to enter lines that are not related to any particular service item click on the top line, No Service Item.

Lines Grid - The Lines are entered in two grids. The top grid has the item codes and miscellaneous codes for each service item entry organized in rows. For each row, or line, the secondary grid will show additional fields related to that line. As is standard with Sage 100 ERP, you can rearrange the order of the fields and move some fields from one grid to the other to suit your unique data entry needs. For a detailed explanation of all the line fields available, check out Line Columns.

Return Lines - If you are returning a service item to your stock with a Credit Return or an Exchange service item entry, there is a special line automatically added. This line, as shown on the Return Lines page, shows the actual item code that will be put back in stock, along with the price and other information.

Show All Lines - Click the Show All Lines button to pop up a dialog with a list of all the service item entries and all the associated lines. You can then browse through all of them and double-click on the one you want. Take a look at Show All Lines for a more detailed view.

Time Transactions - The Time Transactions button is available when you are entering a labor miscellaneous item code. Take a look at Miscellaneous Item Maintenance - Labor to see how to specify that a miscellaneous item code is labor. You can use the Technician Time Transactions feature on the main menu to enter time for technicians as they log on and off of tasks. Once the entries are done and you wish to bill that time, create a new line on the lines tab, using a labor miscellaneous item code, then click this Time Transactions button to accumulate all the time and calculate the quantity of hours to bill. See Time Transactions for more detail.

Text Editor - The Text Editor button is a feature that has been added for your convenience. This button will be enabled when you have your cursor in a field that is able to hold more than 30 non-numeric characters, such as a comment line. If you click the button, a large edit window will appear so you can view, edit, and format your comment more easily.

Return Lines

The screenshot shows the 'Service Order Entry (SMC) 2/22/2013' window. At the top, the 'Service Order' number is 0000072. The interface includes navigation tabs for '1. Header', '2. Address', '3. Service Items', '4. Lines', '5. Totals', and '6. Credit Card'. The '3. Service Items' tab is active, displaying a table of service items:

Entry Seq	Description	Entry No	Svc Type	Item Code	Serial No	Svc Item Description
000000	No Service Item	000000				
000001	Router	000002	Standard	GB-MD750	B4351-0	MODEM 9600 (SY...
000002	Smart phone	000003	Credit Return	GB-MD791	1161	MODEM 9600 FAS...
000003	Router	000004	Standard	GB-MD750		MODEM 9600 (SY...
000004	000005	000005	Standard	GB-MD750	B4351-0	MODEM 9600 (SY...
000005	000005	000006	Standard	GB-MD750		MODEM 9600 (SY...

The 'Service Item Total Amount' is 25.00. Below this, the '4. Lines' panel is active, showing a detailed view of the selected 'Credit Return' line (Entry Seq 000002). The 'Quick Row' is set to 2. The detailed line view includes:

Item Code	Ordered	Unit Price	Extension	Comment
1 GB-MD791	1.00-	25.000	25.00-	
2	.00	.000	.00	

The 'Total Amount' at the bottom is 25.00. The interface also includes buttons for 'Quick Print...', 'Recalc Price', 'Accept', 'Cancel', and 'Delete'.

When you enter a Credit Return or an Exchange service item entry then move to the Lines panel and highlight that entry in the service item list box, you will see the item to be returned in the lines grid. This allows you to change the price you wish to refund to the customer and enter a comment. There are no other changes allowed to this line. When the service item entry is complete and a credit memo is created, this line will be copied to the lines of that credit memo.

Line Columns

	Item Code	Ordered	Unit Price	Extension	Comment
1	6655	1.00	179.000	179.00	
2	/REPAIR LABOR	3.00	85.000	255.00	
3		.00	.000	.00	

Description	PRINTER STAND W/ BASKET
Warehouse	000
Unit Of Measure	EACH
Price Level	1
Tax Class	TV

Available Quantity in this Warehouse is 26 EACH

Total Amount 1,216.00

Item Code - Enter an item code from the Inventory Management item table, or enter a miscellaneous code (comment, miscellaneous charge or miscellaneous item) starting with a slash (/). You can use the F2 key to look up an item code, or do a more sophisticated search by using the flashlight or binoculars icons just above the primary grid. There is more detail about these search options in the Fields link on Sales Order order entry overview.

Description - This field will automatically fill in with the description of the item code entered in the first field, but you can change it.

Ordered Quantity - Enter the quantity ordered for this item. If this is return line created by the system for a credit return or exchange service item entry, the quantity will be negative one (-1) and cannot be changed. If you used the Time Transactions button to calculate labor hours from time transactions, the total of the transactions selected will be filled in here.

Note: The Technician Time Transaction entry will always override the quantity manually entered here. For example, if a technician logged 2 hours, a supervisor can then change it to 3 hours in service order lines. But if the technician then works .5 more hours, the total in the service order lines will become 2.5, not 3.

Unit Price - The default unit price will be brought from the item code entered. It can be changed if the user has role security rights.

Extension - The ordered quantity times the unit price will calculate the extension automatically, but it can be overridden. If the extension amount is entered by the user, the unit price will be recalculated.

Comment - You can enter a very long comment for each line.

Warehouse - Enter the warehouse from which this item is to be sold. This field is only available for inventory item lines. By default the warehouse will be taken from the header warehouse, unless you have specified a warehouse by technician in which case the warehouse is taken from the service technician record for the tech assigned to the service item entry.

Unit of Measure - Enter a unit of measure, or click the Lookup button to list all units of measure. This field will be taken from the item code record or from the miscellaneous code.

Price Level - Type a price level for the current customer. The price level is used to determine the pricing schedule for calculating the price of this item. This field is available only if the Inventory Management module is integrated with Sales Order and an inventory item is entered at the Item Code field.

Tax Class - Enter the tax class for the order, or click the Lookup button to list all tax classes. This field is available only if the Sales Tax Reporting check box is selected in Accounts Receivable Options.

Discountable - Select this check box if the item is discountable. Clear this check box if the item is not discountable.

Note A warning message appears if a discount amount is entered and no line items are selected as discountable on the Lines tab.

Disc % - Type the discount percentage to apply to this line. This field is available only if the Allow Discount Rate By Detail Line check box is selected in Sales Order Options.

Drop Ship - Select this check box if the item will be drop-shipped. Clear this check box if the item will not be drop-shipped. If this check box is selected, the quantity on hand is not checked because the item does not affect inventory in stock. This check box defaults to cleared for a new item.

Commissionable - Select this check box to calculate commission on this item. Clear this check box if you do not want to calculate commission on this item.

Subj to Exempt - Select this check box if the item is subject to sales tax exemption. Clear this check box if the item is not subject to sales tax exemption.

Cost - Type the unit cost amount of this item (the total amount you pay for the item). This field is available only if the Drop Ship check box is selected.

Sales Account - Enter the general ledger sales account number for posting the sale of this item, or click the Lookup button to list all general ledger accounts. If the account number is longer than the field, use the left and right arrow keys to view the entire account number.

This field defaults to one of the following:

- The Sales account assigned to the Inventory Item Product Line in Product Line Maintenance
- The Sales account assigned to the miscellaneous item in Miscellaneous Item Maintenance
- The Special Item Sales account assigned in Sales Order Options

- The Returns account assigned to the Inventory Item Product Line in Product Line Maintenance when entering parts and charges for a Credit Return or an Exchange service item entry
- The Sales account assigned to the Service Item Product Line in Product Line Maintenance if the Use product Line from Service Item option is selected in Service Order Options
- The Returns account assigned to the Service Item Product Line in Product Line Maintenance when entering parts and charges for a Credit Return or an Exchange service item entry if the Use Product Line from Service Item options is selected in Service Order Options
- Service G/L accounts if the Use Service G/L Fields from Product Line option is selected in Service Order Options
- The Exchange Sales Account for the replacement item being sent and the line item for the unit being returned if the Use Exchange G/L Accounts options is selected in Service Order Options

Accounts can be created at this field if the appropriate settings are defined at the Auto Create when all Segments are Valid field in General Ledger Options.

Cost Account - Enter the general ledger account number for posting the cost of goods sold for this item, or click the Lookup button to list all general ledger accounts. If the account number is longer than the field, use the left and right arrow keys to view the entire account number. This field is not available if a miscellaneous charge, comment item, or kit component is entered at the Item Code field.

This field defaults to one of the following:

- The Cost of Goods account assigned to the Inventory Item Product line in Product Line Maintenance
- The Cost of Goods account assigned to the miscellaneous item in Miscellaneous Item Maintenance
- The Special Item Cost of Goods account assigned in Sales Order Options
- The Cost of Goods account assigned to the Service Item Product Line in Product Line Maintenance if the Use product Line from Service Item option is selected in Service Order Options
- Service G/L accounts if the Use Service G/L Fields from Product Line option is selected in Service Order Options
- The Exchange Cost of Goods Sold Account for the replacement item being sent and the line item for the unit being returned if the Use Exchange G/L Accounts options is selected in Service Order Options

Accounts can be created at this field if the appropriate settings are defined at the Auto Create when all Segments are Valid field in General Ledger Options.

Item Type - This field displays the item type of the item selected, and can only be viewed. Inventory item types can be accessed and maintained in Item Maintenance.

Product Line - This field displays the product line of the item selected, and can only be viewed. Once a Product Line is entered, it can be changed but it cannot be blanked out. The product line is first pulled from the Item Code when a Svc Item Code is entered. When a serial number is also entered, making it a valid Service Item, then the product line is pulled from the Service Item record. The user can override the product line on the service item entry at any time.

Product Type - This field displays the product type of the item selected, and can only be viewed.

Price Code - This field displays the price code of the item selected, and can only be viewed.

Costing - This field displays the cost description of the item selected, and can only be viewed.

Extended Desc - This check box appears selected if the item has an extended description. This field can only be viewed.

Component - This check box appears selected if the item is a component item in a sales kit. This field can only be viewed.

Alias Item - This field displays the alias item code for the item code selected, and can only be viewed.

Alias Item Desc - This field displays the alias item code description for the item code selected, and can only be viewed.

Svc Tech - This field is enabled for a labor miscellaneous code. It will default to the technician assigned to the service item entry but can be changed on each labor line.

Complaint Code - Enter the complaint code for this line. This field will default to the complaint code entered on the service item entry, but can be changed on each line.

Failure Reason - Enter the failure reason for this line. This field will default to the failure reason entered on the service item entry, but can be changed on each line.

Covered by Wty - This flag indicates if the line is covered by the warranty on the service item entry. It will be checked if the service item is under warranty unless the failure reason is set up to suppress the warranty.

Ordered Hours - If this is a labor line (see Miscellaneous Item Maintenance - Labor) then the Ordered Quantity entered may be in any unit of measure. The Ordered Hours field converts the Ordered Quantity, regardless of the unit of measure, to hours, using the conversion factor.

Trans Hours - For labor lines, if you have calculated the ordered quantity based upon Time Transactions, the number of hours imported from the time transactions will be shown here, even if the ordered quantity has been changed.

Updated - Once the service item entry has been invoiced and the invoice has been updated, this line is considered "updated" and can no longer be changed or deleted. However, if there are other service item entries or lines on the service order that have not yet been updated, the service order will stay in the current data entry table until all service item entries are updated.

Invoice No - Once an invoice has been created for this service item entry (see Create Service Invoices) that invoice number is displayed in this field for your reference. As long there is an invoice in this field, you cannot change the service item entry or any of the lines.

Vendor Number - Enter the vendor number, or click the Lookup button to list all vendor numbers. For inventory items, this field defaults from the inventory item's primary vendor but it can be changed. For previously entered service orders, this field is blank. This field is available only if the Purchase Order module is set up and the user has the appropriate security set up.

Note This field is not available for a kit item if No is selected when prompted to explode the lines and order by component.

PO Number - Type the purchase order number. The entry at this field defaults from Auto Generate from Service Orders and when creating a purchase order from Service Order Entry. This field is available only if the Purchase Order module is set up and the user has the appropriate security set up. **Note** This field is not available for a kit item if No is selected when prompted to explode the lines and order by component.

PO Required Date - Type the purchase order required date. The entry at this field defaults from Auto Generate from Service Orders and when creating a purchase order from Service Order Entry. This field is available only if the Purchase Order module is set up and the user has the appropriate security set up. **Note** This field is not available for a kit item if No is selected when prompted to explode the lines and order by component.

Serial Numbers List - Enter a list of serial numbers that will be used in creating service items for non-serialized inventory items. **Note** This field is not available if the **Get Serial Numbers from Line Entry** box is not checked in Service Order Options (see Line Entry Tab) or the line item is not set up for service tracking (see Service Item Setup).

Show All Lines

The screenshot shows the Sage Service Order Entry (SMC) interface. A dialog box titled "Service Item Details" is open, displaying a list of service items. The main window behind it shows a grid of service items with a "Show All Details, Alt-G" button highlighted. A blue arrow points from this button to the dialog box.

Entry Seq	Description	Warehouse	Unit Of Measure	Price Level
000001	No Service Item			
000001	Service Item 000001			
000001	/C			
000002	Service Item 000002			
000002	/C			
000003	Service Item 000003			
000003	/C			
000004	Service Item 000004			
000004	/C			
000004	/C			
000004	GB-MD789			
000008	Service Item 000008			

The dialog box "Service Item Details" contains the following data:

Svc Item	Item Code	Description	Qty Ordered	Unit Price	Extension	Comment
000000	Default Service It...	No Service Item				
000001	Service Item 000001	warranty replacem...				GB-MD750 SN: B4351-0
000001	/C	Default Item Code /C	.00	.000	.00	needed to get a replacement
000002	Service Item 000002	000002				GB-MD788 SN: 24-834
000002	/C	Default Item Code /C	.00	.000	.00	Need this for test
000003	Service Item 000003	000003				GB-MD789 SN: 315-4011
000003	/C	Default Item Code /C	.00	.000	.00	needed for test
000004	Service Item 000004	000003				GB-MD789
000004	/C	Default Item Code /C	.00	.000	.00	Replacement unit GB-MD750
000004	/C	Default Item Code /C	.00	.000	.00	Sent Feb 20, 2:30PM
000004	GB-MD789	MODEM 300	1.00	1,650.000	1,650.00-	
000008	Service Item 000008	Router				GB-MD750 SN: B4351-0

The dialog box also shows a "Total Amount" field with the value 1,650.00 and buttons for "Accept", "Cancel", and "Delete".

Clicking on the Show All Lines button just above the primary line grid will pop up a dialog that shows all the service item entries and all the lines in a format that is easy to view. This gives you an idea of what the customer will see if you create an invoice for all the service item entries. It also makes it easy to find the line you wish to edit. Just find the line and double-click to return to the grid with the selected line highlighted.

Time Transactions

Service Order: 0000071
 Entry No: 000004
 Status: N NEW UNPRINTED SERVICE ORDER
 Technician: JOHN BROWN

Select Technician:

Unbilled Transactions		
Technician	Start	End
JOHN BROWN	01/25-09:00	01/25-20:22
JOHN BROWN	01/10-08:00	01/10-10:00
WWW	10/01-11:15	10/01-11:15

Selected Transactions		
Technician	Start	End

Unbilled Hours: 2.00 Selected Hours: .00

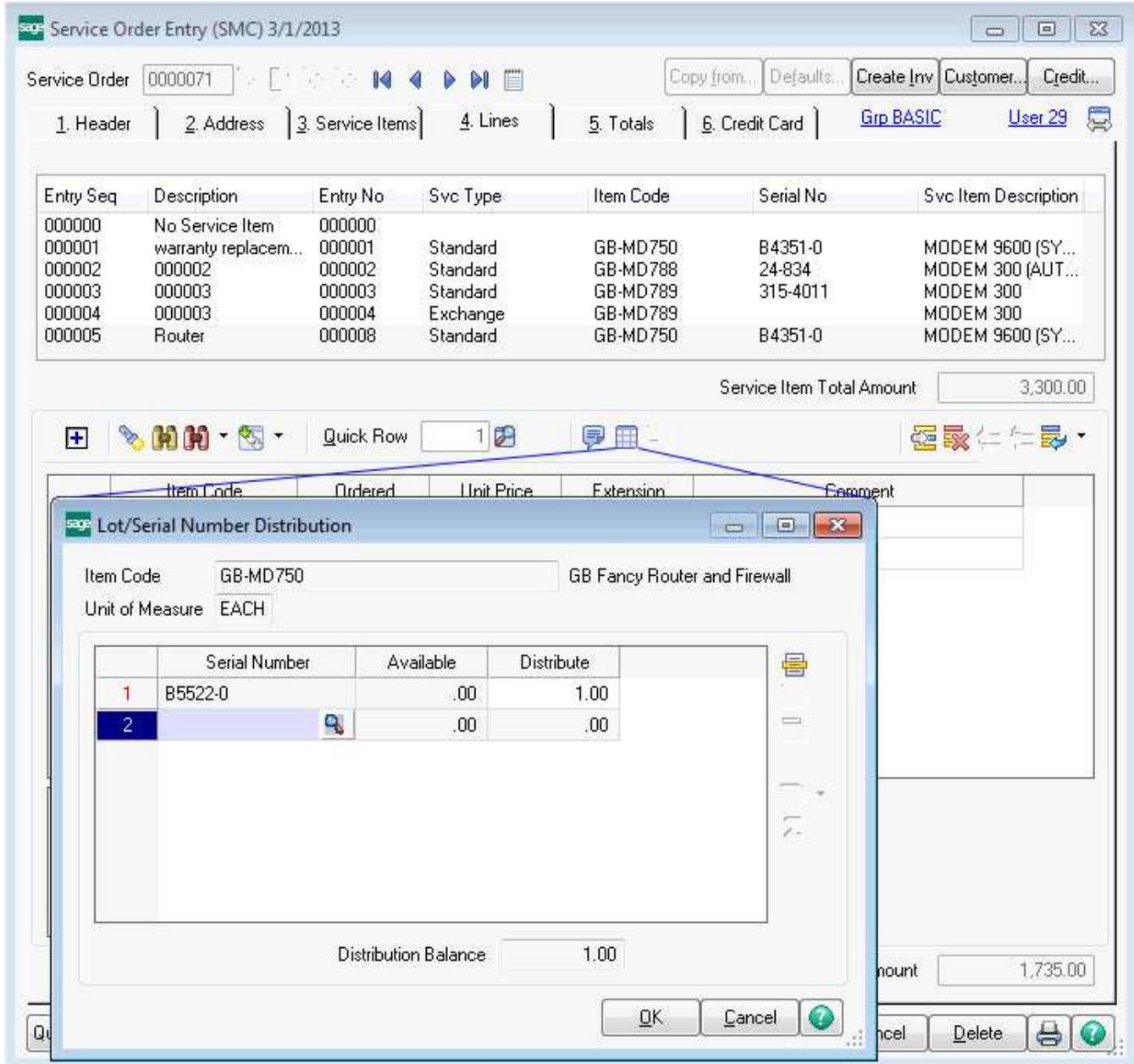
Buttons: Accept, Cancel, [Green Arrow]

As you can see in the above image, all the transactions entered will be displayed on the left side. You can filter by technician by using the Select Technician field. Highlight the time transactions you wish to bill on this repair labor line and click the arrow pointing to the right in the middle. You can copy all the transactions from left to right using the double-arrow in the middle. You can also drag and drop transactions from either column to the other using your mouse.

As you move transaction, the total hours at the bottom of each column will change to show how many transaction hours you have selected. You can also double-click on any of the transactions to edit it as necessary.

Once you are satisfied with the selection, click the accept button. The total Selected Hours will then be copied to the Ordered Quantity field on the line. If the unit of measure for the labor miscellaneous item code is not HOUR, then the Selected Hours will be converted to the appropriate quantity based on the unit of measure. You can then change the Ordered Quantity as you wish, but the selected Transaction Hours will still be available for viewing in the Trans Hours field, which you can see on the Service Order lines panel.

Lot/Serial Distribution



If the Enable Lot/Serial Distribution check box is selected in Service Order Options, you can distribute lot and serial numbers to Standard, Credit Return, Exchange and Refurbish order types during order entry.

Use Lot/Serial Number Distribution to display the lot and serial numbers that are already distributed for the current line item or to distribute the transaction quantity by entering the quantity next to the corresponding lot and serial numbers. You can also enter additional lot and serial numbers.

When entering a lot or serial item during line entry, you are required to distribute the total quantity entered for the item to one or more lot/serial numbers. You can enter the lot/serial numbers and quantities one at a time until the total quantity for the item is fully distributed. You must fully distribute all lot and serial lines before completing an invoice.

The Distribution Balance field at the bottom of the window reflects a running total of the remaining quantity to distribute. This balance does not reflect the quantity entered for the current line.

Note When the item code, warehouse code, or unit of measure is changed on a previously saved line with existing lot and serial distribution records, the previously entered distribution records are removed after you click OK.

Purchase Order

The screenshot displays two overlapping software windows. The background window is titled "Service Order Entry (SMC) 3/1/2013" and shows a table of service items. The foreground window is titled "Purchase Order Entry (SMC) 3/1/2013" and shows a form for entering purchase order details.

Entry Seq	Description	Entry No	Svc Type	Item Code	Serial No	Svc Item Description
000000	No Service Item	000000				
				GB-MD750	B4351-0	MODEM 9600 (SY...
				GB-MD788	24-834	MODEM 300 (AUT...
				GB-MD789	315-4011	MODEM 300
				GB-MD789		MODEM 300
				GB-MD750	B4351-0	MODEM 9600 (SY...

The Purchase Order Entry window shows the following details:

- Order Number: 0000071
- Order Date: 3/1/2013
- Order Type: Standard Order
- Vendor No: 01-CONT (Container Corporation Of Usa)
- Order Status: New
- Required Date: 3/1/2013
- 1099 Form: None
- 1099 Box: []
- Sales Tax: Schedule CA
- Use Tax: []
- Purchase Address: []
- Ship-To Address: 0000 ABC Distributing Company
- Terms Code: 03 NET END OF MONTH
- Ship Via: FOB
- Warehouse: 000 CENTRAL WAREHOUSE
- Confirm To: []
- E-mail: []
- Telephone: (312) 555-7721
- Fax: []
- Comment: []
- On Hold: []
- Print Order: [x]

The Service Item Total Amount is 45.00 and the Total Amount is 1,520.00.

