TRAVERSE®

Service Director

Training Manual

ETMSD11

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This document has been prepared to conform to the current release version of TRAVERSE Accounting Business Software for Windows. Because of our extensive development efforts and our desire to further improve and enhance the product, inconsistencies may exist between the software and the documentation in some instances. Call your customer support representative if you encounter an inconsistency.

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INTRODUCTION

OVERVIEW

The Service Director application helps you manage equipment service calls by consolidating technician information, schedules, and Work Orders into one module. After you have set up the system, Service Director tracks your Work Orders from entry to completion by scheduling dispatches, recording service call work, and maintaining Work Order history.

Service Director associates regularly serviced equipment with your Customers, then uses that information when you enter Work Orders. The Work Order is the heart of the system: it records a service request action with a dispatch, which in turn contains labor and parts lines to record what was done during that service call action. When the Work Order is complete, the system maintains the work history for both the Work Order and the serviced equipment so that you can view service details, identify recurring problems, or plan routine maintenance.

Service Director also allows you to manage your internal equipment through Service Orders. By working with the TRAVERSE Fixed Asset application, you can track the ongoing maintenance costs of your equipment during its service life. Like Work Orders, Service Orders record a service request with a dispatch for labor and parts, and allow you to record what was done during that service call action. You can also plan routine maintenance, view service details, and identify recurring problems with your equipment while maintaining equipment history.

Service Director simplifies scheduling with scheduling tools. These tools allow you to create schedules, specify holidays and dates your company is closed, and enter any advance schedule changes for specific technicians to plan future availability and manage workflow. When you need to schedule a Service Order or Work Order dispatch, you can ask the system to suggest a time based on technician availability or view a specific technician's calendar to create a booking. Once you have booked dispatches, use the built-in calendars to view scheduled dispatches and plan activities.

Service Director works with the TRAVERSE Accounts Receivable application to record invoice and payment information for completed service calls. Posting completed Work Orders in Service Director creates open invoices in Accounts Receivable. After you post Work Orders, use Accounts Receivable to print or reprint invoices and record payment information.

Finally, use the reporting tools to view Service Order, Work Order, profitability, and productivity information to analyze your business, identify trends, or introduce new types of services.

System Information

Additional information about using the system is found in the following sources:

- The *Service Director User’s Help.*
- The training manuals for other TRAVERSE applications.

- The *Developer's Guide* and *Developer's Object Descriptions* manuals.
- Online help.

Customer Support

Open Systems Holdings Corp. has a strong commitment to customer service and product quality. If you need help using any Open Systems product, follow these procedures:

- Consult the user's guide and other TRAVERSE reference materials.
- If you are a subscriber to the TRAVERSE customer support program, you can consult your customer support representative (1-800-320-3088) or e-mail them at traverse_support@osas.com.

ABOUT SERVICE DIRECTOR

Frequently used functions

The most frequently used functions are on the Work Orders and Service Orders menus. Use these functions for the following tasks:

- Enter Work Orders, Service Orders and dispatches for Work Orders and Service Orders.
- Enter transactions to record time and parts used.
- Print the Work Orders and Service Order forms and worksheets.
- Post Work Orders and Service Orders.

Generate Work Orders and Service Orders

Generating recurring Work Orders and Service Orders are done using the Work Orders and Service Orders menus. Equipment that is maintained in the generated Work Orders and Service Orders are set up in the Setup and Maintenance menu. Use these functions for the following tasks:

- Set up Site Equipment, Service Contracts and General Equipment.
- Print Orders and Invoices and post.

Reports

The Work Order Report and Service Order Report will give you a list of the open Work Orders and Service Orders in summary or detail. You may also print a history of the Work Orders and Service Orders posted for Customers’ and equipment.

Interactive Views

Scheduled Technicians, Orders, Transactions, Equipment History, General and Site Equipment and Service Contract information can be displayed through the Interactive Views functions.

Interfaces

Service Director can be interfaced with Inventory, General Ledger and Fixed Assets.

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SETTING UP SERVICE DIRECTOR

SETUP CHECKLIST

Before you can use Service Director to manage your Work Order, Service Orders, dispatches and service calls, follow the setup procedures in this chapter. Follow these procedures carefully; the choices you make determine how the system operates.

To set up Service Director, perform the following tasks:

___ Set up other TRAVERSE applications.

___ Set up Item information.

___ Set up Form Printers.

___ Set up Business Rules.

___ Define Batch Codes.

___ Set up Schedules.

___ Set up Schedule Controls.

___ Define Labor Codes.

___ Specify Skill Levels.

___ Set up Technicians.

___ Set up Equipment Categories.

___ Set up Billing Types.

___ Set up Work to do Descriptions.

___ Set up Warranty Types.

___ Enter Site Equipment.

___ Enter General Equipment.

___ Enter outstanding Work Orders.

___ Enter outstanding Service Orders.

SETUP INFORMATION

Other TRAVERSE Applications

Service Director requires the TRAVERSE System Manager and Accounts Receivable applications in order to function. Service Director accesses and updates Customer and site information in the Accounts Receivable Customers and Ship-to Addresses tables, and accesses technician names and Item information in the System Manager Employees and Item Descriptions tables.

Before you set up Service Director, make sure that your Customer and site information is correct in Accounts Receivable, and that your Employee and Item information is correct in System Manager or Inventory (if interfaced).

In addition, Service Director can optionally interface with the General Ledger, Inventory, and Fixed Assets applications. Interfacing with General Ledger allows Service Director to access General Ledger Accounts and update these Accounts with Work Order amounts when you post. Interfacing with Inventory allows Service Director to access Item information in Inventory (rather than in System Manager) and update Item quantities as appropriate when you save transactions. Interfacing with Fixed Asset application, you can track the ongoing maintenance costs of your equipment during its service life. If Accounts Payable is installed you can track the Vendor purchase information for your equipment.

Before using Service Director, verify that you have the System Manager, Accounts Receivable, and any other applications you plan to interface Service Director with, set up and running correctly. Refer to the training manuals for information on installing, setting up, and verifying information in other TRAVERSE applications.

Item Information

Service Director accesses Item information from either Inventory or System Manager when you enter site and general equipment and parts information. Before you can use Service Director, you must enter Item information for your Customers' equipment, your internal equipment and the parts your technicians use, into either Inventory or System Manager.

If you have the Inventory application installed and plan to interface it with Service Director, use the Items function to enter Item information. When you save and post Work Order and Service Order details, Service Director updates Item quantity, history, and Lot and Serial information in Inventory as appropriate.

If you do not have the Inventory application, or you do not want to interface it with Service Director, enter Item information into the System Manager Description Items function. You will then use this information when you enter Customer equipment and service details into Service Director.

Form Printers

The Setup and Maintenance Form Printers function in System Manager allows you to print multiple copies of a Service Director Invoice or Work Order. For example; you could set up form printer entries to print a copy for the Customer, a copy for the company, and a copy to be filed, each printing with the appropriate heading.

To set up forms to print multiple copies, create or edit printer entries for the SD INVOICE and SD WRK ORD forms. See the System Manager Training Manual for more information on creating or editing printer entries for forms.

Business Rules

Once you've prepared for setup and installed Service Director, use the **Business Rules** function (page 3-5) to interface Service Director with General Ledger, Inventory, and Fixed Assets, select options that control how Service Director works, and specify default entry preferences. Once you've specified these options, you likely will not need to modify them again.

Batch Codes

Use the **Batch Codes** function (page 3-15) to set up batches in which to enter Work Orders. Batch Codes provide a way to organize Work Orders, allowing you to lock a set of Work Orders in preparation for a large change (such as posting) without affecting those in another. Batch Codes are especially useful when several people are working in the system at one time.

Use the Batch Codes setup to enable batch processing. Set up your batch codes using the Batch Codes function. If you choose not to use batch processing, all transactions are entered into the default ###### batch. If no other Batch Codes are set up all transactions will automatically go to the ###### batch.

Schedules

Next, set up the Schedules your company uses. Use the **Schedules** function (page 3-21) to define business hours for your company, such as regular office hours or shifts. The Schedules function is designed to be flexible—you can use it to enter available and unavailable hours (such as lunch or scheduled breaks) or to define business hours for different groups of employees (such as office staff, consultants, and shift workers). You can then use these Schedules to determine availability when you schedule service calls.

Use the Schedule function to enter the dates your company is closed or your technicians are unavailable—holidays, company-wide vacation days, and so on. This information helps Service Director avoid scheduling service calls on these days.

Use the Schedules function to enter changes in Schedules for future availability planning. Examples of schedule changes include seasonal hours or technicians switching from shift to shift. You then apply Schedules to technicians to calculate availability for specific technicians.

Labor Codes

Once you've set up the Schedules for your company, use the **Labor Codes** function (page 3-27) to set up codes that organize the types of work performed by your company. Examples of Labor Codes include installation, repair, and consulting. Use these Labor Codes when you set up your technicians.

Skill Levels

Next, use the **Skill Levels** function (page 3-33) to set up the Skill Levels technicians must have in order to perform certain tasks. Once you've set up these Skill Levels, apply them to your technicians so that you can search for a technician by Skill Level when scheduling Work Order dispatches. These Skill Levels are for information only.

Technicians

After you've entered information using the functions above, set up the **Technicians** (page 3-37) employed by your company. Since Technician names are pulled from your Employee base, use the TRAVERSE System Manager application to enter Employees and their contact information. If you have Payroll installed, Service Director will use the Payroll Employee list for Technicians. Next, use the Technicians function to define Tech IDs, Labor Codes, Skill Levels, and Schedule IDs for a Technician name. You may set up multiple Labor Codes per Technician and the scheduling suggestion will base it suggestions on the Labor Codes set up for the Technician.

Service Director does not allow you to schedule bookings without specifying a Technician. If you need to schedule bookings without specifying a specific Technician, use the Technicians function to set up a "dummy" Technician to serve as a placeholder.

For example; you might need to schedule service for a client at a specific time, but you haven't yet determined which Technician will be performing the service. In this case, you could use the "dummy" Technician to schedule the service, then edit the Work Order later to add the correct Technician ID. If you decide to use such a placeholder, be sure to add the placeholder as an Employee in System Manager before you set up the Technician in Service Director and name it appropriately (such as TBD for To Be Determined). For more information on entering employees, refer to the System Manager or Payroll Training Manual.

Equipment Categories

Use the **Equipment Category** function (page 3-57) to set up categories you can assign to equipment, similar to the Inventory Product line. Equipment Categories are used in the setup of equipment, and can be used to separate equipment into groups that allow you to quickly determine the type of equipment you are dealing with.

Billing Types

Billing Types (page 3-61) are used to group Work Orders and dispatches for printing the Work Order Report and Worksheet. The Billing Types also determine if the Work Order and dispatch are billable or not.

Work To Do Descriptions

Use the **Work To Do Descriptions** function (page 3-47) to record short descriptions of regularly performed tasks or to save brief instructions used by your technicians. You can then add these descriptions to Work Orders and Service Orders and print them for use by technicians on service calls.

Warranty Type

Use the **Warranty Type** function (page 3-65) to create classifications for the types of warranties you offer. These Warranty Types will be available to select when setting up Site Equipment on the Warranty tab.

General Equipment

Use the **General Equipment** function (page 3-69) to record information about the equipment your company services. This function is designed to record pieces of equipment you service but are not assigned to a particular Customer or your company.

Use the General Equipment to enter or edit basic information. Use the Service, Warranty, Parts List, and Knowledge-base tabs to record Service history, Warranty information, Parts used, and other information about the selected equipment.

Site Equipment

Use the **Site Equipment** function (page 3-83) to set up equipment owned by you or one of your customers, that you service or repair. Site Equipment does not have to exist in Inventory, and the Site ID allows you to easily move equipment from one location of usage to another.

Use the Site Equipment to enter or edit basic information. Use the Service, Warranty, and Activity tabs to record Service history, Warranty information, and other historical Activity for the equipment.

Service Contracts

Use the fields on the **Service Contracts** (page 3-99) screen to enter information about the Service Contracts you have with your Customer.

Use the Service Contracts to enter or edit basic information. Use the Equipment and Billing tabs to record equipment information and other information about the selected equipment.

Outstanding Work Orders

After you perform the tasks above to set up the system, use the **Work Order Entry** function (page 4-5) on the Work Orders menu to enter outstanding Work Orders. You don't need to set up previous history for Service Director, but you need to enter your outstanding Work Orders to begin tracking them.

Outstanding Service Orders

After you perform the tasks above to set up the system, use the **Service Order Entry** function (page 5-5) on the Service Orders menu to enter outstanding Service Orders. You don't need to set up previous history for Service Director, but you need to enter your outstanding Service Orders to begin tracking them.

PROCEDURES & PROCESSES

Overview

The Service Director application provides a tool for managing your service calls from scheduling the initial dispatch to creating the final invoice. As such, there are tasks you must perform on a regular basis as part of your workflow. The processes you use as you work with Service Director include the following:

- Daily Work Order processes.
- Business processes.
- Maintenance processes.

These processes, and the procedures they include, are described on the following pages. These processes and procedures are meant to give you an idea of how Service Director works with other applications and what you may need to keep in mind as you work. Your actual workflow processes may differ.

Daily Work Order Processes

The Work Order is the center of the Service Director application. It drives how service calls are scheduled, recorded, and completed. The following procedures should give you an idea of what you need to do to create a Work Order and follow it through to completion. Keep in mind that the following procedures are suggestions; your actual workflow might differ slightly.

Track Work Orders

A typical Work Order might proceed through these steps:

1. Enter a new Work Order in response to a service call.
2. Use the Work Order Entry function (page 4-5) to create and schedule a dispatch.
3. Print the Work Order Report (page 4-51) or Scheduled Dispatch Report (page 6-25) and give it to the technician servicing the call.
4. Record the Work Order information as you receive it.
5. When the Work Order is complete, use the Print, Invoice (page 4-31) button on the Work Order Entry screen to print an Invoice for the Customer, then post it.

Schedule Work Orders

Follow the steps below to schedule a Work Order:

1. To schedule a dispatch as you enter it, click the Schedule button on the Work Order Entry screen's Dispatch tab (page 4-11), then click OK to schedule the Work Order once you find an appropriate time. You can also enter schedule details manually by entering date and time information directly into the fields. If you schedule dispatches manually, be sure to click OK to actually book the dispatch; dispatches are not booked until you click OK.
2. To identify dispatches that need to be scheduled, print the Unscheduled Dispatch Report (page 6-31).
3. Use the Calendar View function (page 6-5)to identify conflicts and availabilities.

Post Work Orders

The Work Order Status changes to Complete when you click the Complete button and enter a Completed Date and Tech ID into the Completed Date box on the Work Order Entry screen's Dispatch tab (page 4-11). After you complete a Work Order, use the Post Work Orders function (page 4-95) to post the Work Order and create an open invoice in Accounts Receivable, then use the Accounts Receivable Hold/Release Invoices and Cash Receipts functions to release the invoice, record payments, and finish the Work Order.

If your company deals with a large number of Work Orders, you may want to post Work Orders daily.

Business Process

Service Director includes reports that access Work Order history records, giving you the information you need to analyze your business practices. To make the most of your business information, use the procedures described below.

Analyze Profitability

Print the Profitability Report monthly or quarterly to review price and costing data. You can print this report for a range of Customers, Work Orders, Technicians, or Completion Dates. The report will list how much you're spending on labor and parts and the resulting profit, allowing you to identify practices that may be costing you money or services that are especially in demand.

Analyze Productivity

Print the Productivity Report monthly or quarterly to view Technician productivity. You can print this report organized by Customer, Work Order, Technician, or Completion Date. Use the information on the report to adjust dispatch time estimates, identify time-consuming tasks or dispatches, and determine service call trends.

Verify Work Order Completion

Print the Order History Report as often as necessary to verify that Work Orders are completed in a timely manner. Print the Scheduled Dispatch Report and Unscheduled Dispatch Report to identify lost Work Orders and analyze your company's response time to Work Order requests.

Maintenance Processes

As your business grows, you'll need to add new information to Service Director to remain current. Follow the procedures below to add and maintain your company's information.

Add New Employees

Follow these steps to add a new Technician:

1. Determine whether the new Technician's skills fit in with the Skill Levels you have defined. If necessary, use the Skill Levels function (page 3-33) to add a new Skill Level.
2. If you need a new Labor Code for the Technician, add the Labor Code using the Labor Codes function (page 3-27).
3. Use the Schedules function (page 3-21) to enter the new Technician's schedule changes, if necessary. If the Technician does not have any schedule changes, assign the Technician a Schedule control record that contains only the Schedule ID for the hours he or she regularly works. See "Schedules" for more information on using schedules for regular hours.
4. Add the new Employee to your Employee base using the System Manager Employees or Payroll Employee Information function.
5. Use the Technicians function (page 3-37) to add the new Technician.

Add New Parts or Equipment

As you gain new Customers, you need to enter information about their equipment or the parts necessary for its service if this information is not already present in the system. If Inventory is installed and interfaced with Service Director, use the Items function to enter new Item information; otherwise, use the System Manager Description Items function to enter this information. Once you enter the new equipment/parts information into the system, you can use it in Service Director's Site Equipment (page 3-83), General Equipment (page 3-69), and Work Order Entry (page 4-5)functions.

Add New Service Contracts

Follow these steps to add a new Service Contract:

1. If the Service Contract is for a new Customer, record the new Customer's information using the Accounts Receivable Customers function.

2. If the contract involves a new piece of equipment or uses new parts, enter the new equipment and parts information into either the Inventory Items function (if Inventory is installed and interfaced with Service Director) or the System Manager Item Descriptions function.
3. Use the Site Equipment function (page 3-83) to enter information about the equipment that will be serviced.
4. Use the Service Contracts function (page 3-99) to enter the new contract.
5. If the contract involves regular dispatches, enter a Recurring Entry in Accounts Receivable for the Service Contract and use the Billing tab in the Service Contracts function (page 3-99) link the Service Contract to the Accounts Receivable Recurring Entry. Use the Generate Service Orders functions (page 5-29) to set up a recurring billing record for the Customer.

Add New Services

If your company is adding a new type of service, follow these steps to record the new service information:

1. Determine what information you need to add—will you need to add new Items, Skill Levels, Labor Codes, Technicians, Work To Do Descriptions, Schedules, or is this information already present in your system?
2. Use either the Inventory Items function (if Inventory is installed and interfaced with Service Director) or the System Manager Description Items function to enter information about new Site Equipment pieces your company will service or new parts your technicians will use.
3. Use the functions on the Setup and Maintenance menu to enter the information you gathered above.
4. If the new service occurs regularly, use the Generate Work Orders (page 4-41) or Generate Service Orders (page 5-29) function to speed Work Order or Service Order entry.

3

SETUP AND MAINTENANCE

OVERVIEW

Before you use the Service Director system, make sure that you have set it up correctly. See "Service Director Setup Information" on (page 2-5) for information on the setup tasks you need to complete to set up the system.

Use the Setup and Maintenance functions to enter the basic information you use on a daily basis into the system. Once entered, this information does not often change and can be left as is except for minor maintenance.

You must use most of the functions on the Setup and Maintenance menu before you can use any other Service Director functions. For example; use the Business Rules function first after you install Service Director to specify how the system should work. The menu also contains a few functions you will use repeatedly as you gain new Customers, add Service Contracts, and Equipment. Use the remaining functions to enter Batch Code, Technician, and scheduling information for your company.

To set up the Service Director application, follow these steps:

- Set up Business Rules
- Set up Codes and Categories
    - Batch Codes
    - Equipment Categories
    - Labor Codes
    - Work to do Descriptions
- Define Billing Types
- Enter Technicians
- Create Schedules
- Set up Skill Levels
- Set up Warranty Types
- Add Site and General Equipment

BUSINESS RULES

Use the **Business Rules** function to define application interfaces, control how Service Director works, and set Work Order and GL Account default entry values. Be careful when you specify options; the choices you make are global and affect other users of Service Director.

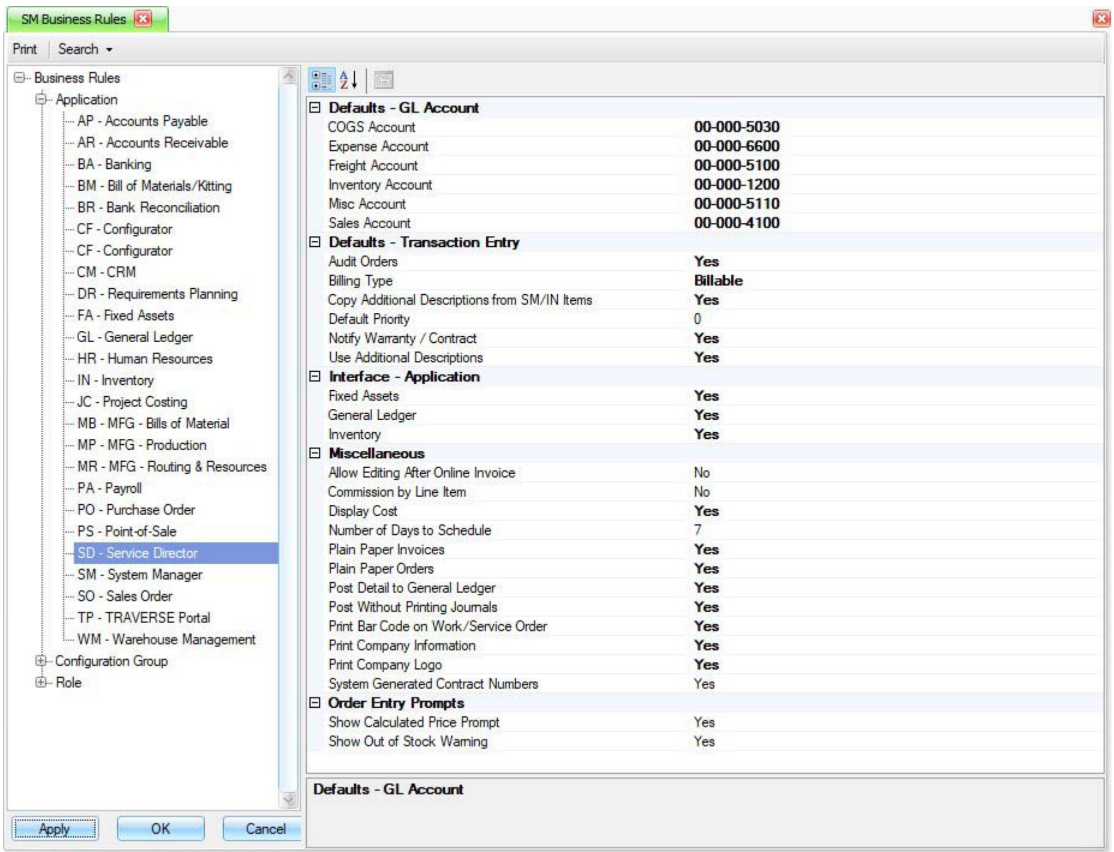
To set up **Business Rules**, follow these steps:

1. Select **Business Rules** from the **System Manager, Company Setup** menu.

Business Rules Menu

2. The **Business Rules** screen appears. Select **Service Director**.

Business Rules Screen



Defaults - GL Accounts

3. If Service Director interfaces with General Ledger, select the default Cost-Of-Goods-Sold, Expense, Freight, Inventory, Miscellaneous, and Sales Accounts used for posting. If Service Director does not interface with General Ledger, enter the Accounts that you want to appear on the posting logs when you post.

   If Service Director interfaces with Inventory and you select Inventory Items for parts the COGS, Sales and Inventory accounts assigned to the Item through the Account Code will be used to post.

4. **COGS Account**: Select the default GL Account for Cost Of Goods Sold.

5. **Expense Account**: Select the default Account to post service Expenses.

6. **Freight Account**: Select the GL Account for Freight costs.
7. **Inventory Account**: Select the GL Inventory Account for when an Item ID is manually entered (not selected from Inventory or System Manager Items). This is the offset to the Cost of the Item used during the post.

   This should not be your Inventory GL Account. Your Inventory valuation will not balance if you use your Inventory Account here. A value is posting to the Inventory Account, but no Inventory Item is affected by the transaction.
8. **Misc Account**: Select the GL Account for any Miscellaneous costs.
9. **Sales Account**: Select the default Account for miscellaneous Items entered into the Item detail of a transaction. Miscellaneous Items would be Items that are not set up in Inventory or System Manager. You will have the option to change this Account at the time of the transaction.

Defaults - Transaction Entry

10. **Audit Orders**: Select **Yes** to keep a log of changes to orders; otherwise, select **No**. This will track any user-made changes to your orders. The changes to the orders can be viewed using the Audit Explorer on the System Manager, System Audit menu.
11. **Billing Type**: Select the default billing type from the drop-down list. This list uses the values you create with the Billing Type function (page 3-61) on the Setup and Maintenance menu. If this value is not set, you will not be able to use the Generate Work Orders function.
12. **Copy Additional Descriptions from SM/IN Item**: Select **Yes** to copy Additional Descriptions from System Manager or Inventory; otherwise, select **No**. If you interfaced Service Director with Inventory, System Manager Items are not used. If you do not elect to use Additional Descriptions, this option is not available.
13. **Default Priority**: Select the default priority to use when entering a transaction. You will be able to change the priority in the Work Order Entry screen or the Service Order Entry screen, if necessary.
14. **Notify Warranty/Contract**: Select **Yes** to notify the user that warranty/contract information exists for the Site Equipment ID when entering a Service/Work Order; otherwise, select **No**.
15. **Use Additional Descriptions**: Select **Yes** to use Additional Descriptions for line Items; otherwise, select **No**. In the detail mode in Work Orders or Service Orders you will get an additional field to enter an Additional Description for the Item in the transaction. The column is also available in the column chooser.

Interface - Application

16. **Fixed Assets**: Select **Yes** to interface Service Director with Fixed Assets; otherwise, select **No**. If Fixed Assets interfaces with Service Director, you will have the ability to update service history for your assets. You will be able to link Site Equipment to a Fixed Asset.
17. **General Ledger**: Select **Yes** to interface Service Director with General Ledger.

NOTE: This switch applies only to Service Order costing and only affects how Service Orders are processed. Work Order billing through the General Ledger is controlled by the Accounts Receivable interface to GL. If you want Work Order billing to process through Accounts Receivable, make sure the Accounts Receivable interface to the General Ledger is set to Yes.

18. **Inventory**: Select **Yes** to interface Service Director with Inventory; otherwise, select **No**. If Inventory interfaces with Service Director, you will have the ability to select Items that are set up in Inventory when you enter transactions. The information such as Description, Account numbers, Cost, and Price will all be brought into the transaction from Inventory. Transactions update the Inventory Committed, Available and On-Hand quantities online.

Miscellaneous

19. **Allow Editing After Online Invoice**: Select **Yes** to be able to edit the Work Order after the invoice has bee printed Online, from the Work Order screen. Select **No** to lock the Work Order editing once the invoice has been printed Online from the Work Order screen.
20. **Commission by Line Item**: Select **Yes** to calculate commission per line Item of an invoice; otherwise, select **No**. Selecting No will use the Sales Rep information on the Site Information tab of the Work Order.
21. **Display Cost**: Select **Yes** to display unit cost on line Items in transactions; otherwise, select **No**.
22. **Number of Days to Schedule**: Enter the number of days to schedule.

    The number entered here will determine the number of days displayed on the calendar when scheduling a technician for a dispatch.

23. **Plain Paper Invoices**: Select **Yes** to use plain paper invoices; otherwise, select **No** to use preprinted forms.
24. **Plain Paper Orders**: Select **Yes** to use plain paper Work Order and Service Orders; otherwise, select **No** to use preprinted forms.

25. **Post Detail to General Ledger**: Select **Yes** to post details to General Ledger to post line-Item detail information to General Ledger; otherwise, select **No** to only post summary information. If you use multi-currency, this option is automatically selected and cannot be changed. Information is always posted in detail when you use multi-currency.

26. **Post Without Printing Journals**: Select **Yes** to post without printing journals; otherwise, select **No**. If you select Yes, you will be allowed to post transactions without printing your Work Order and Service Order Journals to a printer or output. You will receive a dialog box stating the reports have not been printed and you may continue or stop and print the reports.

27. **Print Bar Code on Work/Service Order**: Select **Yes** to default the option to print bar codes on the Work Order and Service Order forms; otherwise, select **No** to manually select to print bar codes.

28. **Print Company Information on Plain Forms**: Select **Yes** to print the company information on plain paper forms; otherwise, select **No**.

29. **Print Company Logo**: Select **Yes** to print the company logo on plain paper forms, otherwise, select **No**. This will look at the company logo box in the System Manager, Company Setup, Company Information function for a company logo. This option can only be changed to Yes if you said Yes to the option to use plain paper invoices or orders.

30. **System Generated Contract Numbers**: Select Yes to use system-generated contract numbers; otherwise, select **No** to enter contract numbers manually.

31. **Show Calculated Price Prompt**: Select **Yes** to have the system show a prompt when the calculated price changes, otherwise, select **No**.

32. **Show Out of Stock Warning Prompt**: Select **Yes** to have the system show a warning message when an Item is out of stock, otherwise, select **No**.

33. Select a command button:

Command Buttons

Name	Description
Apply	Save the changes you have made to the business rules functions. The screen will remain open.
OK	Save the changes and exit the business rules function.
Cancel	Close the business rules screen without saving any changes.

Name	Description
Print	Preview and print a business rules report.
Search	Perform a wildcard search of all existing business rule descriptions. The results will display in a tree-view for easy navigation.

Business Rules Report

Continental Products Unlimited
Business Rules List

Page 1

Application	Group / Description	Current Value	Default Value
SD - Service Director			
	Defaults - GL Account		
	COGS Account	00-000-5030	-
	Expense Account	00-000-6600	-
	Freight Account	00-000-5100	-
	Inventory Account	00-000-1200	-
	Misc Account	00-000-5110	-
	Sales Account	00-000-4100	-
	Defaults - Transaction Entry		
	Audit Orders	No	No
	Billing Type	Billable	-
	Copy Additional Descriptions from SM/IN Items	Yes	No
	Default Priority	0	0
	Use Additional Descriptions	Yes	No
	Interface - Application		
	Fixed Assets	Yes	No
	General Ledger	Yes	No
	Inventory	Yes	No
	Miscellaneous		
	Allow Editing After Online Invoice	No	No
	Commission by Line Item	No	No
	Display Cost	Yes	No
	Number of Days to Schedule	7	7
	Plain Paper Invoices	No	No
	Plain Paper Orders	No	No
	Post Detail to General Ledger	No	No
	Post Without Printing Journals	Yes	No
	Print Bar Code on Work/Service Order	No	No
	Print Company Information	Yes	No
	Print Company Logo	No	No
	System Generated Contract Numbers	Yes	Yes

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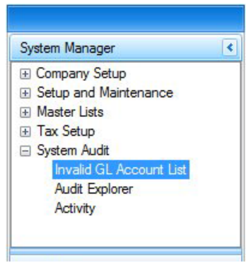
Invalid GL Account List

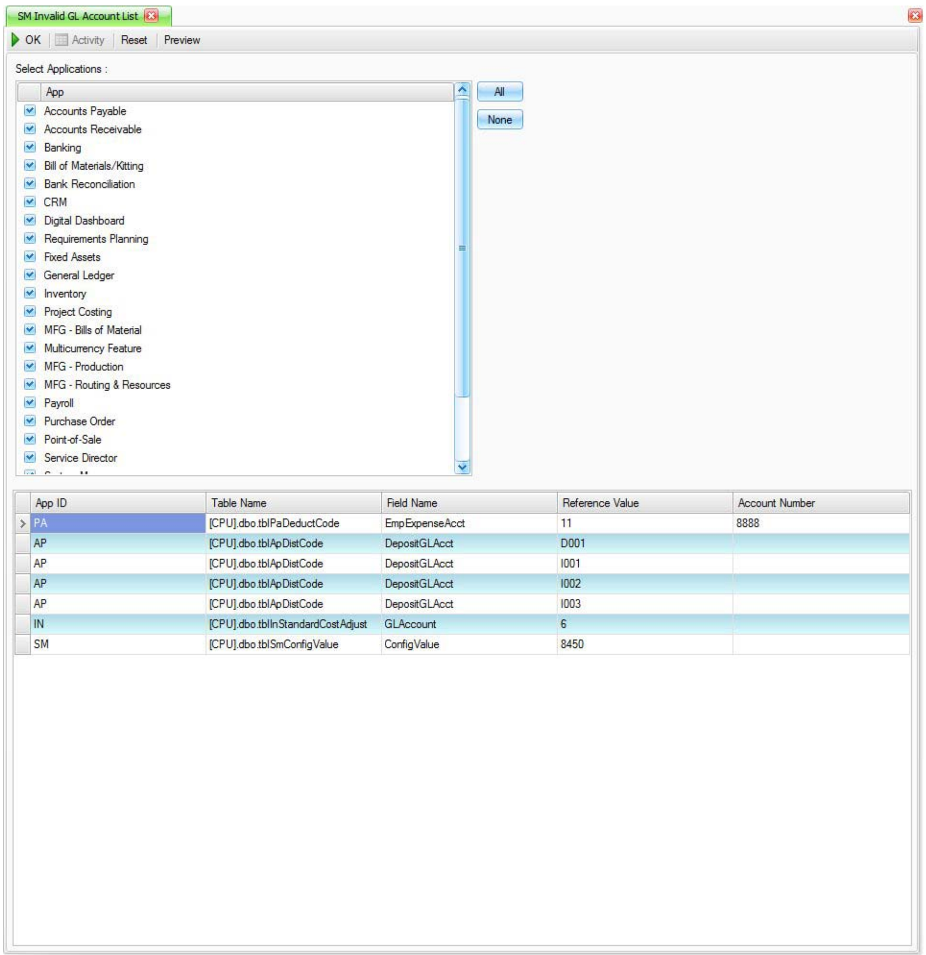
1. To check for invalid GL accounts select **Invalid GL Account List** from the **System Audit** menu in **System Manager**.

Invalid GL Account List Menu



2. The Invalid **GL Account List** screen appears.

Invalid GL Account List Screen



3. Select the **Applications** you want to check for invalid GL Accounts. If you want to have all applications checked click the **All** button.
4. Click **OK** to start the search for invalid GL accounts.
5. Select a command button:

Command Buttons

Name	Description
OK	Executes the list.
Activity	Not Available.
Reset	Return the value of all fields on the list or report screen to their default values.
Preview	View the list or report on your monitor.

Invalid GL Accounts List

Continental Products Unlimited
SM Invalid GL Account List

Page 1

App ID	Table Name	Field Name	Reference Value	Account Number
SM	[CPU].dbo.tblSmTaxLoc	GLAcct	AZ	010002021
SM	[CPU].dbo.tblSmTaxLoc	TaxRefAcct	AZ	010002021
SM	[CPU].dbo.tblSmTaxLocDetail	ExpenseAcct	AZ|0	000002021
SM	[CPU].dbo.tblSmTaxLocDetail	ExpenseAcct	AZ|0	000002021
SM	[CPU].dbo.tblSmTaxLocDetail	ExpenseAcct	AZ|0	000002021
SM	[CPU].dbo.tblSmTaxLocDetail	ExpenseAcct	AZ|0	000002021
SM	[CPU].dbo.tblSmTaxLocDetail	ExpenseAcct	AZ|0	000002021
SM	[CPU].dbo.tblSmTaxLocDetail	ExpenseAcct	AZ|0	000002021
SM	[CPU].dbo.tblSmTaxLocDetail	ExpenseAcct	AZ|0	000002021
SM	[CPU].dbo.tblSmTaxLocDetail	ExpenseAcct	AZ|0	000002021
SM	[CPU].dbo.tblSmTaxLocDetail	ExpenseAcct	AZ|0	000002021
SM	[CPU].dbo.tblSmTaxLocDetail	ExpenseAcct	AZ|0	000002021

BATCH CODES

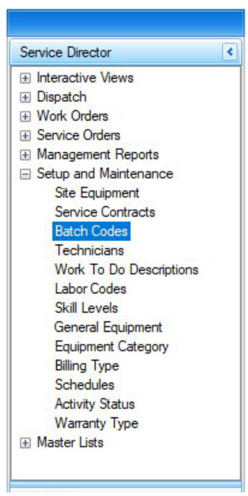
Batch codes allow you to group Work Orders, so that you can make changes to one group without affecting those in another.

Service Director does not have a Business Rule to use batch processing. If you want to use batch processing, use the Batch Codes function to define the Batch Codes you will use. Then, assign Work Orders and Service Orders to a Batch Code so you can post them in groups. If you not want to use batch processing the main ###### batch is assigned to all transactions when you are not using batch processing.

To set up **Batch Codes**, follow these steps:

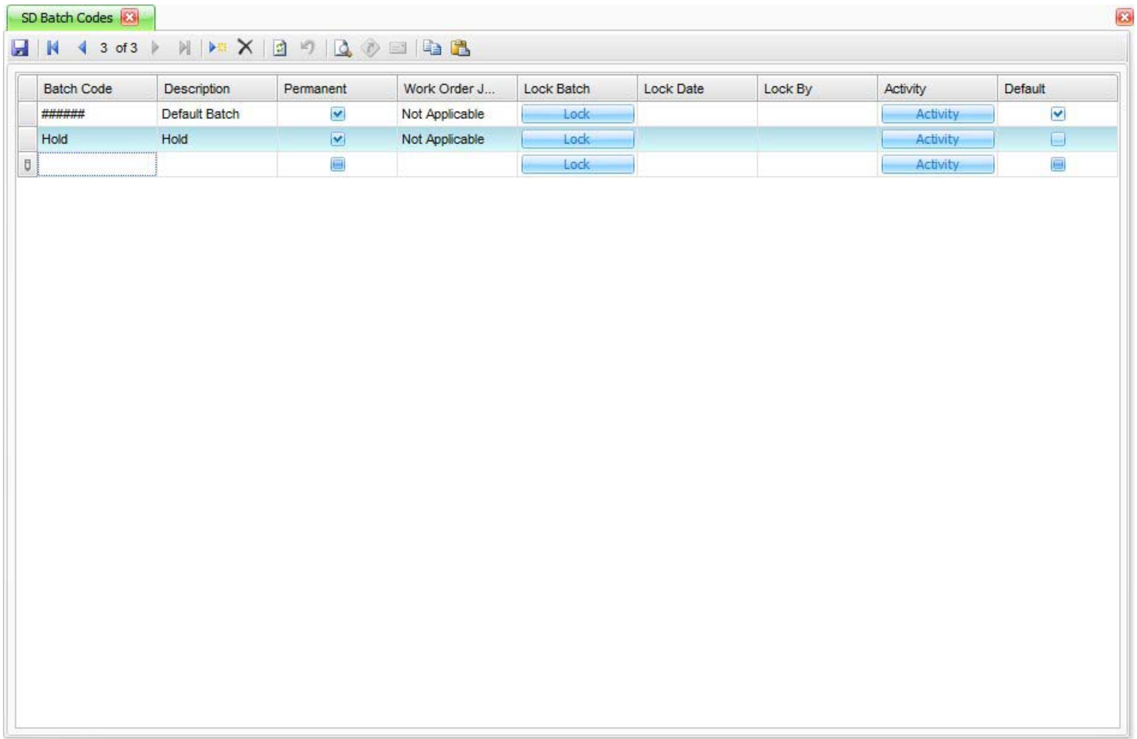
1. Select **Batch Codes** from the **Setup and Maintenance** menu.

Batch Codes Menu



2. The **Batch Codes** screen appears.

Batch Codes Screen



3. Enter the **Batch Code**.
4. Enter the **Description** of the batch.
5. Select the **Permanent** check box if you would like the PO application to keep the batch after it has been posted.
6. Accept the **Status** of the **Work Order Journal** that is displayed, or change it.
    - The default status is **Not Applicable**.
    - If Work Orders are entered, the default is **Unprinted**.
    - If the Work Order Journal has been printed out output, the status will be **Printed**.
    - If you enter a new Work Order after you print the journal, the default becomes **Reprint**.
7. The Batch is locked if it is unsuccessfully posted. To unlock a Batch, click the **Lock** button. When a Batch is locked, you cannot enter, edit, or post it.

8. Select the check box to indicate which batch will be the **Default** batch for this company.

Command Buttons

Name	Description
Activity	List the batch users.
Lock Batch	Lock the batch to prevent any activity in the batch.

Adding, Editing, and Deleting Batch Codes

To add a Batch Code, follow these steps:

1. Select the **New Record** icon on the toolbar. A blank record appears.
2. Enter the **Batch Code** and the **Description** of the batch.

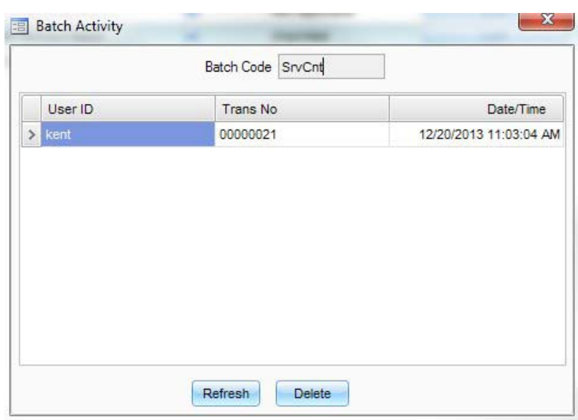
To edit a Batch Code, follow these steps:

1. Position the cursor in the field to edit.
2. Change the value in the field.

To delete a Batch Code, follow these steps:

1. Make sure that the **Batch Code** is not being used.
2. Select the **Batch Code** to delete. You cannot delete the main batch, **######**.
3. Select the **Delete** hot key (F3) or the **Delete** button .

Batch Activity Dialog Box



The **Batch Activity** dialog box appears when you select **Activity** on the Batch Codes screen.

1. The Batch Code entered on the **Batch Codes** screen is displayed.
2. The **User ID** of the users who are using the batch are displayed.
3. The **Trans No** of the transaction currently in use by the user is displayed.
4. The workstation **Date/Time** that the user accessed the transaction are displayed.

Command Buttons

Name	Description
Refresh	Refresh the list of users in the dialog box.
Delete	Change the status of a transaction from locked to unlocked, and delete it from the Batch Activity dialog box. This needs to be done if a journal or posting was not completed successfully, to unlock the batch. Deleting this record will only delete the locking record, not change anything for that transaction.

Producing a Batch Codes List

Use the **Batch Codes List** function to produce a list of the batch codes you defined in the Batch Codes function on the Setup and Maintenance menu.

To produce a **Batch Codes List**, follow these steps:

1. Select the **Print Preview** button to preview the list of **Batches**.
2. The **Preview Report** screen appears.
3. Select the **Print** button in the toolbar to print your list.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Batch Codes List

Consolidated Service Director
SD Batch Codes

Page 1

Batch Code	Description	Permanent	Work Order Journal Status	Lock Batch	Lock Date	Lock By	Activity
######	Default Batch	✔	Not Applicable				
Disp	Dispatch batch	✔	Not Applicable				
Hold	Hold	✔	Not Applicable				
SrvCnt	Service Contract Batch	✔	Unprinted				
WrkOrd	Work Order Batch	✔	Not Applicable				

SCHEDULES

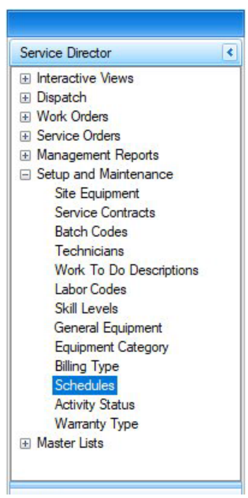
Use the **Schedules** function to set up business hours for your company. You can set up Schedules in a variety of ways. For example, you might set up one Schedule for AM hours and another for PM hours, or set up several Schedules that correspond to multiple shifts. You can also use the Schedules function to set up Schedules for different groups of Employees. For example, you can set up one Schedule for office staff, another for technicians performing field work, and a third for consultants.

The **Schedule** function defines the daily and hourly availability of a given resource. Within each Schedule there are multiple date ranges or days and within each date range or day called Availability Descriptions, there are usually multiple time frames. Each one of these shows availability in terms of a start time and a finish time.

To set up **Schedules**, follow these steps:

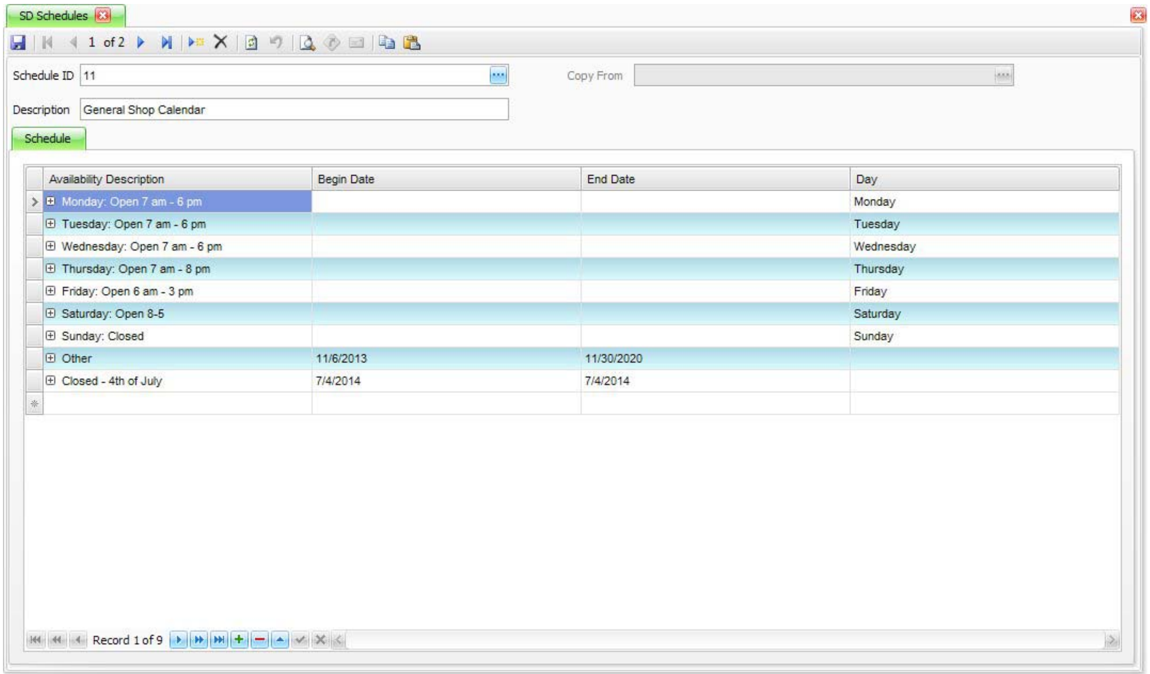
1. Select **Schedules** from the **Setup and Maintenance** menu.