If the Enable Purchase Order Generation During Service Order Entry check box is selected in Service Order Options and a Purchase Order is generated for a service order line, you can click on the Purchase Order button to drill into Purchase Order Entry. To create a Purchase Order through Service Order Entry, hit the "Generate PO" button on the Totals tab.

Service Order Totals

The screenshot shows the Sage Service Order Entry (SMC) 2/20/2013 window. The interface includes a navigation bar with tabs for 1. Header, 2. Address, 3. Service Items, 4. Lines, 5. Totals, and 6. Credit Card. The current view is the 'Totals' section, which displays various financial and operational data for the service order.

Service Order: 0000071

Order Date: 2/18/2013 Order Type: Standard

Customer No.: 01-ABF American Business Futures Salesperson: 0100

Amount Subject to Discount	1,650.00-	Deposit Payment Type	CREDIT CARD	AMEX - test credit cards
Discount Rate	.000%	Deposit Amount	.00	
Discount Amount	.00	Commission Rate	10.000%	
Taxable Amount	.00	Sales Tax Amount	.00	
Non-Taxable Amount	1,650.00-	Order Total	1,650.00-	
Ship Zone		Billed Amount	.00	
Ship Weight				
Freight Amount	.00			

Buttons at the bottom: Quick Print..., Recalc Price, Accept, Cancel, Delete, Print, Help.

Generate PO - If the Enable Purchase Order Generation During Service Order Entry check box is selected in Service Order Options, a Generate PO button appears allowing you to generate a Purchase Order from a Service Order. If the 'Prompt to Generate Purchase Order on New Service Orders' check box is selected, you will be prompted to generate a Purchase Order from a new Service Order.

Order Date - This field displays the order date and can only be viewed.

Order Type - This field displays the order type and can only be viewed.

Salesperson - This field displays the salesperson code and can only be viewed.

Amount Subject to Discount - This field displays the total of all line items for which the amount is subject to discount. This field can only be viewed.

Discount Rate - Type a discount rate for this customer. If a new rate is entered, the discount amount is recalculated. This field defaults the rate entered in the Discount Rate field in Customer Maintenance, but it can be changed.

Discount Amount - Type a discount amount. The discount amount is calculated by multiplying the amount subject to discount by the discount rate. If a new discount amount is entered, the discount rate is recalculated. A warning message appears if a discount amount is entered and no items are selected as Discountable on the Lines tab.

Taxable Amount - This field displays the taxable total amount of all line items for which a tax class is entered in the Tax Class field. This field can only be viewed.

Non-Taxable Amount - This field displays the nontaxable total amount of all line items for which a tax class is entered in the Tax Class field. This field can only be viewed.

Ship Zone - Enter a ship zone for this order. If Yes or Actual is selected in the Use Shipping Code to Calculate Freight field in Service Order Options, click the Lookup button to list all ship zones. The freight is calculated automatically.

- If the shipping code entered in the Ship Via field for this invoice indicates that the ship zone is a ZIP Code, the ZIP Code from the ship-to address appears.
- If the Use Prior Range of ZIP Codes check box is selected in Shipping Rate Maintenance, the last sequential ZIP Code that most closely matches the ZIP Code entered is used in the freight charge calculation. This field is available only if the shipping code entered in the Ship Via field is defined to use ship zones.

Ship Weight - Type a shipping weight for this order. Fractional weights are not accepted.

- If Yes or Actual is selected in the Use Shipping Code to Calculate Freight field in Service Order Options, click the Lookup button to list all ship weights.
- If Actual is selected in the Use Shipping Code to Calculate Freight field in Service Order Options, this field displays the actual total weight of all inventory items on this order; however, the weights for each item must be in the Inventory file, and all weights must be expressed in the same unit of measure (lb, tons). You can change the actual weight that appears.
- If Auto Use Next Weight from Table is selected in the Freight Calculation Method field in Shipping Rate Maintenance, the next sequential weight for this ship zone that most closely matches the ship weight entered is used to calculate the freight charge for this order.

Note The ship weight must be numeric. Do not include the unit of measure.

Freight Amount - Type the freight amount for the invoice. If the Use Shipping Code to Calculate Freight check box is selected in Service Order Options and a shipping code is entered in the Ship Via field, the freight amount is automatically calculated based on the entries in the Ship Zone and Ship Weight fields.

Deposit Payment Type - Select the deposit payment type to use for the current service order. If Credit Card is selected, focus moves to the Credit Card tab where you can enter the credit card information and submit the transaction.

If the default payment type is Credit Card and the customer is assigned a primary card ID in Customer Maintenance, this field defaults to Credit Card, but it can be changed. Payment types are defined in Payment Type Maintenance.

Check Number/Reference Number - For deposits paid by a check payment type, type the check number. For deposits paid by cash payment type, type a reference number. This field is available only if Check or Cash, or a check or cash payment type set up in Payment Type Maintenance is selected in the Deposit Payment Type field.

Deposit Amount - Type the customer deposit amount to record a customer deposit to apply against the invoice for this service order. The deposit amount can be maintained for partial shipments and is not zeroed out automatically for the first shipment. For credit card deposits, this field displays the deposit amount entered on the Credit Card tab.

Commission Rate - The commission rate for the responsible salesperson appears. Type 0 (zero) for the commission rate if you do not want commission calculated for this order. The commission amount is calculated after the order is invoiced. You can override the commission rate if the appropriate security has been set up.

Sales Tax Amount - This field displays the total sales tax for the order and can only be viewed. The sales tax amount is calculated by multiplying the amount in the Taxable Amount field by the total tax rate for the state, county and/or local codes that apply to this service order. To modify the sales tax amount displayed, click Tax Detail and enter the new sales tax amount in the Tax Amount field in the Tax Detail window.

Order Total - When all field entries are complete for the order, this field displays the total for all lines items, applicable freight, and tax amounts, minus any applicable discount. This field can only be viewed.

Billed Amount - If the service order has been partially invoiced, and the invoice has been updated, this field displays the total amount of the updated invoice. This field can only be viewed.

Net Order - When all field entries are complete for the order, this field displays the order total less any deposit amount. This field can only be viewed.

Service Order Credit Card

Service Order Entry (SMC) 2/20/2013

Service Order 0000071

Copy from... Defaults... Create Inv Customer... Credit...

1. Header | 2. Address | 3. Service Items | 4. Lines | 5. Totals | 6. Credit Card | Grp BASIC | User 29

Card ID AMEX1 Save Clear

Payment Type AMEX AMEX - test credit cards

Card Information

Card Type AMEX Primary

Last Four Digits *2376

Expiration Month/Year 02 2016

Billing Address for Card

Cardholder Name American Business Futures

Address 2131 N. 14th Street
Suite 100

ZIP Code 53205-1204

City Milwaukee State WI

Country USA

E-mail Address artie@sage.sample.com

Comment

Corporate Card Information

Corporate ID/PO

Transaction Information

Transaction Type Deposit/Sale

Pay Balance

	Balance	Deposit
Amount	.00	.00
Corp Sales Tax	.00	.00
Auth No.		
Auth Amount	.00	
Auth Date		
Auth Time	12:00 AM	12:00 AM

Submit Card...

Quick Print... Recalc Price

Accept Cancel Delete

The Credit Card tab is available only if Credit Card is selected in the Deposit Payment Type drop box on the Totals tab, and at least one of the service item entries has a service type of Standard or Refurbish.

If the service order has several service item entries of different service types, all information entered on the Credit Card tab will be applied against the invoices created for Standard or Refurbish service item entries only.

Card ID - Enter a card ID to identify this credit card, or click the Lookup button to view a list of all card IDs for this customer. The primary card ID automatically defaults if the default payment type is Credit Card and the customer is assigned a primary card ID in Customer Maintenance, but it can be changed. Click Clear to clear the information on the Credit Card tab.

Save - Select this check box to save the card ID for future use. Clear this check box if you do not want to save the card ID for future use.

- This check box is automatically selected when entering a new card ID and clicking Yes to the message that appears asking if you want to save the card ID for future use. This check box is also selected if the card ID already exists for the customer, but it can be changed.
- If this check box is selected and changes are made to the billing or corporate card information, the record in Customer Credit Card Maintenance will be automatically updated when the entry is saved. This check box is cleared after the credit card information is successfully updated.
- If this check box is cleared for an existing card ID and the card's expiration date is changed in the Credit Card Payment Processor window, clicking Submit in Credit Card Payment Processor will automatically update the record in Customer Credit Card Maintenance with the new expiration date.

Payment Type - Enter the credit card payment type, or click the Lookup button to list all credit card payment types. The payment type automatically defaults if an existing card ID is entered for the customer or if the customer is assigned a primary card ID in Customer Maintenance, but it can be changed.

Card Type - This field displays the card type and can only be viewed.

Primary - This check box is automatically selected if this credit card is the primary card ID assigned in Customer Maintenance; otherwise, it is cleared. This field can only be viewed.

Last Four Digits - This field displays the last four digits of the credit card number entered in Credit Card Payment Processor and can only be viewed. For a one-time use card that is not processed through Credit Card Payment Processor, this field is available to manually enter the last four digits of the credit card number.

Expiration Month/Year - These fields display the expiration month and year of the credit card entered in Credit Card Payment Processor and can only be viewed. If you are using a non-processing payment type and not saving the credit card record, these fields will be available to manually select an expiration month and year. A message indicating that the card will expire in a specified number of days may appear based on the value entered in the Days Before Credit Card Expiration field in Accounts Receivable Options. You can click Submit Card to update the credit card's expiration month and year.

Cardholder Name - Type the cardholder name. When entering a new card ID and a payment type or changing the payment type, this field will default to the customer name in Customer Maintenance, but it can be changed. This is a required field.

Address - Type the cardholder's billing address. When entering a new card ID and a payment type, these fields default to the first two address lines in Customer Maintenance, but they can be changed. The first line of the Address field will be used by the Credit Card Payment Processor address verification service. This is a required field.

ZIP Code - Type the cardholder's billing ZIP Code. When entering a new card ID and a payment type, this field defaults to the customer's billing ZIP Code in Customer Maintenance, but it can be changed. The information in this field will be used by the Credit Card Payment Processor address verification service. This is a required field.

City - Type the cardholder's billing city. When entering a new card ID and a payment type, this field defaults to the customer's billing city in Customer Maintenance, but it can be changed. If a ZIP Code is entered, the city automatically appears. This is a required field.

State - Type the cardholder's billing state. When entering a new card ID and a payment type, this field defaults to the customer's billing state in Customer Maintenance, but it can be changed. If a ZIP Code is entered, the state abbreviation automatically appears. This is a required field.

Country - Enter the code for the cardholder's billing country, or click the Lookup button to list all country codes. When entering a new card ID and a payment type, this field defaults to the customer's country code in Customer Maintenance, but it can be changed. The information in this field will be used by the Sage Exchange address verification service. This is a required field.

E-mail Address - Type the cardholder's e-mail address. This field defaults to the e-mail address in Customer Maintenance, but it can be changed. Use a semicolon (;) to separate multiple e-mail addresses. If the e-mail address is longer than this field, use the left and right arrow keys to view the entire address.

Comment - Type a comment for this credit card.

Corporate ID/PO - Type the corporate ID or purchase order number assigned to the user of the corporate/commercial card. This field is available only if the Allow Corporate Cards check box is selected for the payment type in Payment Type Maintenance.

Note The corporate ID or purchase order number is not required to process the transaction; however, the credit card company may charge a higher transaction fee if you do not track this information.

Transaction Type - Select a fund transfer method.

- Select Deposit/Sale to process a credit card transaction on the deposit amount entered. A deposit transaction will be fully processed as a sale when the Submit Card or Accept button is clicked in this task or S/O Invoice Data Entry and a deposit amount is entered. If

the Process in Batch check box is selected, the transaction can be fully processed when the Perform Credit Card Processing check box is selected during the Daily Sale Journal printing.

- Select Payment/PrePost Authorization to trigger the transfer of funds when printing the Daily Sales Journal. A payment will first be pre-authorized when the Submit Card or Accept button is clicked in this task or S/O Invoice Data Entry. If the Process in Batch check box is selected, the transaction can be fully processed when the Perform Credit Card Processing check box is selected during the Daily Sales Journal printing.

Pay Balance - Select this check box to pay the balance of the order using a credit card. If this check box is selected and you click Submit Card, the deposit that is entered will be processed and the remaining order balance will be pre-authorized. The remaining balance will be processed when the Daily Sales Journal is printed. Clear this check box to pay only the deposit using a credit card.

This field is available if Deposit/Sale is selected in the Transaction Type field.

(Balance/Payment) Amount - This field displays the credit card balance or credit card payment amount for the service order. This field can only be viewed.

(Balance/Payment) Corp Sales Tax - Type the sales tax amount associated with the credit card payment for the service order. This amount is included in the total transaction amount. Sales tax amounts are reported for corporate cards only, and the amount entered here will be reported on the customer's corporate credit card statement.

If the Sales Tax Reporting check box is selected in Accounts Receivable Options, the default amount is calculated based on the actual sales tax amount and the amount of sales tax already allocated to the payment. If the Sales Tax Reporting check box is cleared, this field defaults to 0.00. Click the Reset Corporate Sales Tax button to reset the amount to the default amount.

This field is available only if the Allow Corporate Cards check box is selected for the payment type in Payment Type Maintenance, and a corporate card ID or purchase order has been entered.

Note The sales tax amount is not required to complete the transaction; however, the credit card company may charge a higher transaction fee if you do not track this information.

(Balance/Payment) Auth No. - This field displays the authorization number for the credit card transaction processed through Credit Card Payment Processor and can only be viewed. For a one-time use card that is not processed through Credit Card Payment Processor, this field is available to manually enter the authorization number for the credit card transaction.

Note The Process in Batch check box must be cleared to obtain an authorization number through Credit Card Payment Processor immediately after clicking Submit Card.

(Balance/Payment) Auth Amount - This field displays the authorization amount for the credit card transaction processed through Credit Card Payment Processor. The authorization amount defaults to the total order amount less the deposit amount, but it can be changed.

The pre-authorization amount is valid for several days. If the order will be held beyond the pre-authorization period, select the Process in Batch check box to pre-authorize the amount through the Daily Sales Journal process.

This field is available when the Pay Balance check box is selected or Payment/PrePost Authorization is selected in the Transaction Type field.

(Balance/Payment) Auth Date - This field displays the authorization date for the credit card transaction processed through Credit Card Payment Processor and can only be viewed. For a one-time card that is not processed through Credit Card Payment Processor, this field defaults to the current date when an authorization number has been entered.

(Balance/Payment) Auth Time - This field displays the authorization time for the credit card transaction processed through Credit Card Payment Processor and can only be viewed. For a one-time card that is not processed through Credit Card Payment Processor, this field defaults to the current time when an authorization number has been entered.

(Balance/Payment) Transaction ID - This field displays the transaction ID for the credit card transaction when the transaction is successfully processed through Credit Card Payment Processor and can only be viewed. A message appears below this field stating that the credit card transaction was authorized. If the transaction is declined, this field is blank and a message appears below this field stating that the credit card transaction was not authorized. This field is available only when the Pay Balance check box is selected or Payment/PrePost Authorization is selected in the Transaction Type field.

(Deposit) Amount - Type the credit card deposit amount applied to this transaction. This field is available only if Deposit/Sale is selected in the Transaction Type field.

(Deposit) Corp Sales Tax - Type the sales tax amount associated with the credit card deposit for the service order. This amount is included in the total transaction amount. Sales tax amounts are reported for corporate cards only, and the amount entered here will be reported on the customer's corporate credit card statement.

If the Sales Tax Reporting check box is selected in Accounts Receivable Options, the default amount is calculated based on the actual sales tax amount and the amount of sales tax already allocated to the deposit. If the Sales Tax Reporting check box is cleared, this field defaults to 0.00. Click the Reset Corporate Sales Tax button to reset the amount to the default amount.

This field is available only if the Allow Corporate Cards check box is selected for the payment type in Payment Type Maintenance, and a corporate card ID or purchase order number has been entered. This field is also available only if Deposit/Sale is selected in the Transaction Type field.

Note The sales tax amount is not required to complete the transaction; however, the credit card company may charge a higher transaction fee if you do not track this information.

(Deposit) Auth No. - This field displays the authorization number for the credit card transaction processed through Credit Card Payment Processor and can only be viewed. For a one-time use card

that is not processed through Credit Card Payment Processor, this field is available to manually enter the authorization number for the credit card transaction. This field is available only if Deposit/Sale is selected in the Transaction Type field.

Note The Process in Batch check box must be cleared to obtain an authorization number through Credit Card Payment Processor immediately after clicking Submit Card.

(Deposit) Auth Date - This field displays the authorization date for the credit card transaction processed through Credit Card Payment Processor and can only be viewed. For a one-time card that is not processed through Credit Card Payment Processor, this field defaults to the current date when an authorization number has been entered. This field is available only if Deposit/Sale is selected in the Transaction Type field.

(Deposit) Auth Time - This field displays the authorization time for the credit card transaction processed through Credit Card Payment Processor and can only be viewed. For a one-time card that is not processed through Credit Card Payment Processor, this field defaults to the current time when an authorization number has been entered. This field is available only if Deposit/Sale is selected in the Transaction Type field.

(Deposit) Transaction ID - This field displays the transaction ID for the credit card transaction when the transaction is successfully processed through Credit Card Payment Processor and can only be viewed. A message appears below this field stating that the credit card transaction was authorized. If the transaction is declined, this field is blank and a message appears below this field stating that the credit card transaction was not authorized. This field is available only if Deposit/Sale is selected in the Transaction Type field.

Swipe Card - Select this check box if a new credit card will be swiped for this transaction when Credit Card Payment Processor is launched. Clear this check box if the credit card will not be swiped. This check box is available only if the Process in Batch check box is cleared.

Note A Credit Card Payment Processor approved credit card swipe device, available through Credit Card Payment Processor only, is required to use this feature.

Process in Batch - Select this check box to process this credit card transaction through Credit Card Payment Processor in a batch when printing the Daily Sales Journal or the Sales Order Batch Authorization listing. Clear this check box if you do not want to process this transaction in a batch. You can then enter the CVV number for each credit card transaction when clicking Submit Card or Accept. This check box is automatically selected if the Default Transactions to Process in Batch check box is selected in Company Maintenance, but it can be cleared. This check box is available if the Swipe Card check box is cleared.

Note When processing credit card transactions in a batch, the CVV number cannot be entered for each credit card transaction; therefore, the credit card company may charge a higher transaction fee.

Service Order Quick Print

Service Order Entry (SMC) 2/20/2013

Service Order: 0000071

1. Header | 2. Address | 3. Service Items | 4. Lines | 5. Totals | 6. Credit Card

Order Date: 2/18/2013 | Order Type: Standard

Customer No.: 01-ABF | American Business Futures | Salesperson: 0100

Amount Subject to Discount: 1,650.00- | Deposit Payment Type: CREDIT CARD | AMEX - test credit cards

Discount Rate: .000% | Deposit Amount: .00

Discount Amount: .00

Taxable Amount: .00 | Commission Rate: 10.000%

Non-Taxable Amount: 1,650.00- | Sales Tax Amount: .00

Ship Zone: | Ship Weight: | Freight Amount: | Total: 1,650.00- | .00

Quick-Print Form Selection

Program	Default Form Code	Print?
Quick Print from Order Entry		
Service Order Printing	STANDARD	<input checked="" type="checkbox"/>
Picking Sheet Printing	STANDARD	<input checked="" type="checkbox"/>
Service Item Label Printing	STANDARD	<input checked="" type="checkbox"/>
Shipping Label Printing	STANDARD	<input checked="" type="checkbox"/>

Proceed

Quick Print... Recalc Price

Accept Cancel Delete

Service Order Printing

Service Order Printing (SMC) 2/15/2013

Form Code: STANDARD

Description: Standard

Number of Copies: 1 Collated: Multi-Part Form Enabled:

Sort Orders By: Order Number

Order Type to Print: All Print Comments: Partial

Line 1 Message:

Line 2 Message:

Selections

Select Field	Operand	Value
Order Number	Equal to <input type="button" value="▼"/>	0000145
Warehouse Code	All <input type="button" value="▼"/>	<input type="text"/>

HP Photosmart C4600 series (redirected 3)

Service Order Printing allows you to print a Crystal Reports form containing all the service order information. To actually print the form, select a printer then click the Print button. If you wish to see the form on the screen, you can click the Preview button.

In either case, if you preview or print with no other choices made on the screen, the program will select and print only those service orders where the "Print Order" box on the service order header is checked. You can, however, enter parameters and click the "Select" button at the top of the panel to find all matching service orders and change the "Print Order" flag to "Y" for those orders.

Picking Sheet Printing

Picking Sheet Printing (SMC) 2/15/2013

Form Code: STANDARD 

Description: Plain

Number of Copies: Collated: Multi-Part Form Enabled:

Order Type to Print: All Include Completed Orders Only:

Print Comments: Partial Print Closed Service Item Entries Only:

Include Unauthorized/Expired Credit Card Orders:

Additional Item Types to Print

Charge Items: Miscellaneous Items: Special Items:

Line 1 Message:

Line 2 Message:

Selections

Select Field	Operand	Value
Order Number	All <input type="button" value="Down"/>	
Warehouse Code	All <input type="button" value="Down"/>	
Svc Item Code	All <input type="button" value="Down"/>	
Serial Number	All <input type="button" value="Down"/>	
Entry Number	All <input type="button" value="Down"/>	

HP Photosmart C4600 series (redirected) 

Service Item Label Printing

sage Service Item Label Printing (SMC) 2/15/2013

Form Code: STANDARD 

Description: Plain

Service Type to Print: All Labels Per Service Item: 1 Print Detail Lines:

Selections

Select Field	Operand	Value
Order Number	All <input type="button" value="v"/>	
Svc Item Code	All <input type="button" value="v"/>	
Serial Number	All <input type="button" value="v"/>	
Entry Number	All <input type="button" value="v"/>	

HP Photosmart C4600 series (redirected 

Shipping Label Printing

sage Shipping Label Printing (SMC) 2/15/2013

Form Code: STANDARD 

Description: Plain two-across

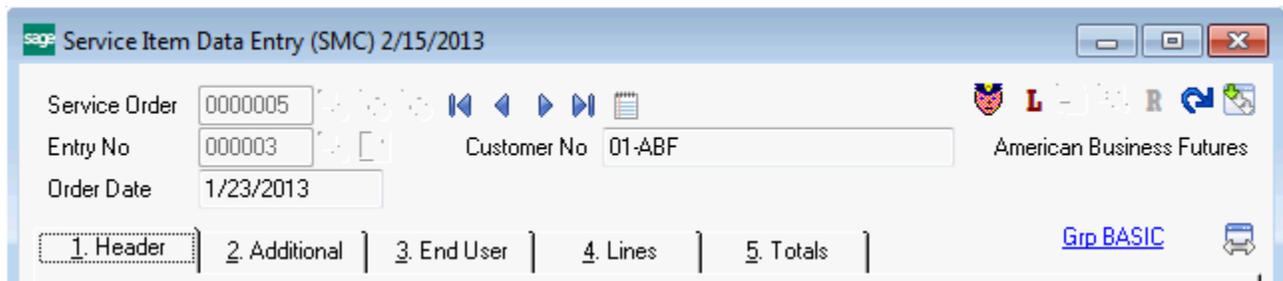
Order Type to Print: All

Selections

Select Field	Operand	Value
Order Number	All <input type="button" value="v"/>	
Warehouse Code	All <input type="button" value="v"/>	

HP Photosmart C4600 series (redirected 

Service Item Data Entry



Service Item Data Entry allows you to edit, delete, and add lines to a Service Item Entry without having to lock the whole order. Service Item Entries represent the individual pieces of equipment that are being serviced on an order. These are added to the order during Service Order Data Entry. Once the Service Item Entry exists, you can edit the fields, add comments and add lines for that entry from the Service Item Data Entry Screen. Click on the image above or the links below for more information about the options on each tab.

You can also add new Service Item Entries by typing in a new number, or by pressing the Next Entry No button (#).

Most of the fields and features in this menu option are identical the counterparts in Service Order Data Entry. Refer to Service Item Entry for details about most of the information on the panel. The fields covered below are exceptions.

Order Number - You can enter an order number, or use the F2 key or lookup button to select an existing order. You do not have the option of creating a new order here. That must be done in Service Order Data Entry.

Entry Number - You can enter a six-digit entry number, or you can use the F2 key, lookup button, or browse buttons to find the entry that you wish to modify. If you enter a number for which a entry does not exist, you will have the option to add the entry.

Service Item Entry Header

Service Item Data Entry (PRO) 1/19/2014

Service Order: 0000044
 Entry No: 000001
 Order Date: 9/28/2012
 Customer No: 02-CAPRI

1. Header | 2. Additional | 3. End User | 4. Lines | 5. Totals | [Grp DEFAULT](#)

Entry Description: 000001
 Item Code: MAX100
 Serial No.: MX110001
 Svc Item Description: MAXPHONE 100

*** Warranty Void ***

Quantity: 0
 Service Type: Standard

Status: V SERVICE RETURN TO VENDOR
 Status Date: 7/11/2013
 Status Comment:
 Exp Rec Date: Received
 Date Received: 9/28/2012
 Vendor No.: 02-TELCOMM Tel-comm Communications
 Vendor RMA: 123321123

Complaint Code: SCREEN
 Failure Reason: DAMAGE
 Svc Technician: JEC
 Orig Invoice No.: 0000001

Warranty Code: ZYREXT
 Warranty Start: 2/16/2012
 Warranty End: 2/15/2014
 Prohibit Repair Warranty:

Replace/Loaner:
 Loaner So No.:
 Est Comp Date:
 Act Comp Date:

Print Service Item Label:
 Picking Sheet Printed:
 Picking Sheet Print Date:
 Original Price: 495.000
 Reference:
 Product Line:

Problem Description:
 The phone is cracked.

Accept Cancel

The header panel of Service Item Data Entry displays the same information that is available in the grids on the Service Item Entry tab of Service Order Data Entry. Since Service Item Data Entry deals with only one entry (or unit, serial number, equipment) at a time, the fields that are in grids on Service Order Data Entry are displayed in individual fields on the header panel of Service Item Data Entry. This may be a more convenient format if a user chooses to work with one service item entry at a time.

Quantity - The Quantity field is only available for Credit Returns and Exchange Service Types that have no serial number entered. This field is useful when large amounts of items are being returned or exchanged that are not being individually tracked. Replacements can also be sent out for those items since the Replacement Dialog now allows a quantity to be entered, defaulting to the quantity returned.

Service Item Entry Additional

Service Order: 0000071
 Entry No: 000009
 Order Date: 2/18/2013
 Customer No: 01-ABF
 Bill To: 01-AVNET
 American Business Futures
 Avnet Processing Corp
 Grp BASIC

1. Header | **2. Additional** | 3. End User | 4. Lines | 5. Totals

Apply To Invoice No.
 Price Overridden
 Roll Up Refurbish Cost
 Scrap

Return Whse: 000 CENTRAL WAREHOUSE
 Refurbish Source Whse: 001 EAST WAREHOUSE
 Refurbish Target Whse: 002 WEST WAREHOUSE

New Item Code: GB-MD791
 New Serial No.: 24-834
 New Return Cost:

Quick Print... | Accept | Cancel | Help

Service Item Entry End User

sage Service Item Data Entry (SMC) 3/1/2013

Service Order: 0000071
Entry No: 000009
Order Date: 2/18/2013
Customer No: 01-ABF
Bill To: 01-AVNET

American Business Futures
Avnet Processing Corp

1. Header | 2. Additional | **3. End User** | 4. Lines | 5. Totals | [Grp BASIC](#)

Customer No. 01-ABF American Business Futures

Ship To: 2 Residential Address ZIP Code: 53120
Name: American Business Futures City: Racine State: WI
Address: Racine Warehouse Country: USA United States of America
5411 Kendrick Place Telephone: (414) 555-4319

Quick Print...

Service Item Entry Lines

Service Item Data Entry (SMC) 3/4/2013

Service Order: 0000071 Customer No: 01-ABF American Business Futures

Entry No: 000009 Order Date: 2/18/2013

1. Header | 2. Additional | 3. End User | 4. Lines | 5. Totals | Grp BASIC

Quick Row: 2

	Item Code	Ordered	Unit Price	Extension	Comment
1	GB-MD750	1.00	290.000	290.00	
2	2480-8-50	2.00	34.950	69.90	
3	6655	4.00	179.000	716.00	
4		.00	.000	.00	

Description	DESK FILE 8" CAP 50	
Warehouse	000	
Unit Of Measure	EACH	
Price Level	1	
Tax Class	TX	
Discountable	<input checked="" type="checkbox"/>	
Disc %		0.000
Drop Ship	<input type="checkbox"/>	

Total Amount: 1,075.90

Quick Print... Accept Cancel

If you wish to enter parts used and other charges for this Service Item Entry you can go to the Lines tab. Any lines you enter in this panel will refer only to the Service Item Entry you are currently editing. This feature allows multiple people to be adding lines for the same order, but different Service Item Entries.

For detailed information about the grids, fields, and buttons on this panel, refer to Service Order Lines. The fields here are the same ones that can be entered and maintained in Service Order Data Entry.

Parts Limit - If the customer for this order belongs to a group (see Group Code Maintenance), you may have set up a Parts Limit for repairs. If so, that limit will display on the right side of the lines panel. Just below is the actual total price of parts you have entered so far. If the total price of parts exceeds the limit, the Parts Limit field will turn red.

Text Editor - The Text Editor button is a feature that has been added for your convenience. This button will be enabled when you have your cursor in a field that is able to hold more than 30 non-numeric characters, such as a comment line. If you click the button, a large edit window will appear so you can view, edit, and format your comment more easily.

Service Item Entry Totals

The screenshot shows the 'Service Item Data Entry (SMC) 3/4/2013' window. At the top, there are fields for Service Order (0000071), Entry No (000009), Customer No (01-ABF), and Order Date (2/18/2013). Below these are navigation buttons and a 'Grp BASIC' label. A tabbed interface shows '5. Totals' selected. The main area contains a table of financial data:

Warranty Hours	0.00	NonWarranty Hours	0.00
Warranty Labor Cost	.000	NonWarranty Labor Cost	.000
Warranty Material Cost	.000	NonWarranty Material Cost	1,631.756
Labor Sales Amount	.00	Material Sales Amount	1,075.90
Transaction Hours	.00		
Service Item Total Amount	1,075.90		

At the bottom, there are 'Quick Print...', 'Accept', 'Cancel', and a help icon.

Technician Time Transactions

The screenshot shows the 'Technician Time Transactions (SMC) 2/20/2013' window. It contains the following fields and values:

- Service Technician:** JOHN BROWN
- Name:** John Brown
- Service Order:** 0000072
- Entry No:** 000002
- Status:** RECVD (Received)
- Assigned Technician:** JOHN BROWN (John Brown)
- Start Date:** 2/10/2013
- Start Time:** 09:00 AM
- End Date:** 2/10/2013
- End Time:** 08:35 PM
- Elapsed Time:** 11.58
- Billing Charge Code:** /SERVICE LABOR

At the bottom of the window, there are buttons for 'Accept', 'Cancel', 'Delete', and a help icon.

Technician Time Transactions allows each technician to log on and off of service item entries. Transactions entered here can be used to calculate billing hours for labor lines in service order data entry.

Note: The Technician Time Transaction entry will always override the quantity manually entered in the Service Order Data Entry lines tab. For example, if a technician logged 2 hours, a supervisor can then change it to 3 hours in service order lines. But if the technician then works .5 more hours, the total in the service order lines will become 2.5, not 3.

Service Order - Enter or select the service order that you are working on. It may be a good idea to print bar codes on the order form so that each technician can quickly scan the order number into this screen.

Entry No - Enter or select the service item entry number that you are working on. A bar coded entry number on the order form is a good idea to speed up data entry.

Status - DISPLAY ONLY - This shows the current status of the service item entry that was selected.

Assigned Technician - DISPLAY ONLY - This shows the technician assigned to the service item entry.

Start Date / Time - Enter the starting date and time for the work being done. For a new entry, this will default to the current date and time.

End Date / Time - Enter the ending date and time. For a new entry the end date and time will be blank and can be left blank. If the technician has already created a transaction with a start date

and no end date, that same transaction record will be pulled up and the end date and time will be filled in.

Charge Code - Enter the labor miscellaneous item code that should be used for this time transaction. This is for the user's benefit only. In service order entry the user must create a labor line before selecting time transactions. If you would like to have the billing code required with the transaction is closed, you can select the check box in Service Order Option in the Line Entry tab.

Comment - Enter a comment about the work that was done. When time transactions are used to calculate time in service order data entry, the comments for the time transactions selected will be commented and put in the line comment code.

Create Service Invoices

In order for service orders to be completed, they typically must be billed through the Sales Order Invoice Data Entry or Sales Order Shipping Data Entry system. There are several ways to create invoices from service orders.

Create Invoice Button - On the service order header screen there is a button that can be pressed to create an invoice for one service order at a time. Take a look at the Service Order Data Entry for more information about this feature.

Sales Order Invoice Data Entry - You can create a new invoice or credit memo in Sales Order Invoice Data Entry and specify a service order number instead of a sales order number to create an invoice. For this feature to work, at least one of the service item entries on the service order must be closed. See the Complete and Ready to Update flag in Status Maintenance.

Sales Order Shipping Data Entry - You can create a new invoice in Sales Order Shipping Data Entry and specify a service order number instead of a sales order number to create an invoice. For this feature to work, at least one of the service item entries on the service order must be closed. See the Complete and Ready to Update flag in Status Maintenance.

Create Service Invoices - This menu option allows you to scan all the service orders in the data entry table and find those that meet the selection parameters you enter on the screen shown below. In order for any service order to be invoiced this way, at least one of the service item entries must be closed. See the Complete and Ready to Update flag in Status Maintenance. Once the invoices are created using this method, each service order/invoice will appear on the Service Generated Invoice Log.

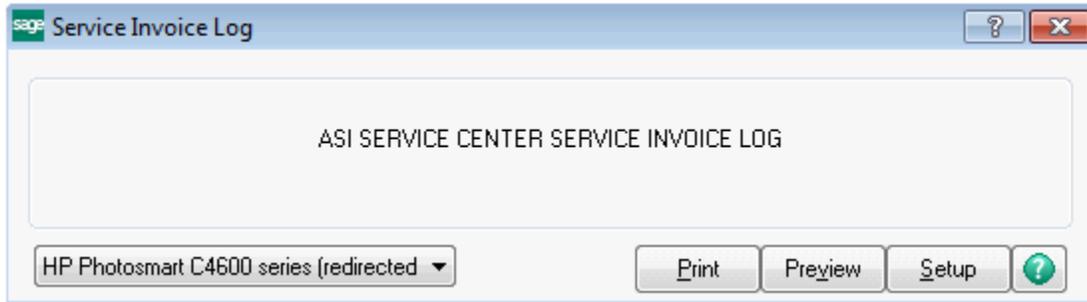
Next Automatic Invoice Number: 0100180 Batch: 00073

Update Only Complete Orders:

Select Field	Operand	Value
Service Order Number	All	
Service Order Date	All	
Customer Number	All	

Proceed Cancel

Service Generated Invoice Log



Every time an invoice is created from a service order using the Create Service Invoices feature from the main menu, a record is entered in the service invoice log. You can print this report to see the list, and then clear the log as soon as the printing is complete.

Quick Status Change

Quick Status Change (ABC) 8/21/2013

Service Order: 0000005
 Entry No: 000001
 Order Date: 1/23/2013
 Customer No: 01-ABF
 Bill To:
 American Business Futures

Status: R SERVICE ORDER RECEIVED
 Status Date: 8/21/2013
 Status Comment: Received 2:30 PM
 Exp Rec Date:
 Received: Date Received: 8/21/2013

Complaint Code: NOISY Noisy
 Failure Reason: WEARTEAR Wear and Tear
 Svc Technician: ISK Irina Kouptsova
 Est Comp Date: 8/1/2013
 Act Comp Date:
 Problem Description:
 Entry Description: 000001 *Out of Warranty*
 Item Code: GB-MD750
 Serial No.: A6899-5
 Svc Item Description: MODEM 9600 (SYNCHRONOUS)
 Service Type: Standard

Accept Cancel ?

Quick Status Change allows you to edit the fields on an existing Service Item Entry without having to lock the whole order. To add new Service Item Entries or to edit, delete, and add lines to a Service Item Entry you should use Service Item Data Entry or Service Order Data Entry.

All of the fields and features in this menu option are identical the counterparts in Service Item Data Entry. Refer to Service Item Entry for details about most of the information on the panel.

Inquiry Menu

Service Order Inquiry

The screenshot shows the 'Service Order Inquiry (PRO) 10/9/2013' window. At the top, the service order number is 0000024. The window has several tabs: 1. Header, 2. Address, 3. Service Items, 4. Lines, 5. Totals, and 6. Credit Card. The 'Header' tab is active. Key fields include: Order Date (6/8/2012), Order Type (Standard), Customer No. (01-BRESLIN), and Status (N - NEW UNPRINTED SERVICE ORDER). Shipping information includes Ship To Addr, Terms Code (03 - C.O.D.), and Ship Via (C.O.D.). Warehouse information shows Whse 000 - Main Irvine Warehouse. At the bottom, there are buttons for 'Quick Print...', 'Recalc Price', 'OK', and a help icon.

Service Order Inquiry is the same as Service Order Data Entry except it is read only.

Service Item Entry Inquiry

sage Service Item Entry Inquiry

Service Order: 0000024 Customer No: 01-BRESLIN Breslin Supply

Entry No: 000001 Order Date: 6/8/2012

1. Header | 2. Additional | 3. End User | 4. Lines | 5. Totals Grp DEFAULT

Entry Description: 000001 *Out of Warranty*

Item Code: MAX100

Serial No.: TESTSERIAL

Svc Item Description: MAXPHONE 100 Service Type: Standard

Status: N NEW UNPRINTED SERVICE ORDER Status Date: 6/8/2012

Status Comment: Exp Rec Date: Received: Date Received:

Complaint Code: Failure Reason: SYSTEM Svc Technician: Orig Invoice No:

Warranty Code: TYRORIG Warranty Start: Warranty End: Prohibit Repair Warranty: Replace/Loaner: Loaner So No.: Est Comp Date: Act Comp Date:

Print Service Item Label: Original Price: .000

Picking Sheet Printed: Reference: Product Line:

Picking Sheet Print Date: 6/14/2012

Problem Description:

OK ?

Service Item Entry Inquiry is the same as Service Item Data Entry except that it is read only.

Service Order History Inquiry

Service Order History Inquiry is similar to Service Order Inquiry and Service Order Data Entry except that it is read only. You can see all Service Orders, including those in history and those that have been deleted.

Service Item Entry History Inquiry

Service Item Entry History Inquiry

Service Order: 0002030 000001 History

Entry No: 000001 Customer No: 01-AVNET Avnet Processing Corp

Order Date: 12/26/2011 Avnet Processing Corp

1. Header | 2. Additional | 3. End User | 4. Lines | 5. Totals

Entry Description: 000001

Item Code: MAX100

Serial No.: MX110001

Svc Item Description: MAXPHONE 100 Service Type: Standard

Status: C Status Date: 12/28/2011

Status Comment:

Exp Rec Date: Received: Date Received: 12/27/2011

Vendor No: Vendor RMA:

Complaint Code: DEAD Warranty Code: 1YRORIG Replace/Loaner:

Failure Reason: DAMAGE Warranty Start: 2/16/2011 Loaner So No.:

Svc Technician: JEC Warranty End: 2/15/2012 Est Comp Date:

Orig Invoice No.: 0000001 Prohibit Repair Warranty: Act Comp Date: 12/28/2011

Print Service Item Label: Original Price: 495.000

Picking Sheet Printed: Reference:

Picking Sheet Print Date:

Problem Description:

She was thrown in the pool during a Christmas party. Phone was immediately dried out, but doesn't seem to work properly. Upon eval, unit won't power on. Display and rear camera are replaced.

Updated: Invoiced: Invoice No.: 0000004

OK /- ?

Service Item Entry Inquiry is similar to Service Item Entry Inquiry and Service Item Data Entry except that it is read only. You can see all Service Item Entries, including those in history and those that have been deleted.

Service Item Inquiry

Service Item Inquiry (PRO) 10/9/2013

Item Code: 1003-100
Serial Number: A100
Description: Rear Camera 100

1. Main | 2. Warranty | 3. Sold To | 4. End User | 5. Purchase Order | 6. Service Info

Invoice Date: 7/18/2013
Invoice Number: 0100069
Sales Price: 49.950
Sold As: New

Still In Service? Scrapped Returned to Stock

Reference:
Warehouse: 001 Peach
Product Line: PART MaxPhone Parts
Sold To: 01-AVNET Avnet Processing Corp
End User: 01-AVNET Avnet Processing Corp

OK [Cancel] [Help]

Service Item Inquiry is the same as Service Item Maintenance except that it is read only.

Serial History Inquiry

Trans Date	Type	Event	Ref No.	Cust/Vendor	Whse	Quantity	Unit Cost	Ext
5/13/2010	PO	PO	G000001	02-AVID	000	1.00	226.650	226.650
8/9/2013	SVC	Refurbish - Current	0000063:000001	04-MAXIMUS	000	.00	.000	.000
8/9/2013	SVC	-Status D	0000063:000001	04-MAXIMUS	000	.00	.000	.000
8/9/2013	SVC	-Status C	0000063:000001	04-MAXIMUS	000	.00	.000	.000
8/15/2013	II	II	0100071	04-MAXIMUS	000	1.00-	226.650	226.650
8/15/2013	IR	IR	0100071	04-MAXIMUS	RFB	1.00	266.630	266.630

Serial History Inquiry is where you can look up any serial number item code in your history to see all of its details and transactions.



- Use the lookup button to perform either a service item search or a serialized item search.



- Use the binoculars at the top if you wish to see the service item which will open Service Item Inquiry.



- Use this button to drill into the item for more information. When you push it, Service Order History Inquiry will open.