Schedules Menu



2. The **Schedules** screen appears.

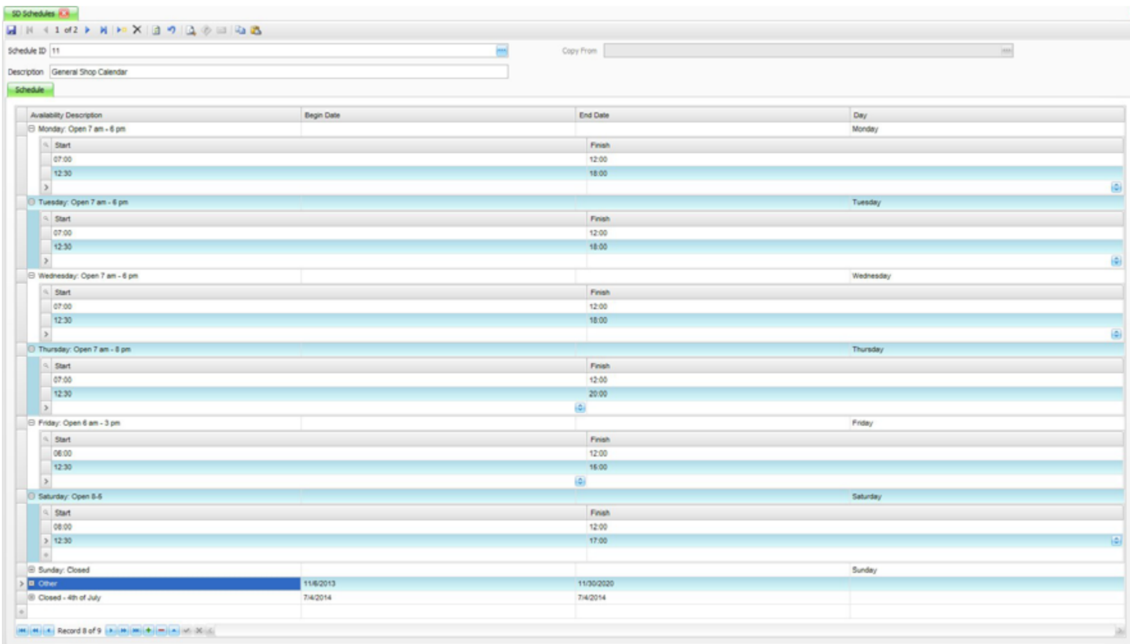
Schedules Screen



3. Select the **New Record** button  from the toolbar and enter the **Schedule ID.**
4. Select the **Copy From** Schedule ID, if you want to copy an existing Schedule and edit the things that are different in your new Schedule ID.
5. Enter a **Description** describing this Schedule. This description will be seen in the drop down as one selects the Schedule to be assigned to Technicians.
6. Enter the Description of the date range or day of the week into the **Availability Description** field. Since, each Schedule ID can have multiple date ranges or days, you may be creating one of several Descriptions. Each one defines the availability for a given day, date, or days and within it hours of availability.
7. Enter the **Begin Date** if this time-frame is based on specific dates or a given day. If the hours will pertain to a day of the week, rather than a date range, this field is left blank.
8. If a beginning date exists, an **End Date** is required, otherwise this field is left blank.
9. Enter a **Day** of the week if no date range exists. The entry can be Sunday, Monday, Tuesday, etc., or the corresponding number of 1, 2, 3, etc.

10. Click the **Plus** (+) next to the desired line to add times.

Schedules Screen (Expanded)



11. Enter **Start** times for the various shifts and breaks for this time-frame. Use the Up and Down arrows to increase or decrease the hour or minutes.

NOTE: Since most days will have short breaks and/or meal breaks you will need to enter multiple records of each start and finish time during the given day.

12. Enter a **Finish** time for each start time for this time-frame. Use the up and down arrows to increase or decrease the hour or minutes.

NOTE: These times are in 24 hour time, so as not to cause confusion with AM and PM.

13. Enter the next times for the next shift available.

The above screen shows a finished example of what a Schedule might look like. Looking at the completed schedule, we can determine that the normal weekday is from 7:00 to 18:00. There is a lunch break from 12:00 to 12:30 and the day ends at 18:00. We can also see that the schedule and this time-frame applies to all dates, however exceptions do exist, and they appear under a different description further down the screen. We work a shorter day on Saturday and we can see that the office is closed on July 4th.

Task Summary

To add a Schedule, follow these steps:

1. Select the **New Record** icon on the toolbar. A blank record appears.
2. Enter the **Schedule ID** and a **Description** of the Schedule.
3. Enter the **Availability Description**, **Begin Date**, **End Date**, **Day**, **Start Time**, and **Finish Time** where appropriate.
4. Click the **Save** button to save your work.

To edit a Schedule, follow these steps:

1. Select the **Schedule ID** to edit.
2. Position the cursor in the field to edit.
3. Change the value in the field.
4. Click the **Save** button to save your work.

To delete a Schedule, follow these steps:

1. Select the **Schedule ID** to delete.
2. Select the **Delete** hot key (F3), or click on the **Delete Record** button on the tool bar.

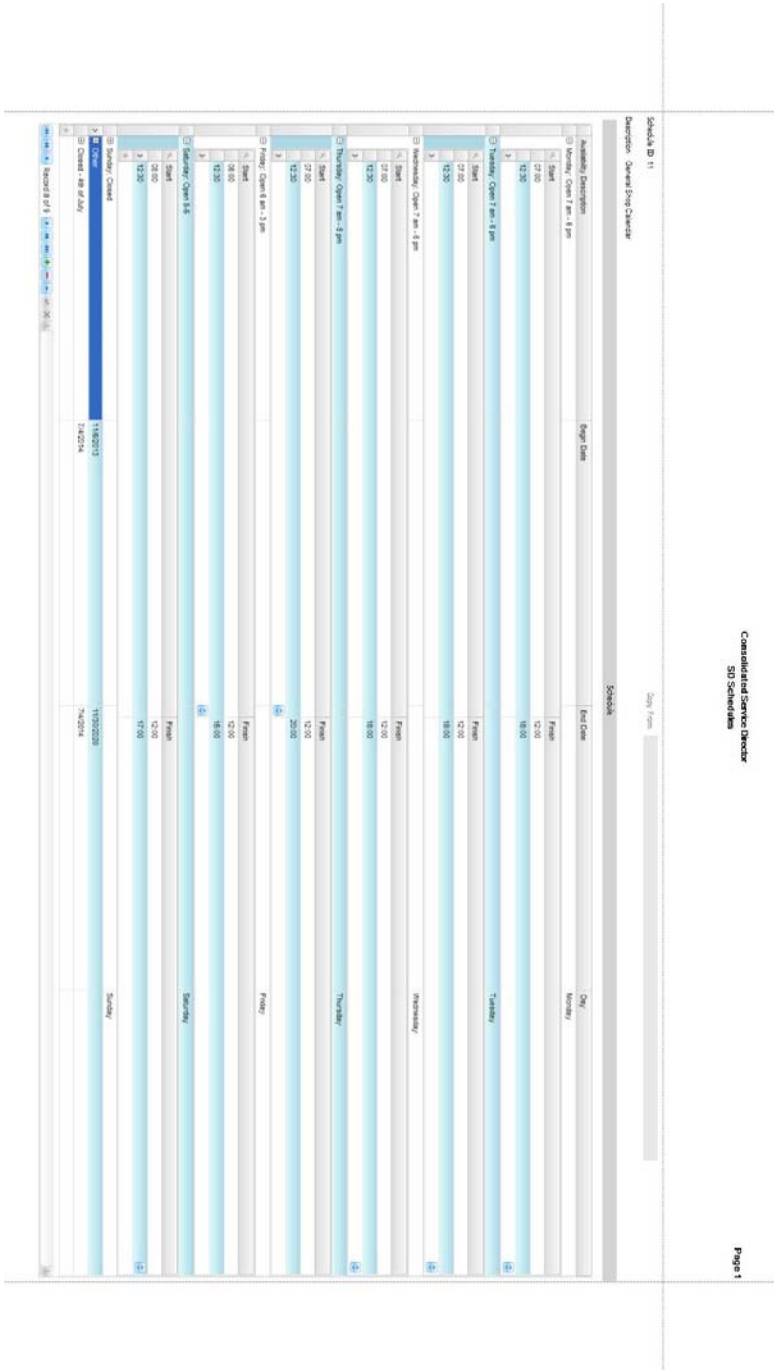
Producing a Schedules List

To produce a **Schedules List**, follow these steps:

1. Select the **Print Preview** button to preview the Schedule report for the Schedule you have displayed on the screen.
2. The **Preview Report** screen appears.
3. Select the **Print** button in the toolbar to print your list.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Schedules List



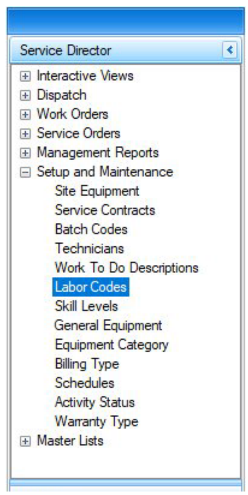
LABOR CODES

Use the **Labor Codes** function to enter Labor Codes for your Technicians. When associated with a Technician, the Labor Code identifies the type of work the Technician can complete. When associated with a Work To Do Description, the Labor Code allows you to identify Technicians best suited for the task.

To set up **Labor Codes**, follow these steps:

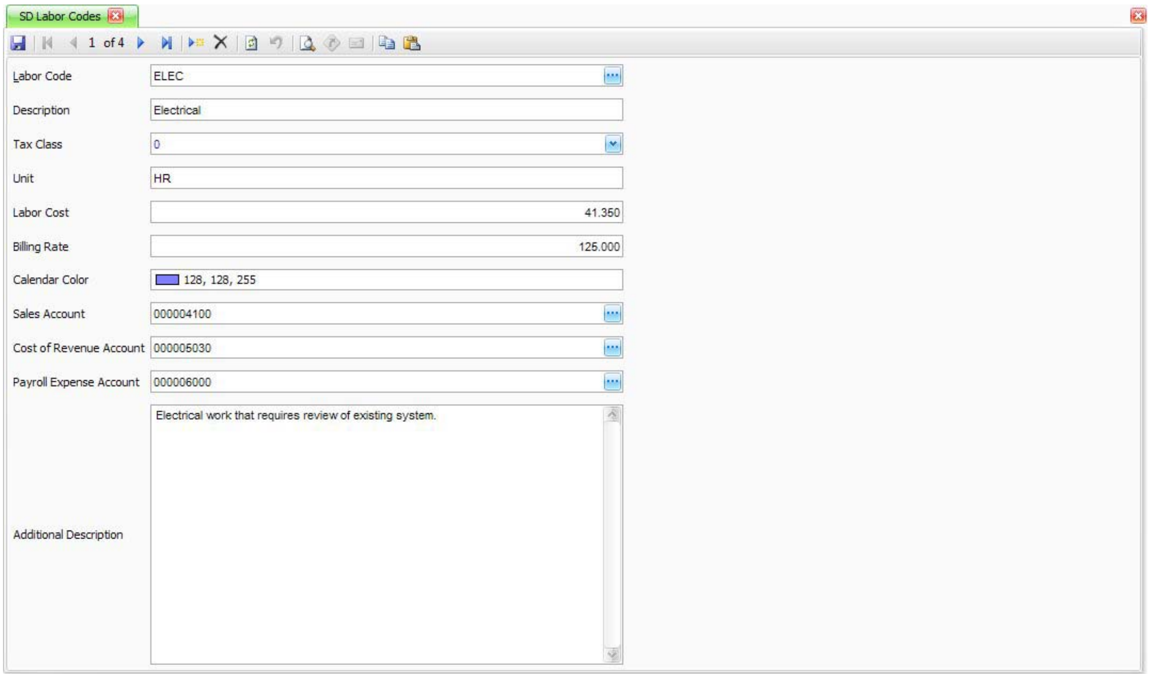
1. Select **Labor Codes** from the **Setup and Maintenance** menu.

Labor Codes Menu



2. The **Labor Codes** screen appears.

Labor Codes Screen



3. Click the **New Record** button, on the toolbar, to open a blank Labor Code record.
4. Create a new Labor Code in the **Labor Code** field, with a maximum length of 6 characters.
5. Enter a Description for the Labor Code in the **Description** field, with a maximum length of 35 characters. Additional Description details can be entered in the **Additional Description** field.

Maint

6. Select the Tax Class for the Labor Code from the **Tax Class** field drop-down list. This will determine the sales tax rate from the Tax Location Group from the Work Order.
7. Enter the Unit of measure for the Labor Code in the **Unit** field. Typically this would be HR for hours or MIN for minutes.
8. Enter the Labor Cost per Unit for the Labor Code in the **Labor Cost** field. How much does it cost you per unit to have an Employee with this Labor Code working on a Work Order or Service Order.
9. Enter the Billing Rate per Unit for the Labor Code in the **Billing Rate** field. For this Labor Code how much are you going to bill your Customer for working on a Work Order.

10. Select the color that will indicate this Labor Code on the calendar in the **Calendar Color** field.

11. Select the GL Sales Account for the Labor Code from the **Sales Account** field drop-down list. This Account will be credited for the billing amount for the time recorded for Employees using this Labor Code.

12. Select the GL Cost of Revenue Account for the Labor Code from the **Cost of Revenue Account** field drop-down list. This Account will be debited for the cost of the labor recorded for time recorded for Employees using this Labor Code.

13. Select the GL Payroll Expense Account for the Labor Code from the **Payroll Expense Account** field drop-down list. This Account will be credited for the cost of the labor recorded for time recorded for Employees using this Labor Code.

14. Click the **Save** button to save your work.

Task Summary

To add a Labor Code, follow these steps:

1. Select the **New Record** icon on the toolbar. A blank record appears.
2. Enter the **Labor Code** and a **Description** of the Labor Code.
3. Enter the **Tax Class**, **Unit**, **Labor Cost**, **Billing Rate**, **Calendar Color**, **Sales Account**, **Cost of Revenue Account**, **Payroll Expense Account**, and **Additional Description** where appropriate.
4. Click the **Save** button to save your work.

To edit a Labor Code, follow these steps:

1. Select the **Labor Code** to edit.
2. Position the cursor in the field to edit.
3. Change the value in the field.

4. Click the **Save** button to save your work.

To delete a Labor Code, follow these steps:

1. Select the **Labor Code** to delete.
2. Select the **Delete** hot key (f3), or click on the **Delete Record** button on the tool bar.

Producing a Labor Codes List

To produce a **Labor Codes List**, follow these steps:

1. Select the **Print Preview** button to preview the Labor Code report for the Labor Code you have displayed on the screen.

   A preview for each Labor Code will need to be done to get a complete list.

2. The **Preview Report** screen appears.
3. Select the **Print** button in the toolbar to print your list.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Labor Codes List

Consolidated Service Director
SD Labor Codes

Page 1

Labor Code	ELEC	
Description	Electrical	
Tax Class	0	
Unit	HR	
Labor Cost		41.350
Billing Rate		125.000
Calendar Color	128, 128, 255	
Sales Account	000004100	
Cost of Revenue Account	000005030	
Payroll Expense Account	000006000	
Additional Description	Electrical work that requires review of existing system.	

1/15/2014 2:21 PM **kenthe**

SKILL LEVELS

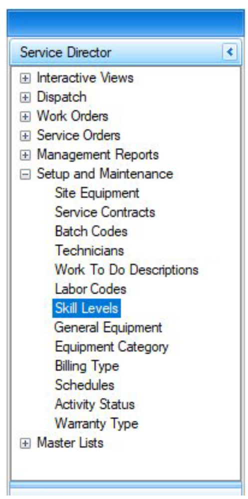
Use the **Skill Levels** function to set up Skill Levels for your Technicians. Skill Levels identify what sorts of skills or how many years of experience a Technician has for a given Labor Code, allowing you to identify the technicians best suited to perform work on a dispatch. Once you assign the skill level to a Technician, you can search for Technicians by Skill Level when you schedule dispatches.

Skill Levels are for information only. The Skill Level a Technician has can be used to find the proper Technician for a particular job, but is not required to be able to schedule the Technician for a particular type of job.

To set up **Skill Levels**, follow these steps:

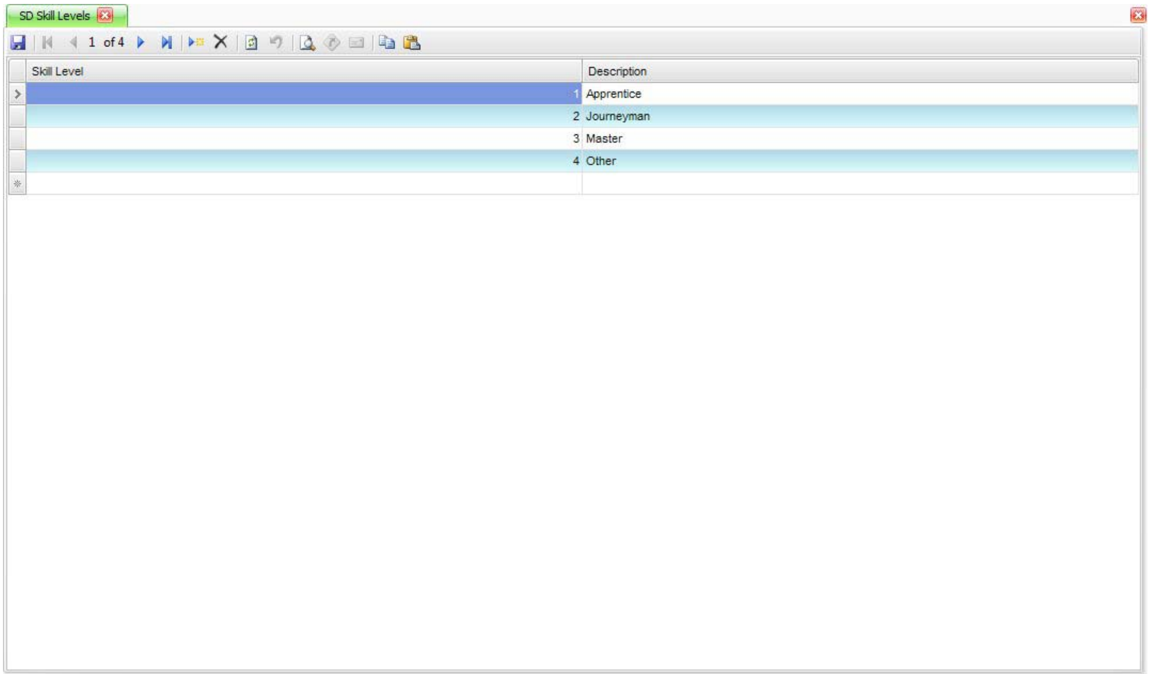
1. Select **Skill Levels** from the **Setup and Maintenance** menu.

Skill Levels Menu



2. The **Skill Levels** screen appears.

Skill Levels Screen



3. Click the **New Record** button , on the toolbar, to open a blank Skill Level record.
4. Enter the **Skill Level** code (this code must be numeric), then enter or edit the **Description**. Use the Technicians function to assign Skill Levels to your Technicians.

Task Summary

To add a Skill Level, follow these steps:

1. Select the **New Record** icon , on the toolbar. A blank record appears.
2. Enter the **Skill Level** number and a **Description** of the Skill Level.
3. Click the **Save** button to save your work.

To edit a Skill Level, follow these steps:

1. Select the Skill Level to edit.
2. Position the cursor in the field to edit.
3. Change the value in the field.

4. Click the **Save** button to save your work.

To delete a Skill Level, follow these steps:

1. Select the Skill Level to delete.
2. Select the **Delete** hot key (f3), or click on the **Delete Record** button on the tool bar.

Producing a Skill Levels List

To produce a **Skill Levels List**, follow these steps:

1. Select the **Print Preview** button to preview the Skill Level report for the Skill Levels you have displayed on the screen.
2. The **Preview Report** screen appears.
3. Select the **Print** button in the toolbar to print your list.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Skill Levels List

Consolidated Service Director
SD Skill Levels

Page 1

Skill Level	Description
1	Apprentice
2	Journeyman
3	Master
4	Other

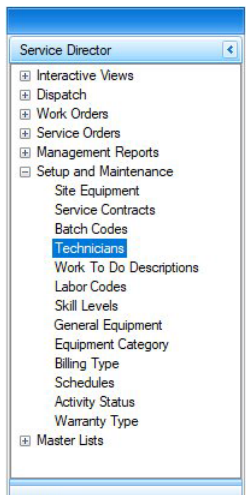
TECHNICIANS

Use the **Technicians** function to set up Technician information. Names for Technicians are pulled from the System Manager Employees file, so you need to enter Employee information using the System Manager Employees function, or if Payroll is installed, the Employee Information function, before you can set up any Technicians.

To set up **Technicians**, follow these steps:

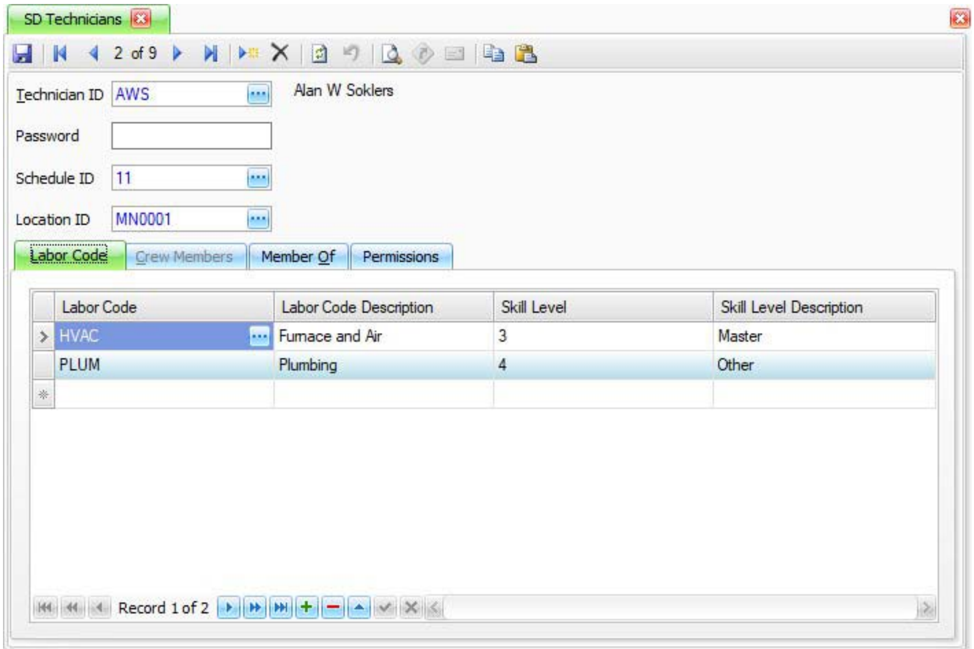
1. Select **Technicians** from the **Setup and Maintenance** menu.

Technicians Menu

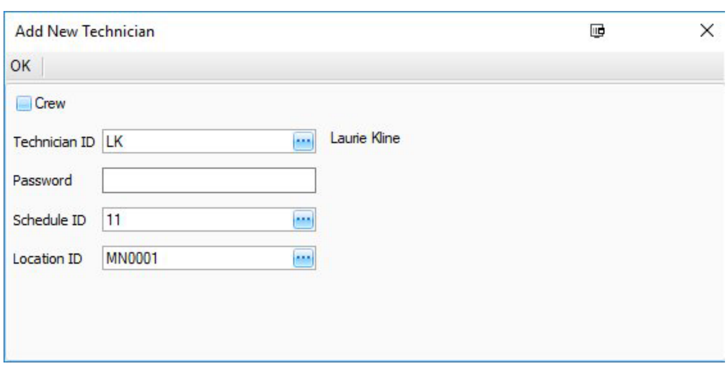


2. The **Technicians** screen appears.

Technicians Screen



3. Click the **New Record** button  , on the toolbar, to open the **Add New Technician** screen.



Maint

4. Select a **Technician ID** from the list of System Manager or Payroll Employees to add as a new Technician.

5. Enter a login **Password** for the Technician. The Technician will use this Password when logging into the Mobile Technician application.

NOTE: There is no login Password for a Crew, so this field is disabled.

Maint

6. Select a **Schedule ID** to be used as a default Schedule for this new Technician when scheduling dispatches.

Maint

7. Select a **Location ID** from the locations available. This list comes from your list of Inventory Locations.

   When you add a new technician, you have the option of adding a Crew. To add a new Crew, mark the **Crew** check box, enter a Crew name in the Technician ID field, then select a Schedule option from the Schedule ID field drop-down list and a Location from the Location ID field drop-down list.

   When scheduling a Technician for a dispatch on a Work Order or Service Order you may select a Crew to do the work on the dispatch. When a Crew is scheduled for a dispatch, the scheduled dispatch will be added to each Technicians' calendar, that is a member of the Crew.

8. Click **OK** to add the Technician or Crew you just created.

   Add members to the Crew by selecting Technicians from the **Technician ID** field on the **Crew Members** tab.

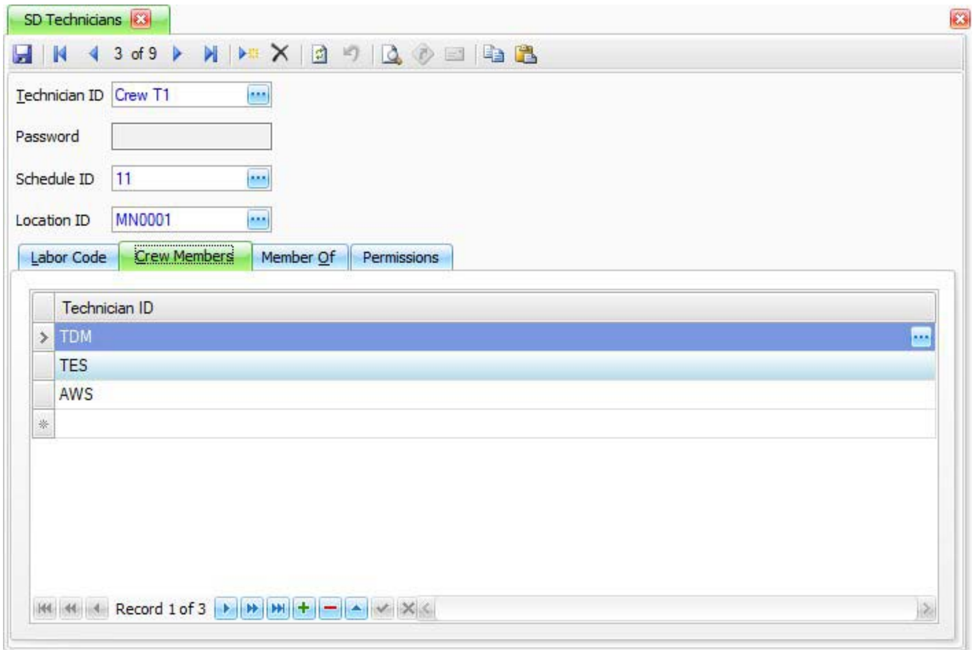
Maint

9. Use the **Labor Code** tab to set or check the Labor Code and Skill Level for the Technician or Crew.

   - Select the **Labor Code** from the list and the **Labor Code Description** will be displayed.
   - Select the **Skill Level** from the list and the **Skill Level Description** will be displayed.

10. Use the **Crew Members** tab to check or add Technician to a Crew.

Technician Screen - Crew Members Tab



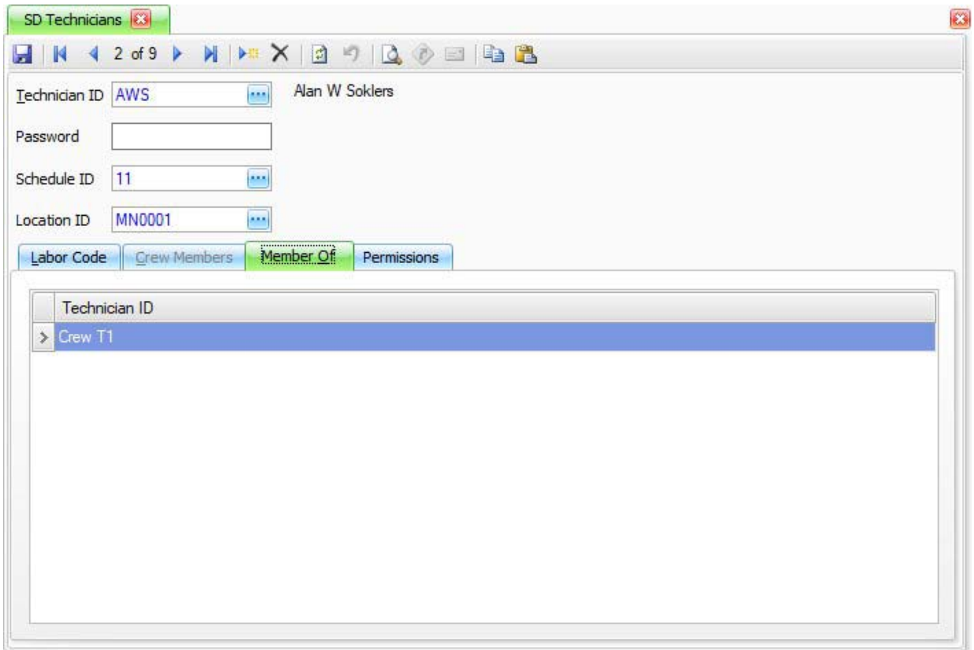
Maint

- Select the **Technician ID** for each Technician you want to include in this Crew.

NOTE: The Crew Members tab will only be active for those Technician IDs that were set up as a Crew when getting added. The Member Of tab will be inactive for any Technician added as a Crew.

11. Use the **Member Of** tab to see which Crews to which a Technician belongs.

Technicians Screen - Member Of Tab

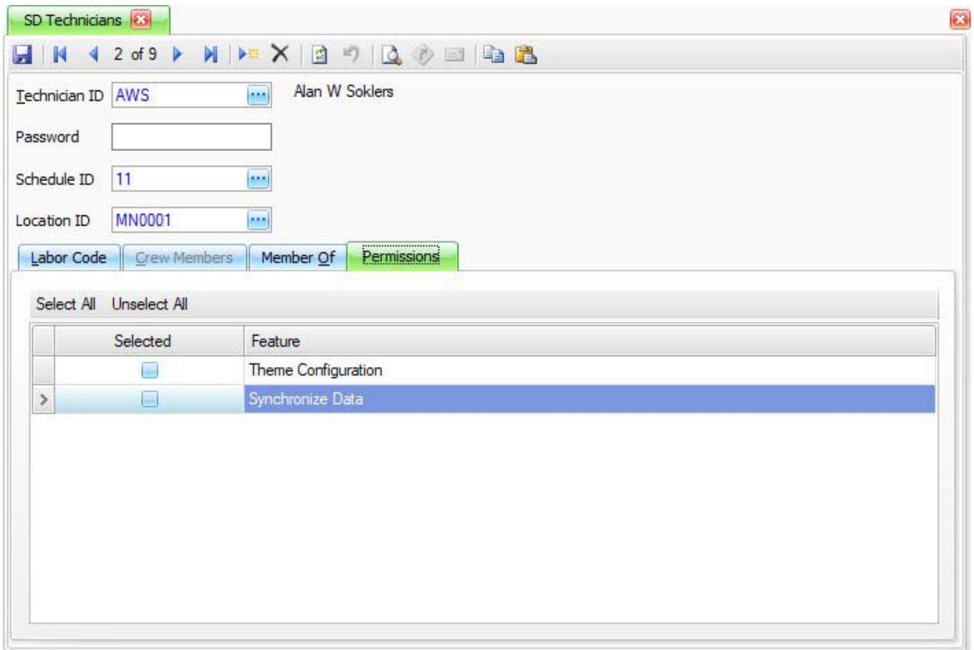


- The **Technician ID** for the Crew to which this Technician was added, will be displayed, and cannot be edited.

NOTE: The Member Of tab will be inactive for any Technician added as a Crew.

12. The **Permissions** tab displays the features of the Mobile Technician application for which you can set Permissions.

Technicians Screen - Permissions Tab



- If you want the Technician or Crew to have permission to use a listed feature, mark the selected feature: **Theme Configuration** and **Synchronize Data**.

13. Click the **Save** button to save your work.

Task Summary

To add a Technician, follow these steps:

1. Select the **New Record** icon on the toolbar. A blank record appears.
2. Select the Technician from the list of Employees.
3. Enter the **Password**, **Schedule**, **Location ID**, **Labor Code**, and **Skill Level** where appropriate.
4. Click the **Save** button to save your work.

To edit a Technician, follow these steps:

1. Select the **Technician ID** to edit.
2. Position the cursor in the field to edit.

3. Change the value in the field.
4. Click the **Save** button to save your work.

To delete a Technician, follow these steps:

1. Select the **Technician ID** to delete.
2. Select the **Delete** hot key (f3), or click on the **Delete Record** button on the tool bar.

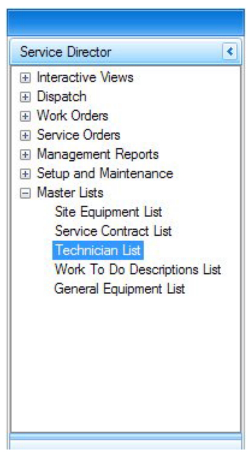
Producing a Technician List

Use the **Technician List** function to print a list of your Technicians. Use the Setup and Maintenance Technicians function to add or edit Technician information.

To produce a **Technician List**, follow these steps:

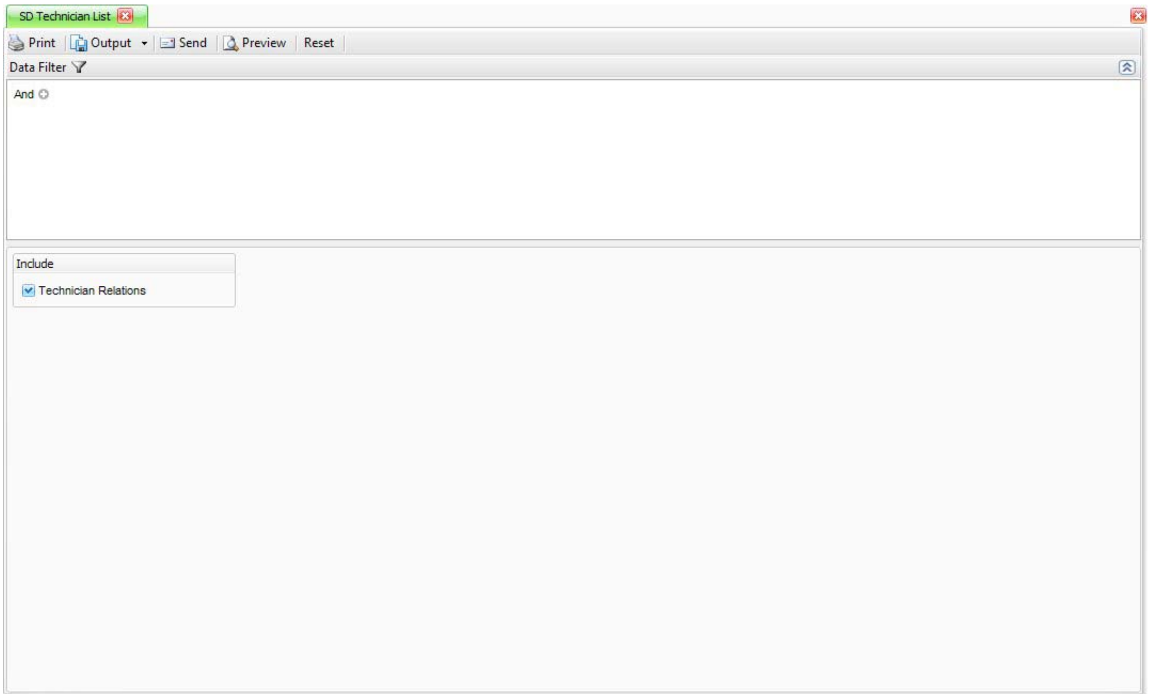
1. Select **Technician List** from the **Master Lists** menu.

Technician List Menu



2. The **Technician List** screen appears.

Technician List Screen



3. Use the **Data Filter** to select the range of filtering options or leave the filter blank to include all available data.
4. Select the **Technician Relation** check box to include the Crew Members and Members Of information on the report.

5. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Technician List

Consolidated Service Director
Technician List

PAGE 1

Report Filter
Include Technician Relations Yes

Technician ID	Technician Name		Schedule ID	Location ID
AMK	Ann Marie M Kelly		11	TX0001
Labor Code		Skill Level		
HVAC	Furnace and Air	2 Journeyman		
PLUM	Plumbing	2 Journeyman		
AWS	Alan W Soklers		11	MN0001
Labor Code		Skill Level		
HVAC	Furnace and Air	3 Master		
PLUM	Plumbing	4 Other		
Crew T1			11	MN0001
Members				
AMK	Ann Marie M Kelly			
AWS	Alan W Soklers			
DOUBLA00001	Mike K Doubla			
GER001	Timothy K Gerard			
JOHNSON0001	Steve W Johnson			
LUK001	George W Lukas			
TDM	Ted D Masters			
TES	Terry E Smith			
DOUBLA00001	Mike K Doubla		22	MN0001
Labor Code		Skill Level		
ELEC	Electrical	3 Master		
HVAC	Furnace and Air	3 Master		
OTHER	Other Services	3 Master		
PLUM	Plumbing	3 Master		
GER001	Timothy K Gerard		11	MN0002
JOHNSON0001	Steve W Johnson		22	MN0001
LUK001	George W Lukas		11	MN0001
TDM	Ted D Masters		11	MN0001
Labor Code		Skill Level		
ELEC	Electrical	3 Master		
HVAC	Furnace and Air	1 Apprentice		
PLUM	Plumbing	4 Other		
TES	Terry E Smith		11	MN0002
Labor Code		Skill Level		
PLUM	Plumbing	3 Master		

*** End of Report ***

12/12/2013 9:10 AM kenthe

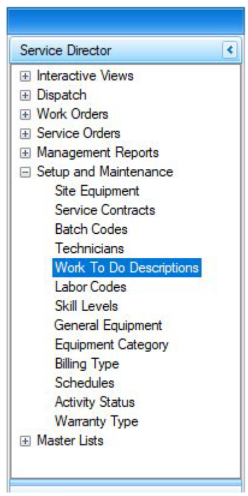
WORK TO DO DESCRIPTIONS

Use the **Work To Do Descriptions** function to record short descriptions of regularly performed tasks or to save brief instructions used by your Technicians. You can then add these descriptions to Work Orders and Service Orders, and print them for use by Technicians on service calls.

To set up **Work To Do Descriptions**, follow these steps:

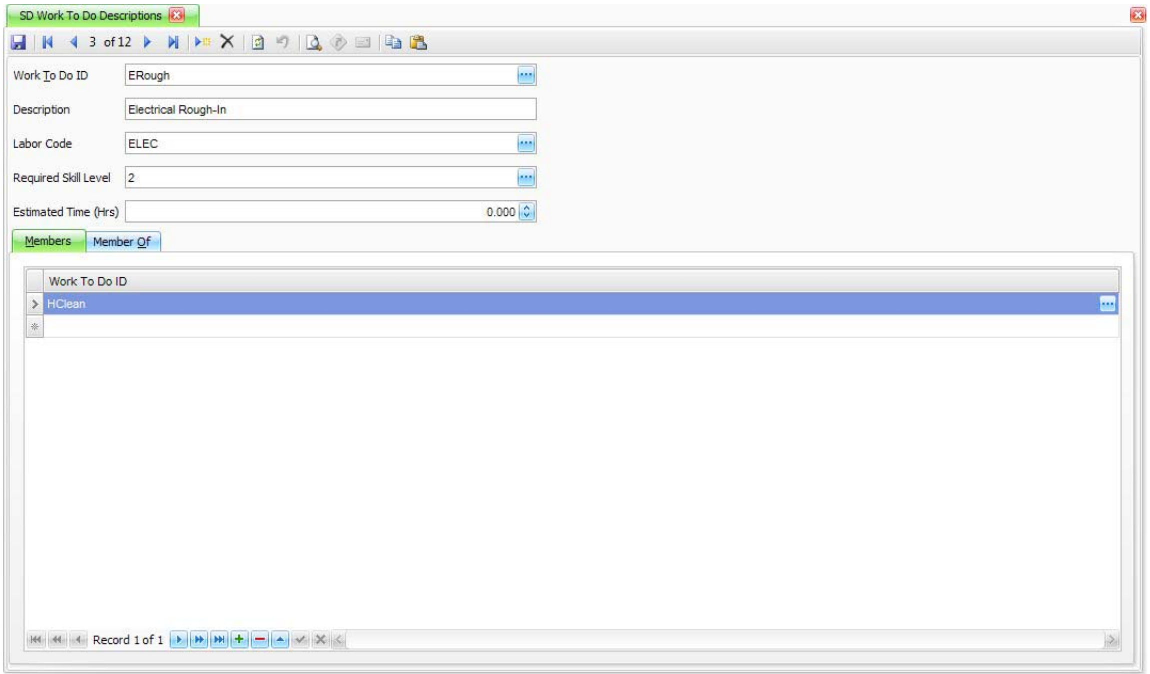
1. Select **Work To Do Descriptions** from the **Setup and Maintenance** menu.

Work To Do Descriptions Menu



2. The **Work To Do Descriptions** screen appears.

Work To Do Descriptions Screen



3. Click the **New Record** button  , on the toolbar, to open a blank Work To Do Description record.
4. Create a new Work To Do ID in the **Work To Do ID** field, with a maximum length of 10 characters.
5. Enter a Description for the Work To Do ID in the **Description** field.
6. Select the Labor Code for the Work To Do in the **Labor Code** field.

   The Labor Code will be brought in with the **Work To Do Id** when it is put into **General Equipment** (page 3-69) and **Site Equipment** (page 3-83). This Labor Code will be used for billing rates and costs when Work Orders are entered and posted.

7. Select the Required Skill Level for Technicians performing this work from the **Required Skill Level** field.

   The Required Skill Level is only a suggestion and is not required for the Technician to have that Skill Level to do work on this Work To Do ID.

8. Enter the Estimated Time to perform this work in hours in the **Estimated Time (Hrs)** field.

The Estimated Time is used when scheduling a dispatch to determine what Technician will have the estimated time available in their schedule.

9. Click the **Save** button to save your work.

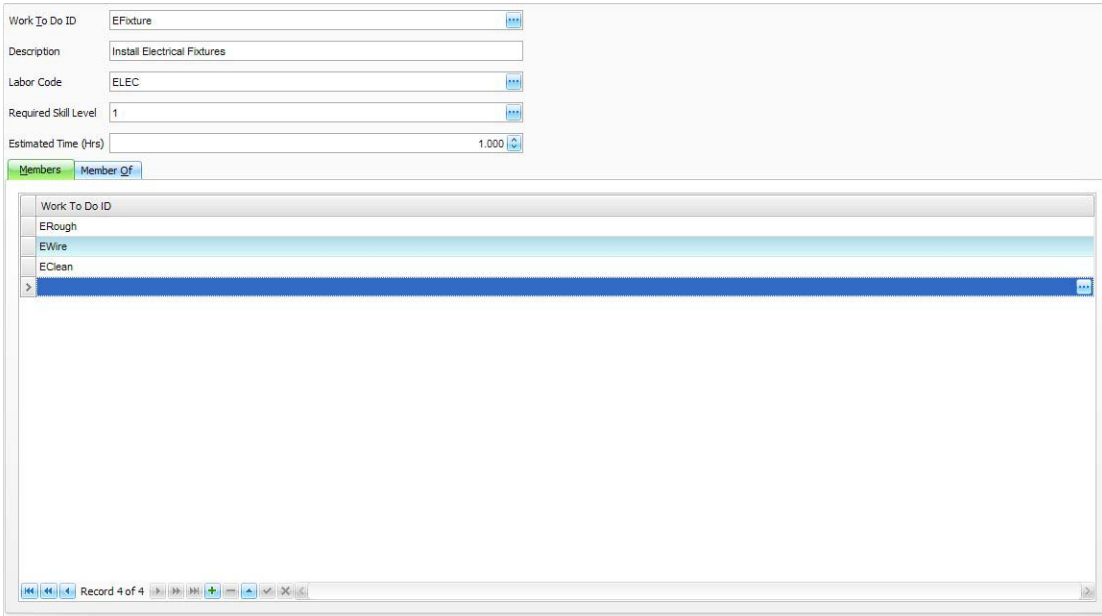
Creating a New Work To Do Description Group

Work To Do Description groups would be used mainly for a scheduled maintenance type of Work To Do. You can set the Work To Do Description to be the name of the general maintenance you will be using, then on the Members tab you would enter the specific Work To Do IDs that make up the different components of the group.