- If the item has an invoice, this button will be activated and you can use it to see invoice information. It will open A/R Invoice History Inquiry



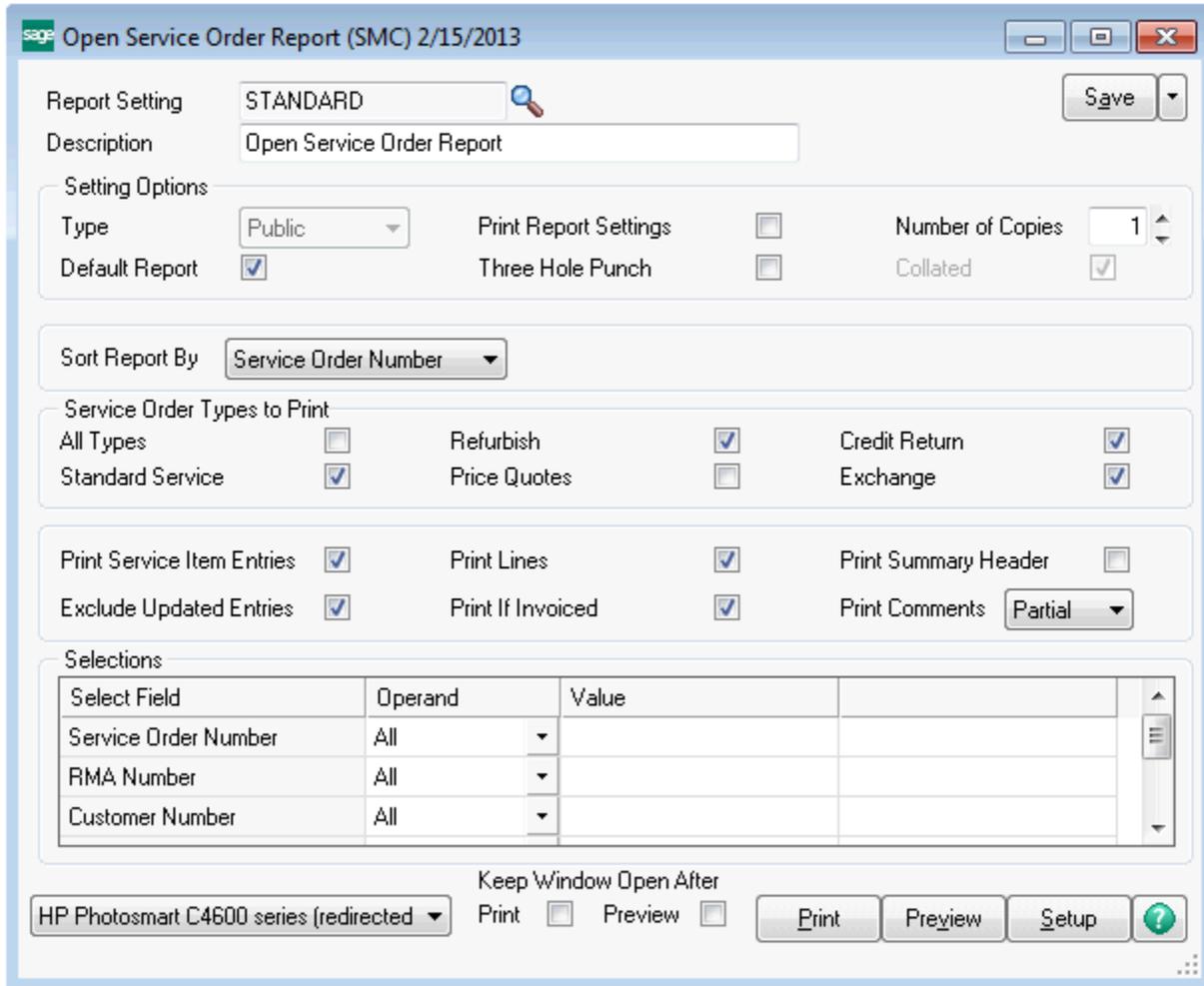
- Use the binoculars on the side to search for serial transactions, the following window will appear.

The screenshot shows a dialog box titled "Search for Serial Transactions" with a table for defining search criteria. The table has three columns: "Select Field", "Operand", and "Value". The "Select Field" column contains the following entries: "Transaction Type", "Transaction Date", "Reference Number", "Vendor Number", "Customer Number", and "Warehouse". The "Operand" column for all entries is "All". The "Value" column is empty. Below the table, there are three buttons: "OK", "Cancel", and a help icon (a question mark inside a circle).

Select Field	Operand	Value
Transaction Type	All	
Transaction Date	All	
Reference Number	All	
Vendor Number	All	
Customer Number	All	
Warehouse	All	

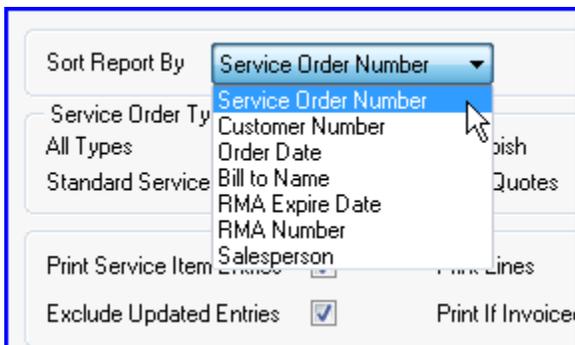
Reports Menu

Open Service Order Report



The Open Service Order Report prints a report of all the service orders in the current service order table. There are several selections and parameters that allow you to select the orders you wish to see and the amount of detail you need.

Sort Report By -



Use the drop box to select the sequence that you want the orders to appear in.

Service Order Types to Print - There are five service types. You can select All or just check the boxes for the service types you wish to include. The program will scan all the service item entries and will only print those entries that match the boxes checked. Service item entries will only print if the Print Service Item Entries box is checked on the panel.

Print Summary Header - If this box is checked, only one line will be printed for each service order header.

Print Service Item Entries - If checked, the report will include a line for selected service item entries.

Print Lines - If checked, the report will include the lines for each service item entry selected.

Print If Invoiced - If this box is cleared and a service item entry has an invoice in process or has already been invoiced, that entry will not be selected for the report.

Print Comments - Select Partial to see one line of comments or full to see the complete comments.

Open Service Order Report										
Sorted By Service Order Number										
For Service Types: All										
ABC Distribution and Service Corp. (ABC)										
Order Number	Order Type	Customer / Name Item Code	Item Description	Tech	Whts	P L	Unit Meas	Price	Quantity On Order	Extension
0000145	Std	01-ABF	American Business Futures							
RMA:		0000145	Cust PO: 0079134	Salesperson: 0100		Order Date:	11/8/2010	Status:	INVDEL	
Entry: 000003	Smart Phone	Src Item: GB-MD791	Serial: 1161	Entry Status:	CLOS:	Entry Tech:	JOHN BROWN			
	6655	PRINTER STAND W/ BASKET		001	1	EACH	179.000	1.000	179.00	
	(REPAIR LABOR	Repair Labor		JOHN BRC		QTRH	85.000	3.000	255.00	
Entry: 000017	return	Src Item: 1001-HON-H252	Serial: 0100123-0000001	Entry Status:	CLOS:	Entry Tech:	JOHN BROWN			
	1001-HON-H252	HON 2 DRAWER LETTER FLE W/O LK		098		EACH	50.000	1.000-	50.00-	
		Comment: This is the unit being returned.								
Entry: 000018	MP3 Player	Src Item: GB-MD750	Serial: B4351-0	Entry Status:	CLOS:	Entry Tech:	JOHN BROWN			
	8953	UNIVERSAL 3 1/2" SSDD FLEX DSK		000	1	EACH	0.000	2.000	0.00	
Order 0000145 Total										384.00
Report Total:										384.00

RMA Progress Report

Report Setting: STANDARD

Description: RMA Progress Report

Setting Options:

- Type: Public
- Default Report:
- Print Report Settings:
- Three Hole Punch:
- Number of Copies: 1
- Collated:

Sort Report By: Service Order Number

Service Order Types to Print:

- All Types:
- Standard Service:
- Refurbish:
- Price Quotes:
- Credit Return:
- Exchange:

RMA Progress:

- All RMAs:
- Open:
- Received:
- Expired:

Print Service Item Entries: Print If Invoiced:

Print Lines: Print Comments: Partial

Select Field	Operand	Value
Service Order Number	Equal to	0000145
RMA Number	All	
Customer Number	All	

HP Photosmart C4600 series (redirected) Keep Window Open After:

Print Preview Print Preview Setup

The RMA Progress Report prints a report of all the service orders with RMA numbers assigned in the current service order table. There are several selections and parameters that allow you to select the RMAs you wish to see and the amount of detail you need.

Sort Report By –

Sort Report By: Service Order Number

- Service Order Number
- Customer Number
- Order Date
- Bill to Name
- RMA Expire Date
- RMA Number
- Salesperson

Use the drop box to select the sequence that you want the orders to appear in.

Service Order Types to Print - There are five service types. You can select All or just check the boxes for the service types you wish to include. The program will scan all the service item entries and will only print those entries that match the boxes checked. Service item entries will only print if the Print Service Item Entries box is checked on the panel.

RMA Progress - Check the box to select what RMAs you wish to see. If an RMA is Open, that means it has not been received yet. Take a look at Service Order Header for more about receiving an RMA. If the report date is beyond the expiration date of the RMA on the service order header, the RMA will show as Expired on the report.

Print Service Item Entries - If checked, the report will include a line for selected service item entries.

Print Lines - If checked, the report will include the lines for each service item entry selected.

Print If Invoiced - If this box is cleared and a service item entry has an invoice in process or has already been invoiced, that entry will not be selected for the report.

Print Comments - Select Partial to see one line of comments or full to see the complete comments.

RMA Progress Report											
ABC Distribution and Service Corp. (ABC)											
Order Number	Order Type	Customer / Name Item Code	Item Description	Tech	Wts	P L	Unit Meas	Price	Quantity On Order	Extension	
0000145	Std	01-ABF	American Business Futures								
Received		RMA: 0000145	Expire Date: 12/31/9999	Cust PO: 0079134		Order Date: 11/8/2010	Status: INVDEL				
Entry: 000003		Smart Phone	Src Item: GB-MD791	Serial: 1181		Entry Status: CLOS	Entry Tech: JOHN BROWN				
	8855		PRINTER STAND W/ BASKET		001	1	EACH	179.000	1.000	179.00	
		REPAIR LABOR	Repair Labor		JOHN BRC		QTRH	85.000	3.000	255.00	
Entry: 000017		return	Src Item: 1001-HON-H252	Serial: 0100123-0000001		Entry Status: CLOS	Entry Tech: JOHN BROWN				
		1001-HON-H252	HON 2 DRAWER LETTER FLE W/O LK		098		EACH	50.000	1.000	50.00	
			Comment: This is the unit being returned.								
Entry: 000018		MP3 Player	Src Item: GB-MD750	Serial: 84351-0		Entry Status: CLOS	Entry Tech: JOHN BROWN				
	8953		UNIVERSAL 3 1/2" SSDD FLEX.DSK		000	1	EACH	0.000	2.000	0.00	
Order 0000145 Total										384.00	

Service History Report by Item

Report Setting: STANDARD [Save]

Description: Service History by Item

Setting Options:

- Type: Public
- Print Report Settings:
- Number of Copies: 1
- Default Report:
- Three Hole Punch:
- Collated:

Sort Report By: Item Code

Print Service Orders: Current and History

Service Order Types to Print:

- All Types:
- Standard Service:
- Refurbish:
- Price Quotes:
- Credit Return:
- Exchange:

Total by Item Code:

Total by Serial Number:

Summarize Svc Item Entry:

Print Lines:

Selections:

Select Field	Operand	Value
Svc Item Code	All	
Serial Number	All	
Customer Number	All	
Customer Name	All	
Order Date	All	
Received Date	All	

HP Photosmart C4600 series (redirected) | Keep Window Open After Print Preview | [Print] [Preview] [Setup] [Help]

The Service History by Service Item report will allow you to see service history organized by the service item. This is similar information that you will see on the Open Service Order Report, but is specific to the item and serial number that defines the service item.

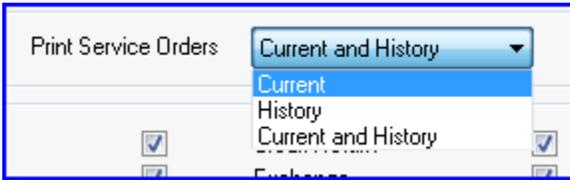
Sort Report By –

Sort Report By: Item Code

- Item Code
- Serial Number
- Customer Number
- Customer Name

You can select how you wish to sort the report by selecting one of the options from the drop box.

Print Service Orders -



Select whether you wish to include only current orders, only history orders or both current and history orders.

Service Order Types to Print - There are five service types. You can select All or just check the boxes for the service types you wish to include. The program will scan all the service item entries and will only print those entries that match the boxes checked. Service item entries will only print if the Print Service Item Entries box is checked on the panel.

Total by Item Code - Check this box to total the lines by item code.

Total by Serial Number - Check this box to total the lines by serial number.

Summarize Svc Item Entry - If this box is checked the service item entry information will be limited to one line each.

Print Lines - Check this box to print the lines from the service order for each service item entry.

Service History by Service Item Report										
For Service Types: All										
Both Current and History										
										ABC Distribution and Service Corp. (ABC)
Order	Entry	Order Dt	Customer	Type	Complaint	Failure	Tech	Status	Cmpl Dt	Cur/Hist
1001-HON-H252 - HON 2 DRAWER LETTER FILE W/O LK										
Svc Item: 1001-HON-H252 Serial: 0100111-0000000										
000053	000001	8/4/2009	00-0001001	ChR		HON 2 DRAWER LETTER FILE W/O LK			8/4/2009	History
			Line Item: //RLABOR			UNKNOWN	ISK	U		
							Labor			Entry 000001 Total: 150.00
000071	000001	10/20/2009	02-ORANGE	Std			ISK	C	10/20/2009	Current
			Line Item: //W1YR-PARTS							Entry 000001 Total: 25.00
										Serial 0100111-0000000 Total: 175.00

Failure Analysis Report

Report Setting: STANDARD Save

Description: Failure Analysis Report

Setting Options

Type: Public Print Report Settings: Number of Copies: 1

Default Report: Three Hole Punch: Collated:

Sort Report By

Group By 1: Customer Number Group By 2: None Group By 3: None Group By 4: None

Report Columns: Monthly Number of Columns: 12 As of date: 2/15/2013

Failure Codes to Analyze

Service Item Entry Failure: Line Item Failure: Technician Diagnostic Code:

Service Order Types to Print

All Types: Refurbish: Credit Return:

Standard Service: Price Quotes: Exchange:

Include Updated Svc Items Only: Ignore Blank Failure Reason: Print Details:

Selections

Select Field	Operand	Value
Service Order Number	All <input type="text"/>	
Customer Number	All <input type="text"/>	
Customer Name	All <input type="text"/>	
Bill To State	All <input type="text"/>	
Product Line	All <input type="text"/>	
Technician	All <input type="text"/>	

HP Photosmart C4600 series (redirected) Keep Window Open After

Print Preview

The Failure Analysis Report will count the occurrence of failures according to the parameters you specify on the screen and will display them in columns by Month, Quarter or Year.

A failure code can be a Failure Reason on the service item entry, a failure reason on a line, or a Technician Diagnostic Code, depending on the selections you make. Each unique failure code will be counted as one for each service item entry. That means that if you have five lines with the same failure code on them, they will only count as one failure, but if three lines have one failure reason code, NOISY, and two lines have a failure reason code, ABUSE, then the program will count two failures, one will show up on the report as NOISY and one will show for ABUSE.

Note - it is important to understand that the same service item entry can be selected and counted twice on this report because each service item entry can have multiple failures.

Sort Report By - You can select up to four breaks and totals for your report. You pick the field by which you want to break by click the drop box for each Group By.

In the example above, we have chosen to group by Failure Code, then Product Line, the item code of the service item, and then Complaint Code. You can see what other options are available in the image above.

Report Columns - Select if you wish to see columns by Month, Quarter or Year.

Number of Columns - Select how many Months, Quarters or Years you wish to show across the page. The maximum number of columns is twelve.

As of Date - The cutoff date for the report. The program will automatically calculate the end of the month for the date you enter and will include all failures within that month.

Failure Codes to Analyze - Select if you wish to count service item entry failure reason codes, line failure reason codes and/or technician diagnostic codes. You can include all of them or select one or two.

Service Order Types to Print - Check the boxes to determine which service types to include. This looks at the service type assigned to the service item entry and will exclude those that are not checked.

Include Updated Svc Items Only - Most of the time, a failure is not analyzed unless we are sure that the repair has been complete. This box would typically be checked.

Ignore Blank Failure Reason - If you do not regularly use failure reason codes, you can still make use of this report by clearing this box so that even those service item entries without a failure reason can be counted.

Print Details - Check this box to print the line detail that goes with each service item entry.

Failure Analysis Report
 Sorted by Product Line, Failure
 For Service Types: All

ABC Distribution and Service Corp. (ABC)

	03/07	06/07	09/07	12/07	03/08	06/08	09/08	12/08	03/09	06/09	09/09	12/09
	-05/07	-08/07	-11/07	-02/08	-05/08	-08/08	-11/08	-02/09	-05/09	-08/09	-11/09	-02/10
Product Line DC - DATA COMMUNICATIONS												
Failure UNKNOWN - Unknown									1			
Product Line DC Total:	0	0	0	0	0	0	0	0	1	0	0	0
Product Line WF&A - WORKSTATION FURN & ACCESS												
Failure UNKNOWN - Unknown						1					1	1
Product Line WF&A Total:	0	0	0	0	0	1	0	0	0	0	1	1
Report Total:	0	0	0	0	0	1	0	1	0	1	1	1

Warranty Renewal Report

The screenshot shows the Sage Warranty Renewal (SMC) 2/16/2013 window. The interface includes the following sections:

- Report Setting:** STANDARD (with a search icon and a Save button).
- Description:** Warranty Renewal.
- Setting Options:**
 - Type: Public (dropdown)
 - Print Report Settings:
 - Number of Copies: 1 (spinner)
 - Default Report:
 - Three Hole Punch:
 - Collated:
- Sort Report By:** Customer Number (dropdown) and Print Items with No Warranty:
- Beginning Date:** 2/16/2013 (calendar icon) and **Ending Date:** 3/18/2013 (calendar icon). **Customer Type:** Current User (dropdown).
- Data to Print:** All , Original Warranty , Extended Warranty , Repair Warranty .
- Selections Table:**

Select Field	Operand	Value
Customer Number	All	
Item Code	All	
Serial No	All	
- Bottom Bar:** HP Photosmart C4600 series (redirected) dropdown, Keep Window Open After Print Preview buttons, and Print, Preview, Setup buttons with a help icon.

The Warranty Renewal Report is useful to find all the service items for which one or more of the warranties is about to expire. You enter a date range and select which warranties to look at, and the report will find all the warranties expiring in that range. It will then print out all the information you need to contact the current user or the original sold-to customer.

Sort Report By -

The close-up shows the 'Sort Report By' dropdown menu with the following options: Customer Number (selected), Item Code, and Serial Number. Below the menu, the 'Beginning Date' field contains the text 'Customer Number'.

Select how you want the data on the report to be sorted.

Print Items with No Warranty - Check this box to also select those service items that do not have a warranty at all. This could be helpful if you are trying to sell extended warranties or service plans.

Beginning Date - Enter the beginning date of the range. If the warranty expiration falls before this, it will not appear on the report.

Ending Date - Enter the end date of the range. If the warranty expiration falls beyond this, it will not appear on the report.

Customer Type - Select whether you wish to print the Original Sold-To or the Current User information on the report.

Data to Print - Check the box to indicate which warranty you wish to show on the report.

Open Demo/Loaner Report

The screenshot shows the 'Open Demo/Loaner (SMC) 2/16/2013' window with the following settings:

- Report Setting: STANDARD
- Description: Open Demo/Loaner
- Setting Options:
 - Type: Public
 - Print Report Settings:
 - Number of Copies: 1
 - Default Report:
 - Three Hole Punch:
 - Collated:
- Sort Report By: Customer Number
- Demo/Loaners to Include: All
- Data to Print:
 - All Valuation Types
 - Both Demo and Loaner
- Selections Table:

Select Field	Operand	Value
Customer Number	All	
Item Code	All	
Serial Number	All	
Warehouse Code	All	

At the bottom, there are buttons for 'Print', 'Preview', and 'Setup', along with a printer icon and a 'Keep Window Open After' section with checkboxes for 'Print' and 'Preview'.

The Open Demo/Loaner Report will show all the parts or items that you have sent out to customers on demo or loan. A demo is typically sent out from a sales order or invoice. A loaner generally is sent out for the customer to use while a service item is being repaired.

Sort Report By -

The 'Sort Report By' dropdown menu is open, showing the following options:

- Customer Number
- Item Code
- Serial Number
- Customer Number

Select if you wish to sort the report by item code, serial number or customer

Demo/Loaners to Include -

Demo/Loaners to Include All

- All
- Updated Svc Entries Only
- Closed and Updated Svc Entries Only

Select if you wish to include on the report All, Updated Service Entries only or Closed and Updated Service Entries only.

Data To Print -

Data to Print All Valuation Types Both Demo and Loaner

Selections All Valuation Types

Select Field Serialized Items Only

Customer Number Lotted Items Only

Fifo, Lifo, Avg, Std Only Value

All

Select the valuation methods you wish to include on the report and whether the report should include just demo units, just loaner units or both demo and loaners units.

Open Demo Loaner Report
 Sorted By Customer Number
 Both Demos and Loaners All Valuations ABC Distribution and Service Corp. (ABC)

Division: 01 EAST SALES OFFICE

Item Code	Serial No	Wts	Valtn	Invoice	Inv Date	Svc Order	Entry No	Demo/Loan	Qty Shpd	Qty Rtrnd	Qty Left
Customer: ABF American Business Futures											
1001-HON-H252	01ABF	001	Non	0100063	7/25/2008			Demo	1	0	1
HON 2 DRAWER LETTER FILE											
1001-HON-H254	01ABF	000	Non	0100066	7/25/2008	0000005		Loan	1	0	1
HON 4 DRAWER LETTER FILE											
DEMQUFO	01ABF	028	Non	DEMO1	2/3/2010			Demo	1	0	1
Demo Lifo Part for Phil											
GB-MD750	14-482	001	Serial	0100069	1/13/2009	0000011	000001	Loan	1	0	1
GB Fancy Router and Firewall											
Repair Item: GB-MD750 / 13-584											
										Customer ABF Total:	4
										Division 01 Total	4

Service Item Report

sage Service Item Report (PRO) 10/21/2013

Report Setting: STANDARD [magnifying glass icon] Save

Description: Service Item Report

Setting Options

Type: Public [dropdown] Print Report Settings: Number of Copies: 1 [up/down arrows]

Default Report: Three Hole Punch: Collated:

Sort Report By: Item Code [dropdown]

Print Warranties: Print Sold To Addresses:

Print End User Addresses: Print Purchase Order Information:

Selections

Select Field	Operand	Value
Svc Item Code	All [dropdown]	
Serial Number	All [dropdown]	
Sold To Customer	All [dropdown]	
End User Customer	All [dropdown]	

HP Photosmart C4600 series (redirected) Keep Window Open After Print: Preview: Print Preview Setup [help icon]

Service Item Report is where you can view a report on a specific service item.