Example: An auto repair shop may want to set up a work to do group for their standard oil change. They would set up the Work To Do IDs for each step; change oil, check air filters, check coolant level, check brake fluid level, check tire pressure, check tire wear, rotate tires. Then they would set up the Standard Oil Change Work To Do ID and add these steps to the Standard Oil Change group.

1. Create new Work To Do Descriptions for each action you want to group.
2. Follow the steps above to add the Work To Do IDs that will be included in the Work To Do Group.
3. On the **Members** tab, click the **Append** button ( ), and select the **Work To Do ID** from the list.

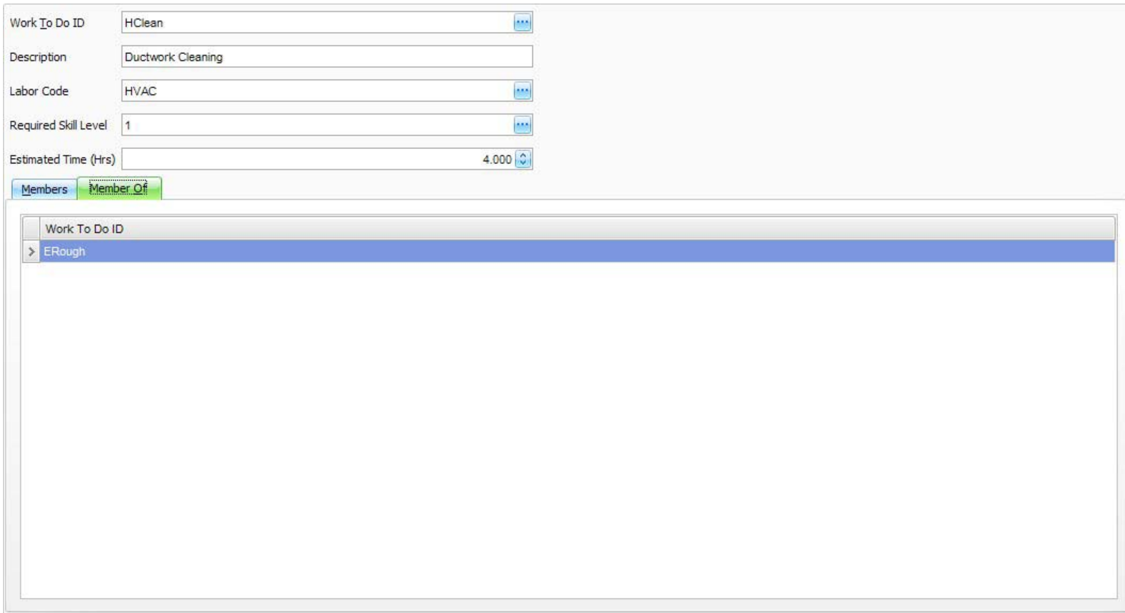
Work To Do Descriptions Screen - Members Tab



4. Continue to add to the list until the list is complete.
5. Once you are finished adding Work To Do IDs, click the **End Edit** button ( ).
6. Make sure you click the **Save** button to save your changes.

7. To see what group(s) a Work To Do ID belongs to, use the **Member Of** tab.

Work To Do Descriptions Screen - Members Of Tab



Task Summary

To add a Work To Do ID, follow these steps:

1. Select the **New Record** icon on the toolbar. A blank record appears.
2. Enter the **Work To Do ID** and a Description of the Work To Do.
3. Enter the **Labor Code**, **Required Skill Level**, **Estimated Time**, and **Members** where appropriate.
4. Click the **Save** button to save your work.

To edit a Work To Do ID, follow these steps:

1. Select the **Work To Do ID** to edit.
2. Position the cursor in the field to edit.
3. Change the value in the field.
4. Click the **Save** button to save your work.

To delete a Work To Do ID, follow these steps:

1. Select the Work To Do ID to delete.
2. Select the **Delete** hot key (f3), or click on the **Delete Record** button on the tool bar.

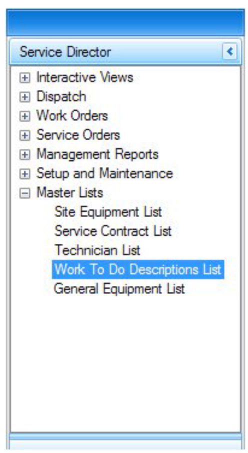
Producing a Work To Do Descriptions List

Use the **Work To Do Descriptions List** function to print a list of your Work To Do Descriptions. Use the Setup and Maintenance Work To Do Descriptions function to add or edit Work To Do Description information.

To produce a **Work To Do Descriptions List**, follow these steps:

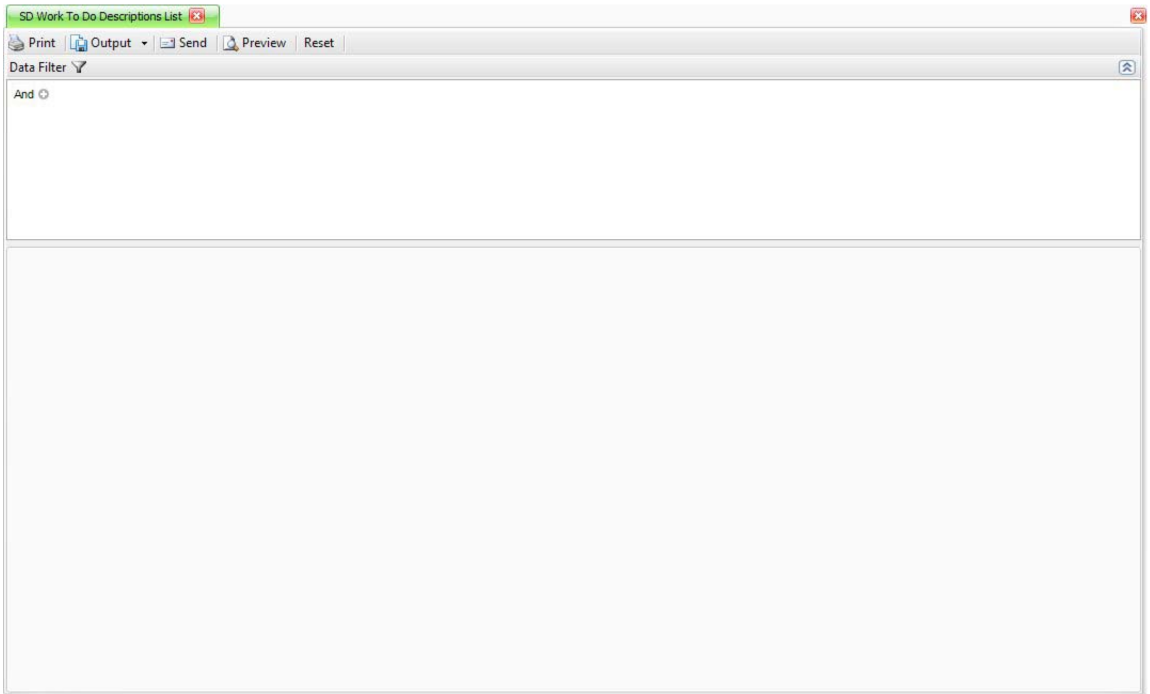
1. Select **Work To Do Descriptions List** from the **Master Lists** menu.

Work To Do Descriptions List Menu



2. The **Work To Do Descriptions List** screen appears.

Work To Do Descriptions List Screen



3. Use the **Data Filter** to select the range of filtering options or leave the filter blank to include all available data.

4. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Work To Do Descriptions List

Consolidated Service Director
Work To Do Descriptions List

PAGE 1

Report Filter

Work To Do ID	Description	Labor Code	Req Skill Level	Est Time (Hrs)
EFixture	Install Electrical Fixtures	ELEC	1	1.000
ERepair	General Electrical Repair	ELEC	3	1.000
ERough	Electrical Rough-In	ELEC	2	0.000
Members				
HClean	Ductwork Cleaning	HVAC	1	4.00
HClean	Ductwork Cleaning	HVAC	1	4.000
HFixture	Install HVAC Fixture	HVAC	2	4.000
HInspect	Inspect and Clean Fuel and Electric System	HVAC	1	1.000
HRepair	General HVAC Repair	HVAC	2	2.000
NetInst	Networking Installation	ELEC	1	0.000
Other	Other services	OTHER	4	1.000
PEmerg	Emergency Plumbing	PLUM	2	2.000
PFixture	Install Plumbing Fixture	PLUM	1	2.000
PRepair	General Plumbing Repair	PLUM	1	1.000

*** End of Report ***

12/12/2013 10:31 AM kenthe

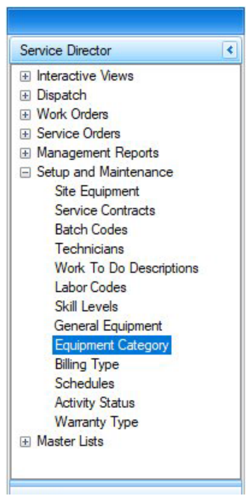
EQUIPMENT CATEGORY

Use the **Equipment Category** function to set up categories you can assign to equipment, similar to the Inventory Product line. Equipment Categories are used in the setup of equipment, and can be used to separate equipment into groups that allow you to quickly determine the type of equipment you are dealing with.

To set up an **Equipment Category**, follow these steps:

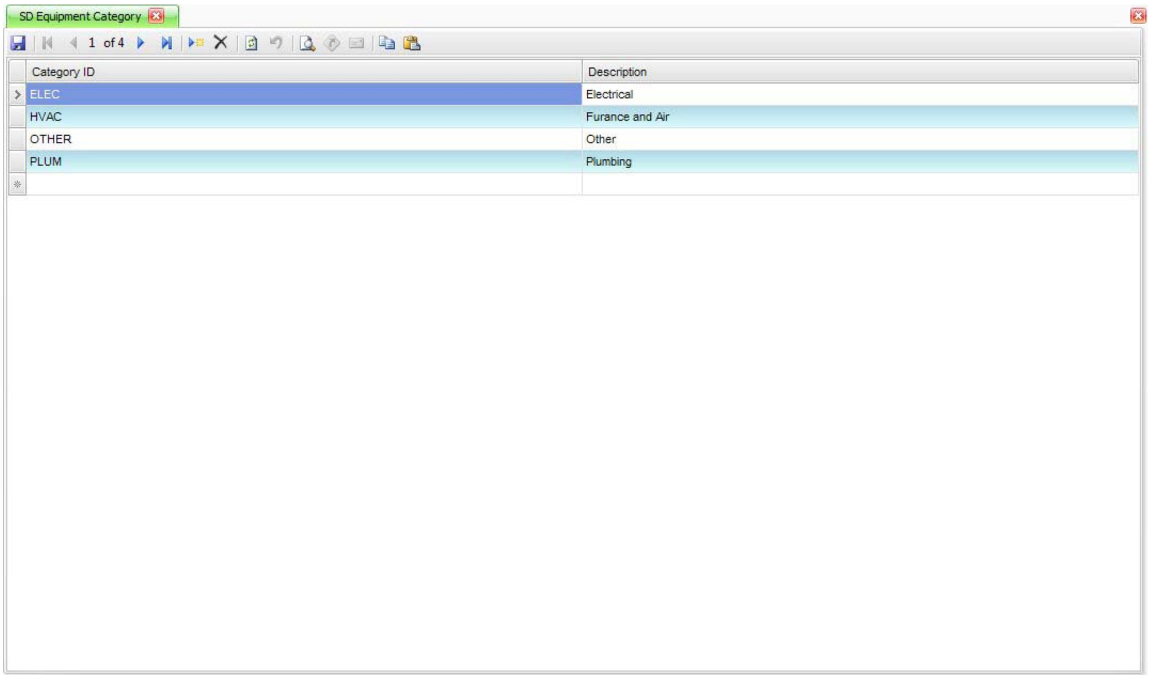
1. Select **Equipment Category** from the **Setup and Maintenance** menu.

Equipment Category Menu



2. The **Equipment Category** screen appears.

Equipment Category Screen



3. Click the **New Record** button , on the toolbar, to open a blank Equipment Category record.
4. Enter a Category ID into the **Category ID** field (up to 12 characters).
5. Enter a Description of the category into the **Description** field.
6. Click the **Save** button to save your work.

Task Summary

To add an Equipment Category, follow these steps:

1. Select the **New Record** icon , on the toolbar. A blank record appears.
2. Enter the **Category ID** and a **Description** of the Equipment Category.
3. Click the **Save** button to save your work.

To edit an Equipment Category, follow these steps:

1. Select the **Category ID** to edit.
2. Position the cursor in the field to edit.
3. Change the value in the field.
4. Click the **Save** button to save your work.

To delete an Equipment Category, follow these steps:

1. Select the **Category ID** to delete.
2. Select the **Delete** hot key (f3), or click on the **Delete Record** button on the tool bar.

Producing an Equipment Category List

To produce an **Equipment Category List**, follow these steps:

1. Select the **Print Preview** button to preview the Equipment Category report for the Equipment Category(s) you have displayed on the screen.
2. The **Preview Report** screen appears.
3. Select the **Print** button in the toolbar to print your list.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Equipment Category List

Consolidated Service Director
SD Equipment Category

Category ID	Description
ELEC	Electrical
HVAC	Furance and Air
OTHER	Other
PLUM	Plumbing

Page 1

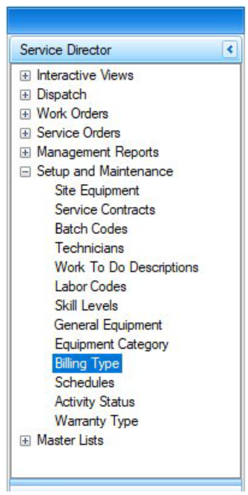
BILLING TYPE

Billing Types are used to group Work Orders and dispatches for printing the Work Order Report and Worksheet. The Billing Types also determine if the Work Order and dispatch are billable or not.

To set up a **Billing Types**, follow these steps:

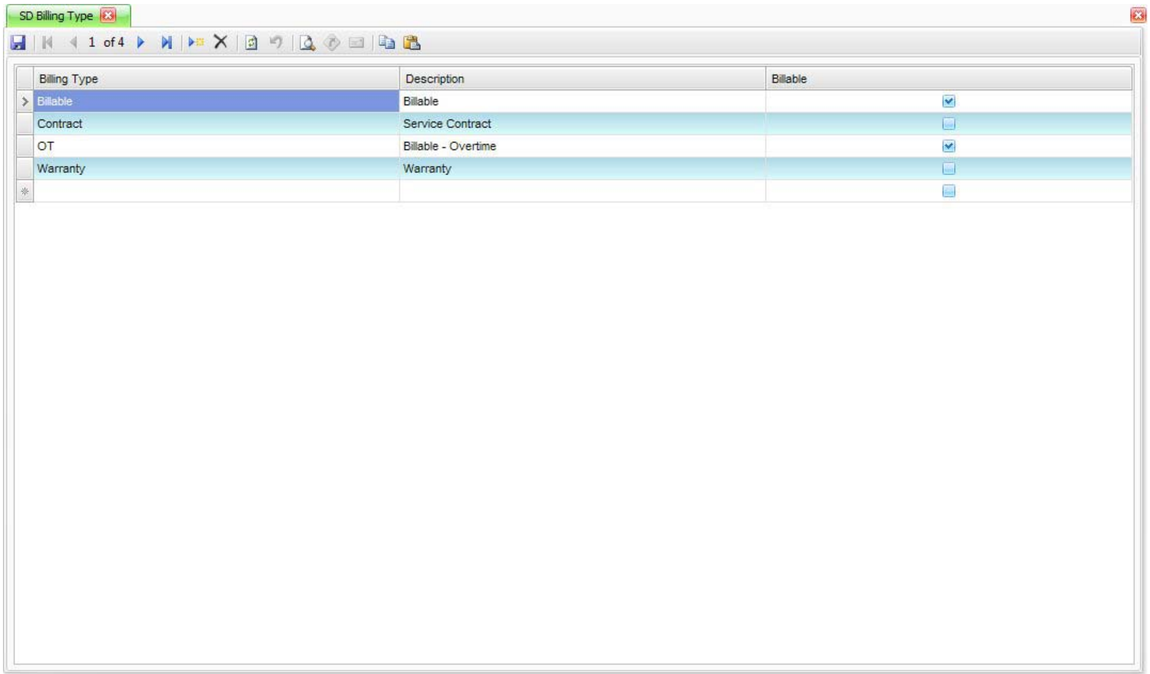
1. Select **Billing Types** from the **Setup and Maintenance** menu.

Billing Types Menu



2. The **Billing Types** screen appears.

Billing Types Screen



3. Click the **New Record** button  , on the toolbar, to open a blank Billing Type record.
4. Enter a Billing Type into the **Billing Type** field (up to 12 characters).
5. Enter a Description of the Billing Type into the **Description** field.
6. Select the check box to determine if the Billing Type is **Billable**.

   If the Billable box is cleared, an invoice will not print and billing information will not be entered into the Work Order or Service Order. If the Billable check box is selected, an invoice may be printed and billing information will be entered into the Work Order or Service Order and posted to AR history and GL.

7. Click the **Save** button  to save your work.

Task Summary

To add a Billing Type, follow these steps:

1. Select the **New Record** icon , on the toolbar. A blank record appears.
2. Enter the **Billing Type**, a **Description** of the Billing Type, and indicate if the Billing Type is **Billable** or not.
3. Click the **Save** button to save your work.

To edit a Billing Type, follow these steps:

1. Select the **Billing Type** to edit.
2. Position the cursor in the field to edit.
3. Change the value in the field.
4. Click the **Save** button to save your work.

To delete a Billing Type, follow these steps:

1. Select the **Billing Type** to delete.
2. Select the **Delete** hot key (f3), or click on the **Delete Record** button on the tool bar.

Producing a Billing Types List

To produce a **Billing Types List**, follow these steps:

1. Select the **Print Preview** button to preview the Billing Types report for the Billing Types you have displayed on the screen.
2. The **Preview Report** screen appears.
3. Select the **Print** button in the toolbar to print your list.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Billing Types List

Consolidated Service Director
SD Billing Type

Page 1

Billing Type	Description	Billable
Billable	Billable	☑
Contract	Service Contract	☐
OT	Billable - Overtime	☑
Warranty	Warranty	☐

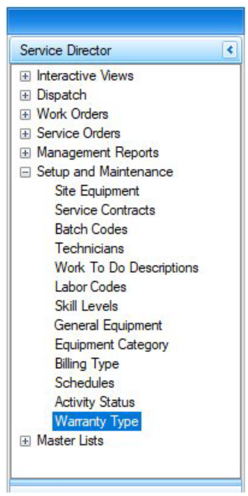
WARRANTY TYPE

Use the **Warranty Type** function to create classifications for the types of warranties you offer. These Warranty Types will be available to select when setting up Site Equipment on the Warranty tab. When the Warranty Type is selected the information in the Warranty Type will default into the Site Equipment record.

To set up **Warranty Type**, follow these steps:

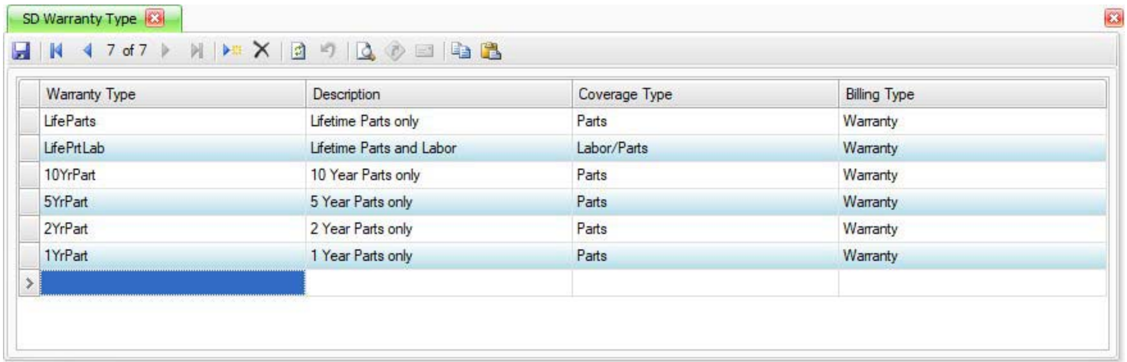
1. Select **Warranty Type** from the **Setup and Maintenance** menu.

Warranty Type Menu



2. The **Warranty Type** screen appears.

Warranty Type Screen



3. Select the **New Record** icon , on the toolbar, to open a blank record.
4. Enter a **Warranty Type** to identify the Warranty Type.
5. Enter a **Description** for the Warranty Type.
6. Select a **Coverage Type**: **Parts**, **Labor**, **Parts/Labor**.

Maint

7. Select a **Billing Type** for the Warranty Type.

   The Billing Type will determine if a Work Order entered for the Site Equipment with the Warranty is billable or non-billable.

8. Click the **Save** button to save your work.

Task Summary

To add Warranty Types, follow these steps:

1. Select the **New Record** icon , on the toolbar. A blank record appears.
2. Enter a **Warranty Type**, **Description**, **Coverage Type**, and **Billing Type** to identify the Warranty Type.
3. Click the **Save** button to save your work.

To edit Warranty Types, follow these steps:

1. Select the **Warranty Type** to edit.
2. Position the cursor in the field to edit.
3. Change the value in the field.

4. Click the **Save** button to save your work.

To delete a Warranty Type, follow these steps:

1. Select the **Warranty Type** to delete.
2. Select the **Delete** hot key (f3), or click on the **Delete Record** button , on the tool bar.

Producing a Warranty Type List

To produce a **Warranty Type List**, follow these steps:

1. Select the **Print Preview** button to preview the Warranty Type report for the Warranty Types you have displayed on the screen.
2. The **Preview Report** screen appears.
3. Select the **Print** button in the toolbar to print your list.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Warranty Type List

Continental Products Unlimited
SD Warranty Type

Page 1

Warranty Type	Description	Coverage Type	Billing Type
10YrPart	10 Year Parts only	Parts	Warranty
1YrPart	1 Year Parts only	Parts	Warranty
2YrPart	2 Year Parts only	Parts	Warranty
5YrPart	5 Year Parts only	Parts	Warranty
LifeParts	Lifetime Parts only	Parts	Warranty
LifePrtLab	Lifetime Parts and Labor	Labor/Parts	Warranty

5/11/2018 11:24 AM **Kent.Heitkamp**

GENERAL EQUIPMENT

Use the **General Equipment** function to record information about the equipment your company services. This function is designed to record pieces of equipment you service but are not assigned to a particular Customer or your company. General Equipment may tied to a specific Inventory Item.

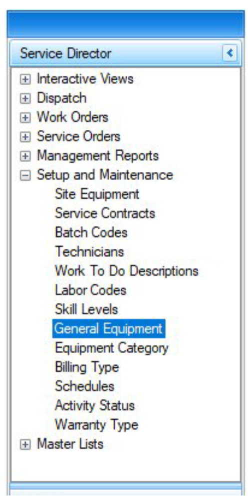
Select General Equipment from the Setup and Maintenance menu, then use the fields at the top of the screen to enter or edit basic information. Use the Service, Warranty, Parts List, and Knowledgebase tabs to record Service History, Warranty information, Parts used, and other information about the selected equipment.

The General Equipment function may be used to set up templates for equipment that will be used in the Site Equipment function (page 3-83). General Equipment may be used to copy the information for equipment that is owned by a Customer in the Site Equipment function. This may save on time and potential errors when setting up Site Equipment.

To set up **General Equipment**, follow these steps:

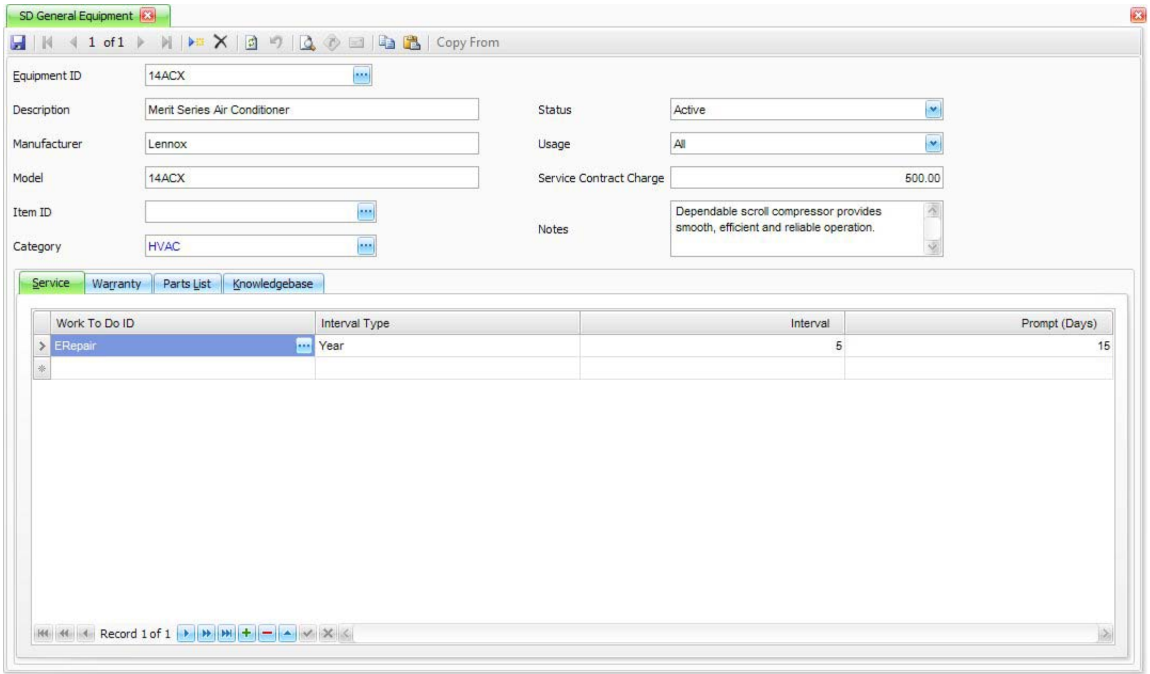
1. Select **General Equipment** from the **Setup and Maintenance** menu.

General Equipment Menu



2. The **General Equipment** screen appears.

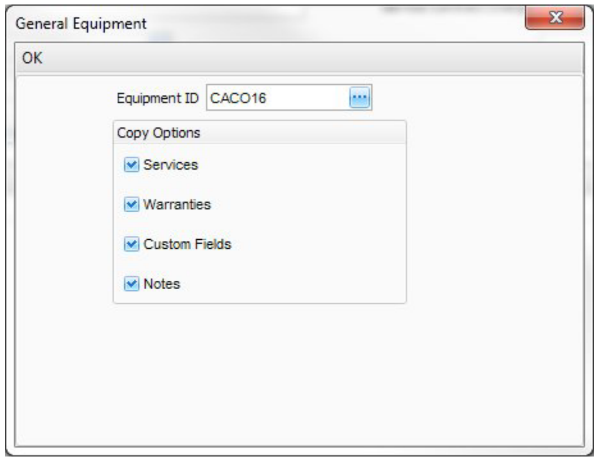
General Equipment Screen



3. Click the **New Record** button  , on the toolbar, to open a blank General Equipment record.

4. Enter an Equipment ID into the **Equipment ID** field (up to 24 characters).

NOTE: To copy Item information from a similar record for a new Item, click the Copy From button on the toolbar then select an existing Item record with the browse button from the Equipment window that opens. Select the Copy Options you want to copy to the new equipment entry, then click the OK button.



5. Enter a Description of the equipment into the **Description** field.
6. Enter the Manufacturer of the equipment into the **Manufacturer** field.

   This Manufacturer is for information purposes only and is not tied to any other field. It can be used to sort and filter reports and interactive views.

7. Enter the Model of the equipment into the **Model** field.

   This Model is for information purposes only and is not tied to any other field. It can be used to sort and filter reports and interactive views.

8. Select an **Item ID** from Inventory, if Service Director is working with your TRAVERSE Inventory application.

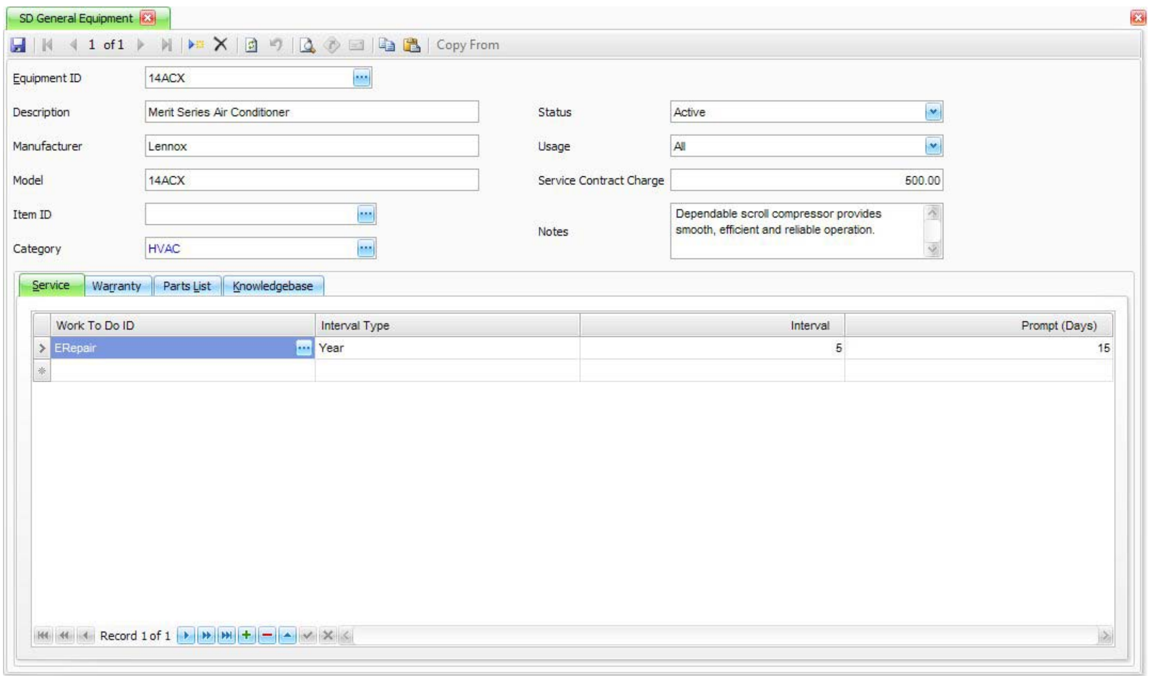
Maint

9. Select an Equipment **Category** for this equipment. This selection is for information only, sorting and filtering reports and interactive views.
10. Select the **Status** of the equipment. Select **Active** if the equipment is in service, or **Inactive** if the equipment is not in service.
11. Select the **Usage** of the equipment. This field indicates how the equipment is being used.
    - Select **Customer** if the equipment is used primarily by your Customer.
    - Select **Company** if the equipment is primarily utilized by your Company.
    - Select **All** if the equipment is used by both you and your Customer.

12. Enter the **Service Contract Charge** value, which is the amount you charge your Customers for the service contract you provide.

13. Enter miscellaneous **Notes** about this equipment.

General Equipment Screen - Service Tab



Use the **Service** tab to enter work that needs to be done on this equipment. You will also be able to enter an Interval Type for the type of interval used and how often this work needs to be done. You can also enter how many days prior to the service being due you want to be prompted that the service is due.

Maint

14. Select the **Work To Do ID** for the work that needs to be done for this equipment.

    Multiple Work To Do IDs may be entered for each piece of equipment. You may have multiple things that need to be worked on at different times and intervals.

15. Select the **Interval Type** for the associated Work To Do ID for this equipment. The Interval Type is the unit TRAVERSE uses when calculating when service is due: **Year**, **Month**, or **Day**.

16. Enter the **Interval**, to set the number of intervals between scheduled service for the associated Work To Do ID for this equipment.

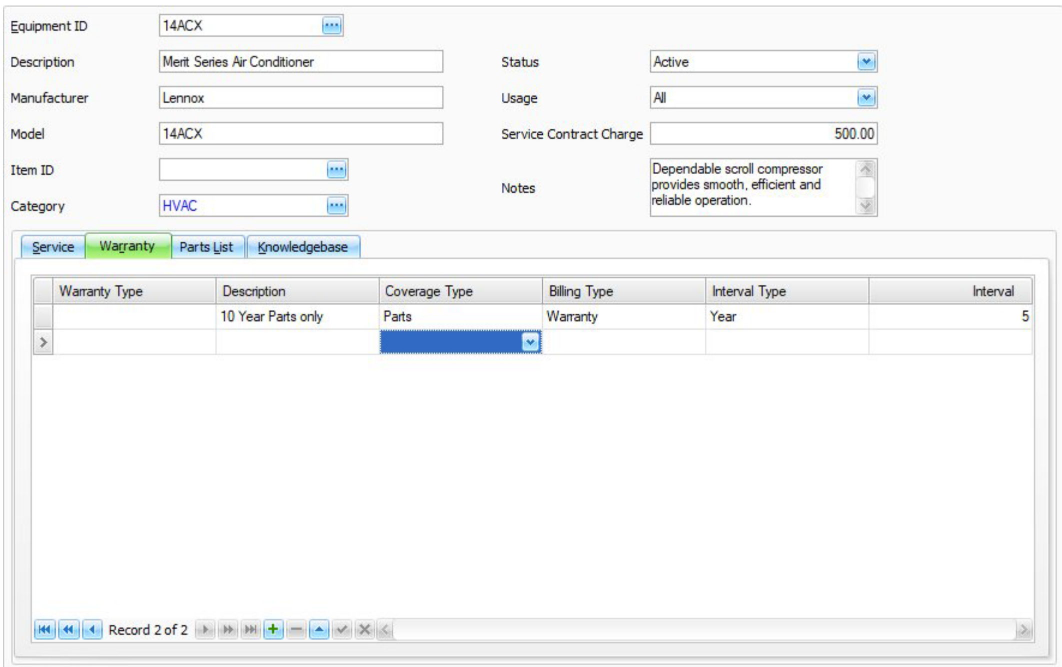
    The Interval is used to determine how many occurrences of the selected Interval Type (years, months, or days) there are between service due dates.

Example: If the Interval Type is Month, and the interval is 3, the service will be due every 3 months.

17. Enter the **Prompt(Days)** to set the number of days before a service due date that TRAVERSE will prompt you that service is due.

18. Click the **Save** button to save your work.

General Equipment Screen - Warranty Tab



Use the **Warranty** tab to enter information about the Warranty for this equipment. This will help you determine if repairs are covered by the Warranty of the equipment or if the repairs are a billable engagement.

19. Select a **Warranty Type** for this Equipment, as applicable.

Maint

If the Warranty Type you want to use is not in the drop-down list, double-click on the Warranty Type field to open the SD Warranty Type function. Add your new warranty with associated details and save your changes. When you return to the Warranty tab, your new warranty type will now appear in the drop-down list.

20. Enter or edit the **Description**, as applicable.

The Description will default from the Warranty Type selected. Edit the Description if applicable.

21. Select the **Coverage Type** for what is covered in the Warranty:

    - **None** - There is no Warranty for this equipment.
    - **Parts/Labor** - There is a Warranty on both parts and labor for the specified Interval Type and Interval.
    - **Labor** - There is a Warranty on only labor for the specified Interval Type and Interval.
    - **Parts** - There is a Warranty on only parts for the specified Interval Type and Interval.

    The Coverage Type will default from the Warranty Type selected. Edit the Coverage Type if applicable.

22. Select a **Billing Type** for this equipment, as applicable.

    The Billing Type will default from the Warranty Type selected. Edit the Billing Type if applicable.

    Maint

    If the billing type you want to use is not in the drop-down list, double-click on the Billing Type field to open the SD Billing Type function. Add your new billing type with associated details and save your changes. When you return to the Warranty tab, your new billing type will now appear in the drop-down list.

23. Select the **Interval Type** for the associated warranty for this equipment. The Interval Type is the unit TRAVERSE uses when calculating when a Warranty is due to expire.

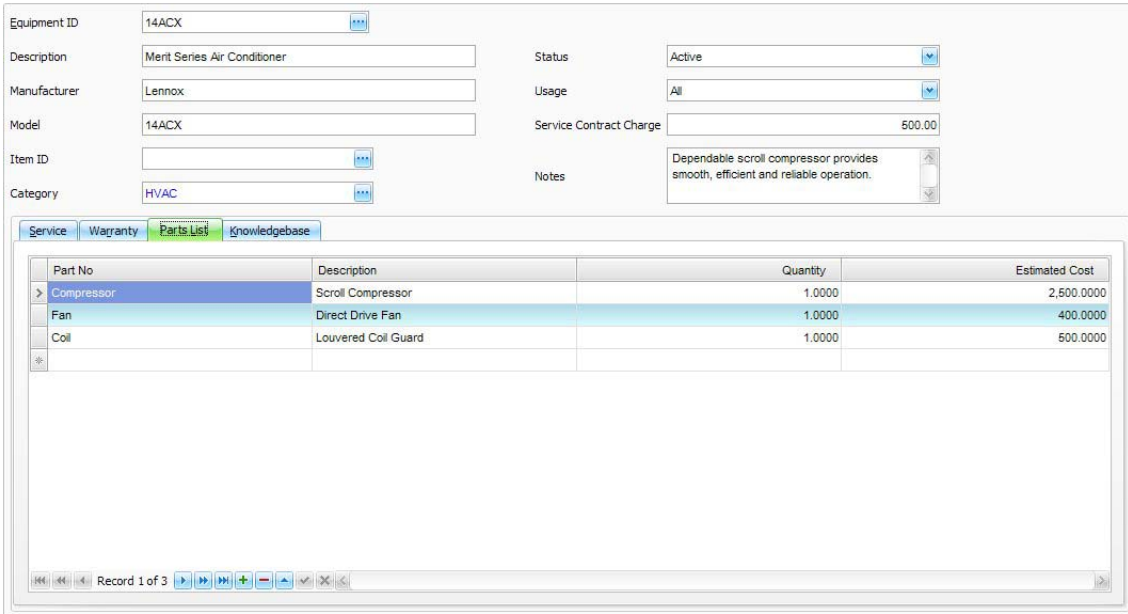
24. Enter the **Interval**, to set the number of Intervals covered by the Warranty on the equipment.

    The interval is used to determine when the Warranty will expire.

    Example: If the Interval Type is Year, and the interval is 3, the Warranty will expire 3 years after the start date.

25. Click the **Save** button to save your work.

General Equipment Screen - Parts List Tab



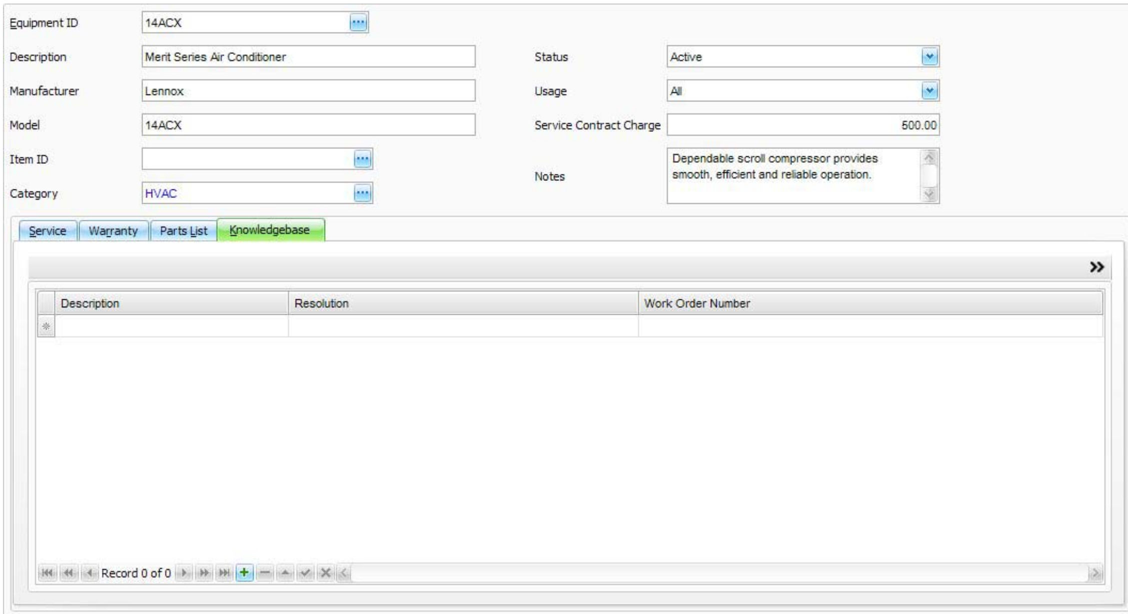
Use the **Parts List** tab to make a list of parts used to service this equipment when services are being done on this equipment.

26. Enter the **Part No** for any part that is used on this equipment.

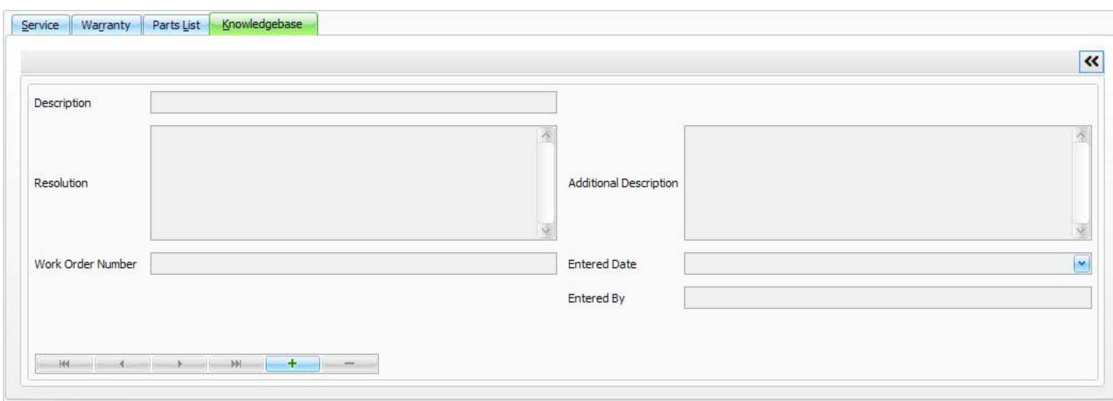
    This field is not linked to any Item ID. This is a manually entered part number and is for reference only.

27. Enter a **Description** of the part to be used on the equipment.
28. Enter the **Quantity** of the part to be used on this equipment.
29. Enter the **Extended Cost** of the total for the quantity of this part to be used on this equipment.
30. Click the **Save** button  to save your work.

General Equipment Screen - Knowledgebase Tab (Summary)



General Equipment Screen - Knowledgebase Tab (Detail)



Use the **Knowledgebase** tab to keep a history of issues with this equipment and what the resolutions were to repair these issues. You may also use the Work Order number to refer to, for more detailed information on repairs done on this equipment.

31. Enter a **Description** for the issue or circumstance the Knowledgebase entry addresses.
32. Enter the **Resolution** for this Knowledgebase entry.

33. Enter the **Work Order Number** of the Work Order where this issue or circumstance was resolved.

34. Enter an **Additional Description** to further describe the Knowledgebase record. (Detail)

35. Select or enter the **Entered Date**, to indicate the date the Knowledgebase record was added. (Detail)

36. Enter the person the Knowledgebase record was **Entered By**. (Detail)

37. Click the **Save** button to save your work.

Task Summary

To add General Equipment, follow these steps:

1. Select the **New Record** icon , on the toolbar. A blank record appears.
2. Enter the **Equipment ID**, a **Description** of the equipment, **Manufacturer**, **Model**, **Item ID**, **Category**, **Status**, **Usage**, **Service Contract Charge**, **Notes**, and information on the **Service**, **Warranty**, **Parts List**, and **Knowledgebase** tabs where appropriate.
3. Click the **Save** button to save your work.

To edit General Equipment, follow these steps:

1. Select the **Equipment ID** to edit.
2. Position the cursor in the field to edit.
3. Change the value in the field.
4. Click the **Save** button to save your work.

To delete General Equipment, follow these steps:

1. Select the **Equipment ID** to delete.
2. Select the **Delete** hot key (f3), or click on the **Delete Record** button on the tool bar.

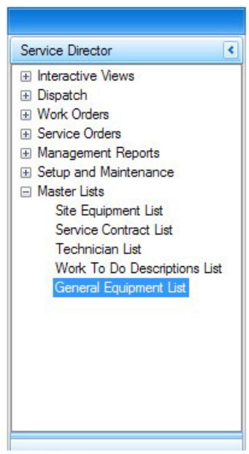
Producing a General Equipment List

Use the **General Equipment List** function to print a list of your General Equipment IDs. Use the Setup and Maintenance General Equipment function to add or edit General Equipment information.

To produce a **General Equipment List**, follow these steps:

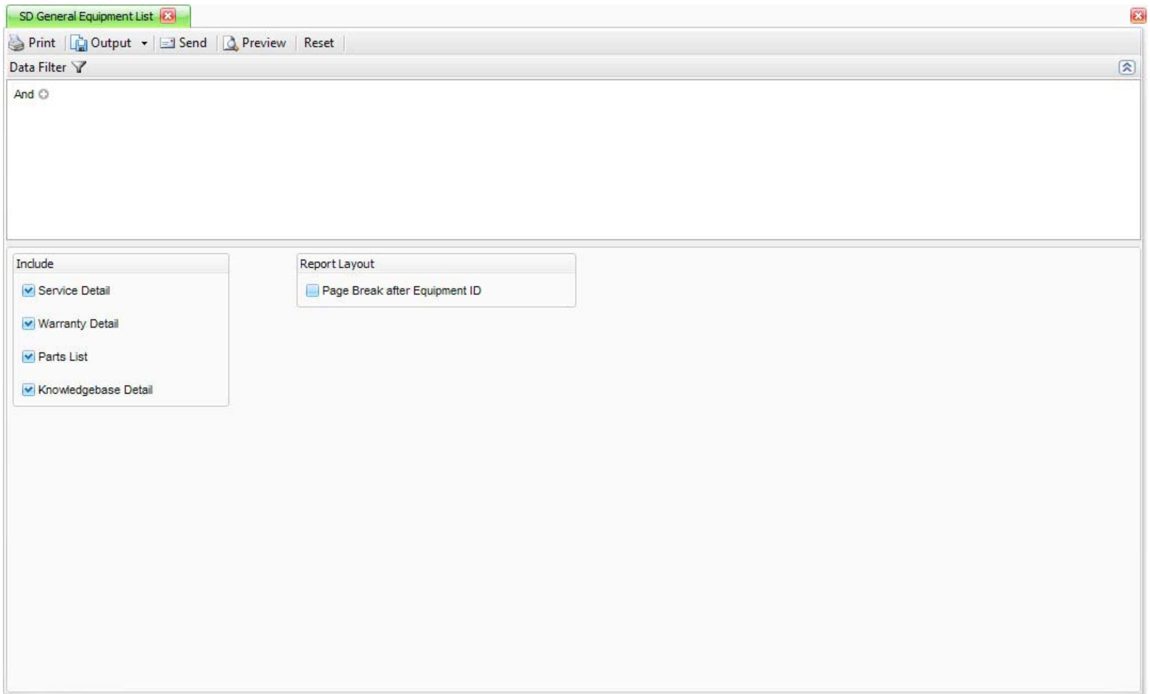
1. Select **General Equipment List** from the **Master Lists** menu.

General Equipment List Menu



2. The **General Equipment List** screen appears.

General Equipment List Screen



3. Use the **Data Filter** to select the range of filtering options or leave the filter blank to include all available data.
4. Select one or more of the following check boxes to include the information on the report:
    - **Service Detail -** This selection will print the information set up on the Services tab.
    - **Warranty Detail -** This selection will print the information set up on the Warranty tab.
    - **Parts List** - This selection will print the items set up on the Parts List tab. This will be the parts used for this equipment id.
    - **Knowledgebase Detail** - This selection will print the details entered on the Knowledgebase tab.
5. Mark the check box for **Page Break after Equipment ID** to start a new page of the report after each Equipment ID listing.

6. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

General Equipment List

Consolidated Service Director
General Equipment List

PAGE 1

Report Filter

Include Service Detail	Yes	Include Parts List	Yes
Include Warranty Detail	Yes	Include Knowledgebase Detail	Yes

Equipment ID	14ACX	Status	Active
Description	Merit Series Air Conditioner	Usage	All
Manufacturer	Lennox	Service Contract Charge	500.00
Model	14ACX	Notes	Dependable scroll compressor provides smooth, efficient and reliable operation.
Item ID			
Category	HVAC		

Service

Work To Do ID	Interval Type	Interval	Prompt (Days)
ERepair	Year	5	15

Warranty

Coverage Type	Interval Type	Interval
Parts	Year	5

Parts List

Part No Item ID	Description Preferred Vendor	Quantity	Estimated Cost	Lead Time
Coil	Louvered Coil Guard	1.0000	500.0000	0.0000
Compressor	Scroll Compressor	1.0000	2,500.0000	0.0000
Fan	Direct Drive Fan	1.0000	400.0000	0.0000

Equipment ID	CACO16	Status	Active
Description	Comfort 16 Central Air Conditioner	Usage	All
Manufacturer	Carrier	Service Contract Charge	600.00
Model	24ABC6	Notes	The Comfort series of air conditioners is designed to give you simple, efficient, affordable cooling. And with impressive SEER ratings they can still make you smile when it comes time to pay your energy bill.
Item ID			
Category	HVAC		

Service

Work To Do ID	Interval Type	Interval	Prompt (Days)
HInspect	Year	5	30

Warranty

Coverage Type	Interval Type	Interval
Parts	Year	10

Parts List

Part No Item ID	Description Preferred Vendor	Quantity	Estimated Cost	Lead Time
Coil	Evaporator Coil	1.0000	400.0000	0.0000
Filter	Filter Drier System	1.0000	1,500.0000	0.0000
UV Lamp	UV Lamp	1.0000	500.0000	0.0000

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SITE EQUIPMENT

Use the **Site Equipment** function to set up equipment owned by you or one of your Customers that you service or repair. Site Equipment does not have to exist in Inventory, and the site ID allows you to easily move equipment from one location of usage to another.

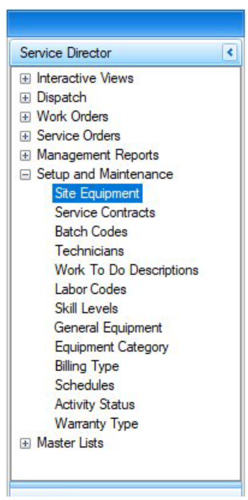
To avoid double entry with your General Equipment, set up the General Equipment (page 3-69) you own and use that Equipment ID to copy from when setting up new Site Equipment. This will bring the information from the General Equipment setup into the Site Equipment setup.

Select Site Equipment from the Setup and Maintenance menu, then use the fields at the top of the screen to enter or edit basic information. Use the Service, Warranty, and Activity tabs to record Service history, Warranty information, and other historical activity for the equipment.

To set up **Site Equipment**, follow these steps:

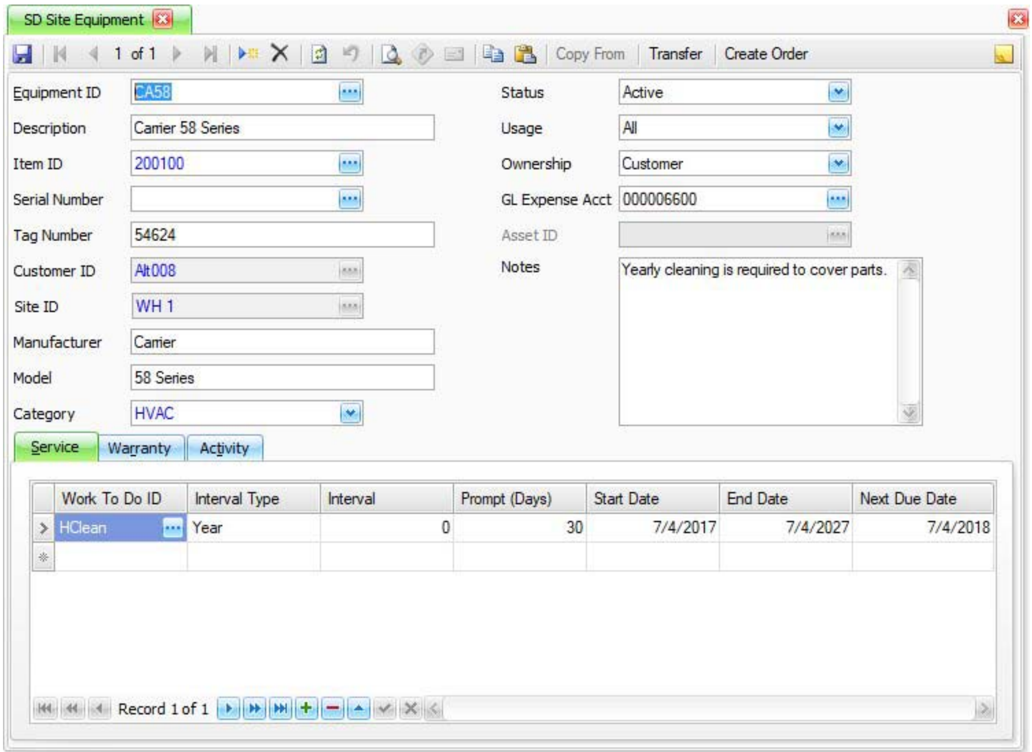
1. Select **Site Equipment** from the **Setup and Maintenance** menu.

Site Equipment Menu



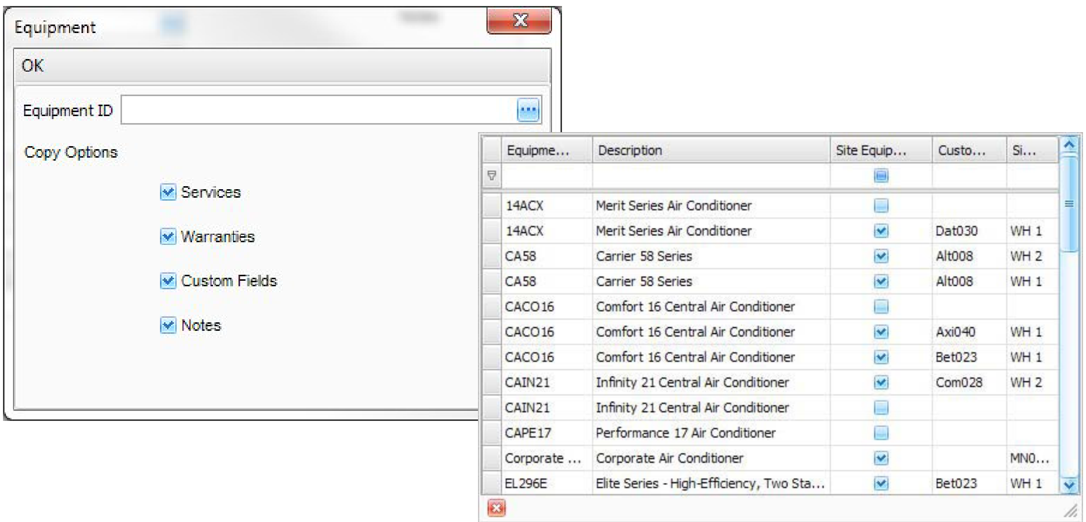
2. The **Site Equipment** screen appears.

Site Equipment Screen



3. Click the **New Record** button , on the toolbar, to open a blank Site Equipment record.
4. Enter an Equipment id into the **Equipment ID** field (up to 24 characters).

NOTE: To copy equipment information from a General Equipment for a new Site Equipment ID, click the Copy From button on the toolbar then select an existing General Equipment record with the Browse button from the Equipment window that opens. A column is included in the lookup box indicating if the General Equipment ID is already set up as a Site Equipment. Check the Copy Options you want to copy to the new equipment entry, then click the OK button.



5. Enter a Description of the equipment into the **Description** field.

Maint

6. Select an Item from the **Item ID** from Inventory, if Service Director is working with your TRAVERSE Inventory application.

7. Enter or select a **Serial Number** for this Equipment ID. The maximum number of characters for this field is 35.

   If the Item ID selected is a Serialized Item in Inventory you will get a list of Serial Numbers from which to select. If the Item ID selected is not a Serialized Item, or no Item ID is selected, you may enter a Serial Number.

8. Enter a **Tag Number** for the equipment if you use Tag Numbers. This will be used as a sorting and filtering tool only.

Maint

9. Select a **Customer ID** from the available list, for equipment owned by a Customer.

   This may be used to enter a Service Order for equipment when a Customer ID is selected for the Service Order. The equipment set up owned by the Customer will be available in your list.

Maint

10. Select a **Site ID** for this Equipment ID. By selecting a Site ID, you are indicating this equipment belongs to your Company and not to a Customer.

11. Enter the manufacturer of the equipment into the **Manufacturer** field.

    This Manufacturer is for information purposes only and is not tied to any other field. It can be used to sort and filter reports and interactive views.

12. Enter the Model of the equipment into the **Model** field.

    This Model is for information purposes only and is not tied to any other field. It can be used to sort and filter reports and interactive views.

Maint

13. Select an Equipment **Category** for this Equipment ID. This selection is for information only, sorting and filtering reports and interactive views.

14. Select the **Status** of the equipment. Select **Active** if the equipment is in service, or **Inactive** if the equipment is not in service.

15. Select the **Usage** of the equipment. This field indicates how the equipment is being used.

    - Select **Customer** if the equipment is used primarily by your Customer.
    - Select **Company** if the equipment is primarily utilized by your Company.
    - Select **All** if the equipment is used by both you and your Customer.

16. Select the **Ownership** of the equipment.

    If you have selected a Customer ID, then select **Customer** in this field. This indicates the Equipment ID will be included on Site Equipment reports.

    If the Site ID field is populated, select **Company** in this field. This indicates you own the Equipment ID and it will appear in General Equipment reports.

17. Select a **GL Expense Acct** from the list of available GL Accounts if Service Director is interfaced with General Ledger. Otherwise enter a GL Expense Acct.

    This account will be used when the Equipment ID is selected in a Service Order and will be debited for the cost of the service.

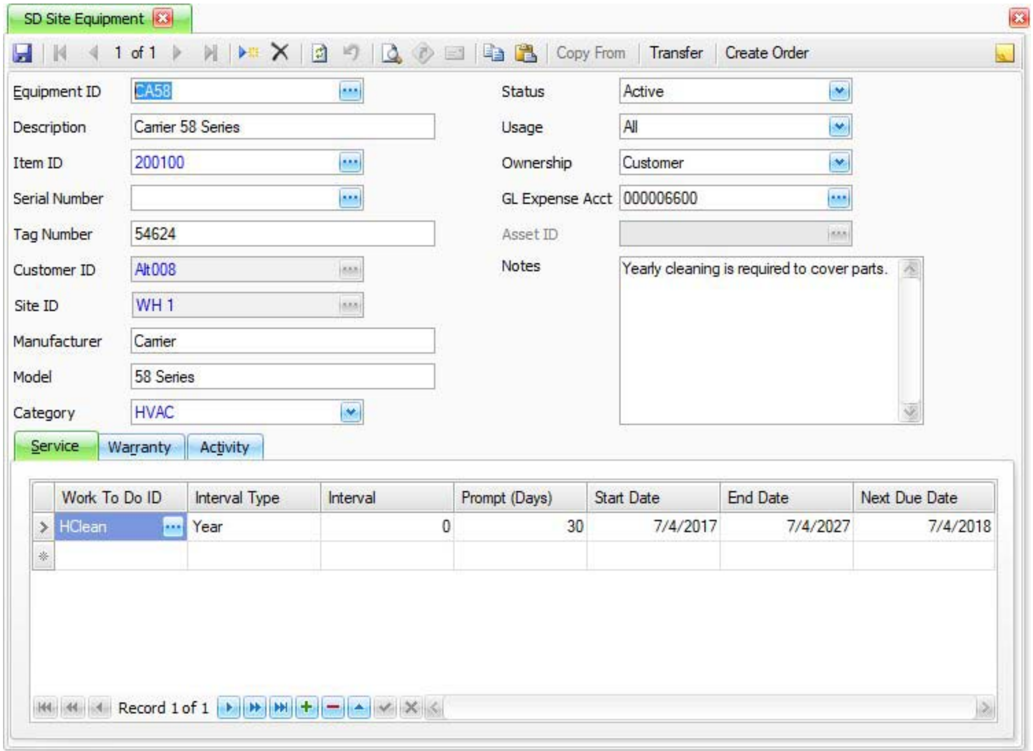
Maint

18. Select an **Asset ID** from Fixed Assets if Service Director is working with your TRAVERSE Fixed Asset application.

    When Work Orders and Service Orders are posted for maintenance recorded, the Asset ID in Fixed Assets will have the Service tab updated with the maintenance or service done on that piece of equipment.

19. Enter miscellaneous **Notes** about this equipment.

Site Equipment Screen - Service Tab



Use the **Service** tab to enter work that needs to be done on this Equipment ID. You will also be able to enter an Interval Type for the type of Interval used and how often this work needs to be done. You can also enter how many days prior to the service being due you want to be prompted that the service is due. You can use this tab to view what the Start Date, End Date, and Next Service Due Date are for this equipment.

Maint

20. Select the **Work To Do ID** for the work that needs to be done for this Equipment ID.

    Multiple Work To Do IDs may be entered for each piece of equipment. You may have multiple things that need to be worked on at different times and intervals.

21. Select the **Interval Type** for the associated work to do ID for this equipment: **Year**, **Month**, or **Day**. The Interval Type is the unit TRAVERSE uses when calculating when service is due.

22. Enter the **Interval**, to set the number of intervals between scheduled service for the associated Work To Do ID for this Equipment ID.

    The interval is used to determine how many occurrences of the selected Interval Type (Years, Months, or Days) there are between service due dates.

Example: If the interval type is Month, and the interval is 3, the service will be due every 3 months.

23. Enter the **Prompt(Days)** to set the number of days before a Next Due Date, that TRAVERSE will prompt you that service is due.

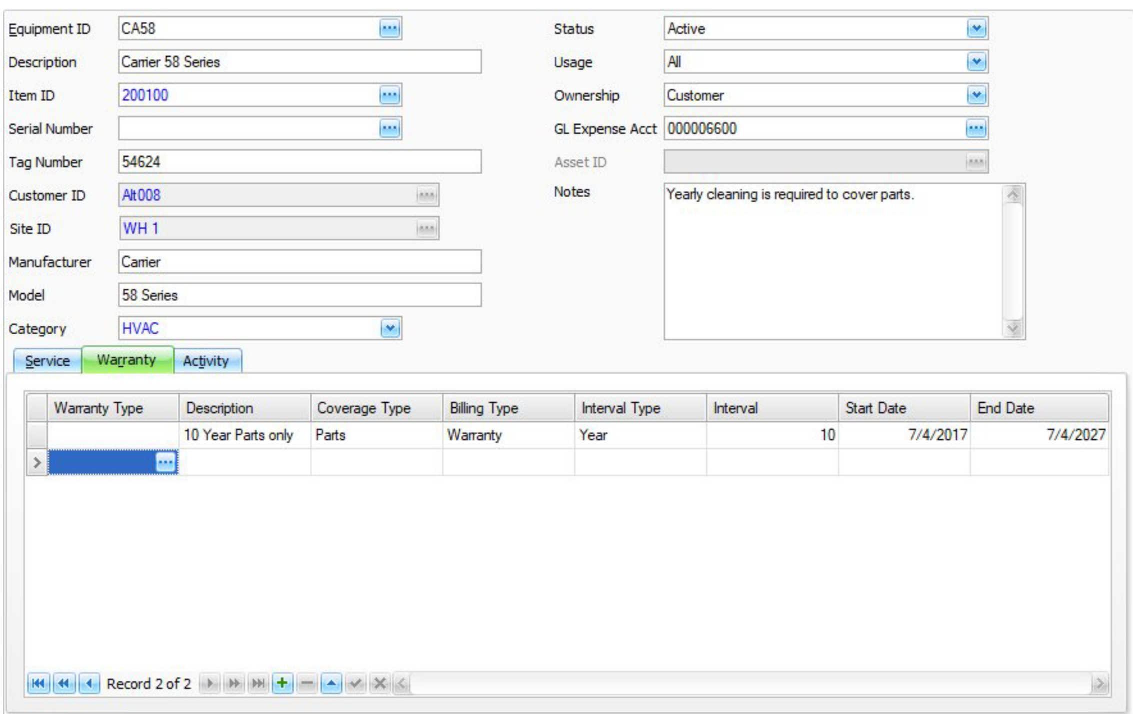
24. Set the **Start Date** TRAVERSE will use to start calculating the Next Due Date before any service has been conducted. Once service has been performed on the equipment, TRAVERSE will use the last service date to calculate the Next Due Date.

25. Set the **End Date** TRAVERSE will stop calculating the Next Due Date.

26. The **Next Due Date** field shows the next date the associated Work To Do ID service is scheduled to be accomplished on the Equipment ID. When you post orders, TRAVERSE will calculate the Next Due Date based on the most recent service date. If no service activity has been recorded for the associated Work To Do ID, TRAVERSE will calculate the Next Due Date based on the service Start Date field value.

27. Click the **Save** button to save your work.

Site Equipment Screen - Warranty Tab



Use the **Warranty** tab to enter information about the Warranty for this Equipment ID. This will help you determine if repairs are covered by the Warranty of the equipment, or if the repairs are a billable engagement. This tab will also let you know when the Start Date and End Date of the warranty are.

28. Select a **Warranty Type** for this Equipment, as applicable.

Maint

If the Warranty Type you want to use is not in the drop-down list, double-click on the Warranty Type field to open the SD Warranty Type function. Add your new warranty with associated details and save your changes. When you return to the Warranty tab, your new warranty type will now appear in the drop-down list.

29. Enter or edit the **Description**, as applicable.

The Description will default from the Warranty Type selected. Edit the Description if applicable.

30. Select the **Coverage Type** for what is covered in the Warranty:

- **None** - There is no Warranty for this equipment.
- **Parts/Labor** - There is a Warranty on both parts and labor for the specified Interval Type and Interval.
- **Labor** - There is a Warranty on only labor for the specified Interval Type and Interval.
- **Parts** - There is a Warranty on only parts for the specified Interval Type and Interval.

The Coverage Type will default from the Warranty Type selected. Edit the Coverage Type if applicable.

31. Select a **Billing Type** for this equipment, as applicable.

The Billing Type will default from the Warranty Type selected. Edit the Billing Type if applicable.

Maint

If the billing type you want to use is not in the drop-down list, double-click on the Billing Type field to open the SD Billing Type function. Add your new billing type with associated details and save your changes. When you return to the Warranty tab, your new billing type will now appear in the drop-down list.

32. Select the **Interval Type** for the associated warranty for this equipment. The Interval Type is the unit TRAVERSE uses when calculating when a Warranty is due to expire.

33. Enter the **Interval**, to set the number of Intervals covered by the Warranty on the equipment.

The interval is used to determine when the Warranty will expire.

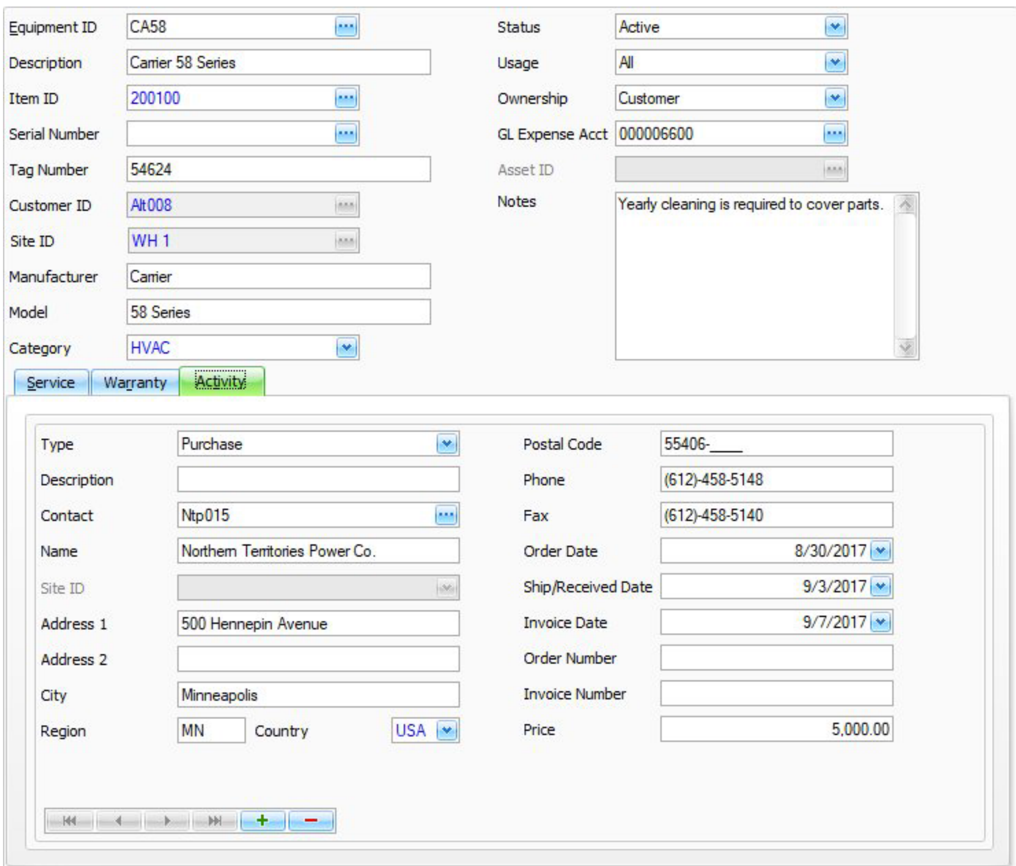
Example: If the Interval Type is Year, and the interval is 3, the Warranty will expire 3 years after the start date.

34. Set the **Start Date** TRAVERSE will use to start calculating the expiration date for the Warranty.

35. The **End Date** field shows the date the associated Warranty will expire. TRAVERSE will calculate the End Date based on the Interval, Interval Type, and Start Date field values.

36. Click the **Save** button  to save your work.

Site Equipment Screen - Activity Tab



Use the **Activity** tab to record Purchase, Sale and Transfer information that has happened with this piece of equipment.

37. Select a **Type** of Activity to record for this Equipment ID.

- Select **Purchase** if the activity is related to the purchase of the equipment. This will record Vendor information about the Vendor from which the Equipment ID was purchased.
- Select **Sale** if the activity is a sale of the Equipment ID. This will record Customer information to which the Equipment ID was sold.
- Select **Transfer** if the equipment is transferred to another Site or Customer.

38. Enter a **Description** of the Activity on the Equipment ID.
39. The **Contact** field links to your Vendors, if Service Director interfaces with Accounts Payable, and to your Customers.

    The selection you made in the Type field will determine what values you can select from in the Contact field.

    - If you chose **Purchase** in the Type field, you can select a Vendor ID from your list of Accounts Payable Vendors.
    - If you chose **Sale** or **Transfer** in the Type field, you can select a Customer ID from your list of Accounts Receivable Customers.

    You may leave the **Contact** field blank, as in the case of a transfer of the Equipment ID between your company sites.
40. The **Name** field displays the Name of the contact from the Contact field. This may be edited.
41. The **Site ID** field links to your Customer's Ship To ID if you selected **Transfer** in the Type field and a Customer ID in the **Contact** field.

    If you chose Transfer in the Type field, and you left the Contact field blank, as in the case of a Transfer of the equipment between your company sites, you will be able to choose one of your company Site IDs for the Site ID field.
42. The **Address 1** and **Address 2** fields display the address of the Customer or Vendor you selected in the Contact field. This field may be edited.
43. The **City** field displays the city listed in the address of the Customer or Vendor you selected in the Contact field. This field may be edited.
44. The **Region** field displays the State or other Region listed in the address of the Customer or Vendor you selected in the Contact field. This field may be edited.
45. The **Country** field displays the Country listed in the address of the Customer or Vendor you selected in the Contact field. You may also select a Country Code in this field.

46. The **Postal Code** field displays the Postal Code listed in the address of the Customer or Vendor you selected in the Contact field. The format of this Postal Code will be based on the format entered into the Country Code selected. This field may be edited.
47. The **Phone** field displays the phone number for the contact from the Contact field. The format of this Phone number will be based on the format entered into the Country Code selected. This field may be edited.
48. The **Fax** field displays the Fax number of the contact from the Contact field. The format of this Fax number will be based on the Phone format entered into the Country Code selected. This field may be edited.
49. Set the **Order Date** to the date the Purchase, Sale, or Transfer of the Equipment ID took place.
50. Set the **Ship/Received Date** to the date you shipped the Equipment ID to a Customer or Site, or the date you or one of your sites received the equipment.
51. Set the **Invoice Date** to the date of the invoice if you Purchased the equipment from a Vendor or Sold it to a Customer.
52. Set the **Order Number** to the Purchase Order Number if you Purchased the Equipment ID, or the Sales Order Number if you Sold the Equipment ID to a Customer.
53. Set the **Invoice Number** to the Purchase Invoice Number if you Purchased the Equipment ID, or the Sales Invoice Number if you Sold the Equipment ID to a Customer.
54. Enter the **Price** paid or received for the Equipment ID.
55. Click the green plus to add an Activity to the Equipment ID.
56. Click the red minus to delete an Activity from the Equipment ID.
57. Click the **Save** button to save your work.

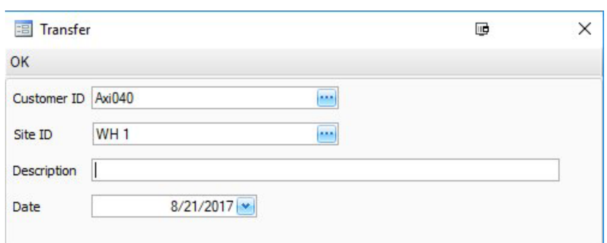
Command Buttons

Name	Description
Copy From	Copy the information from an existing Site Equipment to a new Site Equipment record.
Transfer	Open the Transfer window to transfer a piece of equipment to another site or customer. You cannot transfer the equipment to the current site or customer.
Create Order	Open the Work Order Entry or Service Order Entry screen to create a work order or service order for the selected equipment.

Transfer Button

User the Transfer button to transfer a piece of equipment to another Site or Customer. You cannot transfer the equipment to the current site or Customer.

Transfer Screen



1. To transfer the Site Equipment to a different Customer select a **Customer ID** for which to transfer the Site Equipment.
2. Select a **Site ID** for the Customer selected, or the Location ID if the equipment is being transferred within the company to a new Site.
3. Enter a **Description** of the Transfer.
4. Enter the **Date** of the Transfer.
5. Click **OK** to execute the Transfer.

Task Summary

To add Site Equipment, follow these steps:

1. Select the **New Record** icon , on the toolbar. A blank record appears.
2. Enter the **Equipment ID**, a **Description** of the equipment, **Manufacturer**, **Model**, **Item ID**, **Category**, **Status**, **Usage**, **Ownership**, **Expense Account**, **Asset ID**, **Notes**, and information on the **Service**, **Warranty**, and **Activity** tabs where appropriate.
3. Click the **Save** button to save your work.

To edit Site Equipment, follow these steps:

1. Select the Equipment ID to edit.
2. Position the cursor in the field to edit.
3. Change the value in the field.
4. Click the **Save** button to save your work.

To delete Site Equipment, follow these steps:

1. Select the Equipment ID to delete.
2. Select the **Delete** hot key (f3), or click on the **Delete Record** button on the tool bar.

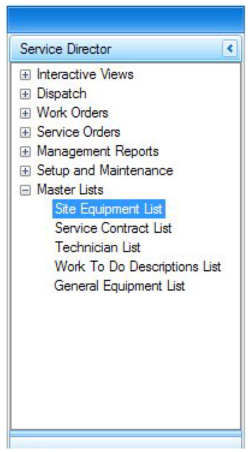
Producing a Site Equipment List

Use the **Site Equipment List** function to print a list of your Site Equipment IDs. Use the Setup and Maintenance Site Equipment function to add or edit Site Equipment information.

To produce a **Site Equipment List**, follow these steps:

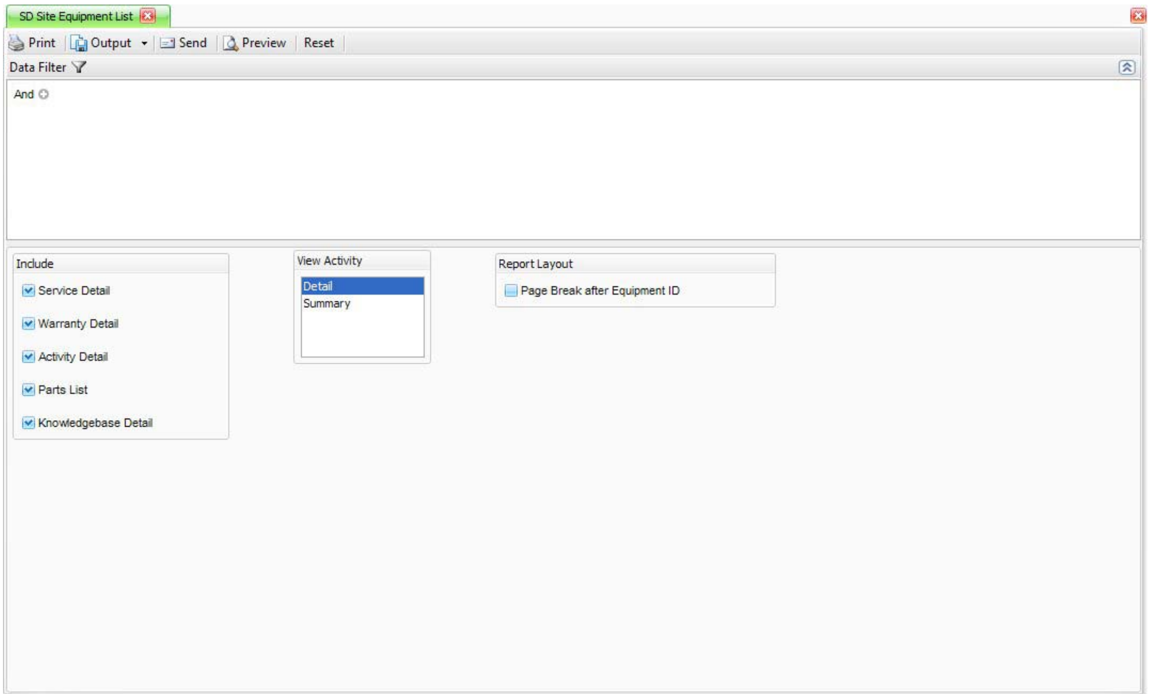
1. Select **Site Equipment List** from the **Master Lists** menu.

Site Equipment List Menu



2. The **Site Equipment List** screen appears.

Site Equipment List Screen



3. Use the **Data Filter** to select the range of filtering options or leave the filter blank to include all available data.
4. Select one or more of the following check boxes to include the information on the report:
   - **Service Detail -** This selection will print the information set up on the Services tab.
   - **Warranty Detail -** This selection will print the information set up on the Warranty tab.
   - **Activity Detail** - This selection will print the information set up on the Activity tab.
   - **Parts List** - This selection will print the items set up on the Parts List tab. This will be the parts used for this Equipment ID. This information will be printed if the Site Equipment was copied from a General Equipment ID.
   - **Knowledgebase Detail** - This selection will print the details entered on the Knowledgebase tab. This information will be printed if the Site Equipment was copied from a General Equipment ID.

5. Select whether to include additional detail in the report by selecting **Detail** in the **View Activity** list box, or select **Summary** to see an overview of the report information.
6. Mark the check box for **Page Break after Equipment ID** to start a new page of the report after each Equipment ID listing.
7. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Site Equipment List

Consolidated Service Director
Site Equipment List
PAGE 1

Report Filter

Include Service Detail	Yes	Include Parts List	Yes
Include Warranty Detail	Yes	Include Knowledgebase Detail	Yes
Include Activity Detail	Yes	View Activity	Detail

Equipment ID	14ACX	Status	Active
Description	Merit Series Air Conditioner	Usage	All
Serial Number		Ownership	Customer
Tag Number		GL Expense	00-000-6600
Customer ID	Dat030	Asset ID	
Site ID	WH 1	Notes	Dependable scroll compressor provides smooth, efficient and reliable operation.
Manufacturer	Lennox		
Model	14ACX		
Item ID	200300		
Category	HVAC		

Service

Work To Do ID	Interval Type	Interval	Prompt (Days)	Start Date	End Date	Next Due Date
ERepair	Year	5	15			

Warranty

Coverage Type	Interval Type	Interval	Start Date	End Date
Parts	Year	5		

Activity

Type	Purchase			Completed Date	11/1/2013
Description				Order Number	
Site ID				Price	7,000.00
Contact	Rem014			Phone	(612)-941-2045
Name	Remote Power Supply Inc.			Fax	(612)-941-2065
Address 1	610 Jefferson Street			Order Date	10/15/2013
Address 2				Invoice Date	11/7/2013
City	Minneapolis	Country	USA	Invoice Number	
Region	MN				
Postal Code	55405				

Type	Purchase			Completed Date	11/4/2013
Description				Order Number	
Site ID				Price	500.00
Contact	PCB009			Phone	(612)-459-9024
Name	PC Builders			Fax	(612)-459-9025
Address 1	1248 Pacific Street			Order Date	11/1/2013
Address 2				Invoice Date	11/5/2013
City	Minneapolis	Country	USA	Invoice Number	
Region	MN				
Postal Code	55459				

Parts List

Part No Item ID	Description Preferred Vendor	Quantity	Estimated Cost	Lead Time
Coil	Louvered Coil Guard	1.0000	500.0000	0.0000
Compressor	Scroll Compressor	1.0000	2,500.0000	0.0000
Fan	Direct Drive Fan	1.0000	400.0000	0.0000

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SERVICE CONTRACTS

Use the fields on the **Service Contracts** screen to enter information about the Service Contracts you have with your Customer.

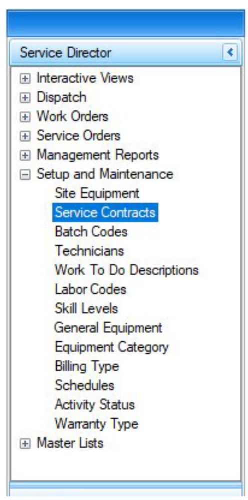
Select Service Contracts from the Setup and Maintenance menu, then use the fields at the top of the screen to enter or edit basic information. Use the Equipment and Billing tabs to record equipment information and other information about the selected equipment.

An Accounts Receivable Recurring Entry must be set up for the Service Contract prior to setting up information on the Billing tab. The information on the Recurring Entry is used to determine the amount and frequency of service on the contract. When the Recurring Entries are copied to invoices and posted, the Billing tab is updated with the Last Billing Date and Next Billing Date.

To set up **Service Contracts**, follow these steps:

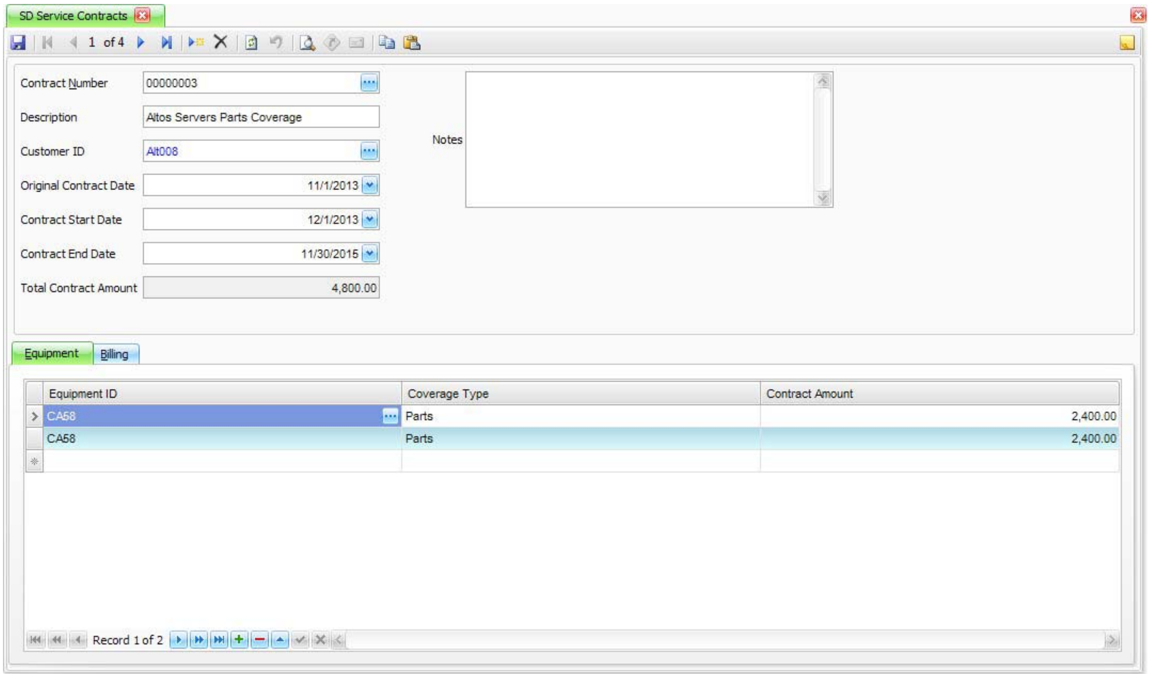
1. Select **Service Contracts** from the **Setup and Maintenance** menu.

Service Contracts Menu



2. The **Service Contracts** screen appears.

Service Contracts Screen



3. Click the **New Record** button , on the toolbar, to open a blank Service Contract record.

4. Select, accept, or enter the Service **Contract Number** for this contract. The Contract Number is generated by the system if you selected Yes to System Generated Contract Numbers in the Business Rules function (page 3-5). If you selected No to the Business Rule, enter the Contract Number.

5. Enter a **Description** for this Service Contract.

Maint

6. Select a **Customer ID** from the list of Customers in Accounts Receivable. This field indicates this equipment belongs to a Customer.

7. Set the **Original Contract Date** to the date the Service Contract was initiated with the Customer.

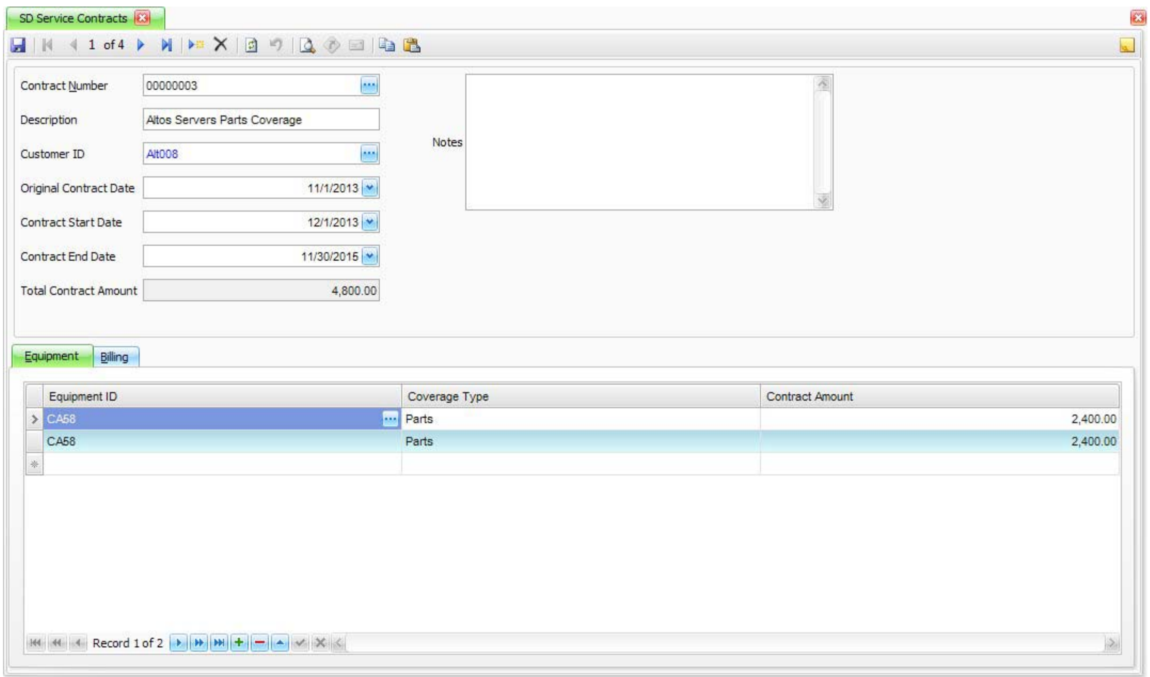
8. Set the **Contract Start Date** to the date the current Service Contract started. This may be the annual renewal date or the date the Service Contract was reinstated after a lapse.

9. Set the **Contract End Date** to the date the current Service Contract is due to expire, or the date the Service Contract lapsed.

10. The **Total Contract Amount** is a read-only field and shows the sum of the equipment contract amounts from the Equipment tab.

11. Enter **Notes** about the Service Contract. These Notes are internal notes only and are not printed on any invoice.

Service Contracts Screen - Equipment Tab



Use the **Equipment** tab to list the Site Equipment, Coverage Type (parts, or labor, or both) and the Contract Amount included in this Service Contract.

Maint

12. Select an **Equipment ID** from the list of Site Equipment (page 3-83) set up for this Customer and covered by this Service Contract.

NOTE: If the Equipment ID you want to use is not in the drop-down list, double-click on the Equipment ID field to open the SD Site Equipment function. Add your new Site Equipment information and save your changes. When you return to the SD Service Contracts function, your new Equipment ID will now appear in the drop-down list.