Utilities Menu

Expired RMA Register and Update

Expired RMA Register (SMC) 2/16/2013

Remove Service Orders Dated on or Before: 2/16/2013

Remove RMA Expired on or Before: 2/16/2013

Include/Purge Blank RMA Numbers:

Print Service Item Entries:

Print Lines:

Select Field	Operand	Value
Service Order Number	All	
Customer Number	All	
Salesperson	All	

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Print Preview Setup ?

The Expired RMA Register will find all the service orders that have expired. You can select the date range and other parameters. Once the report is run, you can select to update and all the listed orders will be purged.

Remove Service Orders Dated on or Before - This is the cutoff date. If the order date falls before this date and all the other criteria are met, the order will appear on the register.

Remove RMA Expired on or Before - This is the RMA expiration date. If the RMA Expiration date on the service order header is on or before the date entered here and all other criteria are met, the order will appear on the register.

Include/Purge Blank RMA Numbers - Check this box if you wish purge service orders with the blank RMA number.

Print Service Item Entries - Check this box if you wish to show the service item entry on the register before purging.

Print Lines - Check this box if you wish to show the lines on the register before purging.

Service History Purge

Remove Service Orders Dated on or Before: 2/17/2011

Remove Service Orders Completed on or Before: 2/17/2011

Remove Deleted Service Orders Only:

Remove Out of Service Service Items Only:

Print Service Item Entries:

Print Lines:

Select Field	Operand	Value
Service Order Number	All	
Customer Number	All	

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Print Preview Setup

The Service History Purge is a good way to get rid of service history, not current service orders, that are old and no longer needed on file.

Service Item Purge

Remove Service Items Sold on or Before: 2/18/2008

Out of Service Only:

Company Owned Only:

Out of Warranty Only:

Select Field	Operand	Value
Service Item Code	All	
Serial Number	All	
Sold To Customer	All	
End User Customer	All	

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Print Preview Setup

Service Item Purge allows you to find and remove service items that were sold on or before a certain date and that meet other requirements. It is best to first purge service history first to make sure there is no history for these items.

Sales History Conversion

This utility is designed to assist you in restoring lost service items and warranty information.

This utility reads your invoice history detail file and extracts information required to set up the original item and serial number, and to add extended warranty information where appropriate.

You will need to have completed the entry of the warranty information in this module and the Service Tracking options in Inventory Item Maintenance before running this utility.

If you choose to correct item descriptions and customer addresses, the program will make a second pass through all the service items on file to compare the description to the I/M item master and/or the sold-to and end user addresses to the A/R customer master.

Beginning Invoice Date: 1/1/1980

Ending Invoice Date: 12/31/2599

Restore Missing Service Items:

Create Service Items for Non-Serialized Items:

Restore Warranties Sold:

Assign Original Warranty if Blank:

Correct Item Descriptions:

Correct Customer Names and Addresses:

Restore Missing Purchase Information:

Buttons: Proceed, Cancel, ?

The Sales History Conversion Utility will read through the A/R Invoice History and recreate any Service Items that are missing. It will also update extended warranties that were sold through S/O invoicing when the service item was first shipped.

This utility is useful not only for restoring master file data after a system crash or file corruption, but it can be used to create Service Items quickly if you have just begun to use Service Center, but have been using Sage 100 ERP® S/O and I/M for a while.

Note that you must set the Service Tracking options for all the items in inventory for which you wish to create Service Items. For more information, see Service Item Setup in Inventory Management.

If you choose to correct item descriptions and customer addresses, the program will make a second pass through all Service Items on file to compare the descriptions to the I/M item master and/or the sold-to and end user addresses to the A/R Customer Master.

Beginning Invoice Date - Enter the earliest invoice date you wish the program to evaluate when searching the invoice history.

Ending Invoice Date - Enter the latest invoice date you wish the program to evaluate when searching invoice history.

Restore Missing Service Items - Check this box if you want the program to create service items that are missing based upon sales of items in the invoice history lines. If an item code found on an invoice history line is set up to create a service item upon sale, this program will create the appropriate service item from the invoice.

Create Service Items for Non-Serialized Items - Check this box if you wish to create service items for non-serialized items. This is a tricky thing to do. For non-serialized items, the serial number is created on-the-fly based upon the date or the invoice number followed by sequence number. When this program runs, it cannot know what sequence number was used the first time, so it cannot evaluate if the service item is already on file. Check this box only if you are creating service items for units that you are certain have never been set up before. This would be the case if you have just install Service Center for the first time, or just turned on the Track In Service option in the Inventory Management Service Item Setup.

Restore Warranties Sold - If you have used miscellaneous item codes to sell additional warranties on the same invoice that the original service item is sold, check this box to make sure those warranties are also restored.

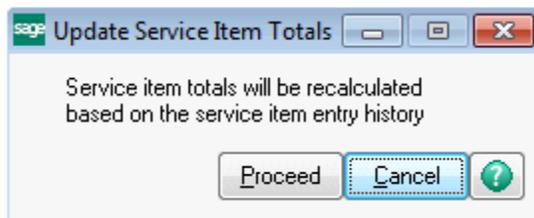
Assign Original Warranty If Blank - If this box is checked, when the program finds an invoice line that sells a product and the service item for that sale already exists, but the original warranty is blank on that service item, it will use the default warranty from the inventory item code to assign the warranty with the beginning warranty date set to the invoice date. This is useful if an inventory item was not correctly set up with a default warranty when it was first sold.

Correct Item Descriptions - Check this box if you want the program to correct the service item description if it does not match the inventory item code description.

Correct Customer Names and Addresses - Check this box if you want the program to change the service item customer name and address, both or the sold-to and the end user, to match the associated A/R customer record.

Restore Missing Purchase Information - Check this box if you want the program to find the original receipt of the serial number and update the service item purchase information based upon that date and the default vendor warranty that was set up in inventory management Service Item Setup.

Update Service Item Totals



The Update Service Item Totals utility will read through the service history and recalculate the totals for each service item. These totals include:

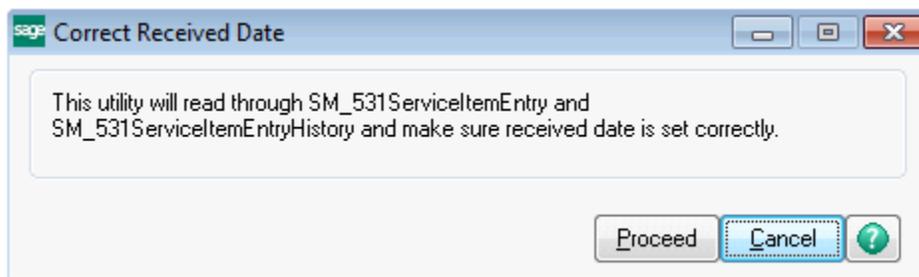
TotalWarrantyHours

TotalWarrantyLaborCost

TotalBillableHours
 TotalServiceLaborCost
 TotalServiceLaborSales
 TotalServiceMaterialCost
 TotalWarrantyMaterialCost
 TotalMaterialSales

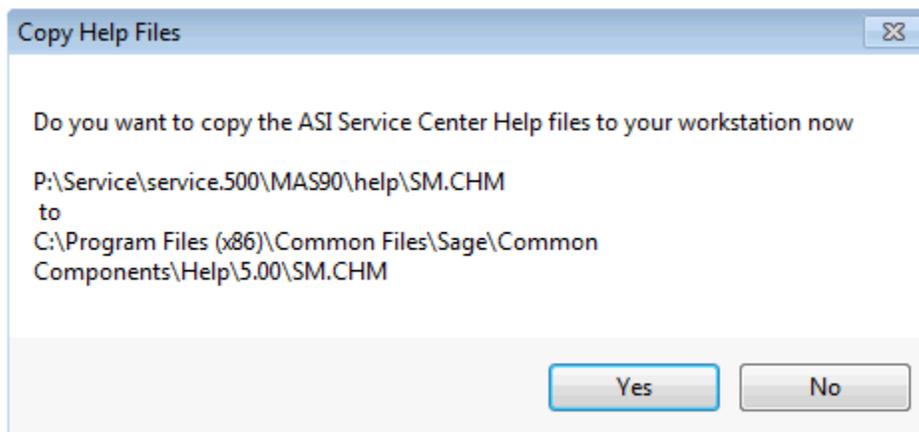
The primary reason for running this utility is when you have upgraded from a legacy version of Service Center (Service & Warranty Management) which did not maintain these totals. It does not do any damage to run it again if you are not sure.

Correct Received Dates



In an early version of Service Center the Actual Received Date was not being set correctly when the status was changed. This utility will read through the service item entry and service item entry history, then read through the status history for each entry, determine the correct received date, then put that received date in the Actual Received date field on the service item entry.

Copy Help Files to Workstation



Help files for Service Center are delivered in a compiled help format (.CHM). For security reasons, Microsoft Windows does not allow this type of file to be viewed across a network connection, so Sage 100 ERP requires that the file be copied to the workstation in a special folder designated for that purpose. Before you can use the pop-up help for Service Center, you must copy the SM.CHM

help file from the Sage 100 ERP\help folder on the server to the special help folder on your workstation.

For each workstation that wishes to use the Service Help Files, simply select the Copy Help Files to Workstation menu option. It prompts to make sure you want to proceed. When you click Yes, the copy is performed.

Remove Update Service Orders



Sage 100 ERP Integrations

Service Center installs as a module in the Sage 100 ERP product line and acts just as any other Sage 100 ERP module would act. It also tightly integrates with Inventory Management, Sales Order and Accounts Receivable. In order for everything to work seamlessly, some changes have been made to other modules and are explained in this section.

Inventory Management

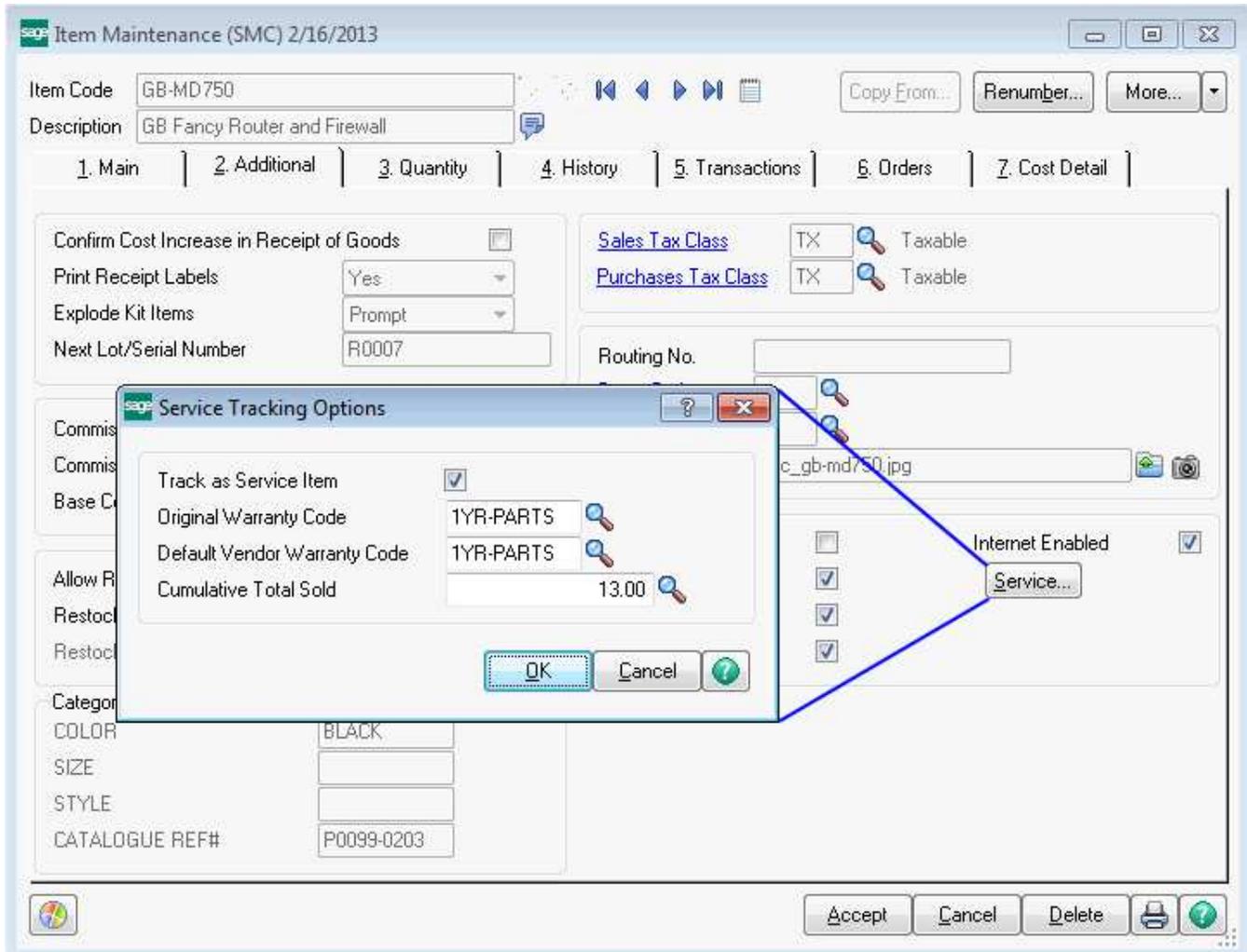
Service Center integrates closely with Inventory Management similarly to Sales Order. There are two specific changes that Service Center makes to inventory Item Maintenance as described below.

- Service Item Setup - Set an item to "track in service" so that a service item is automatically created every time a particular item is sold.
- Service Orders for Item - On the Orders panel in Item Maintenance, you can see which service orders are selling or returning the item code you are viewing.

Service Item Setup

The screenshot shows the 'Item Maintenance (SMC)' window for item 'GB-MD750'. The 'Additional' tab is active, displaying various configuration options. The 'Internet Enabled' checkbox is checked, and the 'Service...' button is circled in red. Other visible settings include 'Sales Tax Class' (TX, Taxable), 'Purchases Tax Class' (TX, Taxable), 'Commission Method' (Percent of Gross Profit), 'Commission Rate' (0.000%), 'Base Commission' (.00), 'Allow Returns' (unchecked), 'Restocking Charge Method' (None), 'Restocking Charge Rate' (.000%), 'Categories' (COLOR: BLACK, SIZE: , STYLE: , CATALOGUE REF#: P0099-0203), and 'Inactive Item' (unchecked). The 'Service...' button is located in the 'Internet Enabled' section.

A new button has been added to the Additional panel in Item Maintenance and Item Inquiry. If you want a new service item to be created each time this item is sold, click this button and set up the default service item creation fields as shown below.



Track as Service Item - Check this box if you want a service item to be created every time this item is sold through Sales Order order processing and invoicing. For more information about service items, take a look at Service Items.

Original Warranty Code - Select a warranty code to assign to each new service item created automatically when this item is sold.

Default Vendor Warranty Code - Select a warranty code to assign as the vendor warranty on the purchase tab of the service item.

Cumulative Total Sold - Each time one of these items is sold and creates a service item, this counter is incremented.

Service Orders for Item

Item Code: GB-MD789
Description: MODEM 300

1. Main | 2. Additional | 3. Quantity | 4. History | 5. Transactions | 6. Orders | 7. Cost Detail

Purchase Order Sales Order Service Order

Svc Order...	Type	Customer No.	Customer Name	Order Date	Whse	Ordered
0000112	Stand...	01-BPTEST	BP Test Customer	11/11/2009	000	2.00
0000162	Stand...	02-BAYPYRO	Bay Pyrotronics C...	3/24/2010	000	1.00-
0000165	Stand...	02-ATOZ	A To Z Carpet Su...	4/27/2010	000	1.00-
0000071	Stand...	01-ABF	American Busines...	2/18/2013	099	1.00-

Ordered: 1.00-

Accept Cancel Delete [Print] [Help]

Service G/L accounts

Product Line: C&A
Description: CABLES & ACCESSORIES

1. Main | 2. Accounts

Account	G/L Account No.	Description	Post by W/hs
Purchases Clearing	200-03-00	Purchases clearing account	<input type="checkbox"/>
PO Variance Adjustment	960-00-04	Miscellaneous	<input type="checkbox"/>
Mfg Variance Adjustment	960-00-04	Miscellaneous	<input type="checkbox"/>
RMA Scrap	116-00-00	Inventory-Scrap	<input checked="" type="checkbox"/>
Repairs In Process	117-00-00	Inventory-Repairs in Process	<input checked="" type="checkbox"/>
Repairs Clearing	118-00-00	Inventory-Repairs Clearing	<input checked="" type="checkbox"/>
Service Material Sales	400-01-01	Distribution sales - East	<input type="checkbox"/>
Service Material Cost	450-01-01	Purchases - East	<input type="checkbox"/>
Service Wty Material Cost	745-00-04	Utilities	<input type="checkbox"/>
Labor Sales	400-02-00	Service fees	<input type="checkbox"/>
Labor Cost	195-00-00	Software costs (net)	<input type="checkbox"/>
Labor Warranty Cost	450-01-02	Purchases - West	<input type="checkbox"/>
Service Returns	425-00-02	Returns & allowances - West	<input type="checkbox"/>

Buttons: Accept, Cancel, Delete, Print, Help

Several new G/L accounts have been added to the Product Line Accounts.

Service Material Sales - This account will be used as a default Sales account when a new item has been added to the grid on the lines panel of the service order if the Use Service G/L Fields from Product Line option is selected in Service Order Options.

Service Material Cost - This account will be used as a default Cost of Goods Sold account when a new item has been added to the grid on the lines panel of the service order if this item is not covered by warranty and the Use Service G/L Fields from Product Line option is selected in Service Order Options.

Service Warranty Material Cost - This account will be used as a default Cost of Goods Sold account when a new item has been added to the grid on the lines panel of the service order if this item is covered by warranty and the Use Service G/L Fields from Product Line option is selected in Service Order Options

Labor Sales - This account will be used as a default Sales account when a new Labor Item has been added to the grid on the lines panel of the service order if the Use Service G/L Fields from Product Line option is selected in Service Order Options.

Labor Cost - This account will be used as a default Cost of Goods Sold account when a new Labor Item has been added to the grid on the lines panel of the service order if this item is not covered by warranty and the Use Service G/L Fields from Product Line option is selected in Service Order Options.

Labor Warranty Cost - This account will be used as a default Cost of Goods Sold account when a new Labor Item has been added to the grid on the lines panel of the service order if this item is covered by warranty and the Use Service G/L Fields from Product Line option is selected in Service Order Options

Service Returns - This account will be used as a default Sales account when a new item has been added to the grid on the lines panel of the service order when you are entering parts and charges for a Credit Return or an Exchange service item entry and the Use Service G/L Fields from Product Line option is selected in Service Order Options.

Sales Order

Service Center is tightly integrated to Sales Order in several ways. The most obvious is that when you create an invoice from a service order, the invoice is in Sales Order Invoice Data Entry or Sales Order Shipping Data Entry. You can also use Sales Orders and Invoices to send out demos or loaners which are then tracked in the Demos and Loaners subsystem, will appear on the Open Demo/Loaner Report, and can be viewed in Demo/Loaner Record Maintenance. Finally, Service Center adds new fields to the sales order and invoice tables that you can then add to forms and reports.

Demo Loaner Lines

The screenshot displays the SAP Sales Order Entry (ABC) 2/11/2013 interface. The main table shows three lines:

	Item Code	Back Ordered	Unit Price	Extension	Comment
1	/C	.00	.000	.00	
2	GB-MD791	.00	.000	.00	
3		.00	.000	.00	

The secondary grid below shows the following fields:

Vendor Number	01-STEVE
PO Number	
PO Req Date	
Demo/Loan	Loaner

A red circle highlights the Demo/Loan dropdown menu, which is currently set to Loaner. The Total Amount is .00.

On the Sales Order Entry and Invoice Data Entry lines panel a new field has been added to the secondary grid to designate that the item code line highlighted is a demo or a loaner. If you set this flag to Demo or Loaner, when the invoice is updated the item is not actually relieved from inventory, but is transferred to the Default Target Warehouse for Demo/Loaner Items on the Service Center Options Main panel. You can then track that item on the Open Demo/Loaner Report

and view it in Demo/Loaner Record Maintenance on the Setup menu. For more information about demo/loaner processing, take a look at Demos and Loaners in the Helpful Hints section.

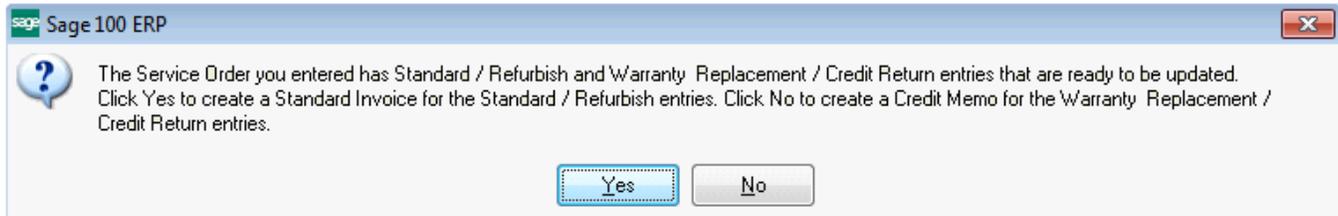
Invoice Data Entry

The screenshot displays the 'S/O Invoice Data Entry (ABC) 2/11/2013' window. At the top, there are navigation buttons and fields for 'Invoice No.' (0100167) and 'Batch' (00064). Below this is a tabbed interface with '1. Header' selected. The main area contains several sections: 'Invoice Date' (2/11/2013), 'Invoice Type' (Standard Invoice), and 'Sales Order Number'. A 'Customer No.' field is present with a search icon. On the left, there's a section for 'Order Status' (1 Step), 'Ship Date' (2/11/2013), 'Due Date', 'Discount Date', 'Warehouse' (001), and 'EAST WAREHOUSE'. The right side includes 'Apply to Inv #', 'Ship To Addr', 'Terms Code' (00), 'Ship Via' (FOB), 'Confirm To', 'E-mail', 'Fax No.', 'Comment', 'Salesperson', and 'Split Comm.' (No). A 'Service Order Number' field (0000145) is circled in red at the bottom. At the very bottom, there are 'Quick Print', 'Accept', 'Cancel', 'Delete', and a help icon.