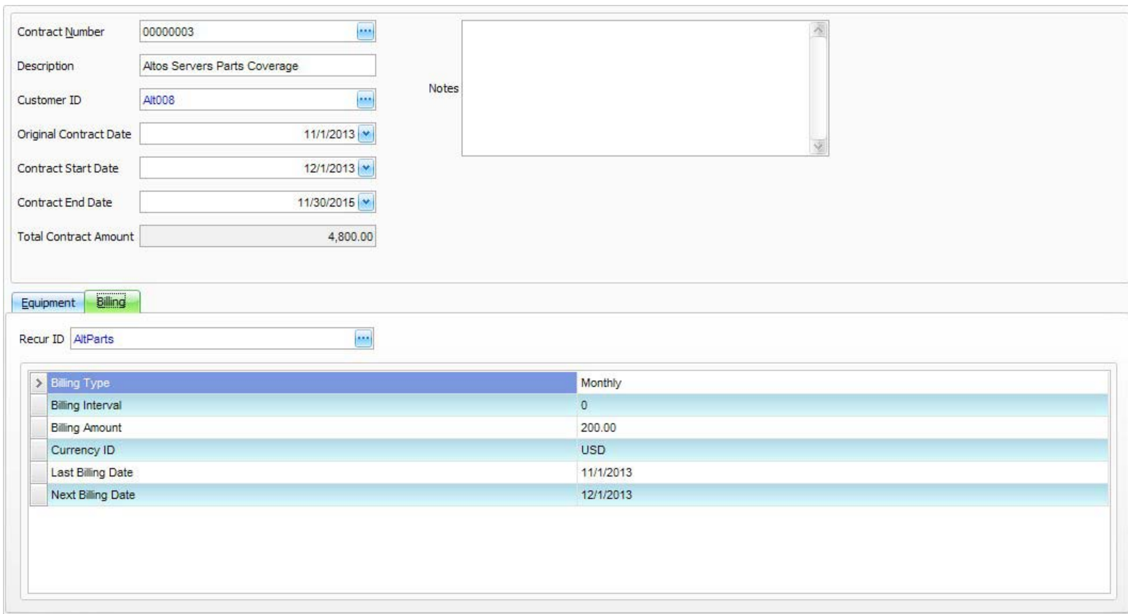
13. **Select** the **Coverage Type** to indicate the type of service coverage for this Equipment ID.

- **Labor/Parts** - The equipment contract amount includes both parts and labor.

- **Labor** - The equipment contract amount includes only labor and not parts.
- **Parts** - The equipment contract amount includes only parts and not labor.

14. Enter the **Contract Amount** to indicate the total amount to be billed to the Customer for the life of the Service Contract for this piece of equipment.

Service Contracts Screen - Billing Tab



The **Billing** tab can be used to store information regarding the Service Contract, or can be used to integrate to the Accounts Receivable application to automate periodic billing for the Service Contract.

If you do not want an automated billing, leave the Recurring ID field blank and enter data in the remaining fields as desired.

Maint

15. Select a **Recurring ID** to link to a Recurring Entry from the AR Recurring Entries function. The read-only detail fields will populate with information from the AR Recurring Entry.

    If you do not select a Recurring ID the **Billing Type**, **Billing Interval** and **Billing Amount** fields become active. You may enter information into these fields for reference purposes only.

NOTE: If there is no Recurring Entry for this Service Contract, you can double-click on the Recur ID field to open the AR Recurring Entries function. Add your new Recurring Entry and save your changes. When you return to the SD Service Contracts function, your new Recur ID will now appear in the drop-down list.

16. If you have not selected a Recur ID, select the **Billing Type** for this Service Contract:
    - **As Needed** is saying we will use this Service Contract as often as needed.
    - **Days** is saying we will use this Service Contract at intervals of a specific number of days. The **Billing Interval** field becomes activated and you will need to enter the number of days you want between billing cycles.
    - **Monthly** is saying we will use this Service Contract once per month.
    - **Quarterly** is saying we will use this Service Contract once per quarter.
    - **Yearly** is saying we will use this Service Contract once per year.
17. Enter the number of increments in between billings into the **Billing Interval** field. This will be based on the Billing Type and indicate how often the service should be done.
18. Enter the amount to be billed per interval into the **Billing Amount** field.

NOTE: Information selected or entered into this tab is for information purposes only. The manually entered information, if a Recur ID is not selected is not used to generate any Work Orders or Service Orders. Work Orders and Service Orders may be generated from information set up on the Service tab of the General and Site Equipment. This information may be viewed through the Service Contracts View.

Task Summary

To add Service Contracts, follow these steps:

1. Select the **New Record** icon, on the toolbar. A blank record appears.
2. Enter or accept the **Contract Number**, and enter the **Description** of the Service Contract, **Customer ID**, **Original Contract Date**, **Contract Start Date**, **Contract End Date**, **Notes**, and information on the **Equipment** and **Billing** tabs where appropriate.
3. Click the **Save** button to save your work.

To edit Service Contracts, follow these steps:

1. Select the **Contract Number** to edit.
2. Position the cursor in the field to edit.
3. Change the value in the field.

4. Click the **Save** button to save your work.

To delete a Service Contract, follow these steps:

1. Select the **Contract Number** to delete.
2. Select the **Delete** hot key (f3), or click on the **Delete Record** button , on the tool bar.

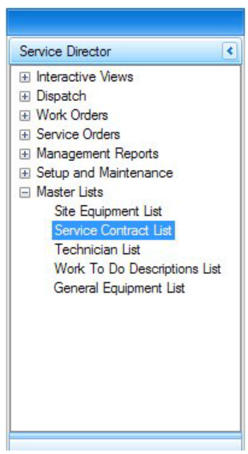
Producing a Service Contract List

Use the **Service Contract List** function to print a list of your Service Contracts. Use the Setup and Maintenance Service Contracts function to add or edit Service Contract information.

To produce a **Service Contract List**, follow these steps:

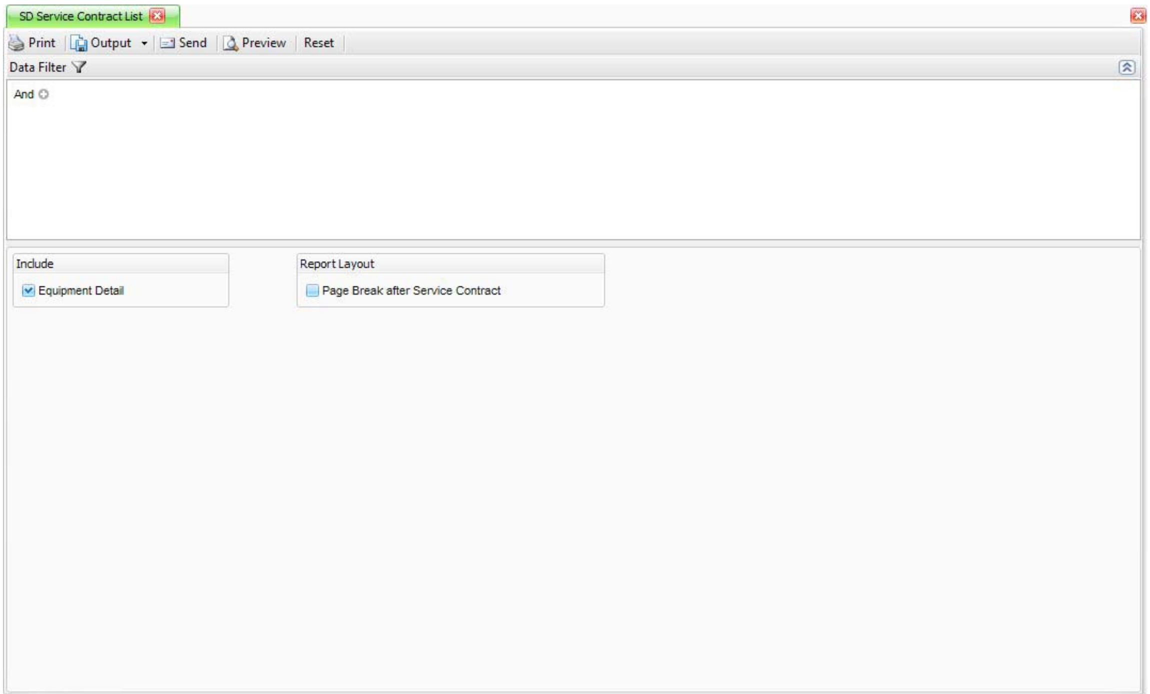
1. Select **Service Contract List** from the **Master Lists** menu.

Service Contract List Menu



2. The **Service Contract List** screen appears.

Service Contract List Screen



3. Use the **Data Filter** to select the range of filtering options or leave the filter blank to include all available data.
4. Select the **Equipment Detail** check box to include that information on the report.
5. Mark the check box for **Page Break after Equipment ID** to start a new page of the report after each Equipment ID listing.

6. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Print	Print the report.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Service Contract List

Consolidated Service Director
Service Contract List
PAGE 1

Report Filter
Include Equipment Detail Yes

Contract Number	00000003	Notes	
Description	Altos Servers Parts Coverage		
Customer ID	Alt008		
Original Contract Date	11/1/2013		
Contract Start Date	12/1/2013		
Contract End Date	11/30/2015		
Total Contract Amount	4,800.00		

Recur ID	AltParts	Billing Amount	200.00
Billing Type	Monthly	Last Billing Date	11/1/2013
Billing Interval	0	Next Billing Date	11/1/2013

Equipment

Equipment ID / Coverage Type	Contract Amount	SiteID / Item ID	Serial Number / Tag Number
CA58	2,400.00	WH 1	
Parts		200100	54624
CA58	2,400.00	WH 2	
Parts		200100	

Contract Number	00000005	Notes	This contract is valid for Labor and Parts on Equipment ID EL296E.
Description	Beta Dynamics Labor/Parts Coverage		
Customer ID	Bet023		
Original Contract Date	12/1/2013		
Contract Start Date	12/1/2013		
Contract End Date	11/30/2015		
Total Contract Amount	4,800.00		

Recur ID	BetLabPa	Billing Amount	200.00
Billing Type	Monthly	Last Billing Date	11/1/2013
Billing Interval	0	Next Billing Date	12/1/2013

Equipment

Equipment ID / Coverage Type	Contract Amount	SiteID / Item ID	Serial Number / Tag Number
EL296E	4,800.00	WH 1	
Labor / Parts		200150	

Contract Number	00000004	Notes	Compumarc has purchased two service part contracts for two of their equipment that should be billed monthly at the same time.
Description	Compumarc Parts Coverage		
Customer ID	Com028		
Original Contract Date	11/1/2013		
Contract Start Date	11/1/2013		
Contract End Date	10/31/2016		
Total Contract Amount	9,000.00		

Recur ID	ComParts	Billing Amount	250.00
Billing Type	Monthly	Last Billing Date	11/1/2013
Billing Interval	0	Next Billing Date	11/1/2013

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SD ACTIVITY STATUS OVERVIEW

You may need to track, view, and filter Work Order and/or Service Order dispatches by a status that is more specific than the current Open, Completed, Billed, or Posted. Activity Status functionality has been added to Service Director, giving you the ability to define and manage the status of your dispatches while ensuring the business logic triggered by a change in status remains. For example; you can select an Activity Status of Parts Hold for a dispatch, which will put the dispatch on hold as usual behind the scenes, but allows you to distinguish between a Part Hold activity and a Customer Requested Hold activity.

Use the Activity Status function to add activity status options for your dispatches. TRAVERSE includes a list of system-defined activity statuses that will auto-populate the grid when you add your own activity.

NOTE: You cannot edit or delete system-defined activity statuses.

Setup Information

Before using the Activity Status functionality, you must go into Service Director, Setup and Maintenance, Activity Status and create the Activity Status table. See the Activity Status (page 3-113) for more information.

Workflow

1. In the Service Director, Setup and Maintenance, Activity Status function, click the New button on the toolbar to add an activity status. Enter a Description, select a Dispatch Status, and select an Action. Save the record.
2. Create a new Work Order or Service Order through the appropriate entry screen. The Activity Status functions the same way in both types of dispatches. On the Site Information tab, enter the Customer information (Work Order) or Site information (Service Order).

   On the Dispatch tab, enter dispatch information, including any work to do. Save the dispatch.
3. To add an Activity Status, click the Activity Status button and select an Activity Status for the dispatch from the drop-down menu.
   - The Activity Status drop-down list includes the descriptions listed in the Activity Status table except those with an Action value of “System”. Each Activity Status option will open a dialog box in which you can accept or edit the Activity Date and Time, select a Technician, and add Notes.

- The Cancel and Reopen options will show a confirmation box for canceling or reopening the dispatch.

  If you do not have permission to cancel, reopen, or complete a Work Order or Service Order, you will not be able to choose those options.

- A dialog box will appear. Accept or edit the Date/Time, select a Technician ID for the activity as necessary, and enter any Notes for the activity.

4. Click OK to save the activity. The activity will appear in the activity grid at the bottom of the Dispatch screen.

Scheduled Technician View, Order View

The Activity Status appears in the Scheduled Technician View (page 6-19).

Double-click the Order No link to open the Order View.

The Activity Status also appears on the Order View interactive view, as well as being available for use in the Data Filter.

Scheduled Dispatch Report

The Activity Status is included on the detailed version of the Scheduled Dispatch Report (page 6-25). You can also filter the report by Dispatch Status (Activity Status).

Unscheduled Dispatch Report

As with the Scheduled Dispatch Report, the detailed version of the Unscheduled Dispatch Report (page 6-31) includes the Activity Status. You can also filter the report by Dispatch Status (Activity Status).

Print Work Orders

You can filter the Work Order dispatches by Dispatch Status (Activity Status). The Dispatch Status also appears on the Work Order (page 4-47).

NOTE: The dispatch must be open (not canceled or on hold) in order to print the Work Order.

Work Order Report

The detailed version of the Work Order Report (page 4-51) includes the Activity Status. By selecting to include the Activity Detail on the report, you can see a list of activity rather than just the most recent. You can also filter and/or sort the report by Dispatch Status (Activity Status).

Work Order Worksheet

The detailed version of the Work Order Worksheet (page 4-57) includes the Activity Status. You can also filter the worksheet by Dispatch Status (Activity Status).

Order History Report

Once the Work Order is completed, billed, and posted, you can view the Activity Status details for the Work Order on the Order History Report (page 8-13). The Activity Detail appears on the detailed version of the report if you select to include the Activity Detail.

ACTIVITY STATUS

Use the **Activity Status** function to maintain Activity Status options for your dispatches. The Activity Status gives you more options for defining and managing dispatches while ensuring the business logic triggered by a change in status remains. For example; you can select an Activity Status of Parts Hold for a dispatch, which will put the dispatch on hold as usual behind the scenes, but allows you to distinguish between a Part Hold activity and a Customer Requested Hold activity.

You will see the Activity Statuses displayed and entered, when you select the Activity Status button on the Dispatch tab in the Work Order Entry and Service Order Entry screens.

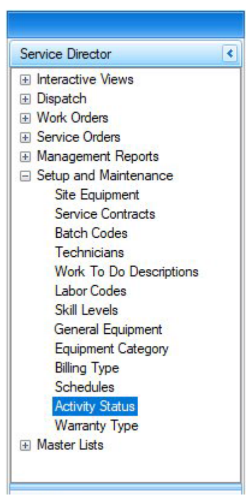
TRAVERSE includes a list of system-defined Activity Statuses that will display in the grid once you add your own Activity Status. You cannot edit or delete the system-defined statuses.

NOTE: System generated Activity Statuses will be displayed in gray. Manually entered Activity Statuses will be displayed in alternating white and colored bands.

To set up **Activity Status**, follow these steps:

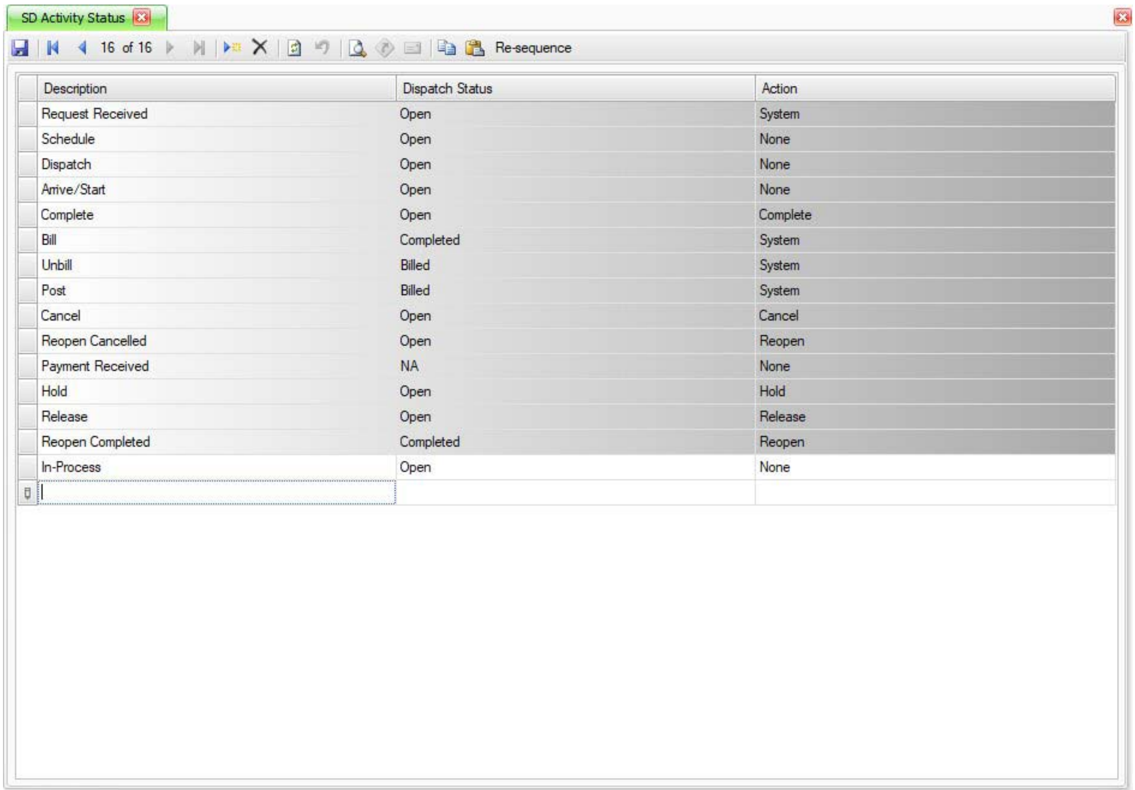
1. Select **Activity Status** from the **Setup and Maintenance** menu.

Activity Status Menu



2. The **Activity Status** screen appears.

Activity Status Screen



Description	Dispatch Status	Action
Request Received	Open	System
Schedule	Open	None
Dispatch	Open	None
Arrive/Start	Open	None
Complete	Open	Complete
Bill	Completed	System
Unbill	Billed	System
Post	Billed	System
Cancel	Open	Cancel
Reopen Cancelled	Open	Reopen
Payment Received	NA	None
Hold	Open	Hold
Release	Open	Release
Reopen Completed	Completed	Reopen
In-Process	Open	None

3. Click the **New Record** button , on the toolbar to open a blank Activity Status record, or click in an empty record.
4. Enter a Description for the Activity Status in the **Description** field.
5. Select a **Dispatch Status** field drop-down list. This status indicates the state of the dispatch, whether it is **Open**, **Completed**, **Billed**, **Posted**, or none of these (**NA**).
6. Select an **Action** to be applied to the dispatch when the Activity Status is selected.

   The action will apply the appropriate business logic to the dispatch.

   Select from these choices:

   - **None** - No action is performed.

- **Hold** - Put the dispatch on Hold to prevent any transactions from being entered, or any scheduling of the dispatch to a Technician. When an Activity Status with the Action of Hold is selected, a dialog box will be displayed to enter the Date/Time, Technician ID, and Notes about putting the dispatch on Hold.
- **Release** - If the status of the dispatch is Hold, the status of the dispatch will change to Released. When an Activity Status with the Action of Release is selected, a dialog box will be displayed to enter the Date/Time, Technician ID, and Notes about releasing the on Hold dispatch.
- **Complete** - When all the transactions and services for the dispatch is completed, the status will change to Completed. When an Activity Status with an Action of Complete is selected a dialog box will be displayed to enter the Date/Time, Technician ID, and Notes about the completion of the dispatch.
- **Cancel** - If the status of the dispatch is Open, and no transactions exist for the dispatch Cancel the dispatch. A canceled dispatch can be reopened using an Activity Status that has an Action of Reopen.
- **Reopen** - If the dispatch is canceled, set the status of the dispatch to Open. A prompt will be displayed confirming you want to Reopen the dispatch.

NOTE: The action System is reserved for system generated Activity Status Actions, and is not available to select.

7. Click the **Save** button to save your work.

Use the **Re-sequence** button on the toolbar when you drag the activity status records into a new order. This will save the new arrangement.

Task Summary

To add Activity Statuses, follow these steps:

1. Select the **New Record** icon , on the toolbar. A blank record appears.
2. Enter a Description for the Activity Status in the **Description** field.
3. Select a **Dispatch Status**.
4. Select an **Action** to be applied to the dispatch when the Activity Status is selected.
5. Click the **Save** button to save your work.

To edit Activity Statuses, follow these steps:

1. Select the **Activity Status** to edit.

NOTE: You can not edit the system generated Activity Statuses.

2. Position the cursor in the field to edit.
3. Change the value in the field.
4. Click the **Save** button to save your work.

To delete an Activity Status, follow these steps:

1. Select the **Activity Status** to delete.
2. Select the **Delete** hot key (f3), or click on the **Delete Record** button , on the tool bar.

NOTE: You can not delete the system generated Activity Statuses, or Activity Statuses that have been used in a dispatch.

Producing an Activity Status List

To produce an **Activity Status List**, follow these steps:

1. Select the **Print Preview** button to preview the Activity Status report for the Activity Statuses you have displayed on the screen.
2. The **Preview Report** screen appears.
3. Select the **Print** button in the toolbar to print your list.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Activity Status List

Continental Products Unlimited
SD Activity Status

Page 1

Description	Dispatch Status	Action
Request Received	Open	System
Schedule	Open	None
Dispatch	Open	None
Arrive/Start	Open	None
Complete	Open	Complete
Bill	Completed	System
Unbill	Billed	System
Post	Billed	System
Cancel	Open	Cancel
Reopen Cancelled	Open	Reopen
Payment Received	NA	None
Hold	Open	Hold
Release	Open	Release
Reopen Completed	Completed	Reopen
In-Process	Open	None

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Kent.Heitkamp

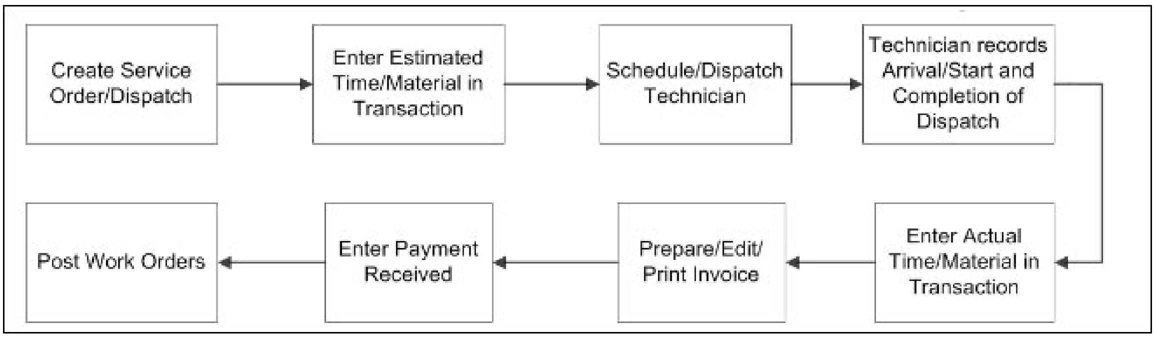
4

WORK ORDERS

OVERVIEW

Work Orders are your way to track work to be done on equipment belonging to your Customers. Use Work Orders to organize and track equipment service, parts used, and contract work performed by your Technicians.

The flow of the Work Order process is illustrated in the flowchart below:



Before you use the functions on the Work Orders menu, set up your Equipment, Categories, Skills, Billing Type, Codes, Work To Do Descriptions, Technicians, and Activity Statuses using the functions on the Setup and Maintenance menu, and verify your Items, codes, and IDs using the functions on the Master Lists and Interactive View menus.

To work with Work Orders do the following steps:

- Enter **Work Orders** (page 4-5) for work to be done for your Customers.
- **Generate Work Orders** (page 4-41) for the equipment that has scheduled services.
- **Print Work Orders** (page 4-47) for entered and generated Work Orders.
- Print the **Work Order Report** (page 4-51) to view details on the Work Orders.
- Print the **Work Order Worksheet** (page 4-57) to send with the technicians that are scheduled to do work on the Work Orders.
- Enter **Transactions** (page 4-63) to record the work done and parts used to complete the Work Orders.
- **Prepare Invoices** (page 4-75) for billing your Customers for the work done and parts used on Work Orders.
- **Edit Billings** (page 4-79) to edit invoices that have been generated from the Prepare Invoices function.
- **Print Invoices** (page 4-85) to send to your Customers.

- **Post Work Orders** (page 4-95) to update history and make General Ledger entries.

WORK ORDER ENTRY

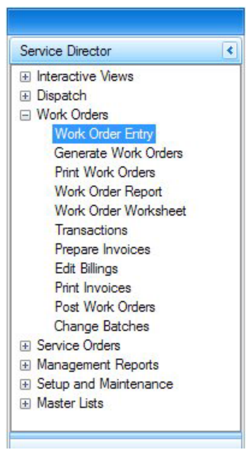
The **Work Order Entry** function is the workhorse of the Service Director system - it records new service calls, schedules dispatches, tracks labor and parts used to complete the Work Order, and invoices completed Work Orders.

Select Work Order Entry from the Work Orders menu, then use the fields at the top of the screen to enter or edit basic information. Use the Site Information and Dispatch tabs to record Site, Billing, Dispatch, Equipment, and other information for the service call.

To enter **Work Orders**, follow these steps:

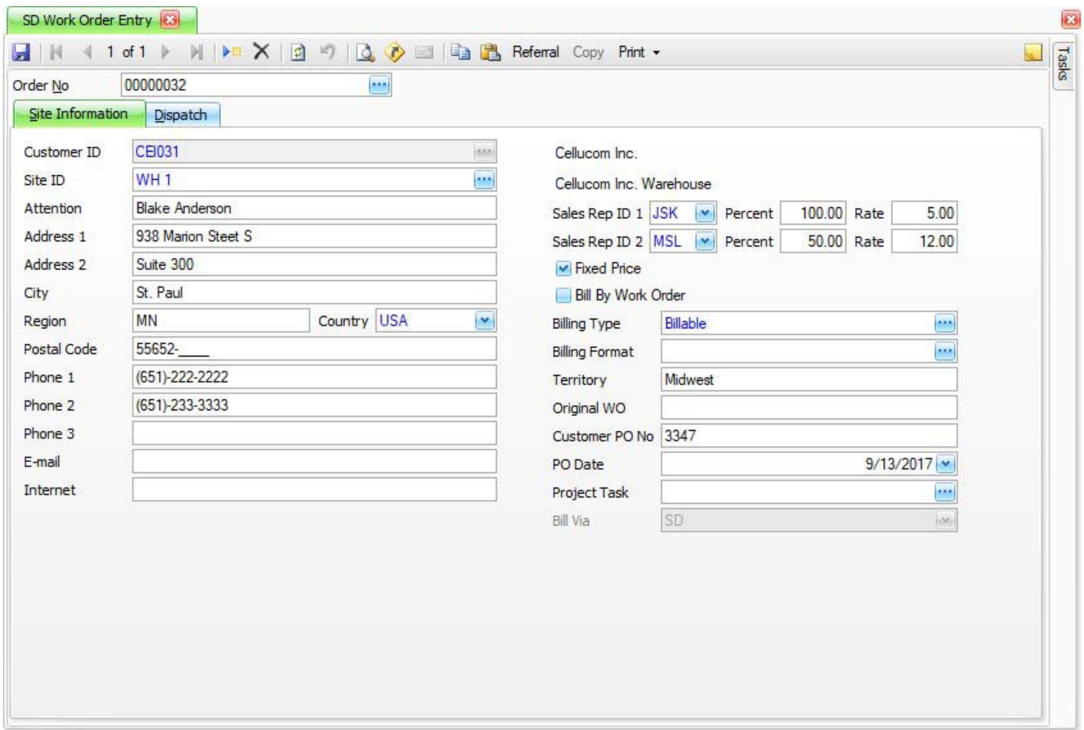
1. Select **Work Order Entry** from the **Work Orders** menu.

Work Order Entry Menu



2. The **Work Order Entry** screen appears.

Work Order Entry Screen



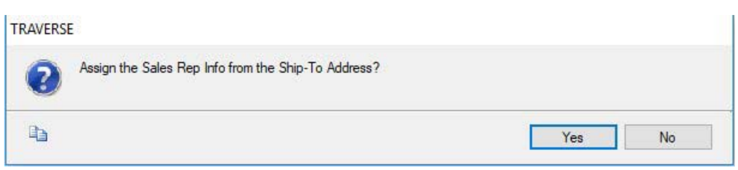
3. Click the **New Record** button , on the toolbar, to open a blank Work Order record.

Maint
4. Select a **Customer ID** from the list of Customers in Accounts Receivable.

Maint
5. Select a Ship-To Address as the **Site ID** for this Work Order.

The Site ID and the information listed in the Address, City, Region and Postal Code fields will come in from Ship To Addresses set up for the selected Customer. There is no Site ID setup function in Service Director.

You may see a notification dialog box:



This dialog box allows you to utilize the Sales Rep information in the Ship-To entity of TRAVERSE for commission purposes. Choose **Yes** if you want to assign the Ship-To Sales Rep information to the Work Order; otherwise, select **No**.

6. Customer Details will fill into the following fields and may be edited.

    These fields display information for the Customer you selected in the Customer ID field or Site ID.

    - **Attention**: the name of the contact listed in the Customer information.
    - **Address 1** and **Address 2**: the address for the selected Customer or Site ID for the Customer.
    - **City**, **Region**, and **Postal Code**: the City, Region, and Postal Code for the selected Customer or Site ID for the Customer.
    - **Phone**, **E-mail**, and **Internet**: the Phone number(s), E-mail address, and Internet website for the selected Customer or Site ID for the Customer.

Maint

7. Select the Sales Representatives that will get credit for the invoice posted with this Work Order from the **Sales Rep ID 1** and **Sales Rep ID 2** fields.
8. The **Percent** field will display the Percentage of the invoice used to calculate commissions for the Sales Rep, but you may change it.

NOTE: Each Sales Representative can receive credit for up to 100 percent of a sale.

9. The **Rate** field will display the commission rate for the Sales Rep. Accept the default, or edit the Rate.
10. Mark the **Fixed Price** check box if this work order will be billed with a Fixed Price.

    If the Customer is to be billed a Fixed Price for this work order, select the **Fixed Price** check box. When you bill Fixed Prices, the system bills labor and parts line Items according to the estimated quantities or units used for the dispatch (as noted in the Qty Estimated and Units Est boxes on the Dispatch tab), not according to the actual amounts used.

11. If you want all dispatches to be completed on the work order before you can print an invoice, select the **Bill By Work Order** check box. Clear the box to print invoices for individual dispatches as each dispatch is completed.

Maint

12. Select the **Billing Type** for this Work Order.
13. Select the **Billing Format** form. When you click on the browse (...) button, a browse window will be displayed and you will be asked to browse to a Design Studio form that you have designed or modified and saved as a .repx type file.

NOTE: To change the Billing Format from the default invoice format you must use the Design Studio to modify the existing Service Director invoice form and save the corresponding form to a shared folder that all workstations, using Service Director can access.

14. The **Territory** field displays the Territory listed in the Customer record you selected in the Customer ID field.

15. If this Work Order is a continuation of another Work Order, enter the original Work Order number in the **Original WO** field.

16. Use the **Customer PO Number** field to enter the Customer's Purchase Order number that corresponds to this Work Order, if applicable.

17. Enter the **PO Date** of the Customer's Purchase Order, if applicable.

Maint

18. Use the **Project Task** field to tie the Work Order to a current Project by selecting the Project from the drop-down list.

    This field will only be available if you have Project Costing installed and the interface from Service Director to Project Costing set to Yes in the Business Rules function (page 3-5).

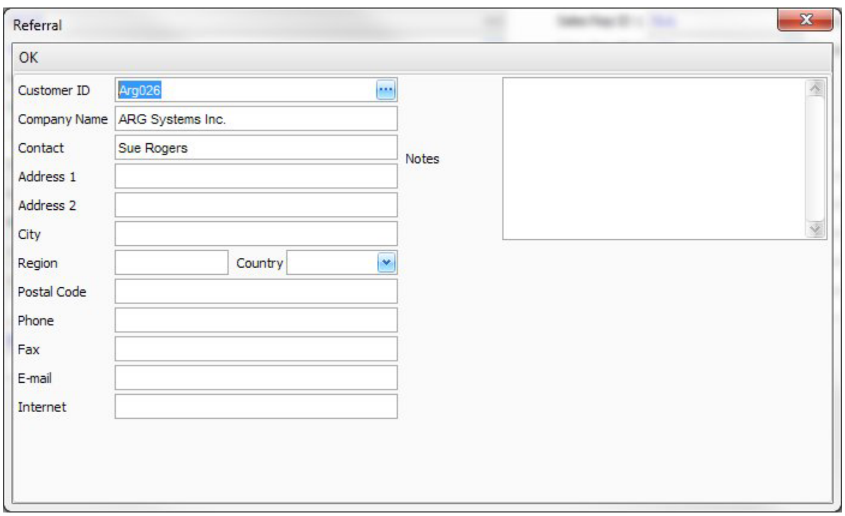
19. In the **Bill Via** field, select whether you want to bill the Work Order through Service Director or Project Costing.

    This is only applicable if you have selected a Project/Task. See SD Link to PC (page 4-25) for more information regarding billing via SD or PC.

Command Buttons

Name	Description
Referral	Add a customer referral to this Work Order.
Copy	Allows you to Copy Work order information from another Work Order.
Print	Gives you the option of printing the Work Order or the Invoice associated with the current Work Order.

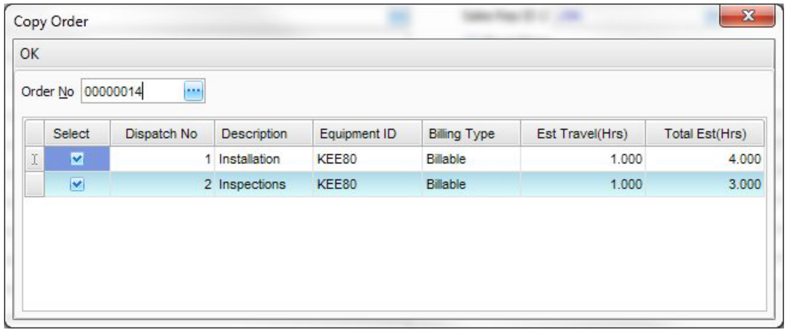
Work Order Entry Screen - Referral



The **Referral** button allows you to enter information regarding a Customer referral for a Work Order.

1. Select a Customer ID from the **Customer ID** field drop-down list. This will then fill in the company information with the AR Customer details.
2. Enter any notes about this referral in the **Notes** field.
3. Click the **OK** button to save your changes.

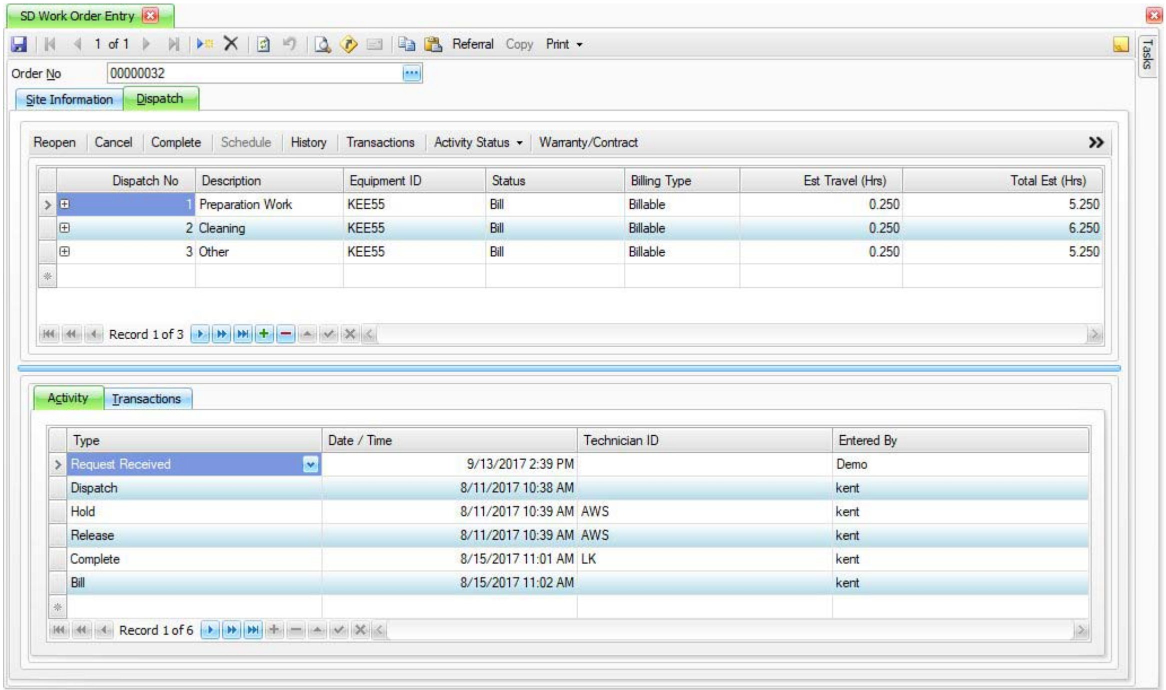
Work Order Entry Screen - Copy



The **Copy** function allows you to copy Work Order information from Work Orders that have been posted to history, for the selected Customer.

1. Select a **Customer ID** and click the **Copy** button to bring up the **Copy Orders** screen.
2. Select a work **Order No** from the list of Work Orders from history.
3. The Dispatches entered and completed for the selected Work Order are listed. Select the dispatches you want to copy into the new Work Order.
4. Click **OK** to copy the selected dispatches into the new Work Order.

Work Order Entry Screen - Dispatch Tab



NOTE: You cannot add a new dispatch if Bill by Work Order is marked on the Site Information tab, and if the work order has a billed or posted dispatch.

1. Click the **Append** button (+) on the **Dispatch** section, to open a new Dispatch record. The Dispatch Number is generated by the system.
2. Enter a Description for the Dispatch in the **Description** field.
3. Select the Equipment ID this Work Order applies to, from the drop-down list in the **Equipment ID** field.
4. The **Status** field will default to **Request Received** when a new Dispatch is created. The Status of the Dispatch will change depending on what has been done with the Dispatch.
    - **Request Received** - When the Dispatch is entered and nothing has yet been done to the dispatch, the status will be Request Received.
    - **Billed** - The Dispatch has been scheduled and transactions have been entered for the Dispatch. The Prepare Invoices has been run and the Invoice has been printed.
    - **Canceled** - The Dispatch has been canceled.

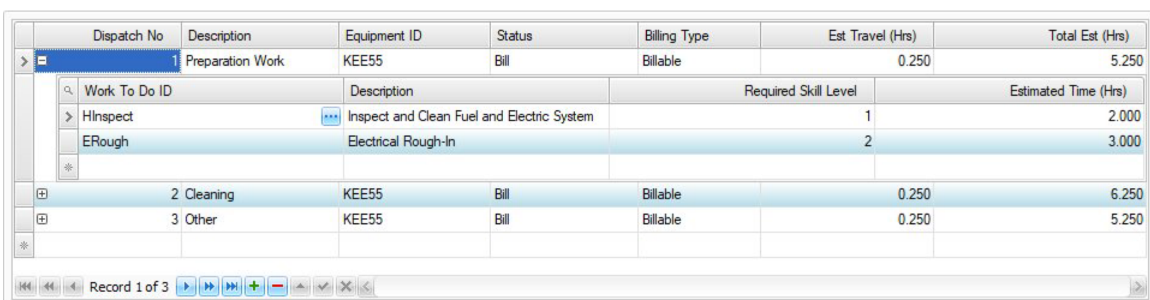
- **Reopen** - A canceled Dispatch has been reopened.
- **Posted** - A Billed Dispatch has been posted using the Post Work Orders function.
- **Completed** - The Dispatch has been Billed and Posted and is now Completed. The status gets changed to Completed when the Complete button is selected and completion information is entered.

  The Status may be changed to Completed prior to billing and posting, if nothing is being billed to the Customer.

NOTE: The Status of the Dispatch will be based on system updates and selections made from the Activity Status button menu.

5. The **Billing Type** field will default to the value selected on the Site Information tab on the Site Equipment setup screen. Select a different Billing Type for the Dispatch if applicable.
6. Enter the Estimated Travel time in hours in the **Est Travel (Hrs)** field.
7. The total estimated time for the dispatch in hours displayed in the Est Travel (Hrs) field is the sum of the estimated travel time and the **Work To Do IDs** for the Dispatch.
8. Press the Enter key or the Tab key to add **Work To Do** detail. If the Work To Do detail rows do not appear, a Plus sign (+) will appear next to the Dispatch Number. Click the Plus sign to add Work To Do IDs to the Dispatch.

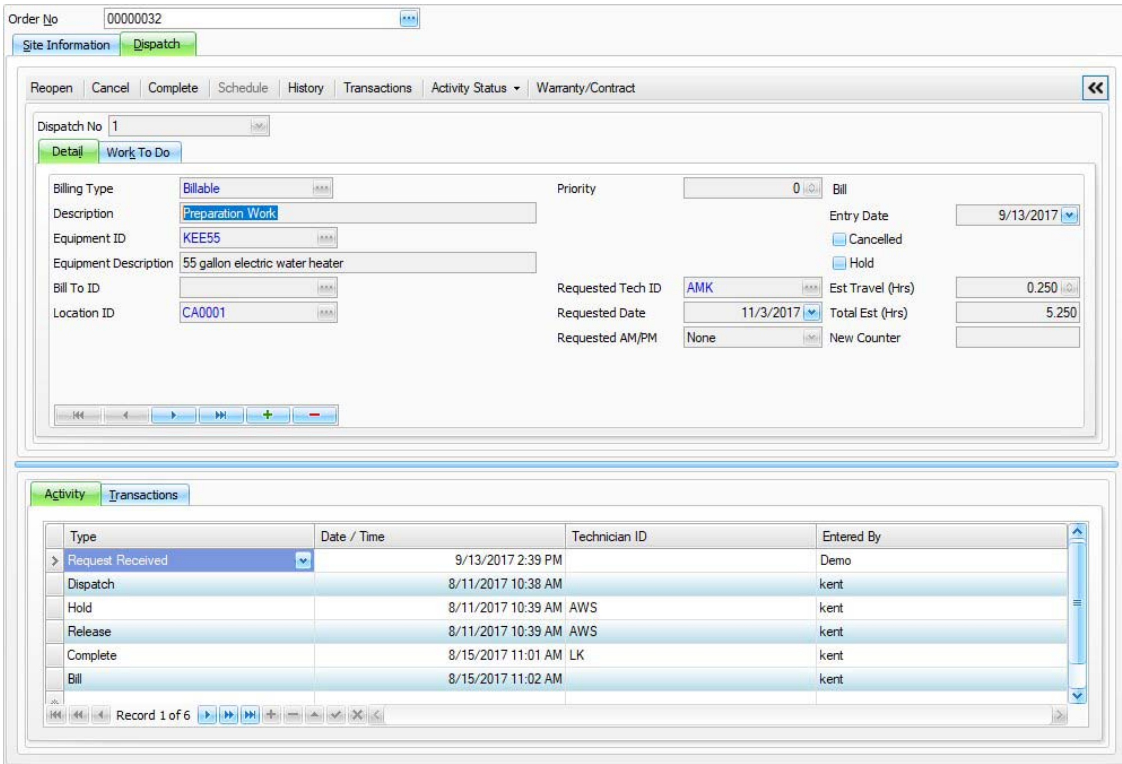
Work Order Entry Screen - Dispatch Tab Work To Do



9. Select a Work To Do ID from the drop-down list in the **Work To Do ID** field. The **Description** and **Required Skill Level** fields will display the information from the Work To Do record.
10. Enter or edit the Estimated Time to perform the Work To Do in hours in the **Estimated Time (Hrs)** field. The Estimated Time will default from the Work To Do ID setup.
11. Repeat Steps 8-10 for each Work To Do ID you want to add to the Dispatch.
12. To finish changes to the Dispatch, click the **End Edit** button ( ).

Use the Toggle button (») to switch from Summary (grid) View to Detail (field) View. Use the Detail View to see additional information about the Dispatch.

Work Order Entry Screen - Dispatch - Detail (field) View - Detail Tab



NOTE: Note: You cannot add a new dispatch if Bill by Work Order is marked on the Site Information tab, and if the work order has a billed or posted dispatch.

1. Click the **Append** button (+) in the **Dispatch** section, to open a new Dispatch record. The Dispatch Number is generated by the system.

Maint

2. The **Billing Type** field will default to the value selected on the Site Information tab. Select a different Billing Type for the dispatch if applicable.
3. Enter a description for the Dispatch in the **Description** field.

Maint

4. Select the Equipment ID to which this Work Order applies from the drop-down list in the **Equipment ID** field. If you have the SD Notify Warranty/Contract Business Rule set to “Yes”, a notification window will appear if the Site Equipment has a warranty or contract associated with it.

5. The **Equipment Description** appears. Accept or edit the Description.

Maint

6. Select a **Bill To ID** as necessary.

Maint

7. Accept or edit the **Location ID**, as applicable.

8. Accept or edit the **Priority** level for the dispatch.

   The Priority field allows you to set a priority for the Work Order. You can assign a default Priority level via the SD Business Rules. This field is for information only.

9. The **Status** field will display the current Status of the Dispatch.

10. The **Entry Date** will default in, and cannot be edited.

11. If the dispatch has been canceled, the **Canceled** check box will be marked.

12. If the dispatch has been put on hold, the **Hold** check box will be marked.

Maint

13. Select a Technician for the entire Dispatch from the **Requested Tech ID** drop-down list, if applicable. Otherwise, you can select multiple Technicians for the Dispatch on the Transactions tab at the bottom of the screen.

14. Enter the estimated travel time in hours in the **Est Travel (Hrs)** field.

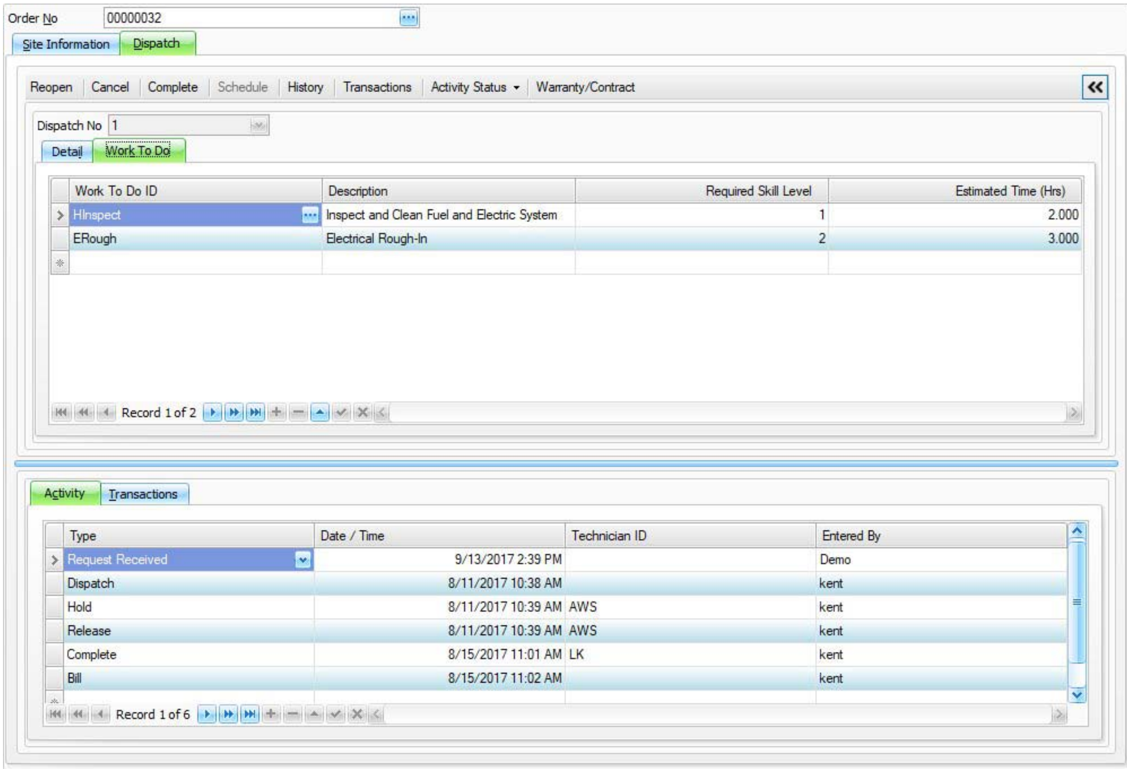
15. Enter a date and time into the **Requested Date** and **Requested AM/PM**, as applicable.

16. The estimated time to perform the work to do in hours will appear in the **Total Est (Hrs)** field.

   The total estimated time for the Dispatch in hours displayed in the Total Est (Hrs) field is the sum of the estimated travel time and the work to do IDs for the dispatch.

17. Enter the internal meter number in the **New Counter** field, if applicable. Examples of counters include the number of hours run, copies made, or pages printed. You can use these information-only numbers as diagnostic tools.

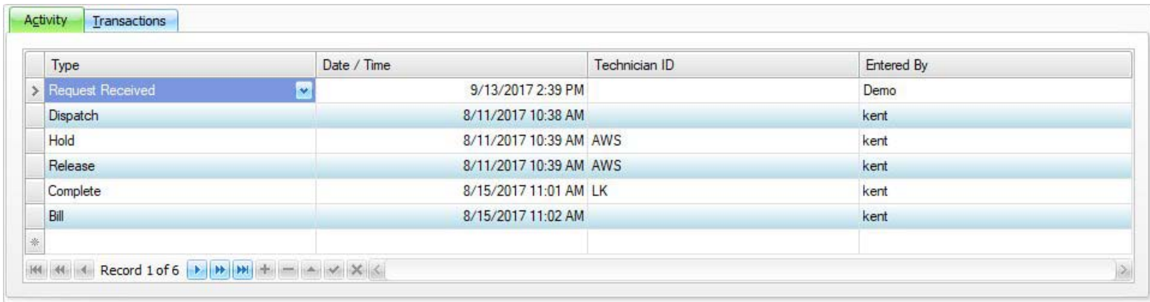
Work Order Entry Screen - Dispatch - Detail (field) View - Work To Do



18. Accept or select a **Dispatch Number** to which you want to assign work to do from the drop-down list, as necessary.
19. Click the **Append** button ( ) to add a new Work To Do record.
20. Select a Work To Do ID from the drop-down list in the **Work To Do ID** field.
21. The **Description** and **Required Skill Level** fields should display the information from the Work To Do record.
22. Accept or edit the **Estimated Time (Hrs)** for the work.
23. Repeat Steps 19-22 for each Work To Do ID you want to add to the Dispatch.
24. To finish changes to the Dispatch, click the **End Edit** button ( ).
25. Click the **Save** button on the toolbar to save your work.

Use the **Dispatch Activity** area of the screen to enter Activities done to the Dispatch.

Work Order Entry Screen - Dispatch Tab Activity Tab



26. Click the **Append** button (+) in the **Dispatch Activity** section, to open a new Dispatch Activity record.

27. Select the **Type** of activity you are entering for this dispatch.

    Some activity types will automatically be added to the Dispatch as things are done to the Dispatch. Below is a list of Activity Types and a description of those types.

- **Request Received** - When the dispatch is first entered and saved an Activity is automatically added to indicate the request for the dispatch as been received.
- **Schedule** - Select Schedule to schedule a Technician to use for this Dispatch. A record will be added if you have used the Schedule button to Schedule the Technician.
- **Arrive/Start** - Select Arrive/Start when the Technician has arrived on the site of the Dispatch.
- **Complete** - When the Complete button is selected and completed information is entered and saved, a record will be added to indicate the Dispatch is Complete.
- **Cancel** - When the Cancel button has been selected and **Yes** is selected in the dialog box, a record will be added to indicate the dispatch has been Canceled.
- **Reopen** - When the Reopen button has been selected and **Yes** is selected in the dialog box, a record will be added to indicate the Dispatch has been Reopened.
- **Bill** - When the Dispatch has gone through the Prepare Invoices and Print Invoices functions a record will be added to indicate the dispatch has been Billed to the Customer.

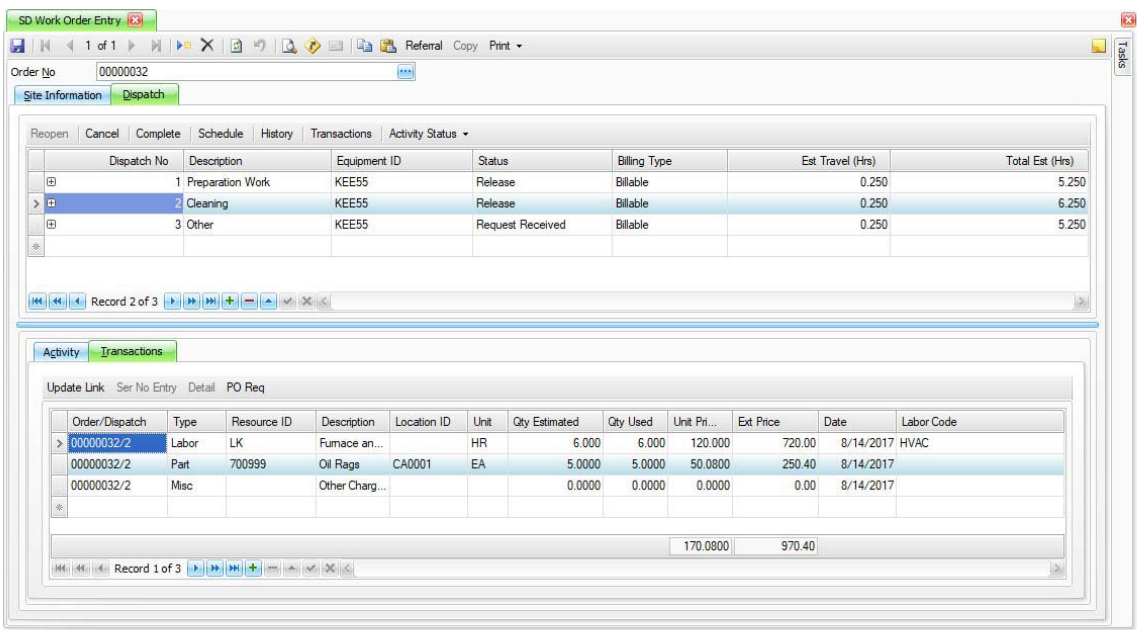
- **Post** - When the dispatch has gone through the Prepare Invoices, Print Invoices, and Post Work Orders functions, a record will be added to indicate the Dispatch has been Billed to the Customer and Posted.

28. The **Date/Time** field will indicate the date and time the Activity was entered. When scheduling a Dispatch enter the date and time to schedule the Dispatch. When adding an Arrived/Start record enter the date and time the Technician arrived at the site and started their work.

29. Select the **Technician ID** for the Technician that has been scheduled for the Dispatch, arrived on site or completed the Dispatch.

30. When an activity record has been added the **Entered By** field will be filled in with the User ID of the user that entered or generated the Activity.

Work Order Entry Screen - Dispatch Tab - Transactions Tab



Use the **Transactions** tab to determine whether a Work Order Dispatch should have activity added, including Parts Costs, Freight Costs, or Labor Resources.

Transactions allow you to track your expenses and billable Items on a Dispatch. These lines belong to the selected Dispatch, allowing you to generate unique labor and parts lists and record Dispatch completion details. The information on Transactions tab is then used to create Invoices.

If Service Director interfaces with Inventory, part quantities update Inventory on hand quantities online. Posting billed Work Orders updates dates, summary and detail history, and Serial and Lot information.

NOTE: Transactions may also be entered using the Transactions button on the Dispatch tab. Using the Transactions button will open the Transactions function (page 4-63).

31. Select a Dispatch for which to add Transactions.

32. Click the **Append** button ( ), at the bottom of the tab, to add a record.

33. Select the Type of transaction you are adding from the **Type** field drop-down list: **Labor**, **Part**, **Freight**, or **Misc**.

    The **Order/Dispatch** will fill in automatically from the Work Order you are working with, and the Dispatch you selected.

Maint

34. If applicable, select a **Resource ID** from the drop-down list.
    - If you selected **Labor** in the **Type** field, the drop-down list will show your Technicians.
    - If you selected **Part** in the **Type** field, the drop-down list field will show your parts.
    - This field is disabled for **Freight** and **Misc** types.

35. Enter a Description into the **Description** field. If the resource is a Part, the Item description will display in this field; otherwise enter a Description.

Maint

36. If you selected a **Part** in the **Resource ID** field, select a Location from the **Location ID** field drop-down list. Otherwise, the **Location ID** field will be blank. This field is disabled for **Freight** and **Misc** types.

37. The **Unit** field will display the Units of measure for the Part selected in the **Resource ID** field, or the value **HR** if **Labor** is selected in the **Type** field. This field is disabled for **Freight** and **Misc** types.

38. Enter the estimated quantity of the **Part** or **Labor** into the **Qty Estimated** field. This field is disabled for **Freight** and **Misc** types.

39. Enter the quantity used into the **Qty Used** field. This field is disabled for **Freight** and **Misc** types.

40. If you selected **Labor** or **Part** in the **Type** field, the Unit Price displays in the **Unit Price** field. You may change the Unit Price. This field is disabled for **Freight** and **Misc** types.

41. If you selected **Labor** or **Part** in the **Type** field, the **Ext Price** is calculated using the **Qty Used** and the **Unit Price** amounts. This field is disabled for **Freight** and **Misc** types.

42. Select or enter a transaction date in the **Trans Date** field. By default, this field will display the current date.

Maint

43. If you selected **Labor** in the **Type** field, select a Labor Code from the drop-down list in the **Labor Code** field.

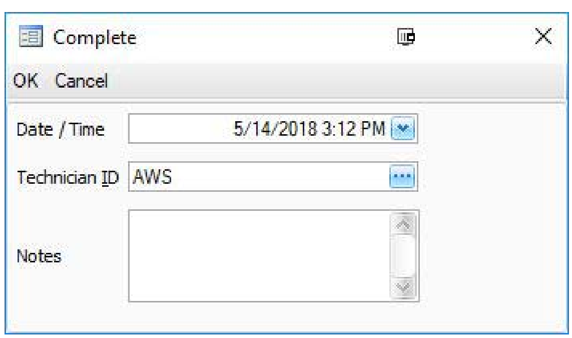
NOTE: To include a Freight or Misc amount on the invoice, use the column chooser to bring the Ext Cost field into your grid, and enter the amount to be billed into this Ext Cost field.

44. Click the **Save** button, on the toolbar to save your work.

Command Buttons

Name	Description
Reopen	Open a closed dispatch.
Cancel	Cancel a dispatch.
Complete	Complete a dispatch.
Schedule	Open the Schedule Info and the Calendar windows and allow you to schedule a technician or crew to a date and time to perform the dispatch work to do.
History	Display the Equipment History View for the equipment used in the selected Dispatch.
Transactions	Opens the Transactions function.
Activity Status	Add an Activity from the list of Activity Statuses.
Warranty/Contract	Include prompts for Warranty and Contract information for the Site Equipment in the Dispatch.

Work Order Entry Screen - Complete

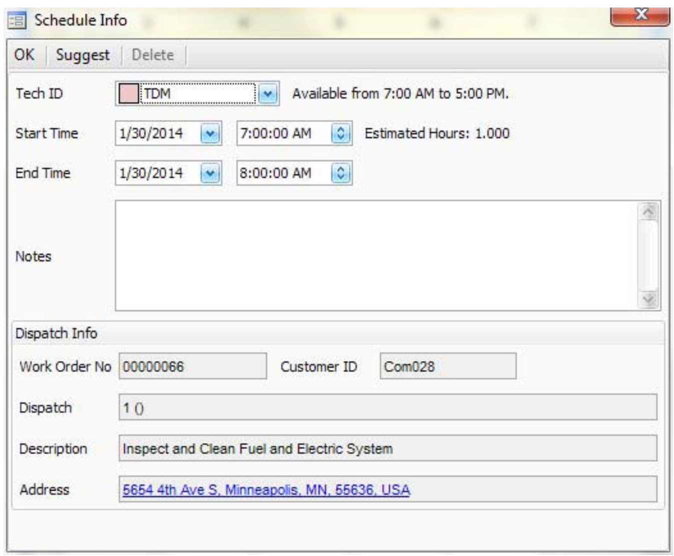


Use the **Complete** button to change the Status of the Dispatch to Complete. This is saying the work has been done on this Dispatch and it is ready to be billed. Once the Dispatch has been completed no more transactions can be saved to the Dispatch.

Multiple Dispatches may be closed at the same time by selecting the first Dispatch to close, hold your Shift key and select the last dispatch to close. This will select the range of dispatches and close all at once. To close non-consecutive dispatches select one dispatch and hold the Ctrl key and select the next Dispatch to close.

1. Enter or select the **Date/Time** the Dispatch was completed.
2. Select the **Technician ID** for the Technician that completed the Dispatch.
3. Enter any **Notes** referring to the completion of the Dispatch.

Work Order Entry Screen - Schedule



The **Schedule Information** window allows you to select a Technician or Crew, set Start and End Times, and add Notes to the calendar entry for a Dispatch.

The **Dispatch Info** section of the window displays details of the Dispatch. If you have a default mapping program selected and Allow Web Features enabled in the SM Business Rules, and click on the Address link, your default mapping program will display a map of the address.

A Calendar window will also be opened and displayed behind the Schedule Info screen so you may see on the Calendar the Dispatches that have already been Scheduled.

1. Select a **Tech ID** from the list of Technicians to Schedule for this Dispatch. Information about the availability of the Technician will be displayed next to the Tech ID field.
2. Select the **Start Time** and date for the time the Dispatch work should start.

3. Select the **End Time** and date for the time the Dispatch work should end.
4. Enter **Notes** about the Dispatch for the Technician working on the Dispatch.

Command Buttons

Name	Description
OK	Add the entry to the calendar.
Suggest	Have TRAVERSE suggest a schedule time based on Dispatch Requested Date (if available), Requested Tech ID (if entered), Work To Do Labor Code, and the Schedules of the available Technicians who can do the work.
Delete	Delete the scheduled entry from the Calendar.

Activity Status Button

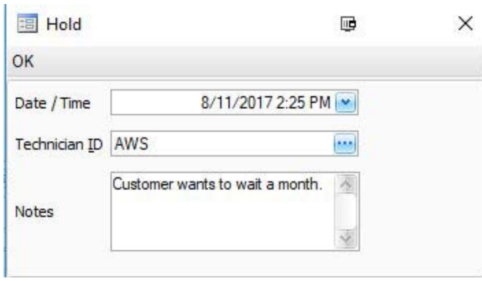
Select the **Activity Status** button to add an Activity for the Dispatch. The Activity Status gives you more options for defining and managing dispatches while ensuring the business logic triggered by a change in status remains. See the Activity Status setup function for details (page 3-113).

Clicking on the Activity Status button will give you a menu list of Activity Statuses that have been set up by the system or manually in the Activity Status function.

When Activity Statuses were set up, an Action was assigned to the Activity Status, which affects the Type of Activity added, and the Status of the Dispatch:

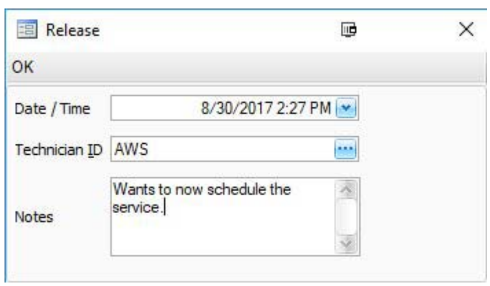
- **None** - No action is performed. An Activity is added for reference purposes.

- **Hold** - Put the dispatch on Hold to prevent any transactions from being entered, or any scheduling of the Dispatch to a Technician. When an Activity Status with the Action of Hold is selected, a dialog box will be displayed to enter the **Date/Time**, **Technician ID**, and **Notes** about putting the Dispatch on Hold.



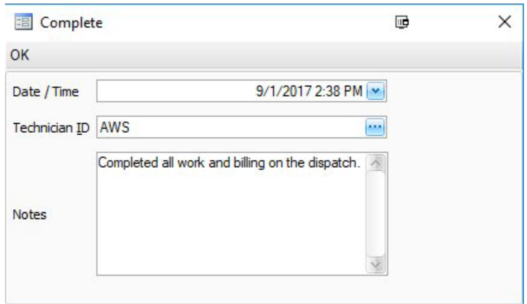
Click **OK** to add an Activity and change the Status of the Dispatch to Hold.

- **Release** - If the status of the Dispatch is Hold, the status of the Dispatch will change to Released. When an Activity Status with the Action of Release is selected, a dialog box will be displayed to enter the Date/Time, Technician ID, and Notes about releasing the on Hold Dispatch.



Click **OK** to add an Activity and change the Status of the Dispatch to Released.

- **Complete** - When all the transactions and services for the Dispatch is completed, the status will change to Completed. When an Activity Status with an Action of Complete is selected a dialog box will be displayed to enter the Date/Time, Technician ID, and Notes about the completion of the Dispatch.



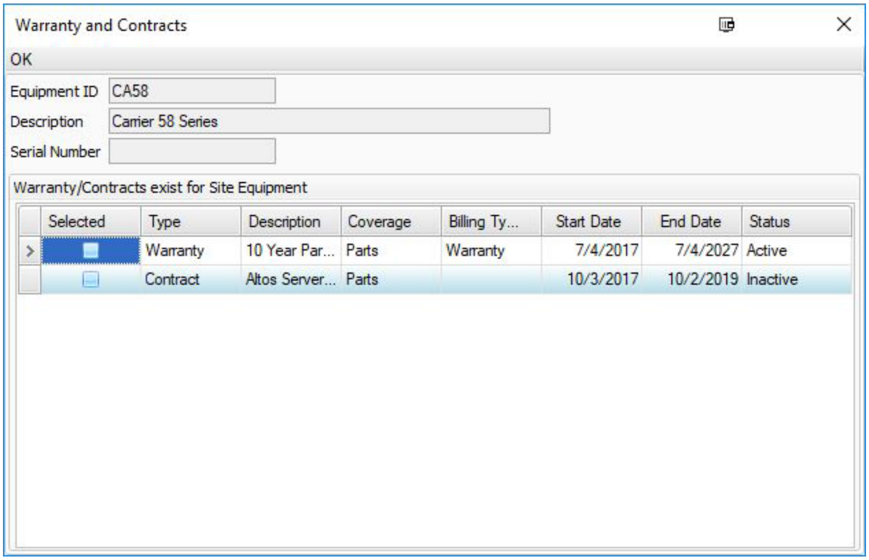
Click **OK** to add an Activity and change the Status of the Dispatch to Complete.

- **Cancel** - If the status of the Dispatch is Open, and no transactions exist for the Dispatch Cancel the Dispatch. A Canceled Dispatch can be reopened using an Activity Status that has an Action of Reopen. A confirmation message will be displayed asking if you are sure you want to Cancel the Dispatch. Select **Yes** to Cancel the Dispatch.
- **Reopen** - If the Dispatch is Canceled, set the status of the Dispatch to Open. A confirmation message will be displayed asking if you are sure you want to Reopen the Dispatch. Select **Yes** to Reopen the Dispatch.

Warranty/Contract Button

Use the **Warranty/Contract** button to include any warranty and/or contract information for the Site Equipment entered into the Dispatch.

Work Order Entry Screen - Warranty/Contract



- The **Equipment ID**, **Description**, and **Serial Number** of the Equipment entered into the Dispatch is displayed.
- Any Warranty and Contract information set up for the Equipment is displayed with the **Type**, **Description**, **Coverage**, **Billing Type**, **Start Date**, **End Date**, and **Status** are displayed.
- Check the **Selected** check box for the Warranty and Contract information you want included in the Dispatch; otherwise clear the check box.
- Click **OK** to save the Selected Warranty and Contract information for the Dispatch's Equipment.

Service Director Link to Project Costing

Users are able to link a Work Order and Service Order to Project Costing Projects, and bill activities in either Service Director or Project Costing. After posting in Service Director, activities are displayed in Project Costing.

When a Project is referenced in a Service Director Work Order or Service Order, the activity on the Order will be passed into the linked Project as Activities. Optionally, the service work can be passed without billing in Service Director so that the billing will be handled as part of Project billing.

The billing work flow can be chosen per Work Order. It cannot be changed once any transactions have been posted for the Work Order.

Bill via Service Director

- Default work flow.
- Billing is generated from Service Director, billable depends on Work Order/Dispatch.
- Project Costing Activities are generated while posting Service Director Work Order.
- Status of generated Project Costing Activity is end-of-cycle status per type of Project/Task.
- Generated Project Costing Activities are for reporting purpose only; no action can be taken on Project Costing side.

Bill via Project Costing

- Billing is generated from Project Costing, billable depends on Project/Task.
- No billing is generated from Service Director.
- Project Costing Activities are generated while posting Service Director Work Order.
- Status of generated Project Costing Activity is Posted.
- Generated Project Costing Activities are processed in Project Costing per type of Project/Task.

NOTE: In these examples, Projects are set up as Billable.

SD Work Orders Linked to a Project: Billed Via Service Director

NOTES:

- Billing is determined by Work Order/Dispatch.
- If a Dispatch has been Billed/Posted, the Project/Task field is not editable.
- The Customer ID of the Project/Task must match the Customer ID on the Work/Service Order.

1. Enter a Work Order, add a Project/Task, and set Bill Via to SD.
2. Enter any Labor, Parts, Freight, or Miscellaneous records for the Dispatch.

NOTE: Freight/Misc records go to Project Costing as income with a type of Other, Labor = Time, and Part = Material.

3. Complete the Work Order.
4. Users can print the Invoice online from the Work Order Entry screen, or use the Prepare Invoices and Print Invoices functions.
5. Post Work Orders.
6. You can view the Service Director activities on the Project Activities View in Project Costing.

NOTES:

- No further billing processing is needed in Project Costing when billing is completed through Service Director.
- To view Activities created only from Service Director, filter the Source by "Bill via SD".

SD Work Orders Linked to a Project: Billed Via Project Costing

NOTES:

- Billing is determined by Project/Task.
- If a Dispatch has been Billed/Posted, the Project/Task field is not editable.
- The Customer ID of the Project/Task must match the Customer ID on the Work/Service Order.

1. Enter a Work Order, add a Project/Task, and set Bill Via to PC.
2. Enter any Labor, Parts, Freight, or Miscellaneous records for the Dispatch.

NOTE: Freight/Misc records go to PC as income with a type of Other, Labor = Time, and Part = Material.

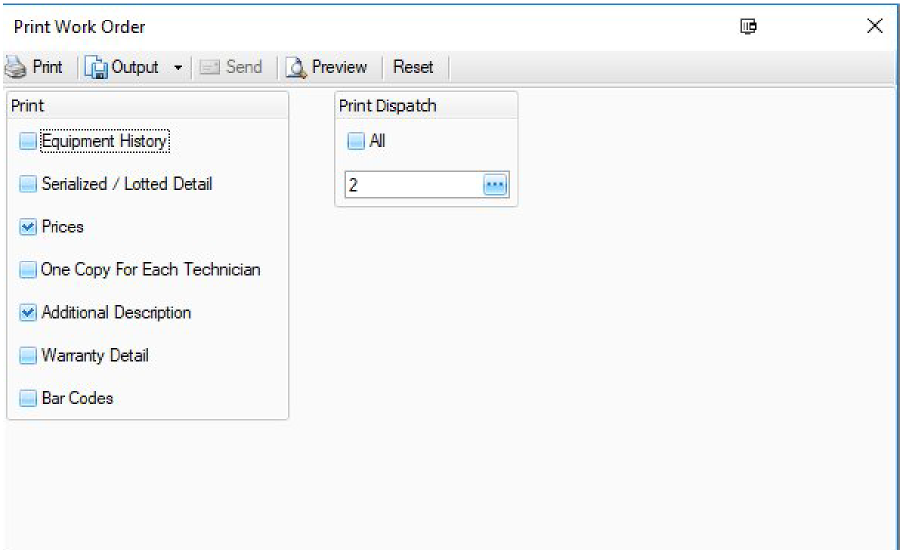
3. Complete the Work Order.
4. Since billing is set to be processed through Project Costing, the Print Invoice button on the Work Order Entry screen is disabled. You must use the Prepare Invoices function.
5. Post Work Orders.
6. In Project Costing, the Standard Project Costing billing workflow can be processed based on the Project Type billing status. You can also use Project Costing Activities View to review records created from Service Director.

NOTES:

- The Extended Income Billed value is $0 until Billing is completed in PC.
- To view Activities created only from Project Costing, filter the Source by "Bill via PC".

Printing a Work Order online

Print Online Work Order Dialog Box



You may print a Work Order for the current Work Order you have displayed on your screen. Follow the steps below to print the Work Order online:

1. The Print Online Work Orders screen appears when you click **Print** and **Order** on the Work Orders screen.
2. To **Print** the **Equipment History** information on the Work Order, select the check box; otherwise, clear it.
3. To **Print Serialized/Lotted Detail** on the Work Order, select the check box; otherwise, clear it.
4. To **Print Prices** on the Work Order, select the check box; otherwise, clear it.
5. To **Print One Copy for Each Technician** for the Work Order, select the check box; otherwise, clear it.
6. To **Print Additional Descriptions** for the Work Order, select the check box; otherwise, clear it.
7. To **Print Warranty Detail** for the Work Order, select the check box; otherwise, clear it.
8. To **Print Barcodes** for the Work Order, select the check box; otherwise, clear it.

9. Select the **All** check box in the **Print Dispatch** area to print the Work Order for all Dispatches. Otherwise clear it, and select the Dispatch to print from the list of Dispatches.

10. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the work order on your monitor.
Output	Output the work order as a .pdf file and save it.
Print	Print the work order.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Online Work Order

PAGE 1

TRAVERSE

Continental Products Unlimited
4301 Dean Lakes Blvd
Shakopee, MN 55379
UNITED STATES
(952)-403-5700

Order No 00000049

SITE INFO

Atm053
ATM Switches Inc.
Mary Brooks
6023 Howard Street
Suite 701
Gettysburg, SD 57442

BILL TO

Atm053
ATM Switches Inc.
Mary Brooks
6023 Howard Street
Suite 701
Gettysburg, SD 57442

Contact Mary Brooks
Phone (605)-489-5023

Dispatch No 1 **Received Date** 9/22/2017 9:11 AM **Requested Tech ID** **Status** Reopen Cancelled

Serial No **Tag No**
Item ID **Equipment Description**
Equipment ID **Priority** 0
Description Repair Services
Billing Type Billable

Notes

Work To Do

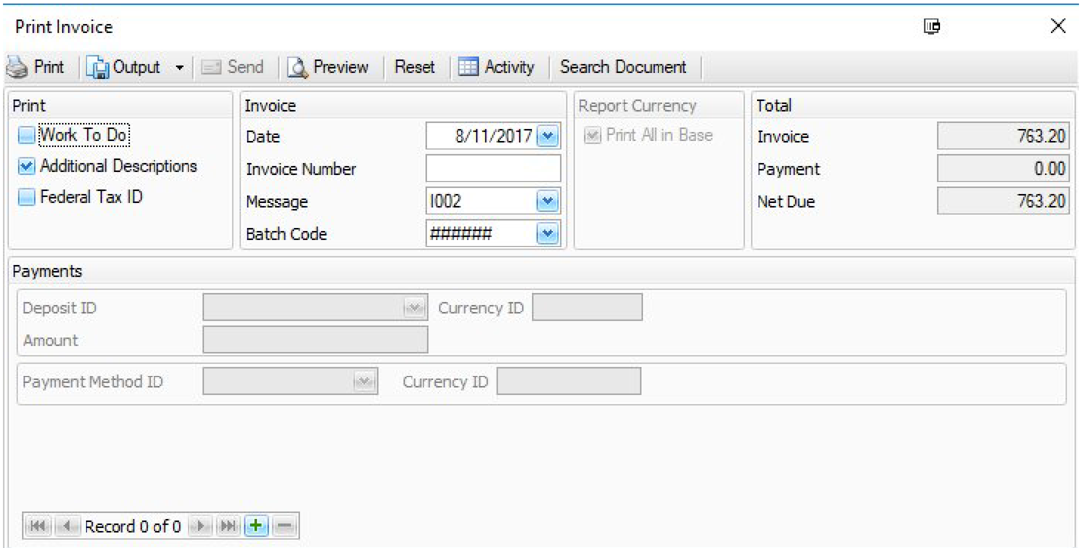
Work To Do ID	Description	Required Skill Level	Estimated Time (Hrs)
HRepair	General HVAC Repair	2	2.000
Other	Other services	4	1.000

Activity

Status	Date / Time	Technician ID	Entry Date	Entered By
Scheduled	11/22/2017 9:00 AM	AWS	9/22/2017	Demo

Printing a Work Order Invoice online

Print Online Invoices Dialog Box



The Work Order must have at least one dispatch with a complete status to be able to print an Invoice for the Work Order online.

NOTE: Once you print an Invoice online you will no longer be able to reopen the Dispatch and edit the Work Order/Dispatch if you have the Business Rule, Allow Editing after Online Invoice set to No. To allow editing, set the Business Rule to Yes, or use the Prepare Invoices and Edit Invoices process to delete the Prepared Invoice and then edit the Work Order/Dispatch.

1. The **Print Invoices** screen appears when you click **Print** and **Invoice** on the Work Order Entry screen.
2. To print the **Work To Do** information on the Invoice, select the check box; otherwise, clear it.
3. To **Print Additional Descriptions** on the Invoice, select the check box; otherwise, clear it.
4. To print the **Federal Tax Id** for the current company at the bottom of the Invoice, select the check box; otherwise, clear it.
5. The **Invoice Date** automatically appears. Accept the default, or edit the Invoice Date.

6. Enter the **Invoice Number**. It can be a combination of letters and numbers. If you enter an invoice number on the Transactions screen, it becomes the default invoice number, otherwise, the next available Invoice Number is used.
7. Select a **Message** for the Invoice.
8. Select a **Batch Code** for which to put the Invoice, when viewing on the Edit Billings screen.
9. If you use multi-currency, select the **Print in Base Currency** check box to print the invoice or credit memo in your company's base currency; otherwise, clear the box to print the invoice in the customer's currency. If you do not use multi-currency, this option does not appear.

If you are adding a Payment to the Invoice to be printed follow the steps below to enter the payment to apply to this invoice:

1. Click the **Append** button ( ) in the **Payment** section, to open a new Payment entry record.
2. If you use batch processing, the Batch Code you entered on the **Header** tab appears as the payment's **Deposit ID**. If you do not use batch processing, this box does not appear.
3. Enter the prepaid **Amount**.
4. If you use multi-currency, the Customer's **Currency ID** appears and cannot be changed.

   If the Customer Currency is the same as the company base currency, or if you do not use multi-currency, this field is not available.

5. If you use multi-currency, the most current daily exchange rate appears in the **Exch Rate** box. You can enter a different rate (or press F6 to open the System Manager **Currency Exchange Rates** function).

   If you do not use multi-currency, this field does not appear.

6. The Payment Method defaults from the Customer record in the **Payment Method ID** field. Accept the default or change the Payment Method.
7. If you use multi-currency, the currency for the Bank Account or GL Account associated with the Payment Method appears and cannot be changed. If this currency is not the same as the Customer's currency or the base currency, a warning message appears. You cannot enter payments in a currency other than the Customer's currency or the base currency.
8. If the Payment Method is **Cash** or **Check**, the **Bank ID** appears.
9. If the Payment Method is **Check**, enter the **Check Number**.
10. If the Payment Method is **Credit Card**, the first credit **Card No** set up on the Payments tab in the Customer setup defaults. Accept the default or select another Credit Card set up. The **Card No** will be masked at the level selected in the Business Rules, once selected. If Credit Cards are set up on the Payments tab of the Customer setup you can select from the drop-down list, or enter the **Card No**.

- Enter the **Security Code** from the back of the Credit Card. This is the three digit number on the back of the card in the signature strip.
- The **Card Holder** name defaults from the Customer Payment record. Accept the default, change it, or enter the Card Holder.
- Enter the **Expiration Date** of the credit card. A warning appears if the card is expired.
- Enter the **Authorization Number** for the Credit Card payment, if applicable.

11. If the Payment Method is a **Direct Debit**, the first Direct Debit account set up on the Payments tab in the Customer setup defaults. Accept the default or select another Direct Debit account set up. The **Account No** will be masked at the level selected in the Business Rules once selected or entered. If Direct Debit accounts are set up on the Payments tab of the Customer setup you can select from the drop-down list, or enter the **Account No**.

    The **Bank Name** appears from the customer payment record. Accept the default, change it, or enter a Bank Name.

    The **Routing Code** appears from the customer payment record. Accept the default, change it, or enter the Routing Code.

12. If the method of payment is **Write-off** or **Other**, enter a **Note**.
13. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Print	Print the report.
Activity	Display the Activity Log to view printing activity.
Search Document	Open the Archived documents search dialog box. (Button only available when you select Yes to Use Archive in the Business Rules.)

Activity Log

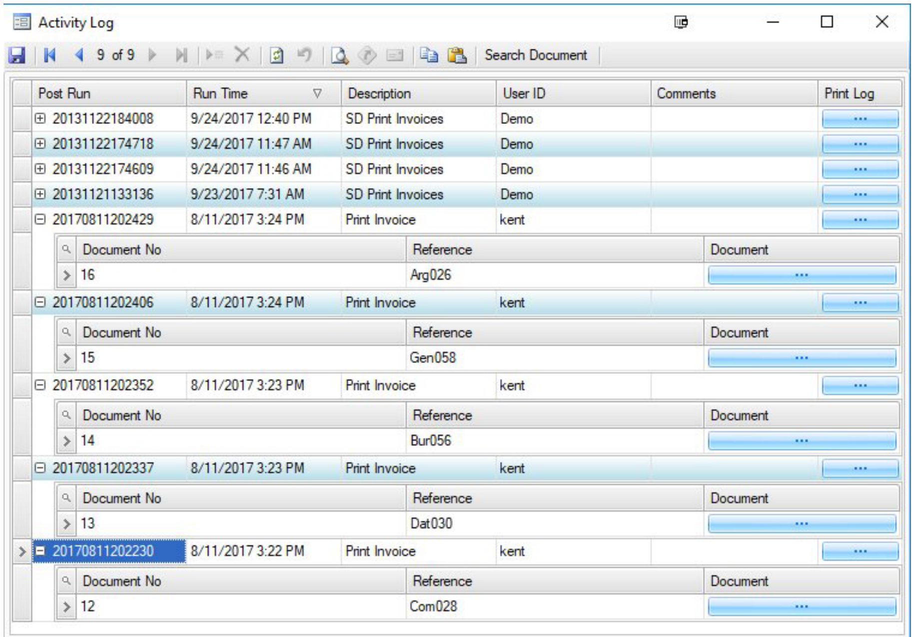
Use the **Activity Log** to view printing activity for administrative purposes.

Name	Displays
Post Run	The system assigned post run ID.
Run Time	The date and time the printing was done.
Description	The printing description.
User ID	The user who performed the print.
Comments	The comments, if applicable, entered in the Comments field.
Print Log	Not available for this function.

- Click the Plus (+) button next to the **Post Run** to view the Invoice(s) printed for the selected printing.
- Click the **Document** button to preview the Invoice printed for the selected **Document No**.

NOTE: These options are only available if you selected Yes to Use Archive in the Business Rules function.

Activity Log Screen



Search Document

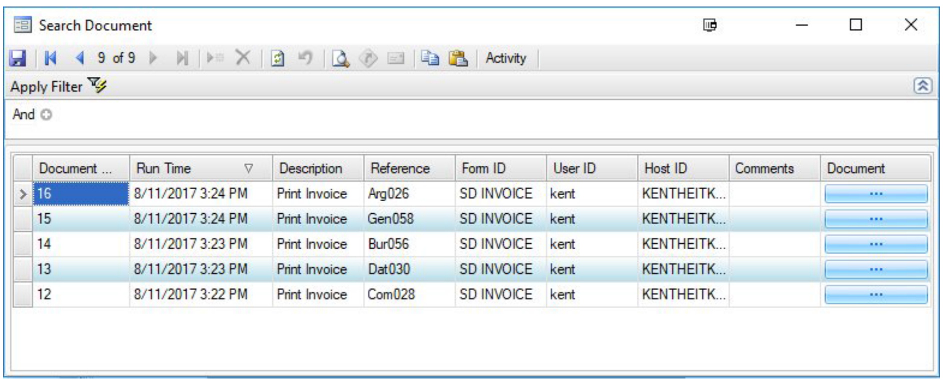
Use the **Search Document** button to view archived Invoices. This button is only available if you selected **Yes** to the **Use Archive Business Rule** (page 3-5).

Select the range of **Filter Criteria** to include in the View. Leave the filter criteria blank to include all records. Click **Apply Filter** to populate the grid below.

Name	Displays
Document Number	The Invoice number printed.
Run Time	The date and time the printing was done.
Description	The printing description.
Reference	The Customer ID for which the invoice was printed.
Form ID	The type of form printed.

Name	Displays
User ID	The user who performed the print.
Host ID	The workstation name used to print the invoice.
Comments	The comments, if applicable, entered in the Comments field.
Document	Preview the original invoice printed.

Search Document Screen



NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Online Invoice

TRAVERSE

Continental Products Unlimited
4301 Dean Lakes Blvd
Shakopee, MN 55379
UNITED STATES
(952)-403-5700

PAGE 1

INVOICE DATE 8/15/2017
INVOICE NO 21

SOLD TO
CEI031
Cellucom Inc.
Accounts Payable
309 Oakton Street
Chicago, IL 60661

SHIP TO
WH 1
Cellucom Inc. Warehouse
Blake Anderson
938 Marion Steet S
Suite 300
St. Paul, MN 55652

NET DUE 1,730.33

SLS1	SLS2	DUE DATE	DISC DUE DATE	ORDER NO	ORDER DATE	COMPLETED DATE
JSK	MSL	8/15/2017	8/15/2017	00000032	9/21/2017	8/15/2017

TERMS DESCRIPTION	CUSTOMER PO NO
0% Disc, Net 30	3347

RESOURCE ID	TX CL	UNITS	ORDERED	UNIT PRICE	EXTENSION
LK/HVAC Furnace and Air	0	HR	5.000	120.000	600.00
LK/HVAC Furnace and Air	0	HR	6.000	120.000	720.00
700999 Oil Rags	0	EA	5.0000	50.0800	250.40
	0		0.0000	0.0000	50.00

Other Charges

Work To Do ID	Description
Other	Other services
HInspect	Inspect and Clean Fuel and Electric System
ERough	Electrical Rough-In
HClean	Ductwork Cleaning

We appreciate your business.

TAXABLE	NONTAXABLE	SALES TAX	TOTAL
1,570.40	50.00	109.93	1,730.33

NET DUE 1,730.33

Working with a Dispatch

Schedule a dispatch

1. Click the **Schedule** command button to open the Calendar. A Schedule Info window will appear.

NOTE: If the Customer's credit is on Hold, or the Customer's status is Inactive, the Calendar will not open.

2. Select the **Tech ID**, **Start Time**, and **End Time** from the associated field drop-down lists.
3. Click **OK** to set the time for the selected Technician on the Calendar. The Calendar will open and display the scheduled Dispatch. Close the Calendar to return to the Work Order Entry function.

Record arrive/start time on a dispatch

1. Click on a new line in the **Activity** section to start a new record.
2. Select **Arrive/Start** from the drop-down list in the **Type** field. The workstation's current date and time will display in the **Date/Time** field. Change the date or time if necessary, and select the Technician from the **Technician ID** drop-down list.
3. Select the **Tech ID**, **Start Time**, and **End Time** from the associated field drop-down lists.
4. Click the **End Edit** button ( ) to complete the entry.
5. Click the **Save** button on the toolbar to save your work.

Complete a dispatch

1. Click the **Complete** command button to open the Complete window.
2. Enter or Select the completion date and time from the **Date/Time** field drop-down list. This will default to the current date and time.
3. Select the **Technician ID** from the drop-down list. This field will default to the Technician listed for the **Arrive/Start** activity.
4. Enter **Notes** about the Complete activity.
5. Click the **OK** button to complete the entry. The dispatch status now shows **Completed**, and a **Complete** entry will appear in the **Activity** section of the **Dispatch** tab.
6. Click the **Save** button on the toolbar to save your work.

Add Parts, Labor, Freight, or Miscellaneous costs to a Dispatch

1. Click the **Transactions** command button, or Transactions tab, to open the **Work Order Transaction** function. To display all of the available fields, click the Detail Toggle button (»).
2. Click the **New Record** button , on the tool bar to add a record. The Work Order Number/Dispatch line will display in the **Dispatch ID** field of the new line.
3. Select the Type of transaction you are adding from the **Type** field drop-down list.
4. If applicable, select a **Resource ID** from the drop-down list. If you selected **Labor** in the **Type** field, the drop-down list will show your Technicians. If you selected **Part** in the **Type** field, the drop-down list will show field will show your Items.
5. Enter a description into the **Description** field. If the resource is a Part, the Item description will display in this field.
6. If you selected a **Part** in the **Resource ID** field, select a location from the **Location ID** field drop-down list. Otherwise, the **Location ID** field will be blank.
7. The **Unit** field will display the units of measure for the part selected in the **Resource ID** field, or the value **HR** if **Labor** is selected in the **Type** field.
8. Enter the estimated quantity of the Part or Labor into the **Qty Estimated** field.
9. Enter the quantity used into the **Qty Used** field.
10. If you selected **Labor** or **Part** in the **Type** field, the Unit Price displays in the **Unit Price** field. You may change the Unit Price.
11. If you selected **Labor** or **Part** in the **Type** field, the extended price is calculated using the **Qty Used** and the **Unit Price** amounts. If you selected **Freight** or **Misc** in the **Type** field, enter a cost in the **Ext Price** field.
12. Select or enter a transaction date in the **Trans Date** field. By default, this field will display the current date.
13. If you selected **Labor** in the **Type** field, select a Labor Code from the drop-down list in the **Labor Code** field.
14. Click the **Save** button on the toolbar to save your work.

Cancel or delete a Dispatch

NOTE: You cannot delete a Dispatch if the Dispatch's status is Posted, Billed, or Completed, or if the Dispatch has transactions.