A new field has been added to the Invoice Data Entry header. Rather than entering a sales order number to invoice, you can enter a Service Order Number. You can also use the lookup button or F2 to show a list of service orders. The field has been placed at the bottom of the panel to avoid rearranging so many standard fields. You can use Custom Office to move the field wherever you prefer it to be.

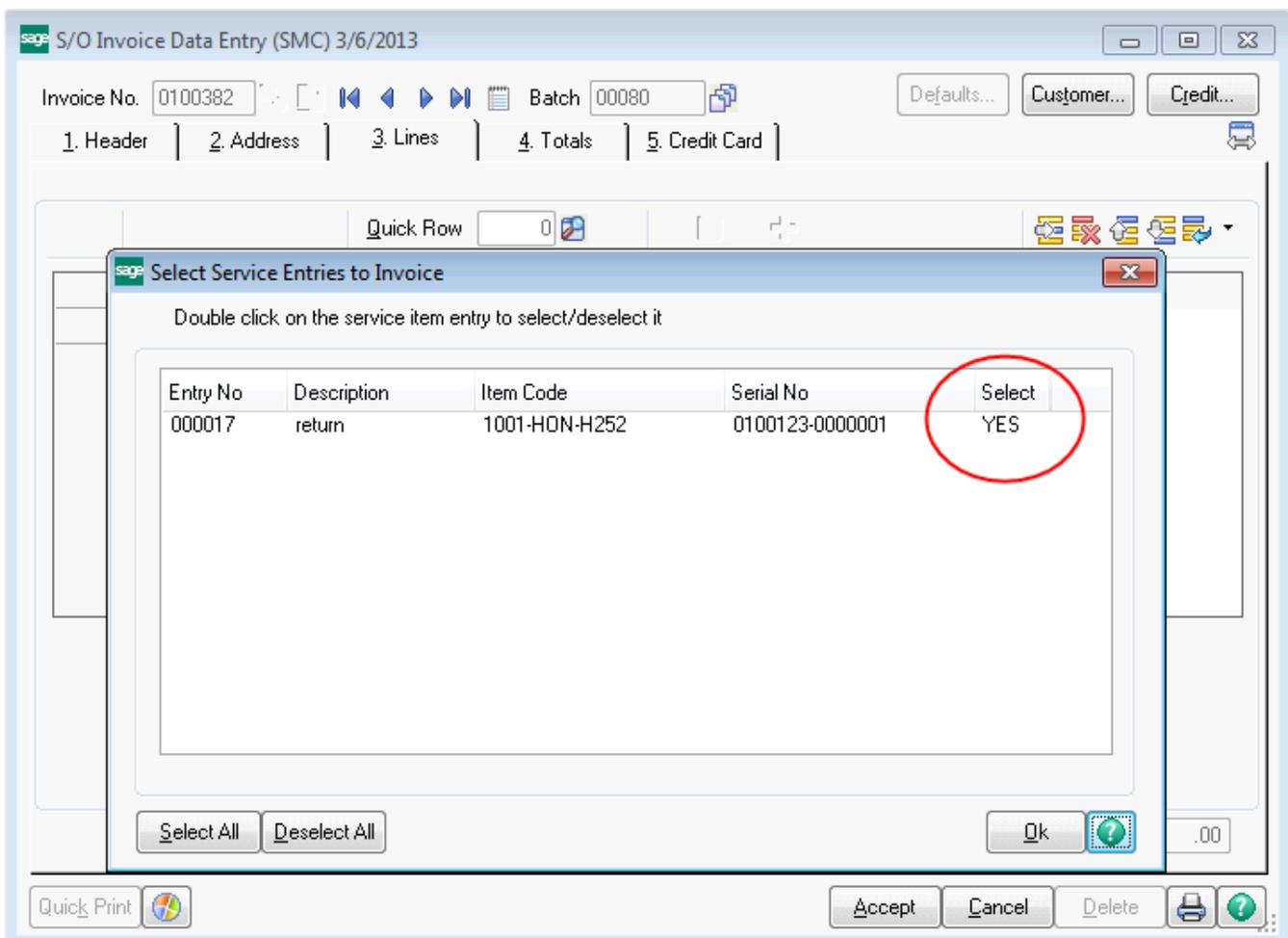
Note - In order for a service order to be invoiced at least one of the service item entries must have a status that indicates it is ready to update and create an invoice. For more information about status codes take a look at Service Order Status Maintenance.

Once you enter or select a service order, the program will review all the service item entries looking for those that are ready to bill. If some service item entries will create credit memos (Credit Return and Exchange) and some will create invoices (Standard and Refurbish), the following message will appear.



The sample order, 0000145, has both credit return and standard service item entries, so it gives a choice to click Yes to create an invoice from the Refurbish and Standard service item entries or click No to create a credit memo for the Credit Return and Exchange service item entries.

Credit Memo - If you click No, the Invoice Type is changed to Credit Memo. Once you fill out the header fields as desired and click on the Lines panel, the program will prompt for which service item entries you wish to invoice.



You must select which of the service item entries you wish to invoice. Double click on a row to change the Select column to YES or NO. The Select All button on the lower left will automatically set them all to YES while the Deselect All button will set all the rows to NO.

Once you have selected all the service item entries you wish to ship, click OK and all the associated lines from the service order will be copied to the invoice. Note that the item being returned is shown on the first line. If you set the New Item Code and New Serial Number when you entered the

service item entry, you will not see the original item code for the service item, but the new item code. The New Item Code and New Serial Number will be put back into inventory. For more information see Service Item Entry Columns.

Sage S/O Invoice Data Entry (SMC) 3/4/2013

Invoice No. 0100182 Batch 00078

1. Header | 2. Address | 3. Lines | 4. Totals | 5. Credit Card

Quick Row 2

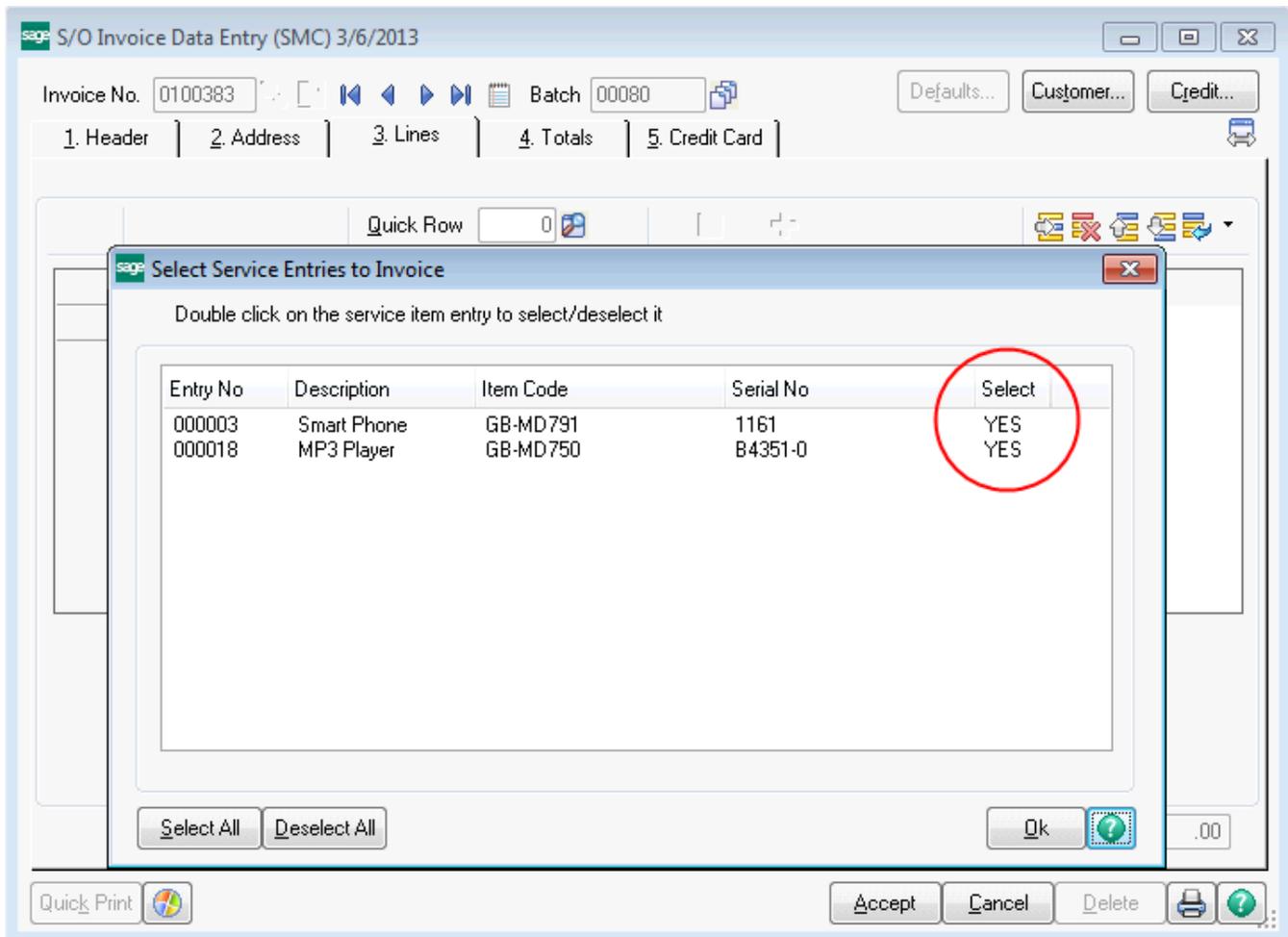
	Item Code	Ordered	Shipped	Unit Price	Extension	Comment
1	1001-HON-H252	1.00	1.00	84.000	84.00	
2		.00	.00	.000	.00	

Total Amount 84.00

Quick Print

Accept Cancel Delete

Invoice - Click Yes to create an invoice from the Refurbish and Standard Service Item entries. Once you've done that, the Invoice Type is set to Invoice (rather than Credit Memo) and you can proceed to edit any of the header fields you wish to change. Once you click on the Lines panel, the dialog will pop up asking you to select the service item entries to invoice.



You must select which of the service item entries you wish to invoice. Double click on a row to change the Select column to YES or NO. The Select All button on the lower left will automatically set them all to YES while the Deselect All button will set all the rows to NO.

Once you have selected all the service item entries you wish to invoice, click OK and all the associated lines from the service order will be copied to the invoice lines. Note that there is a comment line at the top that represents the actual service item.

Sage S/O Invoice Data Entry (SMC) 3/4/2013

Invoice No. 0100183 Batch 00078

Defaults... Customer... Credit...

1. Header | 2. Address | 3. Lines | 4. Totals | 5. Credit Card

Quick Row 4

	Item Code	Warehouse	Ordered	Shipped	Comment
1	/C		.00	.00	Standard service item. Item Code: GB-MC...
2	6655	001	1.00	1.00	
3	/REPAIR LABOR		3.00	3.00	
4			.00	.00	

Unit Of Measure	
Description	
Extension	.00
Back Ordered	.00
Unit Price	000

Total Amount 434.00

Quick Print Accept Cancel Delete

Once the lines are copied to the invoice, you can proceed as you normally would to ship the items.

Add Lines - If you have copied in one service item and then decide that you can ship a second or more service items, click the Add Lines button and select additional service items entries just the way you did before.

Cancel or Delete - If you cancel a shipment record before it is saved, or if you delete an existing shipper that came from a service order, the service order status is changed to the Status To Use if Invoice Deleted from the Service Center Option Main panel.

Shipping Data Entry

Shipping Data Entry (SMC) 3/4/2013

Shipper ID 1 Ship Date 3/4/2013 Order No. Batch No. 00079
 Shipping No. 0100186 Ship Status New SO Created By
 Customer No. 01-ABF American Business Futures

1. Lines | 2. Shipping | Service Order Number 0000051

Item Code Quick Row 1 Pkg 0001

	Item Code	Ordered	Shipped	Back Ordered	Comment
1	/C	.00	.00	.00	Standard service item. Item Code: TEST1...
2	2480-8-50	1.00	1.00	.00	

Description
Warehouse
U/M
Package

Add Lines

Quick Print Auto Increment Accept Cancel Delete

A new field has been added to the Shipping Data Entry header. Rather than entering a sales order number to ship, you can enter a Service Order Number. You can also use the lookup button or F2 to show a list of service orders.

Note - In order for a service order to be shipped at least one of the service item entries must have a status that indicates it is ready to update and create an invoice. For more information about status codes take a look at Service Order Status Maintenance.

Once you enter or select a service order, the program will show a list of service item entries on that order that are complete and ready to invoice. Since Shipping Data Entry cannot create credit memos, only Standard and Refurbish service types will show on this selection panel.

Shipping Data Entry (SMC) 3/4/2013

Shipper ID: 1 Ship Date: 3/4/2013 Order No.: Batch No.: 00079
 Shipping No.: Ship Status: SO Created By: Customer No.: Service Order Number: 0000051

1. Lines 2. Shipping

Item Code

Select Service Entries to Invoice

Double click on the service item entry to select/deselect it

Entry No	Description	Item Code	Serial No	Select
000001	000001	TEST1	TEST1	YES
000002	000002	TEST2	TEST2	NO
000003	000003	TEST3	TEST3	NO

Select All Deselect All Ok

You must select which of the service item entries you wish to invoice. Double click on a row to change the Select column to YES or NO. The Select All button on the lower left will automatically set them all to YES while the Deselect All button will set all the rows to NO.

Once you have selected all the service item entries you wish to ship, click OK and all the associated lines from the service order will be copied to the shipping record. Note that there is a comment line at the top that represents the actual service item.

Shipping Data Entry (SMC) 3/4/2013

Shipper ID: 1 Ship Date: 3/4/2013 Order No.: Batch No.: 00079
 Shipping No.: 0100186 Ship Status: New SO Created By:
 Customer No.: 01-ABF American Business Futures

1. Lines 2. Shipping Service Order Number: 0000051

Item Code: Quick Row: 1 Pkg: 0001

	Item Code	Ordered	Shipped	Back Ordered	Comment
1	/C	.00	.00	.00	Standard service item. Item Code: TEST1...
2	2480-8-50	1.00	1.00	.00	

Description: Warehouse: U/M: Package:

Add Lines

Quick Print Auto Increment Accept Cancel Delete [Printer Icon] [Help Icon]

Once the lines are copied to the shipping record, you can proceed as you normally would to ship the items.

Add Lines - If you have copied in one service item and then decide that you can ship a second or more service items, click the Add Lines button and select additional service items entries just the way you did before.

Cancel or Delete - If you cancel a shipment record before it is saved, or if you delete an existing shipper that came from a service order, the service order status is changed to the Status To Use Invoice Deleted from the Service Center Option Main panel.

Sales Order Forms

Service Center creates invoices and credit memos in the Sales Order invoicing system. To make the invoice forms more useful for customers, several new fields are added to the work tables so they can be optionally added to the Crystal Reports form for invoices. All fields added according to Sage standards.

D531DemoLoanerLine - "D" if this line is a demo and "L" if it is a loaner line. See Demo Loaner Lines.

D531TechnicianCode - Technician code from the service order line. See Line Columns.

D531ServiceOrderDetailLineKey - Combine with D531ServiceOrderNo to link to the service order line. If this is history, D531HeaderSeqNo is also necessary.

D531ReplacedItem - If the invoice is shipping out a replacement for an Exchange service item entry, the original item code from the service item being replaced will be here. See Create Loaner or Replacement.

D531ReplacedSerialNo - If the invoice is shipping out a replacement for an Exchange service item entry, the original serial number from the service item being replaced will be here. See Create Loaner or Replacement.

D531ServiceItemEntryLineKey - Combine with D531ServiceOrderNo to link to the service item entry record. This is also the Service Item Entry number. If printing from history, D531HeaderSeqNo is also necessary for the link.

D531ServiceOrderNo - The service order number that created this invoice.

D531HeaderSeqNo - The header sequence of the service order if printing from history.

D531ReturnItem - If "Y", this is an item being returned to stock because of a Credit Return or a Warranty Replacement service item entry.

D531NewItemCode - For refurbish, credit return or warranty replacement service types you can rename the item code when it's put back in stock. This field holds the new item code you assigned.

D531NewSerial - For refurbish, credit return or warranty replacement service types you can rename the serial number when it's put back in stock. This field holds the new serial number you assigned.

D531NewReturnCost - For credit return or warranty replacement service types you can assign a new cost when it's put back in stock. This field holds the new cost you assigned.

D531OldItemCode - For refurbish, credit return or warranty replacement service types you can rename the item code when it's put back in stock. This field holds the old item code from the original service item.

D531OldSerial - For refurbish, credit return or warranty replacement service types you can rename the serial number when it's put back in stock. This field holds the old serial number from the original service item.

D531ServiceItemLine - If "Y" this is the comment line (or return item line) that represents the actual service item entry you created on the service order.

D531ServiceItemCode - This contains the service item entry's item code. This is the item that was repaired.

D531ServiceItemSerialNo - This contains the service item entry's serial number. This is the item that was repaired.

D531ServiceItemDesc - This contains the description of the service item that was repaired.

D531ProblemDescription - This contains the long problem description from the service item entry.

D531UnderWarranty - If "Y" this service item entry was considered to be under warranty on the service order date.

D531FromWarrantyDate - The beginning of the warranty period for the service item entry.

D531WarrantyExpirationDate - The ending of the warranty period for the service item entry.

Serial Numbers List

Sage Sales Order Entry (SMC) 3/6/2013

Order Number: 0000282

1. Header | 2. Address | 3. Lines | 4. Totals | 5. Credit Card | User: Julia

	Item Code	Ordered	Back Ordered	Unit Price	Extension	Comment
1	1001-HON-H252	2.00	.00	84.000	168.00	
2		.00	.00	.000	.00	

PO Number	
PO Req Date	
Demo/Loan	
Serial NOs List	ABF1243, FDG4563

Total Amount: 168.00

Buttons: Print Order..., Print Pick..., Recalc Price, Accept, Cancel, Delete, Help

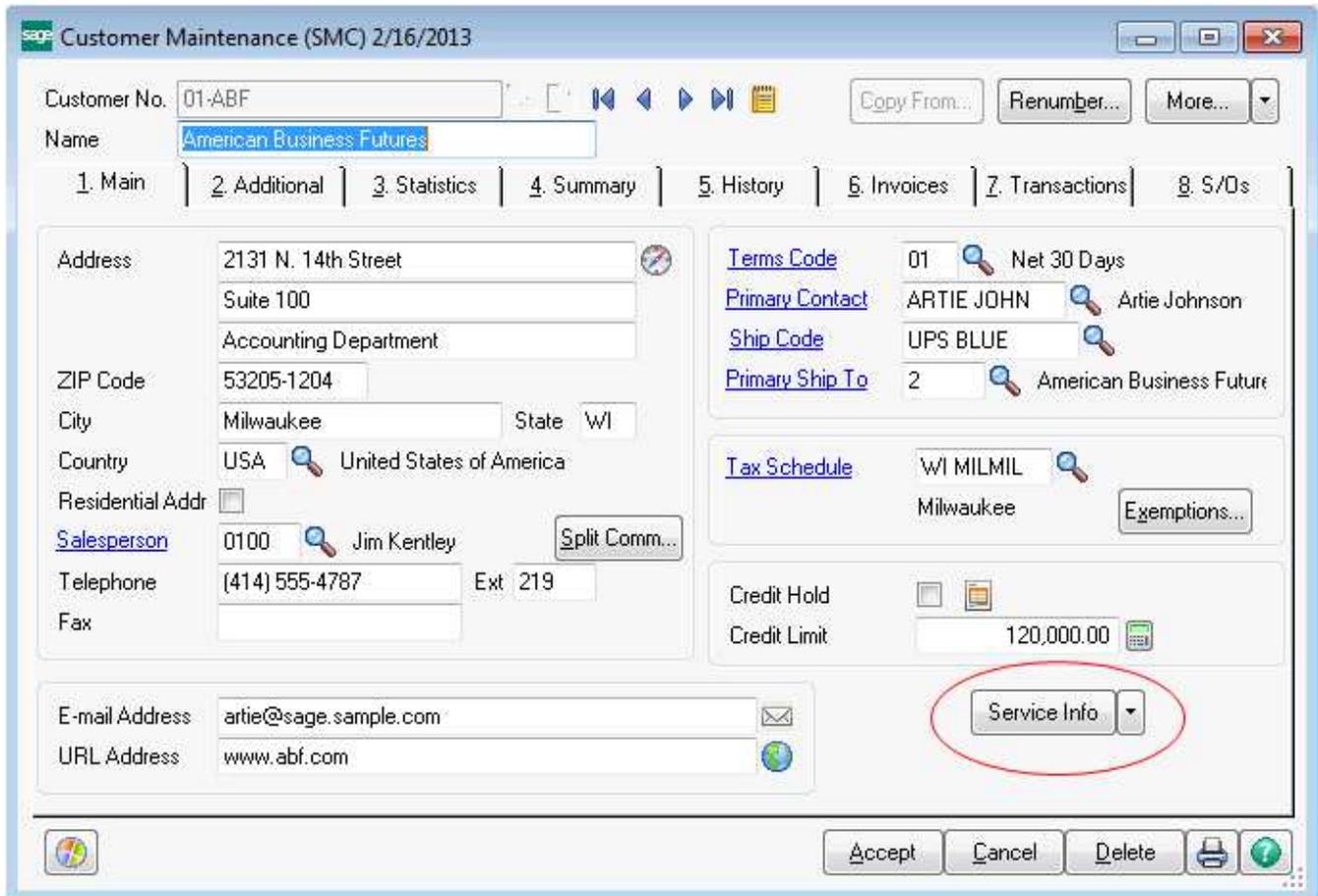
Serial Numbers List - On the Sales Order Entry, Invoice Data Entry and Shipping Data Entry lines panel a new field has been added to the secondary grid to allow entering a list of serial numbers that will be used in creating service items for non-serialized inventory items.

Note This field is not available if the **Get Serial Numbers from Line Entry** box is not checked in Service Order Options (see Line Entry Tab) or the line item is not set up for service tracking (see Service Item Setup).

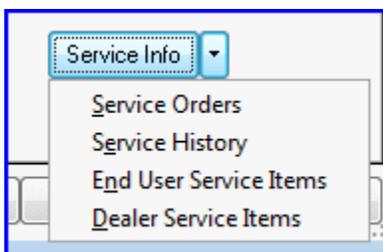
Accounts Receivable

Since Service Center is well integrated to Accounts Receivable, there are added features in this module to give you the information you need for good customer service.

Customer Inquiries



On the A/R Customer Maintenance and A/R Customer Inquiry Main tab, a new button with a drop down menu has been added to allow you to inquire on Service Center records related to that customer. When you click the button you get a drop down menu.



Service Orders - Selecting Service Orders will pop up a lookup window to show all the service orders that are currently in process for this customer. If this customer is assigned on the service order header, that order will display in the list, regardless of who owns the service items being repaired.

Service History - This will show all the service orders, past and present, that exist for this customer. In the list that is popped up, one of the fields will show whether the order shown is history, current, or deleted.

End User Service Items - Selecting this option will pop up a list of all the service items for which this customer is assigned as the End User customer.

Dealer Service Items - The dealer is also the sold-to customer. This option will show all the service items on file for which this customer is assigned as the sold-to customer.

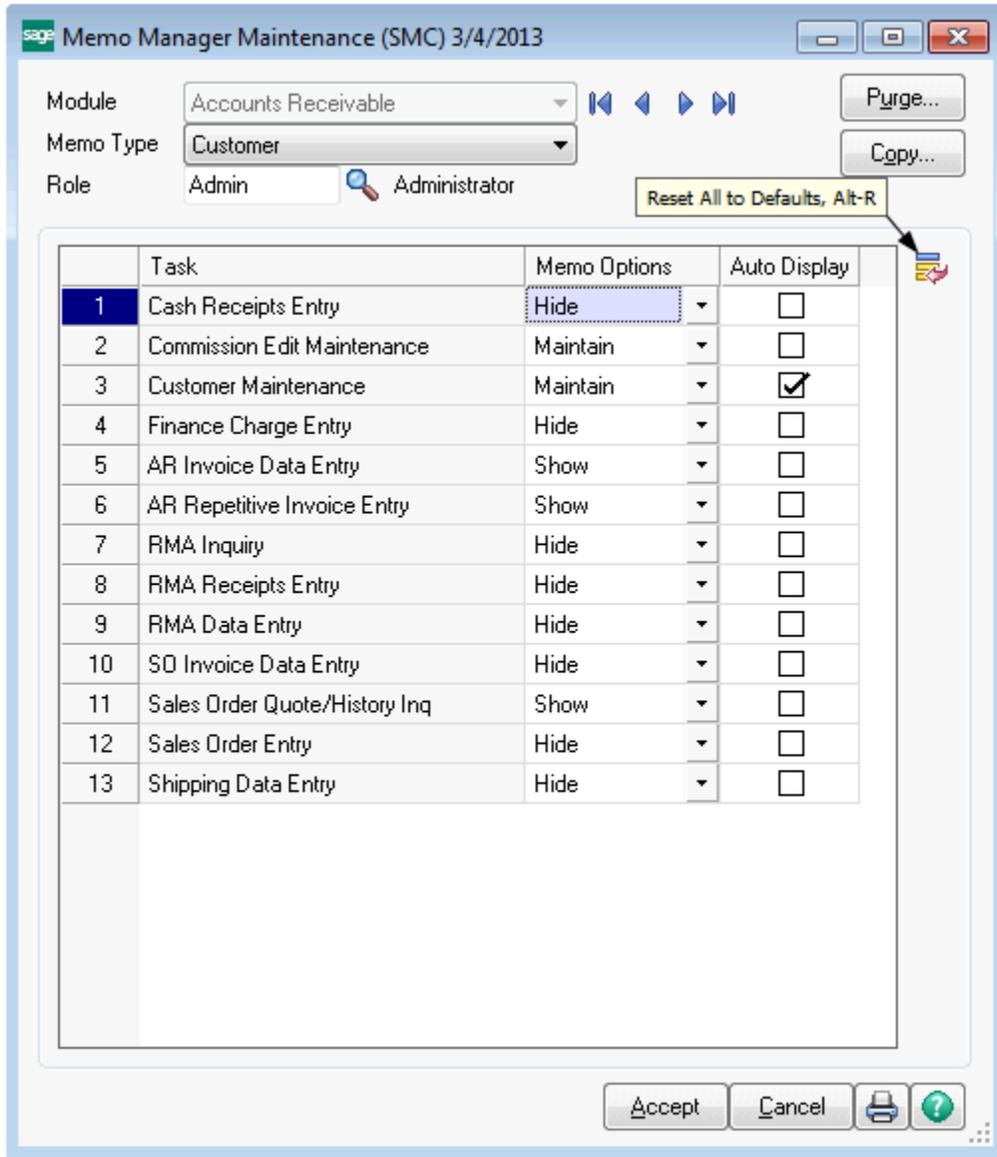
Drill Down -  All of the menu options will bring up an Advanced Lookup showing the selected records. It is valuable to know that in these lookups, you can highlight a record and click the drill down, or Zoom, button to drill into the record. For example, if you are looking at Service Orders, the drill down button will pop up Service Order Entry and all you to edit that order, as long as you have role security clearance to do so. If you have selected one of the service item lookups, you can drill into the Service Item Maintenance for the selected record. When you use the drill down button, you will not lose your place in the list, so it is very useful for making changes quickly to several records associated with a customer.

Open Order Calculation

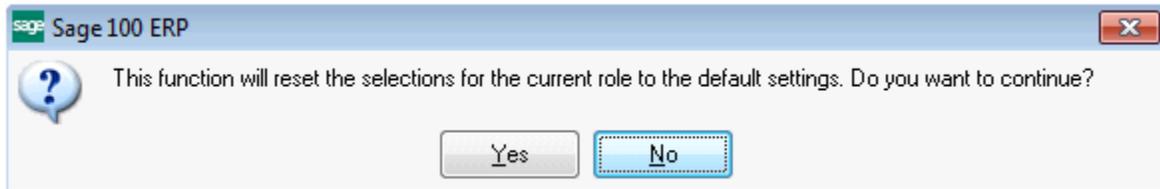
The Customer open order amount is updated every time a sales order or service order is added, changed or deleted. For sales orders, the open order amount does not include quotes and is decreased by the amount that has been invoiced. Service Orders are different. In a service order, the amounts on the totals page are for the complete order, including all the service item entries. Since it is possible to invoice one service item entry without invoicing others, the totals for a service order might include amounts that have already been invoiced. These amounts will still show up in the open order field.

Customer Memos

Service Order Entry allows you to pop up Customer Memos in the same way Sales Order Data Entry does. You can tailor this feature in the A/R Memo Maintenance feature or in Common Information Memo Maintenance. It is possible, though, that Service Order will not show up in the list after you first install Service Center. If you are in A/R Memo Maintenance and have selected Customer type memos for a particular role, check to see if there are four entries for Service Center. Below is a screen with the default entries, lacking any for Service Center. To get the Service Center options to show up, click the Reset All to Defaults button as shown.



When the button is clicked, the system will prompt you to approve the action.



If you answer "Yes", the new options will appear as shown in the screen below. You will need to do this for all roles.

Memo Manager Maintenance (SMC) 3/4/2013

Module: Accounts Receivable

Memo Type: Customer

Role: Admin Administrator

Purge... Copy...

	Task	Memo Options	Auto Display
1	Cash Receipts Entry	Hide	<input type="checkbox"/>
2	Commission Edit Maintenance	Maintain	<input type="checkbox"/>
3	Customer Inquiry	Show	<input checked="" type="checkbox"/>
4	Customer Maintenance	Maintain	<input checked="" type="checkbox"/>
5	Finance Charge Entry	Hide	<input type="checkbox"/>
6	AR Invoice Data Entry	Show	<input type="checkbox"/>
7	AR Repetitive Invoice Entry	Show	<input type="checkbox"/>
8	RMA Inquiry	Hide	<input type="checkbox"/>
9	RMA Receipts Entry	Hide	<input type="checkbox"/>
10	RMA Data Entry	Hide	<input type="checkbox"/>
11	Service Item Data Entry	Maintain	<input checked="" type="checkbox"/>
12	Service History Inquiry	Show	<input checked="" type="checkbox"/>
13	Service Order Inquiry	Show	<input checked="" type="checkbox"/>
14	Service Order Entry	Show	<input checked="" type="checkbox"/>
15	SO Invoice Data Entry	Hide	<input type="checkbox"/>
16	Sales Order Quote/History Inq	Show	<input type="checkbox"/>
17	Quick Order Entry	Maintain	<input checked="" type="checkbox"/>
18	Sales Order Entry	Hide	<input type="checkbox"/>
19	Shipping Data Entry	Hide	<input type="checkbox"/>

Accept Cancel Print ?

Purchase Order

Auto Generate from Service Orders

Auto Generate from Service Orders (SMC) 2/16/2013

Service Entry Types to Generate From
 All Types Standard Refurbish Price Quotes Credit Return Exchange

Procurement Types to Generate
 All Types Make Buy Subcontract

Product Types to Generate
 All Types Finished Goods Raw Materials Discontinued Kits

Item Types to Generate
 All Types Inventory Special Miscellaneous Labor

Options
 Include Drop Ship Lines Yes Summarize Drop Ship Lines by Vendor
 Base Order Quantity On Service Order Quantity Update Unit Cost with Svc Unit Cost for Drop Ship Lines
 Update Unit Cost With Standard Unit Cost
 Summarize Multiple Items by Line
 Include Expired Service Orders

Comments to Generate
 Include Svc Comment Lines None Include Service Order Item Line Comments
 Format PO Header Comment With None

Select Field	Operand	Value
Service Order Number	All	
Service Order Date	All	
Customer Number	All	

Clear Default Settings... Proceed Cancel

Use Auto Generate from Service Orders to automatically generate purchase orders for a selected group of service orders. You can generate purchase orders from all service order types, procurement types, product types, and item types, and you can include the service order header comment and/or comment lines. You can automatically summarize multiple lines with the same item into one line on the purchase order, or create a single purchase order for all drop ship items with the same vendor by sales order.

The purchase quantity can be based on the service order quantity, or the reorder quantity. Separate purchase orders are generated for any drop-ship items contained in the selected service order range.

If you previously made a selection, but did not complete the generation process, you can make additional selections, or you can click Clear to clear the previous selection(s) and restart the generation process.

Note The system does not check whether the Inactive Item check box in Item Maintenance is selected for items included on orders created using this task.

Note Orders are generated only for those items that have a vendor specified on the service order line, and if the service order is not being invoiced.

Note A warning message dialog box appears if you attempt to access Auto Generate from Service Orders while Auto Reorder Selection is in process. This prevents you from automatically issuing duplicate purchase orders for the same items.

Service Entry Types to Generate From - Select one or more service entry types to include when generating the purchase orders, or select the All Types check box to include all sales order types.

Procurement Types to Generate - Select one or more procurement types to include when generating the purchase orders, or select the All Types check box to include all procurement types. These fields are available only if the Purchase Order and Service Order modules are integrated with Inventory Management.

Product Types to Generate - Select one or more product types to include when generating the purchase orders, or select the All Types check box to include all product types. These fields are available only if the Purchase Order and Service Center modules are integrated with Inventory Management.

Item Types to Generate - Select one or more item types to include when generating the purchase orders, or select the All Types check box to include all item types. The Inventory check box is available only if the Purchase Order and Service Center modules are integrated with Inventory Management.

Include Drop Ship Lines - Select an option to determine whether to include drop-ship lines when generating the purchase orders.

- Select Yes to include drop-ship lines.
- Select No to exclude drop-ship lines.
- Select Only to generate the purchase orders for drop-ship lines only.

Base Order Quantity On - Select the quantity type to base the order on. For drop-ship orders and non-inventory items, the order quantity amount is based on the quantity entered on the service order.

- Select Service Order Quantity to set the ordered quantity on the purchase order to equal the quantity entered on the service order.
- Select Reorder Qty / Reorder Qty by Whse / Reorder Qty for Default Whse to use the item's reorder method from the Item Warehouse file. If Reorder Qty for Default Whse is selected, the default warehouse will automatically be assigned to the line item during generation regardless of the warehouse assigned on the services order. This option is available only if the Purchase Order module is integrated with Inventory Management and an option other than Only is selected at the Include Drop Ship Lines field. For more information, see Reorder Maintenance and Inventory Reorder Report.

Note In Inventory Management Options, if the Require Multiple Warehouses check box is cleared, Reorder Qty appears, if the Require Multiple Warehouses and Reorder by Warehouse check boxes are selected, Reorder Qty by Whse appears, and if the Require Multiple Warehouses check box is selected and the Reorder by Warehouse check box is cleared, the Reorder Qty for Default Whse appears.

Update Unit Cost With - Select one of the following options to indicate which unit cost to use.

- Select Last Unit Cost to update the purchase order unit cost with the last cost in Item Maintenance. This option is available only if the Purchase Order and Service Order modules are integrated with Inventory Management, or if the Inventory check box at the Item Types to Generate field is selected.
- Select Standard Unit Cost to update the purchase order unit cost with the standard unit cost from Item Maintenance. This option is available only when an option other than Special is selected at the Item Types to Generate field.
- Select Average Unit Cost to update the purchase order unit cost with the average cost from the item's warehouse in Item Maintenance. If the average unit cost from the item's warehouse is set to zero, the average unit cost of the item is used. This option is available only if the Purchase Order module is integrated with Inventory Management or if the Inventory check box at the Item Types to Generate field is selected.
- Select Svc Unit Cost to update the purchase order unit cost with the service order unit cost. The service order unit cost is based on the total amount paid for the item.
- Select Svc Unit Price to update the purchase order unit cost with the service order unit price.
- Select Costing Hierarchy to update the purchase order unit cost using the costing hierarchy. For more information, see Defining the Hierarchy of Costs. This option is available only if the Purchase Order and Service Order modules are integrated with

Inventory Management, or if the Inventory check box at the Item Types to Generate field is selected.

Note When generating purchase orders for special items, the service order unit cost will be used unless the service order unit price is selected. When generating purchase orders for miscellaneous items, the standard unit cost will be used when Average Unit Cost, Costing Hierarchy, or Last Unit Cost is selected at this field.

Summarize Multiple Items by Line - Select this check box to summarize items that appear multiple times for a vendor and where the Drop Ship check box is cleared for the service order line item; one detail line is generated to order the total quantity for an item included on multiple service orders in the entered range. Clear this check box to generate a separate detail line for each item when the same item is ordered on multiple service orders. This field is available only if an option other than Only is selected at the Include Drop Ship Lines field.

Include Expired Service Orders - Select this check box to include expired service orders. Clear this check box to exclude expired service orders.

Note If the RMA expiration date on the service order is prior to the system date, the service order is expired.

Summarize Drop Ship Lines by Vendor - Select this check box to include items that appear multiple times on the same service order with the same vendor in one drop-ship purchase order. Clear this check box to create a purchase order for each item. This field is available only if an option other than No is selected at the Include Drop Ship Lines field.

Update Unit Cost with Svc Unit Cost for Drop Ship Lines - Select this check box to update the purchase order unit cost with the service order unit cost for drop-ship orders only. Selecting this check box will override the selection made at the Update Unit Cost field for drop-ship lines only. Clear this check box if you do not want to update the purchase order unit cost with the service order unit cost for drop-ship orders. This field is available only if an option other than No is selected at the Include Drop Ship Lines field.

Note When the Summarize Drop Ship Lines by Vendor check box is selected, the unit cost on the item line must match in order to summarize it.

Add Service Order Customer Detail as a Comment Line - Select this check box to add the service order customer detail information as a comment line on the purchase order. Clear this check box if you do not want to add the service order customer detail information as a comment line. This field is available only if the Combine Service Orders by Vendor check box is selected in Service Order Options and the Summarize Multiple Items by Line check box is selected.

Include Svc Comment Lines - Select whether to include comments originating from the service order on the purchase order.

- Select Following Item Only to include any comment lines following the item on the service order.

- Select Preceding Item Only to include any comment lines prior to the item on the service order.
- Select None to exclude all service order comment lines.

Note When summarizing lines and/or combining service orders by vendor, each comment line for the item is included. For example, if there are three items that can be summarized and each has a corresponding comment line, three comment lines will appear on the purchase order following the item.

Include Service Order Item Line Comments - Select this check box to include the service order item line comments. Clear this check box to exclude the service order item line comments. This field is not available if the Summarizing Multiple Items by Line or Summarizing Drop Ship Lines by Vendor check box is selected.

Format PO Header Comment With - Select the format of the purchase order header comment to use when generating the purchase order.

- Select Customer PO No. to include the customer purchase order number from the service order.
- Select Customer PO No. + Customer Name to include the customer purchase order number, a semicolon, and the customer name from the service order, which will be truncated.
- Select Customer PO No. + Ship To Code to include the customer number, a semicolon, and the service order ship-to code from the service order.
- Select Customer PO No. + Ship To Code + Customer Name to include the customer purchase order number, a semicolon, the ship-to code, a semicolon, and the customer name from the service order, which will be truncated.
- Select Service Order Header Comment to include the service order comment from the Header tab on the purchase order Comment field on the Header tab.
- Select None if you do not want to format the purchase order Comment field on the Header tab.

Operand - Select an operand to limit your selection to a particular value or range of values. When selecting a value using the Lookup button or entering a value directly into the Value field (and moving out of the field), the operand automatically changes to Equal to. Likewise, when selecting a value using the Lookup button for a range or entering values directly into both Value fields, the operand automatically changes to Range.

The following operands are available.

Operand	Operand Function
All	Selects all information for the Select Field.
Begins with	Selects only the information for the Select Field that begins with the value entered at the Value field.
Ends with	Selects only the information for the Select Field that ends with the value entered at the Value field.
Contains	Selects only the information for the Select Field that contains the value entered at the Value field.
Less than	Selects only the information for the Select Field that is less than, but not equal to, the value entered at the Value field.
Greater than	Selects only the information for the Select Field that is greater than or equal to the value entered at the Value field. When Range is selected, two Value fields are used. Information is selected that is greater than or equal to the first value entered and less than or equal to the second value entered at the Value fields.
Range	Note Entries at the "From" Value field may change to the entry made at the "To" Value field, if the "From" Value contains a lowercase letter and the "To" Value contains an uppercase letter. This occurs because lowercase letters are greater than uppercase letters. For example, if 01a is entered at the "From" Value field and 01C is entered at the "To" Value field, the "From" Value field changes to 01C.
Equal to	Selects only the information for the Select Field that is equal to the value entered at the Value field.

	condition.
Less than	Only single values are allowed.
Greater than	Only single values are allowed.
Range	Both Value fields are used to define a range. Only single values are allowed at each Value field.
Equal to	Multiple values are separated by a comma or alternate separator, and assume an OR condition.
Not Equal to	Multiple values are separated by a comma or alternate separator, and assume an AND condition.

Note If you enter a value that contains a comma (for example, if a vendor number is 01-SAGE,WEST), then you must enclose the value with an alternate separator (for example, %01-SAGE,WEST%). Because the comma is a separator, if the value is not enclosed in alternate separators, the system can search for two incorrect values (for example, "01-SAGE" and "WEST", instead of "01-SAGE,WEST").

Purchase Order Link to Service Order

The screenshot displays the Sage Purchase Order Entry (SMC) 2/23/2013 window. The Order Number is 0000003. The window is divided into sections: 1. Header, 2. Address, 3. Lines, and 4. Totals. The user is identified as Julia. A tooltip for the 'Service Order' button indicates 'Service Order, Alt-M'. The main grid shows the following data:

	Item Code	Ordered	Back Ordered	Unit Cost	Extension	Cor
1	1001-HON-H252	1.00	.00	34.250	34.25	
2		.00	.00	.000	.00	

Below the main grid is a secondary grid with the following fields:

Costing	FIFO
Sales Order No.	
Customer PO No.	
Svc Order No.	0000003

The 'Svc Order No.' field is circled in red. The Total Amount is 34.25. The window includes buttons for Quick Print, Accept, Cancel, Delete, and a help icon.

On the Purchase Order Entry lines panel a new field has been added to the secondary grid

Service Order Number - Enter the service order number, or click the Lookup button to list all service order numbers. The entry at this field defaults from Auto Generate from Service Orders and when creating a purchase order in Service Order Data Entry. This field is available only if the Service Center module is set up, if the user has the appropriate security setup, and if Standard or Drop Ship is selected at the Order Type field.

When the Combine Service Order by Vendor check box is selected in Service Order Options and the Summarize Drop Ship Lines by Vendor check box is selected in Auto Generate from Service Orders, if a purchase order is created from multiple service orders, MULTI will appear at this field.

Service Order Button - If a line for a standard or drop-ship order includes a service order number at this field and you have the appropriate security set up, press the Service order button to access either Service Order Data Entry or Service Order Inquiry.

The Service Order Number field has also been added to the Receipt of Goods Entry and Receipts of Invoice Entry. This field displays the service order number and can only be viewed. This field is available only if the Service Center module is set up.

Helpful Hints

Service Items

The heart of the Service Center system is the Service Item. Anything you or the customer owns can be tracked in the Service Item table, as long as it has an Item Code and a serial number. One of the best features of Service Center is that this tracking can be automatic if you sell the items out of your inventory, but you can also add Service Items that you did not sell, or that were sold before you installed Service Center.

Service Items are usually serialized parts that you carry in inventory and sell as finished goods to customers or dealers. If the item in inventory is set up for service tracking (see Service Item Setup), then as soon as you sell it on a Sales Order invoice, it will appear in the Service Item database. Along with the Item Number and Serial Number, the Service Item will also store information about your purchase and your sale. You also automatically maintain a service history. Every time you complete a Service Order for that item, Service Center creates a permanent record of the work done. All of the information on a Service Item is visible from the Service Order Entry screens if the customer should call you with another problem.