1. Select the Dispatch you would like to cancel or delete.
2. Click the **Cancel** command button to cancel the Dispatch.
3. A confirmation window will appear. Confirm the cancellation. A **Cancel** activity will be added to the **Activity** section of the **Dispatch** tab.

Reopen a Dispatch

NOTE: You can Reopen a Dispatch if the selected Dispatch status is Open, and the selected Dispatch is Canceled.

1. Select the Dispatch you would like to Reopen.
2. Click the **Reopen** command button to reopen the dispatch.
3. A confirmation window will appear. Confirm the Reopen action. A **Reopen** activity will be added to the **Activity** section of the **Dispatch** tab.

Creating a New Activity

1. Click the **Append** button ( ) in the Activity section, to add a new Activity entry to the Dispatch record.
2. Select a type of Activity from the drop-down list in the **Type** field.
3. The **Date/Time** field will default to the current date and time when a new Activity is created. Enter or select a different date from the calendar control if applicable.
4. If a Technician will perform the Activity, select a Technician from the drop-down list in the **Technician ID** field.
5. The **Entered By** field will display the name of the User who added the Activity to the Dispatch.
6. Enter any notes for the activity in the **Notes** field.
7. To finish changes to the Dispatch, click the **End Edit** button ( ).
8. Click the **Save** button on the toolbar to save your work.

GENERATE WORK ORDERS

Use the **Generate Work Orders** function to Generate Work Orders for all Site Equipment where the Next Due Date is not later than the End Date or the Maintenance Due Date, and the End Date is not earlier than the Maintenance Due Date.

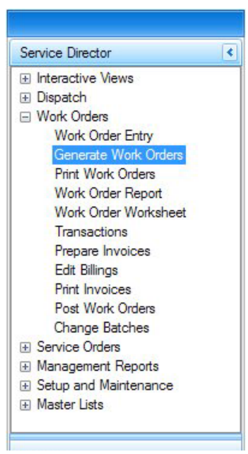
NOTE: Billing Type must be set to Billable in the Business Rules for Service Director, for the Generate Work Orders function to run.

After generating Work Orders, a log report showing the Work Orders generated will display. Each Work Order listed will have a dispatch record, as well as a Request Received Activity record, when you use the Work Order Entry function to maintain the Work Order.

To **Generate Work Orders**, follow these steps:

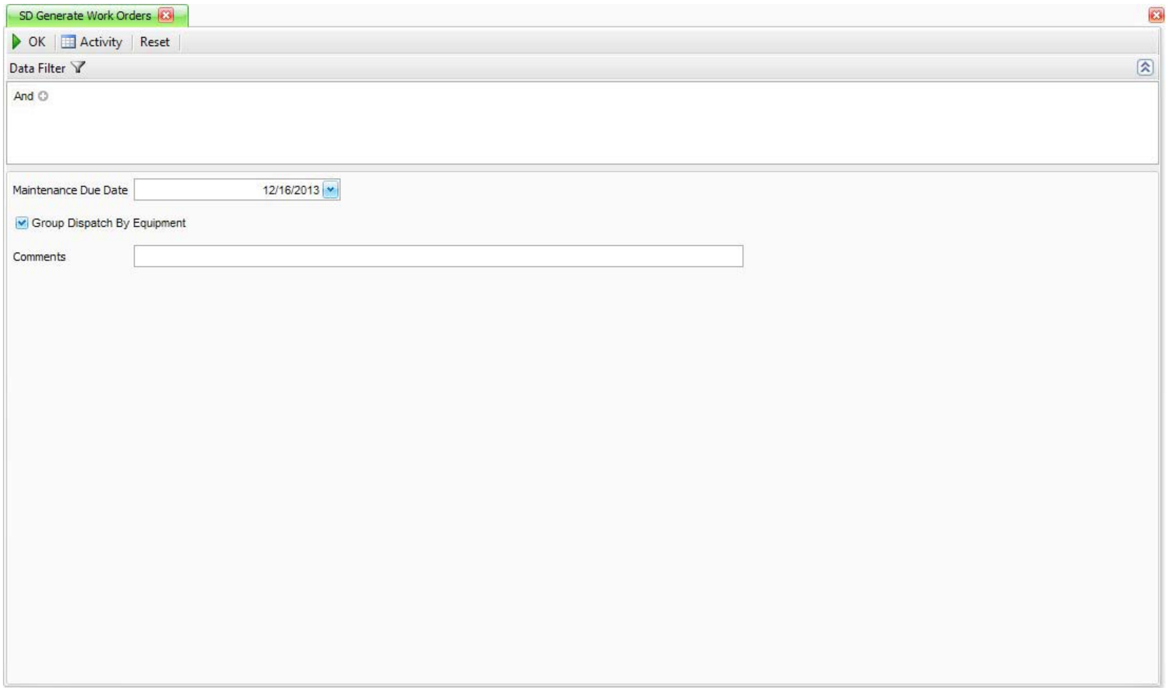
1. Select **Generate Work Orders** from the **Work Orders** menu.

Generate Work Orders Menu



2. The **Generate Work Orders** screen appears.

Generate Work Orders Screen



3. Use the **Data Filter** to select the range of filtering options or leave the filter blank to include all available data.
4. Work Orders with a Maintenance Due Date on or before the value in the **Maintenance Due Date** field will be generated.
5. Marking the **Group Dispatch by Equipment** check box will cause the dispatches to be grouped by Equipment ID.
6. Use the **Comments** to add Comments to the Work Orders.

7. Select a command button:

Command Buttons

Name	Description
OK	Begin processing. A message appears when work orders have been generated successfully.
Reset	Set all fields to their default.
Activity	See a record of the occurrences of generating work orders. Click the **Print Log** button view the Generate Work Orders log from that activity occurrence.

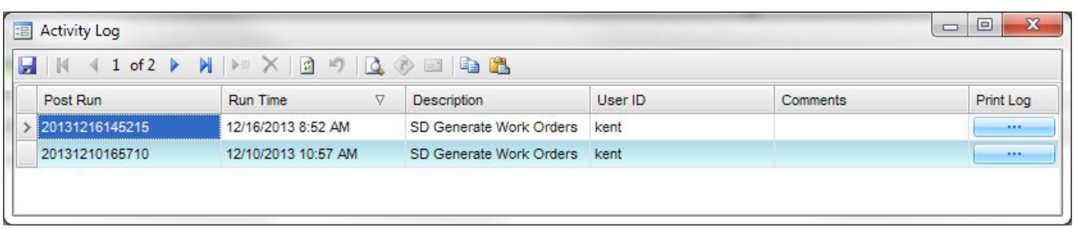
NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

8. Click **Close** to return to the main menu.

Activity Log

Use the **Activity Log** to view all post activity for administrative purposes.

Activity Log Screen



Name	Displays
Post Run	The system assigned post run ID.
Run Time	The date and time the generate orders was made.
Description	The generate orders description.
User ID	The user who performed the generate orders.

Name	Displays
Comments	The comments, if applicable, entered in the Comments field.
Print Log	A PDF version of the original log file if you click the ... button.

Generate Work Orders Report

Consolidated Service Director
Generate Orders Log

PAGE 1

Report Filter

Maintenance Due Date 12/16/2013 | Group Dispatch By Equipment Yes

Comments

Order No	Customer ID	Name	Site ID	Name
00000055	Com028	Compumarc	WH 1	Compumarc Warehouse

Dispatch No	Equipment ID	Equipment Description
1	KE50	Elite 50 Gallon Natural Gas Water Heater

Work To Do ID	Description
HInspect	Inspect and Clean Fuel and Electric System

*** End of Report ***

12/16/2013 8:52 AM | kenthe

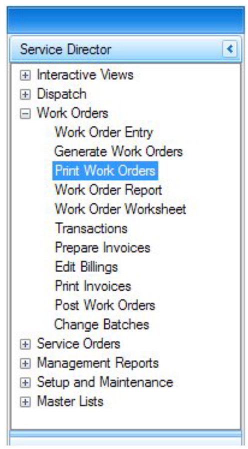
PRINT WORK ORDERS

Use the **Print Work Orders** function to print Work Orders. You can print the lines on the worksheets by item, location, and product line. Choose the sort order by selecting these fields in the order you want to print them.

To **Print Work Orders**, follow these steps:

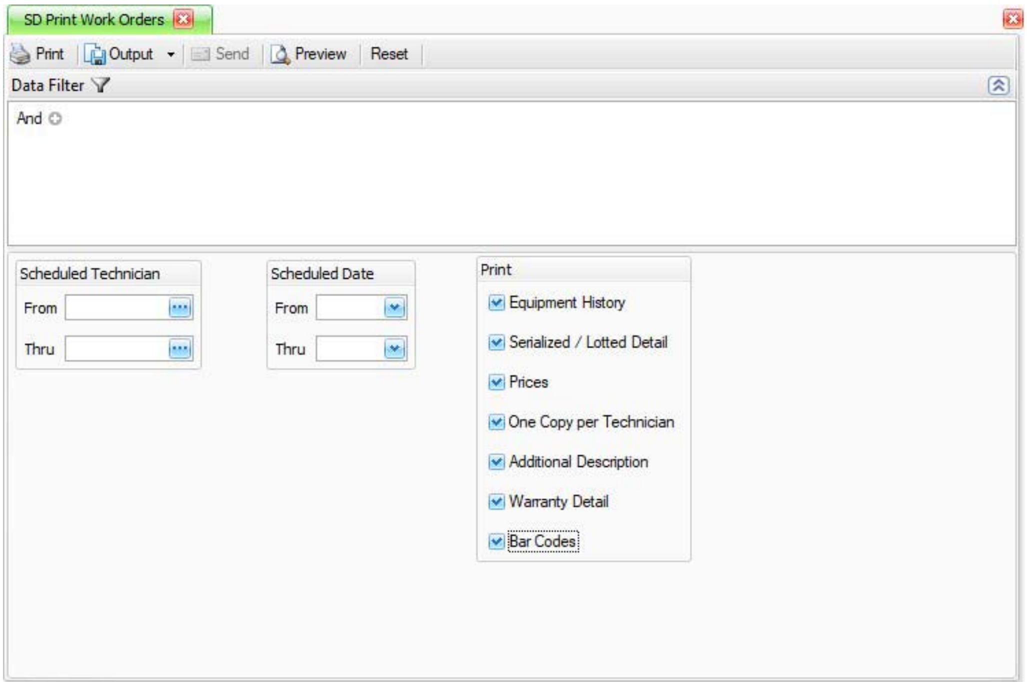
1. Select **Print Work Orders** from the **Work Orders** menu.

Print Work Orders Menu



2. The **Print Work Orders** screen appears.

Print Work Orders Screen



3. Use the **Data Filter** to select the range of filtering options or leave the filter blank to include all available data.

4. Select the range of **Scheduled Technicians From** and **Thru**, for the printed Work Orders. Only work orders assigned to Technicians within the range selected will be printed. Leave the From and Thru fields blank to include all Technicians.

5. Select the range of **Scheduled Dates From** and **Thru**, for the printed Work Orders. Only Work Orders scheduled within the range selected will be printed. Leave the From and Thru fields blank to include all Scheduled Dates.

6. Select from the list of additional information to **Print** on the Work Orders.

    - Select the **Equipment History** check box to include historical information for the equipment on the Work Orders.

    - Select the **Serialized/Lotted Detail** check box to include serial or lot details from the parts used on the Work Orders.

    - Select the **Prices** check box to include prices on the Work Orders.

- Select the **One Copy per Technician** check box to print a copy of the Work Order for each Technician assigned to the Work Order.
- Select the **Additional Descriptions** check box to print the Additional Descriptions entered into the Work Order.
- Select the **Warranty Detail** check box to print the Warranty information for equipment with Warranty information entered, on the Work Order.
- Select the **Bar Codes** check box to print Bar Codes on the Work Order.

7. Select a command button:

Command Buttons

Name	Description
Print	Print the order.
Output	Output the report as a .pdf file and save it.
Preview	Preview the order on your monitor.
Reset	Set all fields to their defaults.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Work Order

PAGE 1

Order No 00000041

S I T E I N F O
Xly044
Xletek Software
Denise Lanker
1200 Westland Drive
Clinton Falls, MN 56225

B I L L T O
Xly044
Xletek Software
Denise Lanker
1200 Westland Drive
Clinton Falls, MN 56225

Contact Denise Lanker
Phone (612)-906-7001

Dispatch No 2 **Received Date** 9/20/2017 1:09 PM **Requested Tech ID** **Status** Request Received

Serial No
Item ID 200150
Equipment ID EL296E
Description Installation
Billing Type Billable

Tag No
Equipment Description Elite Series - High-Efficiency, Two Stage Gas Furnace
Priority 0

Notes

Work To Do

Work To Do ID	Description	Required Skill Level	Estimated Time (Hrs)
EFixture	Install Electrical Fixtures	1	6.000

Activity

Status	Date / Time	Technician ID	Entry Date	Entered By
Scheduled	11/17/2017 1:00 PM	AWS	9/20/2017	Demo

Equipment History

Order No	Dispatch No	Status	Completed Date	Tech ID
00000034	1	Posted	10/11/2017	GER001

Work To Do History

Work To Do ID	Description	Required Skill Level	Estimated Time (Hrs)
HInspect	Inspect and Clean Fuel and Electric System	1	2.000
ERough	Electrical Rough-In	2	6.000

Order No	Dispatch No	Status	Completed Date	Tech ID
00000034	2	Posted	10/22/2017	Crew T1

Work To Do History

Work To Do ID	Description	Required Skill Level	Estimated Time (Hrs)
HFixture	Install HVAC Fixture	2	5.000

Order No	Dispatch No	Status	Completed Date	Tech ID
00000034	3	Posted	11/1/2017	GER001

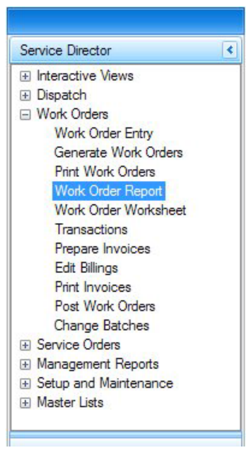
WORK ORDER REPORT

Use the **Work Order Report** function to print details about open Work Orders that you have not posted. In summary form, the report lists dispatch status and scheduling information on individual dispatch lines for quick review. In detail form, the report lists Customer equipment, scheduling, and labor and parts information.

To print the **Work Order Report**, follow these steps:

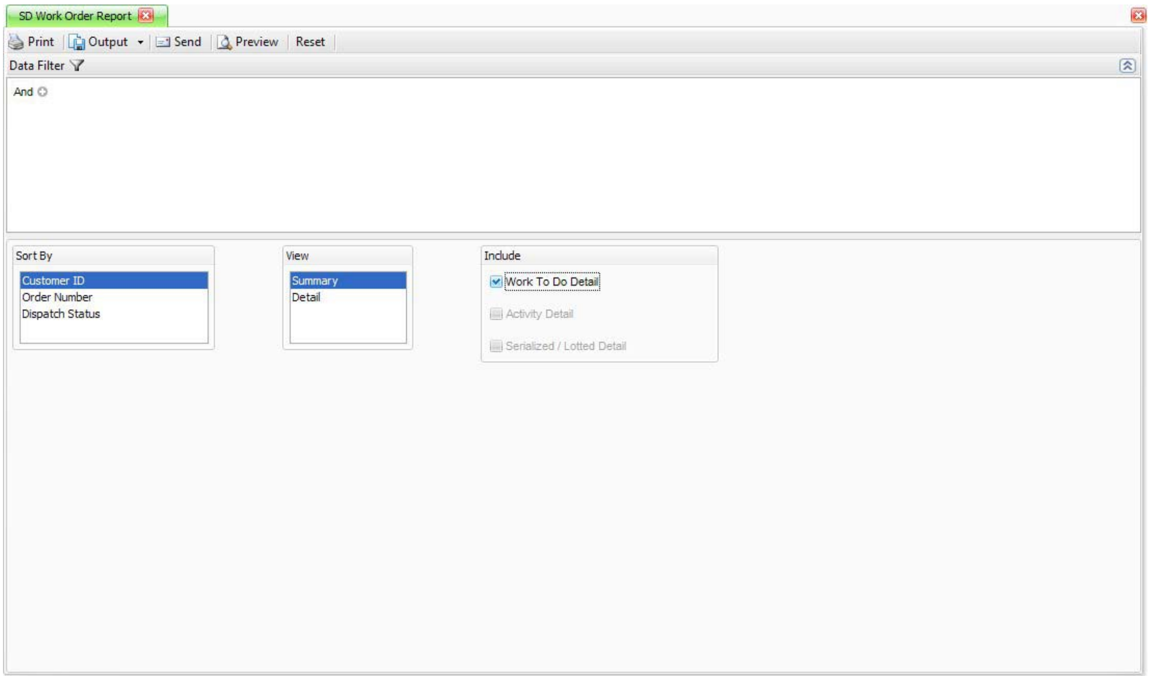
1. Select **Work Order Report** from the **Work Orders** menu.

Work Order Report Menu



2. The **Work Order Report** screen appears.

Work Order Report Screen



3. Use the **Data Filter** to select the range of filtering options or leave the filter blank to include all available data.
4. Select a **Sort By** option to sort the report by: **Customer ID**, **Work Order**, or **Dispatch Status**.
5. Select a **View**:
    - **Summary** to see only a summary of the options.
    - **Details** to see the details of the Work Orders.
6. Additional report options to **Include**:
    - Select the **Work To Do Detail** check box to include details of the Work To Do IDs.
    - Select the **Activity Detail** check box to include details of the Activity done on the Work Orders.
    - Select the **Serialized/Lotted Detail** check box to include Serial or Lot details from the parts used on the Work Orders.

NOTE: The Activity Detail, and Serialized/Lotted Detail check boxes will be available when the Detail View is selected.

7. Select a command button:

Command Buttons

Name	Description
Print	Print the report.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Preview	Preview the report on your monitor.
Reset	Set all fields to their defaults.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Work Order Report - Detail

Consolidated Service Director
Work Order Report (Detail)
Sorted by Customer ID

PAGE 1

Report Filter

Include Work To Do Detail	Yes	Include Activity Detail	Yes
Include Serialized / Lotted Detail	No		

Order No	00000013	Customer ID	Alt008	Site Address	501 East 1st Street Suite 5 Chicago, IL 60018
Order Date	11/19/2013	Site ID	WH 1		

Dispatch No	1	Location ID	CA0001
Description	Cleaning and Installation	Entry Date	11/6/2013
Equipment ID	CA58	Status	Billed
Equipment Description	Carrier 58 Series	Hold	No
Billing Type	Billable	Request Received Date	11/6/2013 2:31 PM
Bill To ID		Requested Date	11/6/2013
Est Travel (Hrs)	1.000	Requested AM / PM	None
Total Est (Hrs)	6.000	Requested Tech ID	
New Counter		Cancelled	No

Work To Do

Work To Do ID	Description	Required Skill Level	Estimated Time (Hrs)
HClean	Ductwork Cleaning	1	3.000
HFixture	Install HVAC Fixture	2	2.000

Activity

Status	Date / Time	Technician ID	Entry Date	Entered By
Scheduled	11/8/2013 7:00 AM	AWS	11/11/2013	Demo
Completed	11/12/2013 10:12 AM	AWS	11/7/2013	Demo

Transactions

Type	Resource ID	Date	Qty Estimated	Qty Used	Unit	Description
Labor	TKG	11/8/2013	6.000	7.000	HR	Furnace and Air

Dispatch No	2	Location ID	CA0001
Description	Inspection	Entry Date	11/6/2013
Equipment ID	CA58	Status	Posted
Equipment Description	Carrier 58 Series	Hold	No
Billing Type	Billable	Request Received Date	11/6/2013 2:35 PM
Bill To ID		Requested Date	11/10/2013
Est Travel (Hrs)	1.000	Requested AM / PM	None
Total Est (Hrs)	4.000	Requested Tech ID	
New Counter		Cancelled	No

Work To Do

Work To Do ID	Description	Required Skill Level	Estimated Time (Hrs)
HInspect	Inspect and Clean Fuel and Electric System	1	3.000

Activity

Status	Date / Time	Technician ID	Entry Date	Entered By
Scheduled	11/11/2013 7:00 AM	AWS	11/7/2013	Demo
Completed	11/12/2013 10:12 AM	AWS	11/7/2013	Demo
Billed	11/22/2013 12:34 PM		11/22/2013	Demo
Posted	11/22/2013 1:44 PM		11/22/2013	Demo

Transactions

Type	Resource ID	Date	Qty Estimated	Qty Used	Unit	Description
Labor	AWS	11/7/2013	4.000	4.500	HR	Furnace and Air

12/16/2013 8:59 AM kenthe

Work Order Report - Summary

Consolidated Service Director
Work Order Report (Summary)
Sorted by Customer ID

PAGE 1

Report Filter
Include Work To Do Detail Yes

Order No	Dispatch No	Customer ID - Name	Site ID	Received	Status	Date / Time	Technician ID
00000013	1	Alt008 - Altos Servers Company	WH 1	11/6/2013 2:31 PM	Completed	11/12/2013 10:12 AM	AWS
	Work To Do ID	**Description**					
	HClean	Ductwork Cleaning					
	HFixture	Install HVAC Fixture					
00000013	2	Alt008 - Altos Servers Company	WH 1	11/6/2013 2:35 PM	Posted	11/22/2013 1:44 PM	
	Work To Do ID	**Description**					
	HInspect	Inspect and Clean Fuel and Electric System					
00000033	1	Arg026 - ARG Systems Inc.		11/12/2013 2:49 PM	Completed	12/16/2013 4:00 PM	LUK001
	Work To Do ID	**Description**					
	HInspect	Inspect and Clean Fuel and Electric System					
	ERough	Electrical Rough-In					
00000033	2	Arg026 - ARG Systems Inc.		11/12/2013 2:49 PM	Completed	12/17/2013 2:00 PM	TDM
	Work To Do ID	**Description**					
	HClean	Ductwork Cleaning					
00000033	3	Arg026 - ARG Systems Inc.		11/12/2013 2:49 PM	Completed	12/18/2013 2:00 PM	GER001
	Work To Do ID	**Description**					
	Other	Other services					
00000043	1	Atm047 - Asynchronous Networking Tech.		11/18/2013 1:29 PM	Scheduled	1/27/2014 10:30 AM	AWS
	Work To Do ID	**Description**					
	HClean	Ductwork Cleaning					
	ERough	Electrical Rough-In					
00000043	2	Atm047 - Asynchronous Networking Tech.		11/18/2013 1:29 PM	Scheduled	1/30/2014 12:30 PM	AWS
	Work To Do ID	**Description**					
	HFixture	Install HVAC Fixture					
00000049	1	Atm053 - ATM Switches Inc.		11/20/2013 9:11 AM	Scheduled	1/20/2014 9:00 AM	AWS
	Work To Do ID	**Description**					
	HRepair	General HVAC Repair					
	Other	Other services					
00000049	2	Atm053 - ATM Switches Inc.		11/20/2013 9:11 AM	Scheduled	1/28/2014 9:00 AM	AWS
	Work To Do ID	**Description**					
	EFixture	Install Electrical Fixtures					

12/16/2013 8:57 AM **kenthe**

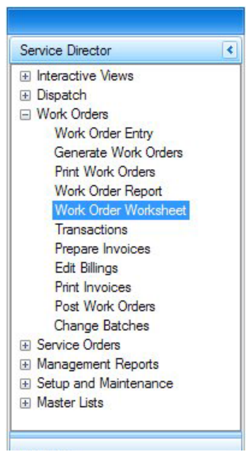
WORK ORDER WORKSHEET

Use the **Work Order Worksheet** function to print information about scheduled Work Orders that your Technicians can use to record notes, equipment problems, detailed fixes, or other information. Only dispatches with a status of Scheduled appear on the Worksheet. The summary format gives basic dispatch information on one line for quick review while the detail format lists more information and provides space for notes.

To print the **Work Order Worksheet**, follow these steps:

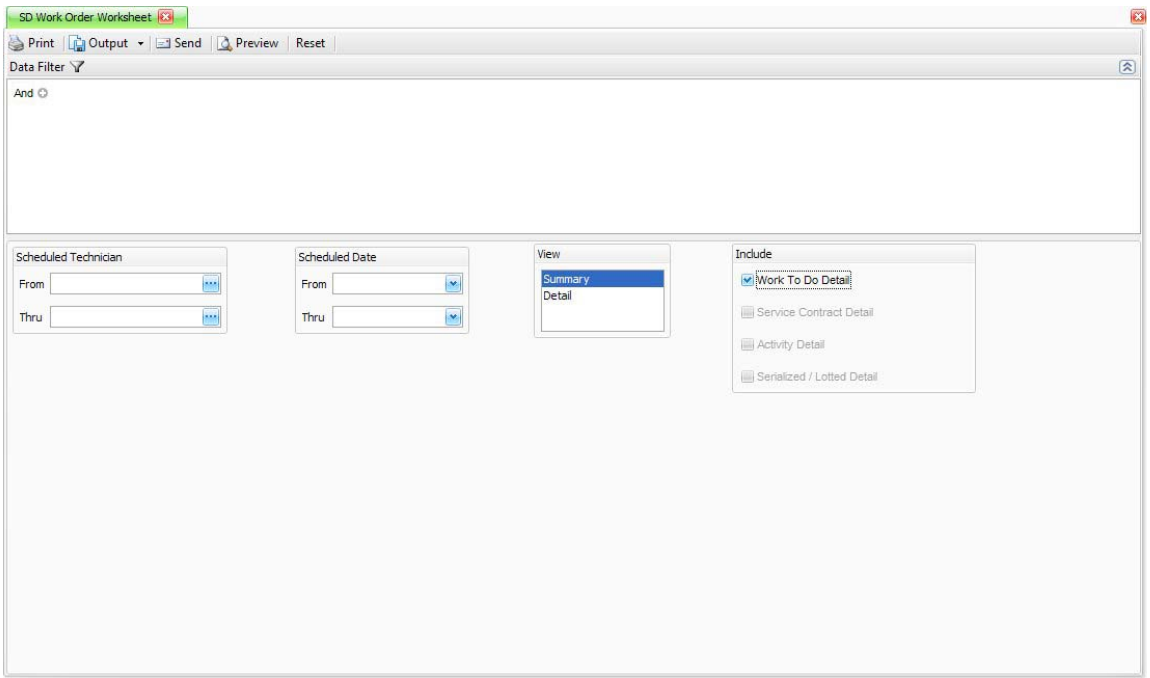
1. Select **Work Order Worksheet** from the **Work Orders** menu.

Work Order Worksheet Menu



2. The **Work Order Worksheet** screen appears.

Work Order Worksheet Screen



3. Use the **Data Filter** to select the range of filtering options or leave the filter blank to include all available data.
4. Select the range of **Scheduled Technicians From** and **Thru**, for the Work Orders. Only Work Orders assigned to Technicians within the range selected will be printed. Leave the From and Thru fields blank to include all Technicians.
5. Select the range of **Scheduled Dates From** and **Thru**, for the Work Orders. Only Work Orders scheduled within the range selected will be printed. Leave the From and Thru fields blank to include all Scheduled Dates.
6. Select a **View**:
    - **Summary** to see only a summary of the options.
    - **Details** to see the details of the Work Orders.
7. Select from the list of additional report options to **Include**:
    - Select the **Work To Do Detail** check box to include details of the Work To Do IDs.

- Select the **Service Contract Detail** check box to include details of the Work Order Service Contracts.
- Select the **Activity Detail** check box to include details of the activity done on the Work Orders.
- Select the **Serialized/Lotted Detail** check box to include Serial or Lot details from the parts used on the Work Orders.

NOTE: The Service Contract Detail, Activity Detail, and Serialized/Lotted Detail check boxes will be available when the Detail View is selected.

8. Select a command button:

Command Buttons

Name	Description
Print	Print the report.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Preview	Preview the report on your monitor.
Reset	Set all fields to their defaults.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Work Order Worksheet - Detail

Consolidated Service Director
Work Order Worksheet (Detail)

PAGE 1

Report Filter

Scheduled Technician From		Scheduled Technician Thru	
Scheduled Date From		Scheduled Date Thru	
Include Work To Do Detail	Yes	Include Service Contract Detail	Yes
Include Activity Detail	Yes	Include Serialized / Lotted Detail	No

Order No	00000032	Customer ID	CEI031	Site Address	938 Marion Steet S Suite 300 St. Paul, MN 55652	Contact	Blake Anderson
		Site ID	WH 1			Phone	(651)-222-2222

Dispatch No	1	Request Received Date	11/11/2013 2:39 PM
Equipment ID	KEE55	Equipment Description	55 gallon electric water heater
Item ID		Serial No	
Tag No			

Billing Type	Billable
Est Travel (Hrs)	0.250
Total Est (Hrs)	5.250

Work To Do

Work To Do ID	Description	Required Skill Level	Estimated Time (Hrs)
ERough	Electrical Rough-In	2	3.000
HInspect	Inspect and Clean Fuel and Electric System	1	2.000

12/16/2013 9:03 AM kenthe

Work Order Worksheet - Summary

Consolidated Service Director
Work Order Worksheet (Summary)

PAGE 1

Report Filter

Scheduled Technician From | **Scheduled Technician Thru**
Scheduled Date From | **Scheduled Date Thru**
Include Work To Do Detail Yes

Order No	Dispatch No	Customer ID - Name	Site ID	Phone	Contact	Scheduled Date / Time	Technician ID
00000032	1	CEI031 - Cellucom Inc.	WH 1	(651)-222-2222	Blake Anderson		
	Work To Do ID	**Description**					
	HInspect	Inspect and Clean Fuel and Electric System					
	ERough	Electrical Rough-In					
00000032	2	CEI031 - Cellucom Inc.	WH 1	(651)-222-2222	Blake Anderson		
	Work To Do ID	**Description**					
	HClean	Ductwork Cleaning					
00000032	3	CEI031 - Cellucom Inc.	WH 1	(651)-222-2222	Blake Anderson		
	Work To Do ID	**Description**					
	Other	Other services					
00000036	1	Ele036 - Electronet Inc.		(515)-350-7895	Mark Phillips	12/18/2013 10:00 AM	AWS
	Work To Do ID	**Description**					
	HInspect	Inspect and Clean Fuel and Electric System					
00000036	2	Ele036 - Electronet Inc.		(515)-350-7895	Mark Phillips	12/23/2013 9:00 AM	AWS
	Work To Do ID	**Description**					
	EFixture	Install Electrical Fixtures					
	Other	Other services					
00000037	1	Mer037 - Meritec Networks		(701)-561-2340	Craig Domine	12/13/2013 11:00 AM	AMK
	Work To Do ID	**Description**					
	HClean	Ductwork Cleaning					
	ERepair	General Electrical Repair					
00000037	2	Mer037 - Meritec Networks		(701)-561-2340	Craig Domine	12/18/2013 11:00 AM	Crew T1
	Work To Do ID	**Description**					
	HFixture	Install HVAC Fixture					
00000038	1	Sen051 - Sensor Semiconductor		(408)-750-5623	Kris Hopkins	12/17/2013 11:00 AM	AMK
	Work To Do ID	**Description**					
	PEmerg	Emergency Plumbing					
00000038	2	Sen051 - Sensor Semiconductor		(408)-750-5623	Kris Hopkins	12/23/2013 11:30 AM	Crew T1
	Work To Do ID	**Description**					
	PFixture	Install Plumbing Fixture					
	Other	Other services					

12/16/2013 9:02 AM **kenthe**

TRANSACTIONS

Use the **Transactions** function to determine whether a Work Order Dispatch should have activity added, including Parts Costs, Freight Costs, or Labor Resources.

Transactions allow you to track your expenses and billable Items on a Dispatch. These lines belong to individual Dispatches, allowing you to generate unique labor and parts lists and record Dispatch completion details. The information in Transactions is then used to create Invoices.

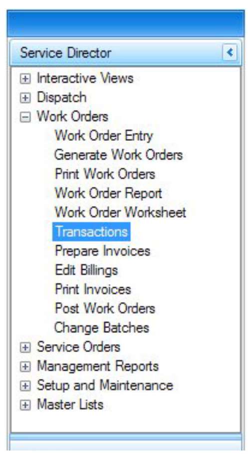
If Service Director interfaces with Inventory, part quantities update Inventory on hand quantities online. Posting billed Work Orders updates dates, summary and detail history, and Serial and Lot information.

Transactions added using the Transactions tab on the Work Order Entry, Dispatch tab (page 4-17), will be displayed and can be edited if appropriate.

To work with **Transactions**, follow these steps:

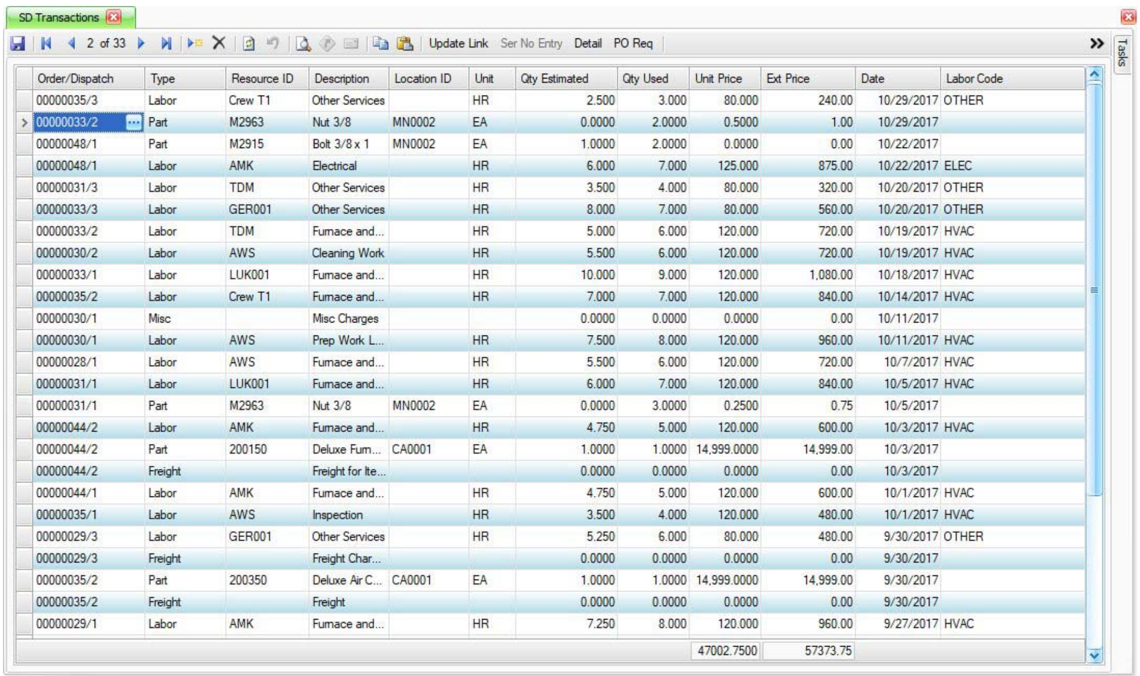
1. Select **Transactions** from the **Work Orders** menu.

Transactions Menu



2. The **Transactions** screen appears.

Transactions Screen - Summary



Order/Dispatch	Type	Resource ID	Description	Location ID	Unit	Qty Estimated	Qty Used	Unit Price	Ext Price	Date	Labor Code
00000035/3	Labor	Crew T1	Other Services		HR	2.500	3.000	80.000	240.00	10/29/2017	OTHER
00000033/2	Part	M2963	Nut 3/8	MN0002	EA	0.0000	2.0000	0.5000	1.00	10/29/2017	
00000048/1	Part	M2915	Bolt 3/8 x 1	MN0002	EA	1.0000	2.0000	0.0000	0.00	10/22/2017	
00000048/1	Labor	AMK	Electrical		HR	6.000	7.000	125.000	875.00	10/22/2017	ELEC
00000031/3	Labor	TDM	Other Services		HR	3.500	4.000	80.000	320.00	10/20/2017	OTHER
00000033/3	Labor	GER001	Other Services		HR	8.000	7.000	80.000	560.00	10/20/2017	OTHER
00000033/2	Labor	TDM	Furnace and...		HR	5.000	6.000	120.000	720.00	10/19/2017	HVAC
00000030/2	Labor	AWS	Cleaning Work		HR	5.500	6.000	120.000	720.00	10/19/2017	HVAC
00000033/1	Labor	LUK001	Furnace and...		HR	10.000	9.000	120.000	1,080.00	10/18/2017	HVAC
00000035/2	Labor	Crew T1	Furnace and...		HR	7.000	7.000	120.000	840.00	10/14/2017	HVAC
00000030/1	Misc		Misc Charges			0.0000	0.0000	0.0000	0.00	10/11/2017	
00000030/1	Labor	AWS	Prep Work L...		HR	7.500	8.000	120.000	960.00	10/11/2017	HVAC
00000028/1	Labor	AWS	Furnace and...		HR	5.500	6.000	120.000	720.00	10/7/2017	HVAC
00000031/1	Labor	LUK001	Furnace and...		HR	6.000	7.000	120.000	840.00	10/5/2017	HVAC
00000031/1	Part	M2963	Nut 3/8	MN0002	EA	0.0000	3.0000	0.2500	0.75	10/5/2017	
00000044/2	Labor	AMK	Furnace and...		HR	4.750	5.000	120.000	600.00	10/3/2017	HVAC
00000044/2	Part	200150	Deluxe Furn...	CA0001	EA	1.0000	1.0000	14,999.0000	14,999.00	10/3/2017	
00000044/2	Freight		Freight for Ite...			0.0000	0.0000	0.0000	0.00	10/3/2017	
00000044/1	Labor	AMK	Furnace and...		HR	4.750	5.000	120.000	600.00	10/1/2017	HVAC
00000035/1	Labor	AWS	Inspection		HR	3.500	4.000	120.000	480.00	10/1/2017	HVAC
00000029/3	Labor	GER001	Other Services		HR	5.250	6.000	80.000	480.00	9/30/2017	OTHER
00000029/3	Freight		Freight Char...			0.0000	0.0000	0.0000	0.00	9/30/2017	
00000035/2	Part	200350	Deluxe Air C...	CA0001	EA	1.0000	1.0000	14,999.0000	14,999.00	9/30/2017	
00000035/2	Freight		Freight			0.0000	0.0000	0.0000	0.00	9/30/2017	
00000029/1	Labor	AMK	Furnace and...		HR	7.250	8.000	120.000	960.00	9/27/2017	HVAC
								47002.7500	57373.75		

3. To display all of the available fields, click the **Summary/Detail** Toggle buttons (» «).

Maint

4. Click the **New Record** button , on the tool bar to add a record. Select the Work Order Number/Dispatch in the **Order/Dispatch** field of the new line.

5. Select the Type of transaction you are adding from the **Type** field drop-down list: **Labor**, **Part**, **Freight**, or **Misc**.

Maint

6. If applicable, select a **Resource ID** from the drop-down list.
   - If you selected **Labor** in the **Type** field, the drop-down list will show your technicians.
   - If you selected **Part** in the **Type** field, the drop-down list field will show your parts.
   - This field is disabled for **Freight** and **Misc** types.

7. Enter a Description into the **Description** field. If the resource is a Part, the Item description will display in this field; otherwise enter a Description.

Maint

8. If you selected a **Part** in the **Resource ID** field, select a Location from the **Location ID** field drop-down list. Otherwise, the **Location ID** field will be blank. This field is disabled for **Freight** and **Misc** types.

9. The **Unit** field will display the Units of measure for the Part selected in the **Resource ID** field, or the value **HR** if **Labor** is selected in the **Type** field. This field is disabled for **Freight** and **Misc** types.

10. Enter the estimated quantity of the **Part** or **Labor** into the **Qty Estimated** field. This field is disabled for **Freight** and **Misc** types.

11. Enter the quantity used into the **Qty Used** field. This field is disabled for **Freight** and **Misc** types.

12. If you selected **Labor** or **Part** in the **Type** field, the Unit Price displays in the **Unit Price** field. You may change the Unit Price. This field is disabled for **Freight** and **Misc** types.

13. If you selected **Labor** or **Part** in the **Type** field, the **Ext Price** is calculated using the **Qty Used** and the **Unit Price** amounts. This field is disabled for **Freight** and **Misc** types.

14. Select or enter a transaction date in the **Trans Date** field. By default, this field will display the current date.

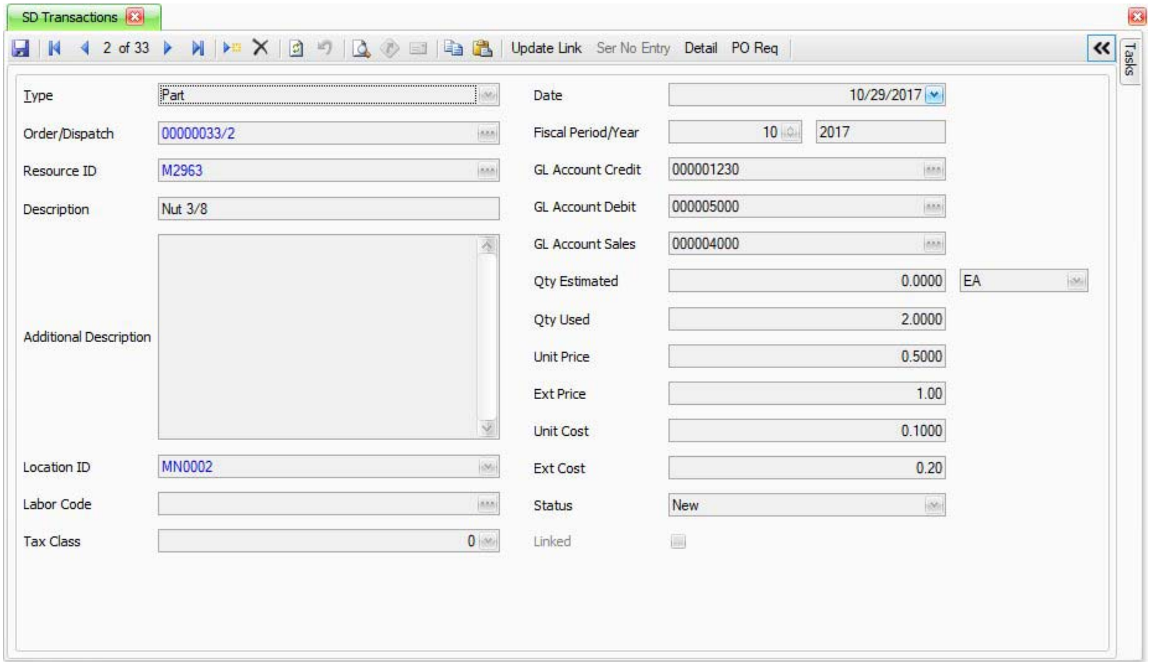
Maint

15. If you selected **Labor** in the **Type** field, select a Labor Code from the drop-down list in the **Labor Code** field.

NOTE: To include a Freight or Misc amount on the invoice, use the column chooser to bring the Ext Cost field into your grid, and enter the amount to be billed into this Ext Cost field.

16. Click the **Save** button on the toolbar to save your work.

Transactions Screen - Detail



1. To display all of the available fields, click the **Summary/Detail** toggle button (» «).

Maint

2. Click the **New Record** button on the tool bar to add a record. The Work Order Number/Dispatch line will display in the **Order/Dispatch** field of the new line.
3. Select the Type of transaction you are adding from the **Type** field drop-down list: **Labor**, **Part**, **Freight**, or **Misc**.

Maint

4. If applicable, select a **Resource ID** from the drop-down list. If you selected **Labor** in the **Type** field, the drop-down list will show your Technicians. If you selected **Part** in the **Type** field, the drop-down list will show field will show your parts. This field is disabled for **Freight** and **Misc** types.
5. Enter a Description into the **Description** field. If the resource is a **Part**, the Item description will display in this field; otherwise enter a Description.
6. Enter or edit the Additional Description of the Item in the **Additional Desc** field. This field is available only if you selected Yes to Use Additional Descriptions in the **Business Rules** function (page 3-5) of System Manager.

   Available Additional Descriptions appear from System Manager and Inventory if you selected Yes to Copy Additional Descriptions from SM/IN Items in the **Business Rules** function (page 3-5) of System Manager.

Maint

7. If you selected a **Part** in the **Resource ID** field, select a Location from the **Location ID** field drop-down list. Otherwise, the **Location ID** field will be blank. This field is disabled for **Freight** and **Misc** types.

Maint

8. If you selected **Labor** in the **Type** field, select a Labor Code from the drop-down list in the **Labor Code** field.
9. Enter or select the **Tax Class** for the transaction. If you selected **Part** in the **Type** field the Tax Class set up in the Item will display. If you select Labor, Freight, or Misc in the Type field the Tax Class will default to 0.

   The Tax Class will determine the tax rate from the Tax Location in the Customer entered into the Work Order.

10. Select or enter a transaction date in the **Date** field. By default, this field will display the current date.
11. Enter the **Fiscal Period/Year**, or accept the default current period and year.
12. Enter or select the **GL Account Credit** to credit for the cost of the Transaction.
    - When **Part** is selected for the **Type**, the Inventory Account from the Inventory Item, Account Code, or the System Manager Description Item will default.
    - When **Labor** is selected for the **Type**, the Payroll Expense Account from the Labor Code will default.
    - When **Freight** is selected for the **Type** for a Service Order, the Freight Account from the Business Rules function will default. When the Transaction is for a Work Order, the field is disabled.
    - When **Misc** is selected for the **Type** for a Service Order, the Misc Account from the Business Rules function will default.
13. Enter or select the **GL Account Debit** to debit for the cost of the Transaction.
    - When **Part** is selected for the **Type**, the COGS Account from the Inventory Item, Account Code, or the System Manager Description Item will default.
    - When **Labor** is selected for the **Type**, the Cost of Revenue Account from the Labor Code will default.
    - When **Freight** is selected for the **Type** for a Service Order, the Expense Account from the Business Rules function will default. When the Transaction is for a Work Order, the field is disabled.
    - When **Misc** is selected for the **Type** for a Service Order, the Expense Account from the Business Rules function will default. When the Transaction is for a Work Order, the field is disabled.