There are several ways that Service Items can be added to the database. The most common is automatic. When you enter a serialized Item in your Inventory Management system, you can select the "Service" button on the Additional panel and check the box to track item. From that point on, any time you sell that inventory item, a Service Item is automatically created. In the Track Service dialog, you can also select a default Original Warranty Code to be used for the Service Item. If the customer belongs to a Group (see Group Codes), then the Group Information can determine the warranties that are used. There is a way to choose between multiple Warranty Codes in Sales Order or in Service Order if you wish (see Warranty Processing).

The second way is to manually add items in the Service Item Setup and Maintenance program on the Service Center Setup menu (see Service Item Maintenance). You will need a valid Item Number, and will also need to know the serial number of the part. If there is no serial number, then you will need to make one up. Every Service Item must have a unique Item Number/Serial Number combination.

If a customer calls in with a problem on a piece of equipment, and you cannot find the serial number or item number in your Service Item database, you can add that Service Item "on-the-fly" from within Service Order Entry.

If you return a serialized item using a credit memo, the system will check to see if this item exists as a Service Item. If it does, then it is important that your records reflect that the item was returned. If

there have been no repairs, or Service Orders, on the Service Item, then the Service Item is completely removed during the update of the credit memo. If there have been repairs, then the program will keep the Service Item and its history, but will change the end-user to the “company owned customer” (on the Service Order Options Main Tab) and will reset the in-service flag.

If you later resell a Service Item that was returned, the program will find that the Service Item already exists in your permanent database. In this case, the assumption is that this is a used item, and the “Condition” flag is set to Used.

Warranty Processing

The Warranty Code is a ten-character code that can be made of numbers or letters. It is created in the Warranty Code Maintenance program on the Service Center menu (see Warranty Code Maintenance). For each Warranty Code, along with the description you will choose if the warranty period is measured in days, weeks, months, or years, and you will tell it how many of these periods are in the warranty. Additionally, you get to choose if this warranty covers labor or parts or both.

There are three categories of warranty code: original, extended, and repair, which correspond to the three warranty code fields in the Service Item (see Service Item - Warranty Tab). The Original Warranty is usually given by your company, or the manufacturer or distributor when the item is first made or sold. The Extended Warranty is typically sold as an additional coverage for an extended period. The Repair Warranty generally is applied after the Service Item has been repaired. The Repair Warranty can be automatically applied upon completion and invoice of a service order with the use of Group Codes (see Group Code Maintenance)

In Inventory Item Maintenance there is a button on the Additional tab that allows you to determine if the item is to be automatically tracked in Service Center when it is sold. On the same screen where you make that decision, you also assign a default Warranty Code to use for that item (see Service Tracking). If the Track Service flag is checked, whenever the Item is sold a Service Item is automatically created and the Warranty Code you entered is assigned to the Service Item. The Warranty Start Date is set to the invoice date and the Warranty End Date is calculated according to the information you set up in the Warranty Code.

You can also set up a Miscellaneous Item Code to sell a particular warranty (see Miscellaneous Item Maintenance - Warranty). This Miscellaneous Item Code can be used on the original sales order or invoice where the service item is sold, to apply an extended warranty, or it can be entered on the lines panel of a service order when a service item is being repaired.

You also have the option to sell an extended warranty on the same sales order. The extended warranty you sell will become the extended warranty for the Service Item. This warranty can overlap the original, or it can be set to start after the original ends, depending on the settings in Warranty Code Maintenance. To sell an extended warranty with a sales order, the new warranty must be sold on the same sales order as the original Service Item.

If you wish to sell an extended warranty some time after the initial sale, you can do so through Service Order Data Entry. First you must enter the Service Item that you are extending the warranty for. On a line after that Service Item Entry, you can sell the extended warranty using the matching miscellaneous code.

Inheriting and Preserving Warranties - There are two features of warranty handling that are often confused. In the Service Order Options you can select to Inherit Warranty on Replacement. This applies to when a replacement service item is sent out as a result of use the Loaner/replace button on a Warranty Replacement service order. When you send out the replacement for a service item being returned, if the Inherit Warranty on Replacement box is checked, the new item being shipped will take the original warranty from the item being returned, rather than getting a brand new warranty. That's 'inheritance'. Preserving the warranty, which is a check box on each service item, tells the system that when a service item is returned to stock then shipped out again, it should keep the original warranty, rather than getting a new warranty assigned. If an item is sold out of inventory, the system will look to see if a service item already exists for that serial number. If it does already exist, a new warranty is assigned, unless the Preserve Warranty box is checked for that service item.

Group Codes

If you have agreements or contracts with groups of customer, or you wish to give a set of customers distinctive treatment when it comes to warranties and pricing, you can use Group Codes (see Group Code Maintenance).

A customer can belong to one, and only one, group. Each group carries with it a set of default Warranty Codes (see Warranty Processing), charge codes, and rates.

In addition to having these codes and rates assigned to the group as a whole, you can also create a list of specific items or product lines that have different Warranty Codes, charge codes, or rates.

For example, you could set up GROUP1 with three warranty codes. When you enter a Service Order for a customer that belongs to GROUP1, you might need to add a new Service Item for the piece of equipment you are receiving from the customer. When you do, the system will first look to see if that particular item number is set up as an exception for the group. If it is, the original and extended warranty codes you set up for the Group and item will automatically fill in for the Service Item. If no record exists for that item for that group, then the program will check the product line and use those warranty codes. Finally, if no product line exception exists, then the warranty codes from the main group code panel are used. In this way, you can assign warranties that are different, depending on the customer group plus the item or product line. This is especially useful for companies that do not sell items, but provide warranty service for other manufacturers.

You can also assign a default Group Code to be used if you have a customer that does not belong to any other group. The default Group Code to be assigned to all customers without a group assignment is on the Service Order Options Main tab (see Main Tab)

The Repair Warranty Code can also be quite useful. You assign the repair warranty to a Group Code, or to an item or product line under a Group Code. When a Service Order is completed and updated, the repair warranty code is automatically applied to the Service Item.

The Charge Codes are intended to allow you to use one or two labor charge codes, but have the price vary depending on the group the customer is in, and the item or product being repaired. If you have a different rate that you charge per hour for each product line, you do not have to set up a different Miscellaneous Item Code for each product line. Rather, you create one Miscellaneous Item

Code, /REPAIRLABOR, and set up a default rate on the main panel, and rates specific to the product line in the Item/Product Line panel.

You can even use the Group Code to modify the way your warranties work. Without Group Code, your warranty either covers labor or it does not. But if you have an agreement in which the labor rate is reduced during the warranty period, you can enter an In Warranty rate and an Out of Warranty rate. In the Warranty Code Maintenance, you would not cover labor, but the Group Code will take care of charging the right rate for /REPAIRLABOR.

In the same way that you can vary the rate for the chosen labor code, you can also assign a different price level for in-warranty and out-of-warranty parts.

When you are on the lines tab of Service Order Data Entry, you can press the GROUP button (see Group Button) to display the charge codes to use for the given customer and Service Item Entry. A screen similar to the one shown below tells the user what the valid charge codes are, what the rates should be, and gives some brief information about the group the customer belongs to.

Service Types

Price Quote - A Price Quote is used to give an estimate to a customer on the repairs necessary for a Service Item. This Service Type is exactly like a Standard Order, except that items are not committed in the inventory system. You can print the Price Quote in the normal fashion and send it to the customer for approval before the repair is done.

You cannot change the Status of a Price Quote to Closed. Once the customer has approved the quote, you can change the Service Type to Standard and all the items on on the lines will be committed in inventory.

Standard - Standard Orders are used for normal repairs, or what some call "Repair and Return". In a typical Standard Order, you will specify the Service Item to be repaired, then you will enter line items for various material, labor, and other charges associated with the repair. When the work is complete, you will close the order, or some of the Service Item Entries on the order, and create invoices.

If you select standard for the order type on the Service Order header, you can set a different type for each Service Item Entry, if you wish.

Credit Return - A Credit Return order is used to return a Service Item to your stock and, optionally, give the customer credit. When the Credit Return order or Service Item Entry is closed and the Create Invoice function is executed, it will result in a Sales Order Credit Memo.

A Credit Return Service Item Entry creates a line on the service order lines panel for the service item entry showing the negative quantity and the credit that will be given. The credit amount for the Service Item being returned defaults to the original sale price from the Service Item record in the permanent database (Sales Price).

You may enter other charges on the lines tab of the order. Note, however, that any charges you enter on the lines will be negative on the credit memo, and will reduce the amount of the credit. The intent is to allow restock and handling charges when necessary. It is possible, however, for the negative amounts on the credit memo to be greater than the positive (credit) amount for the item

being returned, resulting in a negative credit memo. This is confusing to the customer and should be avoided.

Warranty Replacement - Warranty Replacement Orders are used to exchange a bad part for a new or reconditioned part from your inventory.

Note that the service item does not have to be under warranty to use this service type. The name is kept for historical purposes only. It is really an "Exchange".

When you add the Service Item Entry to a Warranty Replacement Order, you have the option to create a sales order to send the replacement (see Loaner/Replace). Once the Sales Order is created, it can be shipped and billed just like any other sales order, but the Service Order remains on file until the defective unit is returned and the Service Order, or the Service Item Entry, is closed. When the order is closed and updated, it will create a Sales Order credit memo to return the item to stock.

The credit amount for the Service Item being returned defaults to the original sale price from the Service Item record in the permanent database. You can override this price, however, on the lines tab of the service order.

You may enter other charges on the lines tab of the order. Note, however, that any charges you enter on the lines will be negative on the credit memo, and will reduce the amount of the credit. The intent is to allow restock charges when necessary. It is possible, however, for the negative amounts on the credit memo to be greater than the positive (credit) amount for the item being returned, resulting in a negative credit memo. This is confusing to the customer and should be avoided.

Refurbish Orders - Refurbish Orders are very much like Standard Orders, except that the customer is your company. A Refurbish Order is used to perform service on your own inventory, and track that inventory in the Service Item database. You must use the customer that you specified in Service Order Options (see Customer Code for Company-Owned Refurbish Items on the Service Order Options Main Tab). If the part you want to repair is not already in the Service Item database, it will be added automatically. When you complete a Refurbish order and the resulting invoice is updated, the serialized item that was modified or repaired is automatically transferred from the original warehouse to the Target Warehouse for Refurbish designated on the Service Order Options Main Tab.

Demos and Loaners

Service Center helps you to track the demonstration units that you send to customers for evaluation, and the units you lend to customers while theirs are being repaired. These are called Demos and Loaners and a complete subsystem is dedicated to them. Demo units and Loaner units are treated exactly the same throughout, so this discussion will simply refer to Demo/Loaners to mean either type.

There are two methods for creating a Demo/Loaner record. You can enter it directly in Sales Order line entry, where you can enter an inventory item on a line, then use the new drop-box to flag that

item as a demo or loaner (see Demo Loaner Lines). Alternatively, you can create a sales order directly from Service Item Entry that will set the flag to Loaner.

To create a sales order directly from Service Item Entry that will set the flag to Loaner, on the Service Item tab of the Service Order Entry, when you are entering the service item to be repaired, click the "Loaner" button just above the primary grid, to the right. It is an L button. When you click that button, a dialog pops up to let you specify the Item Number and the Serial Number you want to ship and the warehouse to ship from. You will be able to enter a Serial Number only if the Lot/Serial Distribution is enabled in Sales Order options, and the item you are going to send is a Lot/Serial item. The Warehouse defaults to the warehouse specified as Default Warehouse for Demo/Loaner on the Service Order Options Main Tab. You can change the item number, serial number or the warehouse here, and you can enter a charge if desired.

Once you click the Proceed button, a sales order is created with the text from Service Order Options Message Text Tab. The line containing the item you specified is automatically created on the sales order with the Demo/Loaner field set to Loaner, usually in the Secondary Grid.

The Sales Order you have created with the Demo/Loaner line is now processed just as if it were any other Sales Order. Once it is invoiced, though, the Demo/Loaner item is not relieved from inventory, but is flagged as a Demo or Loaner and will now show up on the Open Demo/Loaner Report. The item is automatically transferred from the source warehouse to the Demo/Loaner Target Warehouse specified in Service Order Options Main Tab.

The item will stay on the report until you return it with a credit memo. This is the only way to clear a Demo/Loaner record. Therefore, if the customer decides to keep the item, you must first return it to stock, then sell it as a standard item on a different sales order, or a debit memo to the same sales order. If you have the Auto-Transfer feature, returning the item will also transfer it back to the warehouse specified in Service Order Options. A quick way to create the credit memo to return a demo/loaner item is to click the Return button in Demo Loaner Maintenance (see Demo/Loaner Record Maintenance).

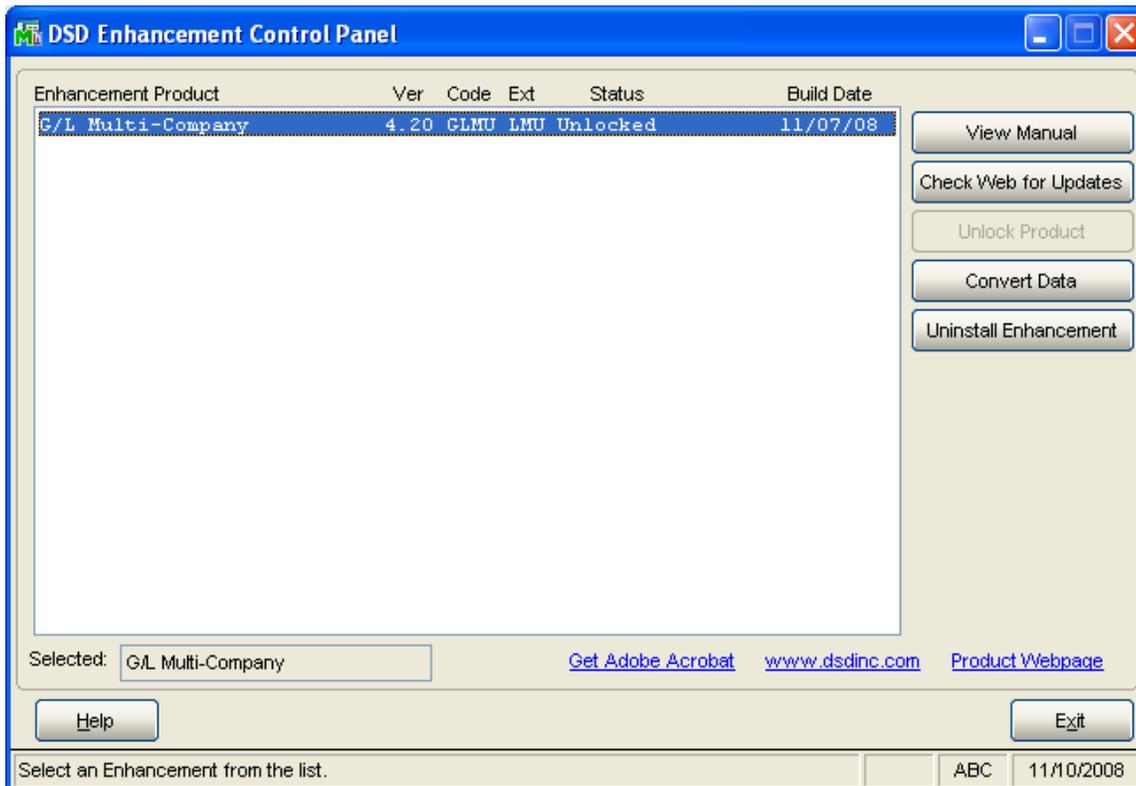
Using Inventory Categories

Service Center can use the Inventory Categories which you define in the Sage 100 ERP Inventory Management Options to carry additional information about a Service Item. A possible example would be to define a new category which you label "COLOR". Once you do this, you have a new ten-character field in every item you can enter the color of the item.

Service Center takes this further by optionally using the field when a Service Item is automatically created during a sale. If you sell a WIDGET where the COLOR category is "Red", the resulting Service Item will also have the COLOR category set to "Red". You can turn that option on in Service Order Options (see Service Order Options Main Tab).

Section E: Uninstall DSD Enhancements

A DSD Enhancements Uninstall Utility has been provided for the purposes of removing DSD Enhancements from your Sage 100 System. This utility may be accessed from the **DSD Enhancement Control Panel** menu option on the **Library Master / Utilities** menu.

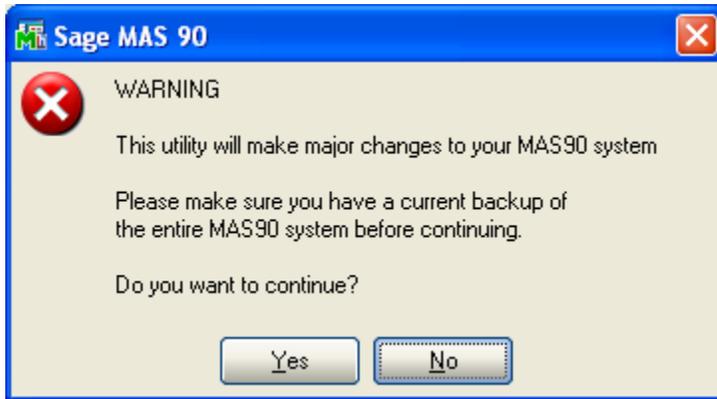


When accessing the **DSD Utility Suite**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



Select **No** to exit the Uninstall Process.
 Select **Yes** to continue with the Uninstall Process.

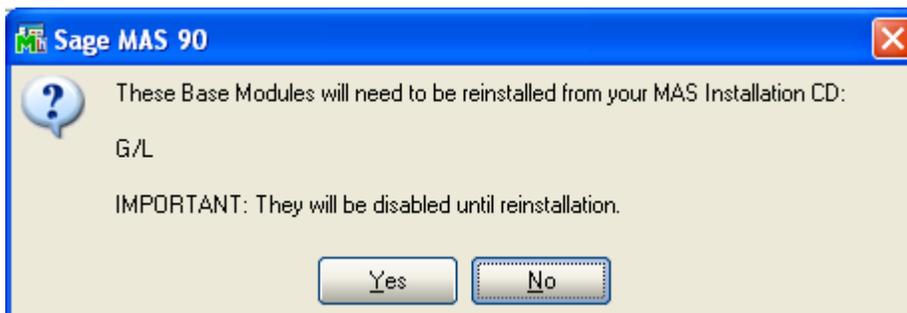
The following message box will appear, to remind you that a complete backup of your entire SAGE 100 system should be completed prior to uninstalling a DSD product.



Select No to exit the Uninstall Process.
Select Yes to continue with the Uninstall Process.

After the Uninstall of the DSD Enhancement, you MUST reinstall certain standard Sage 100 modules, followed by reinstallation of MAS Service Packs / Updates, if applicable.

The following message box will appear, and will display which of those specific Sage 100 modules you must reinstall afterwards.

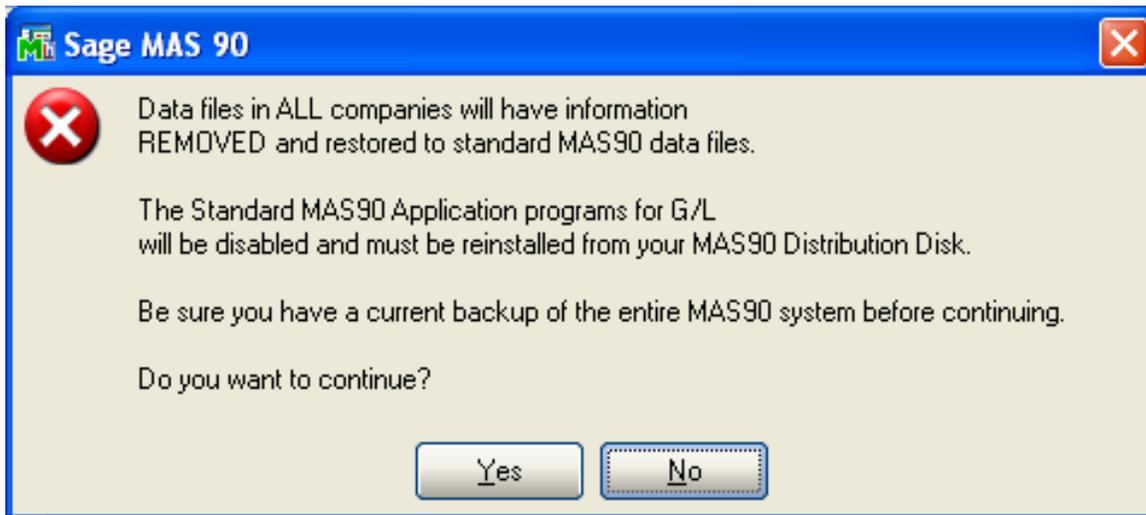


Select No to exit the Uninstall Process.
Select Yes to continue with the Uninstall Process.

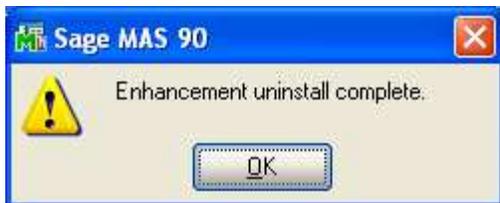
The following message box will appear, displaying the final warning message.

Select **No** to exit the Uninstall Process.

Select **Yes** to continue with the Uninstall Process. At this point, the DSD Enhancement will be removed from the Sage 100 system.



After completion of the Uninstall, the following message box will appear. Select OK to continue.



Now that the Uninstall process is completed, you must:

- Reinstall the applicable standard Sage 100 modules
- Reinstall the latest Sage 100 Service Pack/Updates, if applicable.
- Reinstall any other DSD Enhancements or Developer products that are affected from the reinstallation of the standard Sage 100 module(s).

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From:	Name:		Phone:	
	Company:		Fax:	
Date:	/ /	# Pgs Including this Page:		
Subject:	Check One:	Product Problem	Suggestions	
Product:	<i>SMSM S/M Service Center</i>		Version:	<i>5.00</i>

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