14. Enter or select the **GL Account Sales** to post to for the revenue amount of the Transaction.
    - When **Part** is selected for the **Type**, the Sales Account from the Inventory Item, Account Code, or the System Manager Description Item will default.
    - When **Labor** is selected for the **Type**, the Sales Account from the Labor Code will default.
    - When **Freight** is selected for the **Type**, the field is disabled.
    - When **Misc** is selected for the **Type**, the field is disabled.
15. Enter the estimated quantity of the **Part** or **Labor** into the **Qty Estimated** field. This field is disabled for **Freight** and **Misc** types.
16. The **Unit** field will display the Units of measure for the part selected in the **Resource ID** field, or the value **HR** if **Labor** is selected in the **Type** field. This field is disabled for **Freight** and **Misc** types.
17. Enter the quantity used into the **Qty Used** field. This field is disabled for **Freight** and **Misc** types.
18. If you selected **Labor** or **Part** in the **Type** field, the Unit Price displays in the **Unit Price** field. You may change the Unit Price. This field is disabled for **Freight** and **Misc** types.
19. If you selected **Labor** or **Part** in the **Type** field, the **Ext Price** is calculated using the **Qty Used** and the **Unit Price** amounts. This field is disabled for **Freight** and **Misc** types.

NOTE: To include a Freight or Misc amount on the invoice enter the amount to be billed into the Ext Cost field.

20. The **Status** of the Transaction is displayed.
21. Click the **Save** button, on the toolbar to save your work.

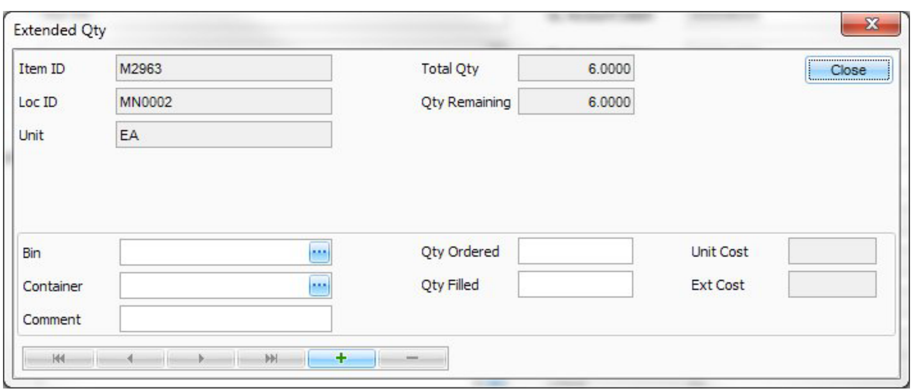
Command Buttons

Name	Description
Update Link	Update the picked/received quantities in inventory if Service Director interfaces with Inventory
Ser No Entry	Enter the serial number of a serialized part if Service Director interfaces with Inventory
Detail	View the details of the extended quantity for the selected part if Service Director interfaces with Inventory
PO Request	Enter a PO Requisition if the business rule for Purchase Order has been set to allow generation of purchases from Service Director

Command Button Functions

Detail

1. If you have the Warehouse Management application installed, click on the **Detail** button to view the **Extended Quantity Entry** screen. On this screen you can select **Bins** and **Containers** from which to take the item to fill the Work Order. You can have several Bins and Containers per Item selected to fill the order.

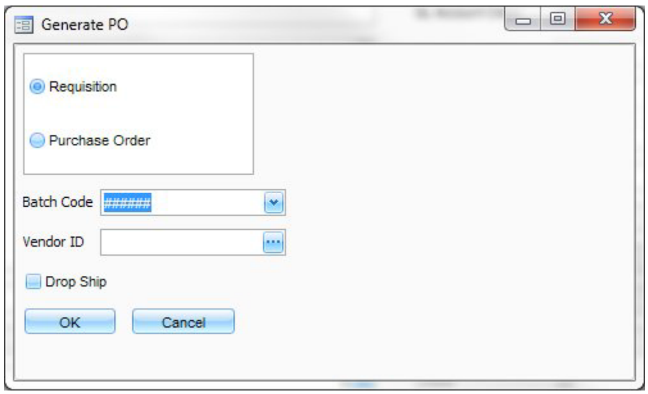


- These Bins and Containers are entered to suggest to the warehouse staff that will be printing the Picking List, in Warehouse Management, where to go to pick the Items in the warehouse. The Bins and Containers selected here will print on the Picking List in Warehouse Management.

2. Close the **Extended Quantity Entry** screen when finished to return to the **Transactions** screen.

PO Req

1. Click **PO Req** to create a new Purchase Order or Requisition for the Item by inserting a record in the Purchase Order **Transactions** or **Requisitions** functions. This button appears only if Purchase Order is installed.



2. Select to generate a **Requisition** or a **Purchase Order** from your Work Order Transaction.

   You will get the option to select either a Requisition or Purchase Order if you selected **Choice** in the Business Rules for Purchase Order, for the **Generate Purchases from Service Director** in the **Business Rules**. If you selected either **Requisitions** or **Purchase Order** you will only be able to generate the type of transaction selected. If you selected **None** for this option the button will be deactivated.

- Select the **Batch Code** in which you want your Purchase Order to be generated. You will only see this option if you use transaction batching in Purchase Order and you selected to generate a Purchase Order.
- Select the **Vendor ID** for the Vendor for which you want the Purchase Order to be generated. This Vendor ID will be filled in on the Purchase Order and into the Vendor ID field in the purchase Requisition.
- Select the check box to have the Item in the Purchase Order **Drop Ship**ped. The Purchase Order Ship To tab will be filled in with the information entered on the Site Information tab in the Work Order.
- Click **OK** to generate the Requisition or Purchase Order.
- Click **Cancel** to return to the transactions screen and not generate a Purchase Order or Requisition.

A confirmation message appears when you click **OK** stating the transaction was generated successfully.

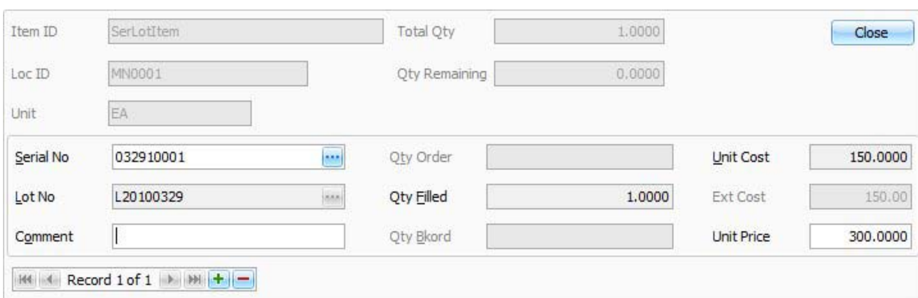
NOTE: When a Purchase Order has been generated from a Work Order, quantity Received for the Item will be filled into the Qty Used field when the Purchase Order Item has been received.

NOTE: The cost from the Purchase Order Item receipt will be transferred directly into the cost of the Work Order Item when the Purchase Order is received.

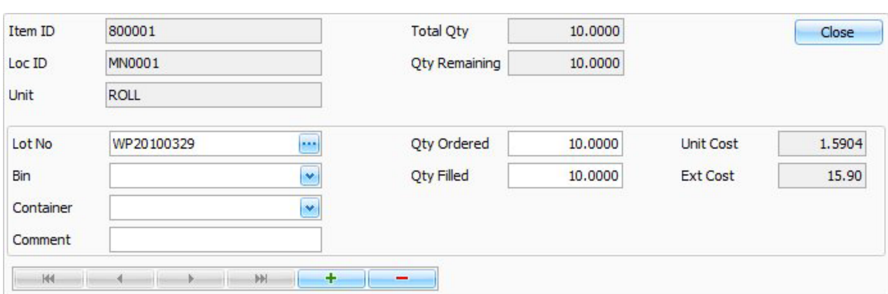
NOTE: When the Drop Ship check box is selected when generating the Purchase Order, Inventory quantities are not affected by the receipt in Purchase Order.

Lot and Serial Entry Details

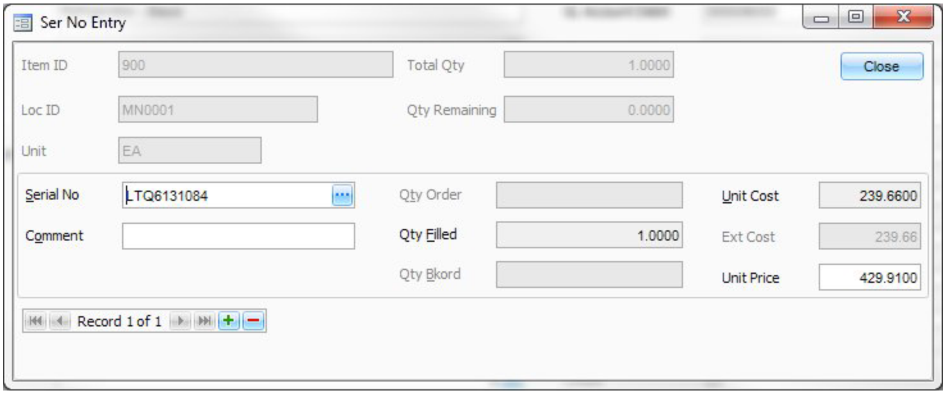
Lot/Ser No Entry Dialog Box



Lot No Entry Dialog Box



Serial No Entry Dialog Box



The Lot/Ser No Entry dialog box appears when you update the **Qty Used** on the Transactions screen, if Lotted or Serialized Items exist for the Transaction, or when you click the **Serial No Entry** button for Serialized Items in the **Transaction**. You must enter Lot and Serial information; if you do not, the amount in the **Qty Used** field on the Transactions screen will be adjusted to zero.

1. Select the Item's Serial Number in the **Serial No** field. This field appears only if the Item is Serialized. You may select Serial Numbers only for available Items.

   If you use an Item in multiple quantities, each with its own Serial Number, enter each Serial Number in a new record on the dialog box. Use the scroll bar to view records.

2. Select the Item's Lot number in the **Lot No** field. This field appears only if the Item is Lotted or Serialized and Lotted.

3. Enter a **Comment**, if desired.

4. Click **Close** to save your changes and return to the Transactions screen. The amount in the **Qty Used** field on the Transactions screen will be adjusted to match the total number of Serial Numbers you entered or to the total of the Lotted quantities you entered, if necessary.

Task Summary

To add Transactions, follow these steps:

1. Select the **New Record** icon , on the toolbar. A blank record appears.
2. Enter the **Order/Dispatch**, **Type**, **Resource ID**, a **Description** of the Transaction or **Item**, **Location ID**, **Unit**, **Qty Estimated**, **Qty Used**, **Unit Price**, **Date**, and **Labor Code** where appropriate.
3. Click the **Save** button to save your work.

To edit Transactions, follow these steps:

1. Select the Transaction to edit.
2. Position the cursor in the field to edit.
3. Change the value in the field.
4. Click the **Save** button to save your work.

To delete a Transaction, follow these steps:

1. Select the Transaction to delete.
2. Select the **Delete** hot key (f3), or click on the **Delete Record** button , on the tool bar.

PREPARE INVOICES

Use the **Prepare Invoices** function to prepare Invoices for a group of completed Work Order Dispatches that contain billable labor or parts lines. After you have Prepared Invoices, use the Print Invoices function to print them.

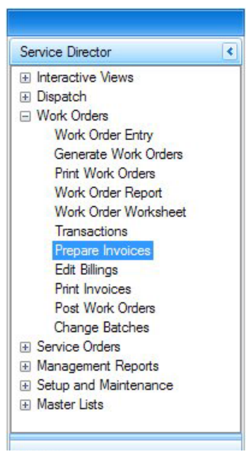
Preparing Invoices performs two tasks. First, Dispatch status changes from Completed to Billed. It also creates an "Invoice" that displays in the SD Edit Billing function, where it can be edited and/or deleted.

If you have prepared an invoice for a Work Order in error, delete the Invoice through the Edit Billing function to unbill the Work Order, prior to posting the Invoice.

To **Prepare Invoices**, follow these steps:

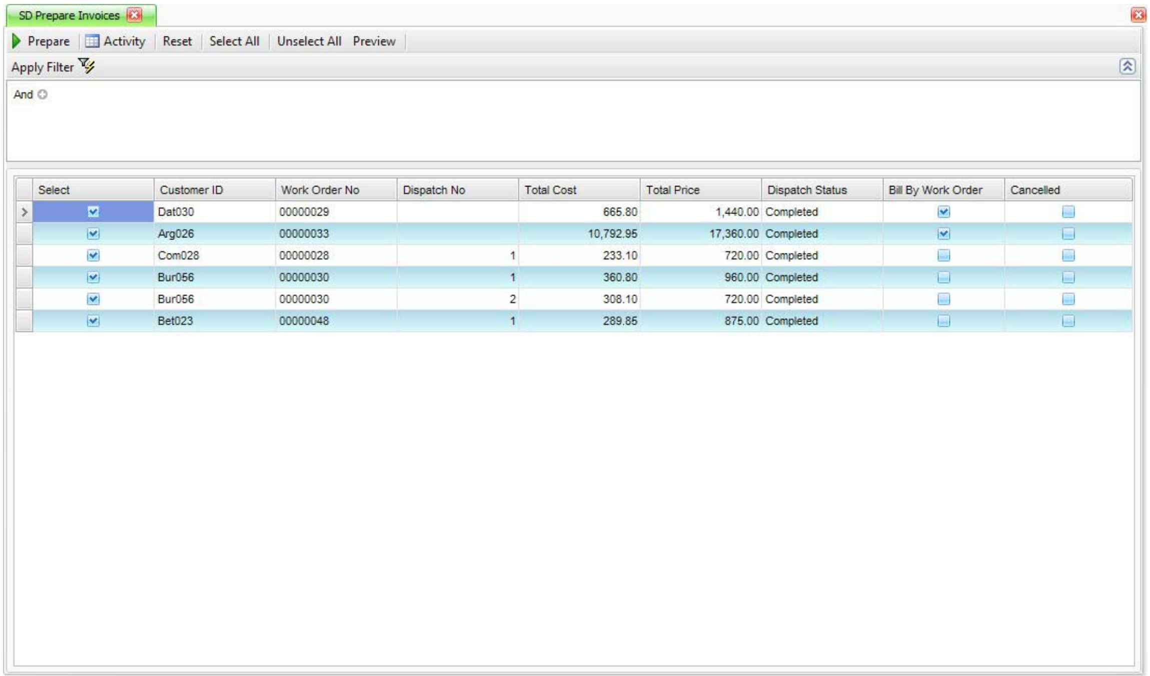
1. Select **Prepare Invoices** from the **Work Orders** menu.

Prepare Invoices Menu



2. The **Prepare Invoices** screen appears.

Prepare Invoices Screen



Select	Customer ID	Work Order No	Dispatch No	Total Cost	Total Price	Dispatch Status	Bill By Work Order	Cancelled
☑	Dat030	00000029		665.80	1,440.00	Completed	☑	☐
☑	Arg026	00000033		10,792.95	17,360.00	Completed	☑	☐
☑	Com028	00000028	1	233.10	720.00	Completed	☐	☐
☑	Bur056	00000030	1	360.80	960.00	Completed	☐	☐
☑	Bur056	00000030	2	308.10	720.00	Completed	☐	☐
☑	Bet023	00000048	1	289.85	875.00	Completed	☐	☐

3. Use the **Data Filter** to select the range of filtering options or leave the filter blank to include all available data. Click **Apply Filter** to populate a list of Work Orders to have Invoices prepared for them.
4. From the list of Work Orders, select the Work Orders for which to prepare invoices, by selecting the **Select** check box next to the Work Order record.
5. The **Customer ID**, **Work Order No**, **Dispatch No**, **Total Cost**, **Total Price**, **Dispatch Status**, **Bill By Work Order**, and **Canceled** fields are displayed and may not be edited.

6. Select a command button:

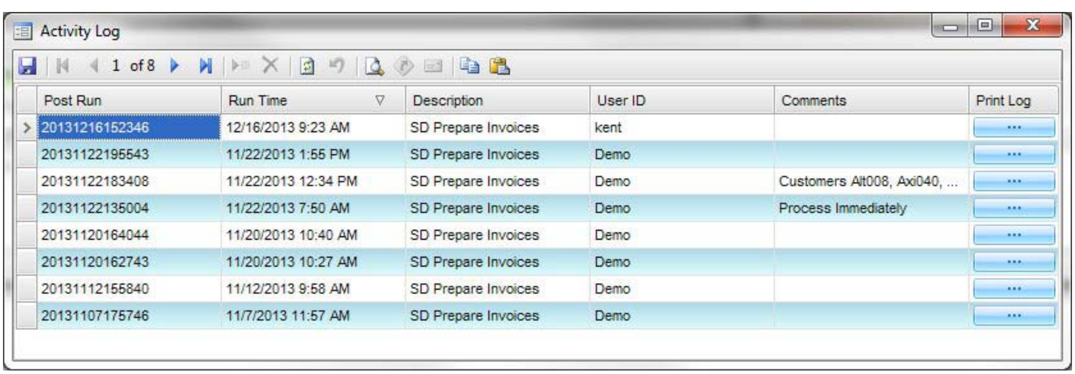
Command Buttons

Name	Description
Prepare	Prepare invoices for the work order numbers you selected.
Activity	Open the Activity Log dialog box where you can view information about previous actions, including run time, user ID, and comments, as well as internal sequence numbers and run IDs.
Reset	Set all fields to their default values.
Select All	Select all work orders.
Unselect All	Unselect all work orders.
Preview	See a preview window of the work order listing.

Activity Log

Use the **Activity Log** to view all post activity for administrative purposes.

Activity Log Screen



Post Run	Run Time	Description	User ID	Comments	Print Log
20131216152346	12/16/2013 9:23 AM	SD Prepare Invoices	kent		...
20131122195543	11/22/2013 1:55 PM	SD Prepare Invoices	Demo		...
20131122183408	11/22/2013 12:34 PM	SD Prepare Invoices	Demo	Customers Alt008, Axi040, ...	...
20131122135004	11/22/2013 7:50 AM	SD Prepare Invoices	Demo	Process Immediately	...
20131120164044	11/20/2013 10:40 AM	SD Prepare Invoices	Demo		...
20131120162743	11/20/2013 10:27 AM	SD Prepare Invoices	Demo		...
20131112155840	11/12/2013 9:58 AM	SD Prepare Invoices	Demo		...
20131107175746	11/7/2013 11:57 AM	SD Prepare Invoices	Demo		...

Name	Displays
Post Run	The system assigned post run ID.
Run Time	The date and time the post was made.
Description	The post description.
User ID	The user who performed the post.
Comments	The comments, if applicable, entered in the Comments field.
Print Log	This function is not available for this action.

EDIT BILLINGS

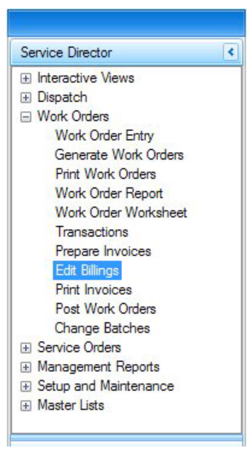
The **Edit Billings** function provides you with the ability to review and edit billing information for Work Orders before you Print Invoices. If you want to edit the billing information, click the **Update** button. Use the **Rem Credit** button to check the Customer's credit status, including balances, available credit, and credit limit. If you have created an Invoice in error, you can delete it through the Edit Billings function, which will unbill the Work Order. You can create the Invoice again with the Prepare Invoices function.

Transaction details cannot be changed for a Work Order that has an invoice prepared.

To use the **Edit Billings** function, follow these steps:

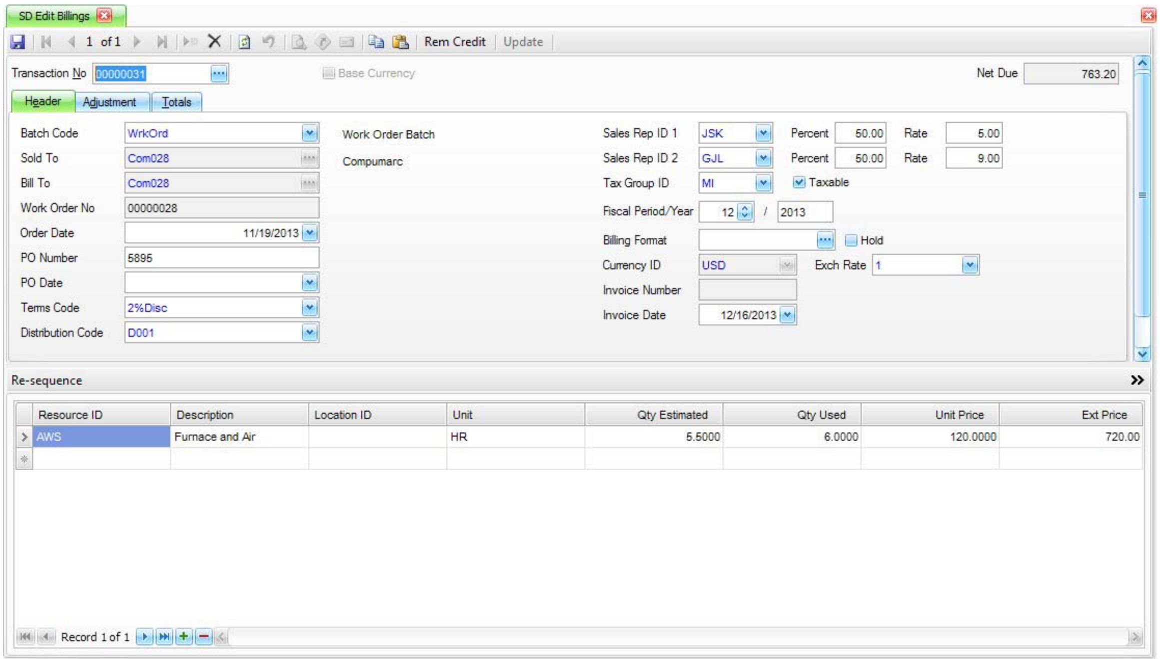
1. Select **Edit Billings** from the **Work Orders** menu.

Edit Billings Menu



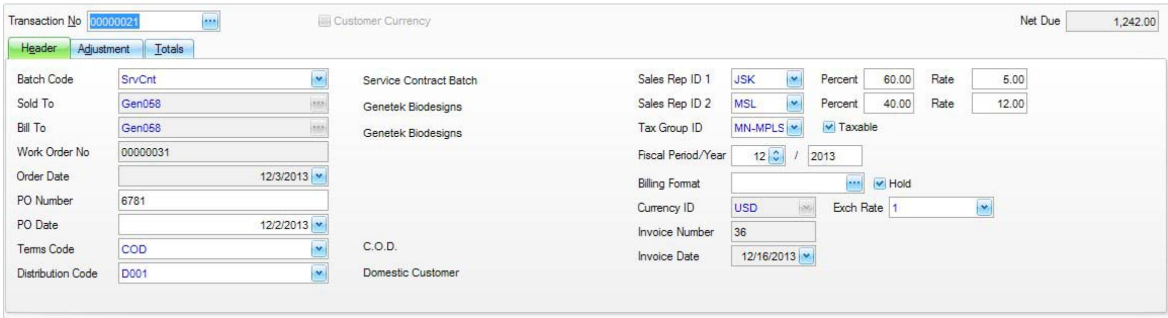
2. The **Edit Billings** screen appears.

Edit Billings Screen



3. Select the **Transaction No** with which to work. The list will contain the billings that have been prepared using the Prepare Invoices function (page 4-75).
4. The **Net Due** amount is displayed and cannot be edited.
5. Click **Update** to unlock the Transaction selected.

Edit Billings Header Tab



Maint

6. Select the **Header** tab and edit the information that needs editing. The fields available to edit are the **Batch Code**, **PO Number**, **PO Date**, **Sales Rep ID 1** and **2**, **Percent**, **Rate**, **Terms Code**, **Distribution Code**, **Tax Group ID**, **Fiscal Period/Year**, **Billing Format**, and Exch Rate, if you use multi-currency.
7. Select the check box to put a billing on **Hold**. Clear the check box to release the billing.

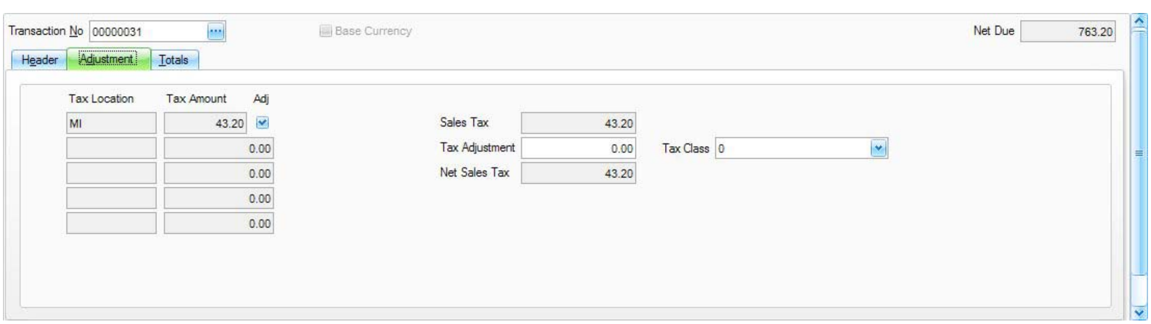
The **Hold** check box will be checked if the Prepare Invoices was set to put the billings on Hold when preparing.

Maint

Select a **Batch Code** to change batches for a transaction from the Batch Code field.

NOTE: This option is only available if you select Yes to Use Batch Processing in the System Manager Business Rules (page 3-5). If you select No to Use Batch Processing, transactions are applied to the main ###### batch.

Edit Billings Adjustment Tab



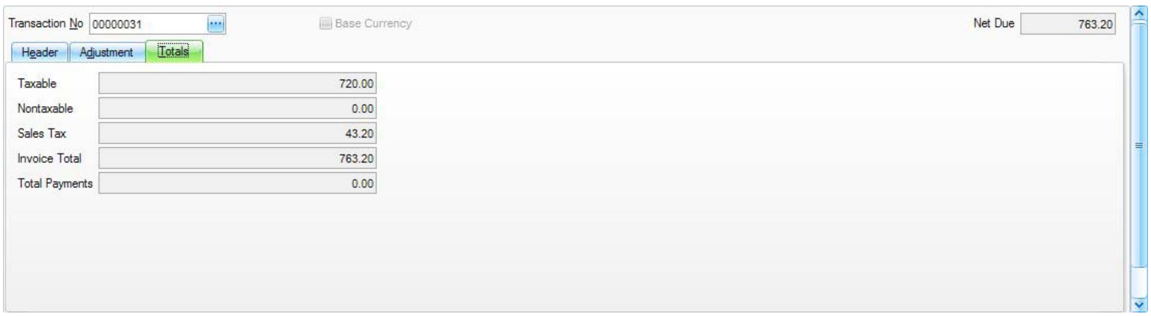
8. Select the **Adjustment** tab if you want to make a sales tax adjustment to the selected billing.

9. In the **Tax Adjustment** field enter a positive or negative number for the amount by which to adjust the sales tax.

10. Select the **Tax Class** to which the Tax Adjustment applies.

11. Select the **Adj** check box next to the **Tax Location** to which you want the adjustment applied.

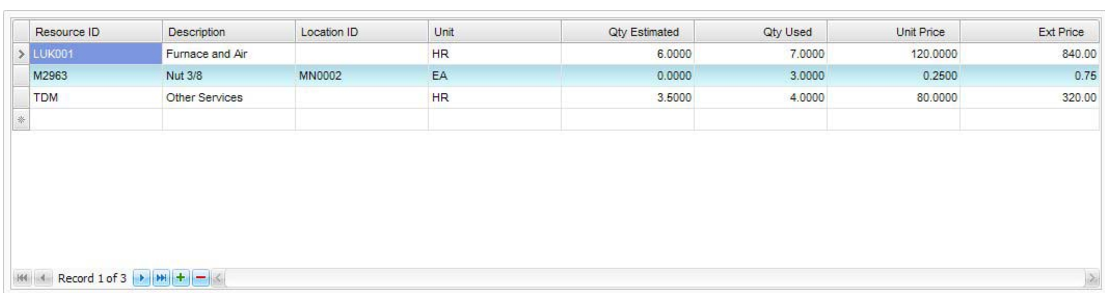
Edit Billings Totals Tab



12. Select the Totals tab to view your **Taxable**, **Nontaxable**, **Sales Tax**, **Invoice Total**, and **Total Payments** amounts. These fields are for viewing only and cannot be edited.

Work Order Activity Summary

»



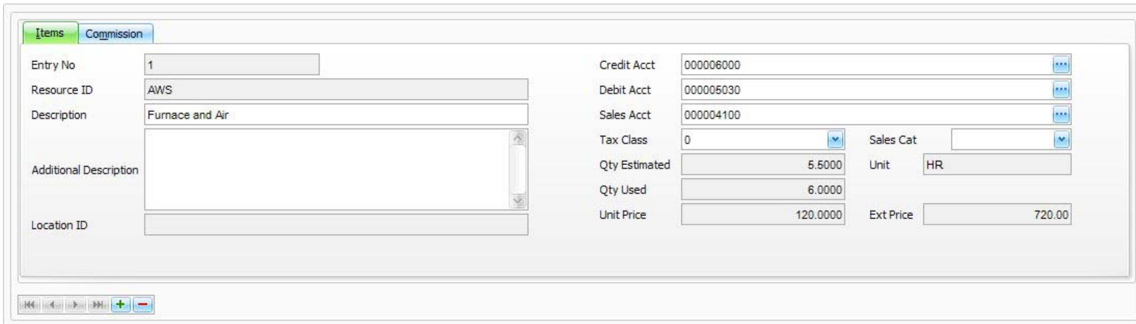
13. In the summary mode you are not allowed to edit any existing information for the activities listed.

14. Click the **Append** button (+) in the Item/Activity section, to add a new item or activity entry to the invoice record.

15. Enter information into the **Description**, **Location ID**, **Unit**, **Qty Estimated**, **Qty Used**, **Unit Price**, and **Ext Price** where appropriate.

16. Select the **Detail** button » to view the activity records in detail.

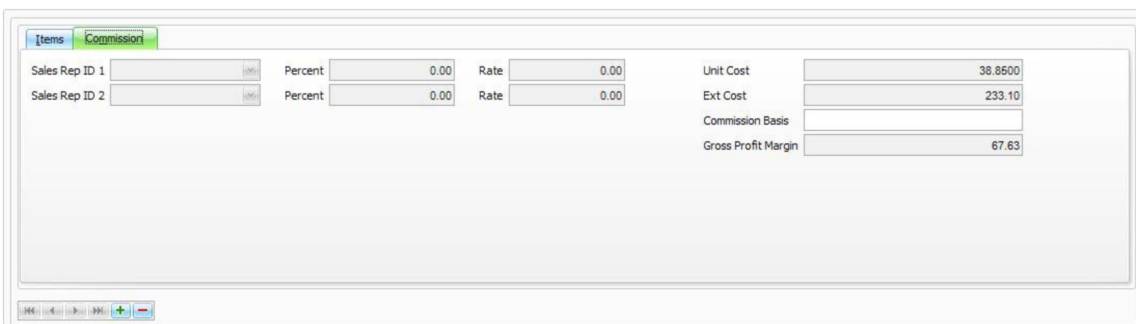
Work Order Activity Detail Item Tab



17. Select the **Items** tab.
18. Edit the information that needs to be edited.

The fields available to edit are, the **Description**, **Additional Description**, **Credit Acct**, **Debit Acct**, **Sales Acct**, **Tax Class** and **Sales Cat**.

Work Order Activity Detail Commission Tab



19. Select the **Commission** tab to edit commission information for Sales Reps.

Maint

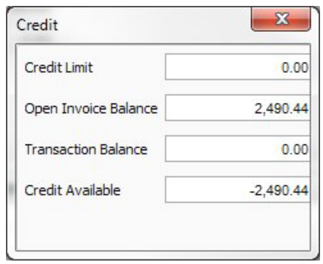
20. Information is displayed for **Sales Rep ID 1** and/or **Sales Rep ID 2** for the activity selected.
21. Information is displayed for **Percent** for Sales Rep ID 1 and/or 2, for the percent of the invoice to use for commission calculation.
22. Information is displayed for **Rate** for Sales Rep ID 1 and/or 2, for the rate to use for commission calculation.
23. Edit the **Commission Basis** to change the Gross Profit Margin amount for commission calculations for Sales Reps using the Gross Profit method of commission calculation.

Use the toolbar at the bottom of the Work Order Activity area to move from record to record or delete activity records.

To move from record to record use the blue single or double arrows to move to the first, previous, next or last record.

Click on the red minus sign to delete activity records.

Rem Credit Dialog Box



1. The **Credit** dialog box appears when the Customer's credit limit is exceeded, or when you click the **Rem Credit** button.
2. The customer's **Credit Limit**, **Open Invoice Balance**, **Transaction Balance**, and **Credit Available** appear.
3. You can Edit Billings even if the Customer is over their Credit Limit. A Credit Limit of 0 means that the Customer has unlimited credit.
4. Click **OK** to return to the Edit Billings screen.

PRINT INVOICES

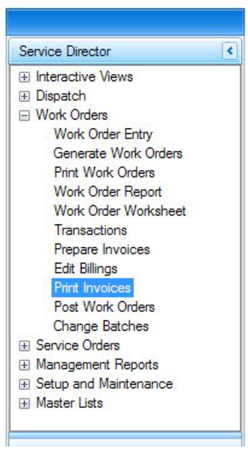
Use the **Print Invoices** function to print the invoices you prepared with the Prepare Invoices function. You can also use this function to reprint invoices that did not print correctly due to printer malfunction.

You cannot use this function to reprint invoices you printed online from the Work Order Entry function. To reprint invoices for unposted dispatches, use the Work Order Entry screen's Invoice option of the Print button to reprint the invoice for that dispatch. To reprint invoices for dispatches that have been posted, use the Accounts Receivable Print Invoices function in an Interactive View.

To **Print Invoices**, follow these steps:

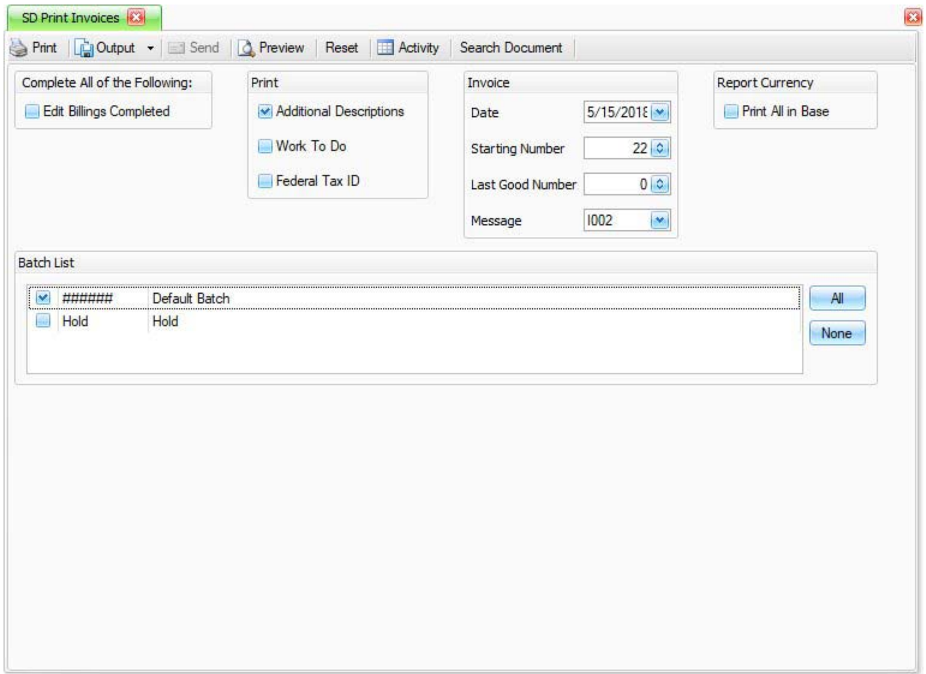
1. Select **Print Invoices** from the **Work Orders** menu.

Print Invoices Menu



2. The **Print Invoices** screen appears.

Print Invoices Screen



3. Before you print the invoices, ensure you are finished editing billings by marking the **Edit Billings Competed** check box.
4. To **Print Additional Descriptions** on the Invoice, select the check box; otherwise, clear it.
5. To **Print** the **Work To Do** information on the Invoice, select the check box; otherwise, clear it.
6. To **Print** the **Federal Tax Id** for the current company at the bottom of the Invoice, select the check box; otherwise, clear it.
7. The **Invoice Date** automatically appears. Enter the first Invoice Number. If you enter an Invoice Number on the Transactions screen, it becomes the default Invoice Number.
8. Enter the **Starting Invoice Number** or use the default. The Invoice Number cannot include letters.

   Invoice Numbers entered during Work Order entry, except those entered for online Invoices, are overwritten by this function.

9. If you are reprinting invoices, enter the number of the **Last Good Number** that was printed correctly. Print the **Billing Journal** to serve as a record of Invoice Numbers.

10. Select a **Message** to print on the Invoices. The messages will come from the Accounts Receivable, Setup and Maintenance, Invoice Messages function.

11. If you use multi-currency, select the **Print All in Base** check box to print all transactions in base currency (regardless of the currency in which they were entered). Clear the check box to print invoices in the Customer's currency. If you do not use multi-currency, this check box does not appear.

12. Select the **Batches** for which you want to print invoices. Select the **All** button to select all available batches. Select the **None** button to clear the check box for all selected batches. This option is available only if you selected Yes to Use Batch Processing in the Business Rules function (page 3-5) on the System Manager, Company Setup menu.

13. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the invoices on your monitor.
Output	Output the invoices as a .pdf file and save it.
Print	Print the invoices.
Activity	Display the Activity Log to view printing activity.
Search Document	Open the Archived documents search dialog box. (Button only available when you select Yes to Use Archive in the Business Rules.)

Activity Log

Use the **Activity Log** to view printing activity for administrative purposes.

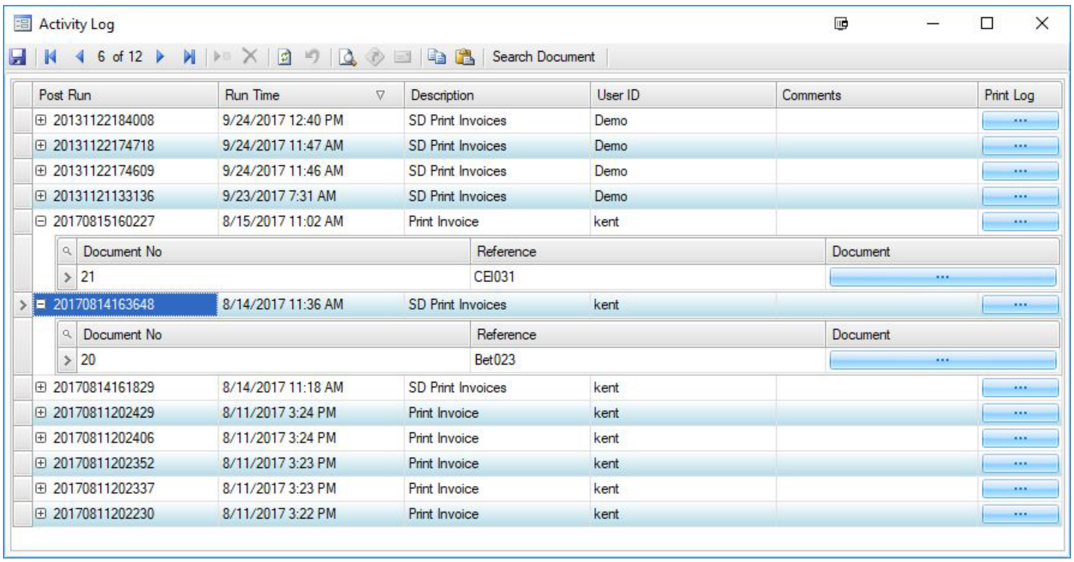
Name	Displays
Post Run	The system assigned post run ID.
Run Time	The date and time the printing was done.
Description	The printing description.
User ID	The user who performed the print.
Comments	The comments, if applicable, entered in the Comments field.
Print Log	Not available for this function.

- Click the Plus (+) button next to the **Post Run** to view the Invoice(s) printed for the selected printing.

- Click the **Document** button to preview the Invoice printed for the selected **Document No**.

NOTE: These options are only available if you selected Yes to Use Archive in the Business Rules function.

Activity Log Screen



Search Document

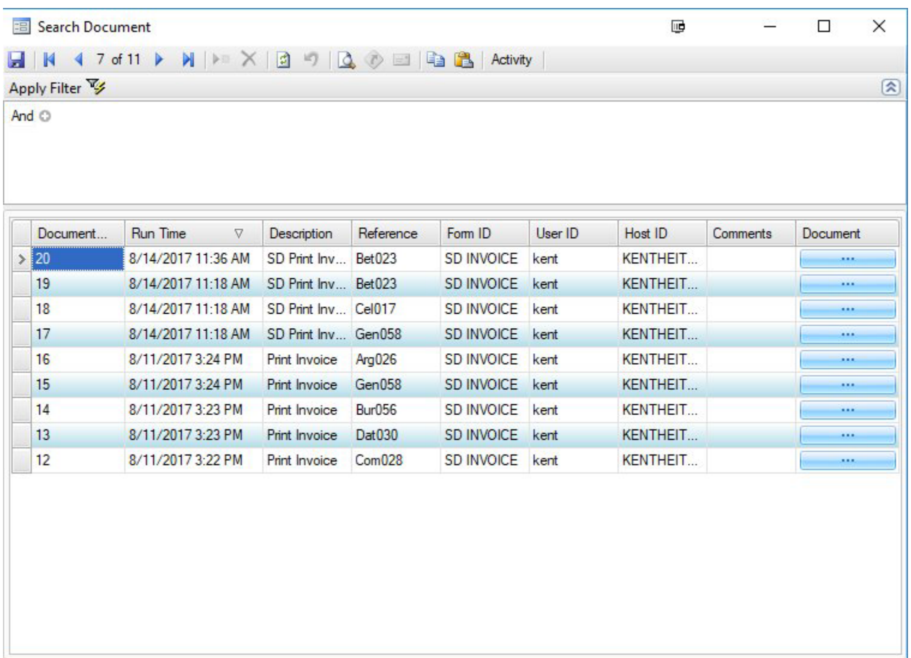
Use the **Search Document** button to view archived Invoices. This button is only available if you selected **Yes** to the **Use Archive Business Rule** (page 3-5).

Select the range of **Filter Criteria** to include in the View. Leave the filter criteria blank to include all records. Click **Apply Filter** to populate the grid below.

Name	Displays
Document Number	The Invoice number printed.
Run Time	The date and time the printing was done.
Description	The printing description.
Reference	The Customer ID for which the invoice was printed.

Name	Displays
Form ID	The type of form printed.
User ID	The user who performed the print.
Host ID	The workstation name used to print the invoice.
Comments	The comments, if applicable, entered in the Comments field.
Document	Preview the original invoice printed.

Search Document Screen



Document...	Run Time	Description	Reference	Form ID	User ID	Host ID	Comments	Document
20	8/14/2017 11:36 AM	SD Print Inv...	Bet023	SD INVOICE	kent	KENTHEIT...		...
19	8/14/2017 11:18 AM	SD Print Inv...	Bet023	SD INVOICE	kent	KENTHEIT...		...
18	8/14/2017 11:18 AM	SD Print Inv...	Cel017	SD INVOICE	kent	KENTHEIT...		...
17	8/14/2017 11:18 AM	SD Print Inv...	Gen058	SD INVOICE	kent	KENTHEIT...		...
16	8/11/2017 3:24 PM	Print Invoice	Arg026	SD INVOICE	kent	KENTHEIT...		...
15	8/11/2017 3:24 PM	Print Invoice	Gen058	SD INVOICE	kent	KENTHEIT...		...
14	8/11/2017 3:23 PM	Print Invoice	Bur056	SD INVOICE	kent	KENTHEIT...		...
13	8/11/2017 3:23 PM	Print Invoice	Dat030	SD INVOICE	kent	KENTHEIT...		...
12	8/11/2017 3:22 PM	Print Invoice	Com028	SD INVOICE	kent	KENTHEIT...		...

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Print Invoices Total Report

Consolidated Service Director

Page 1

Print Invoices Total

Currency ID	Taxable	Nontaxable	Sales Tax		Invoice Total
JPY	0	26	0		26
				Net Due	26
USD	37,758.75	550.00	2,635.92		40,944.67
				Net Due	40,944.67

Invoices Printed 8
Invoice Copies Printed 0

12/16/2013 9:52 AM *** End of Report *** kenthe

Invoice

COMPUTER PRODUCTS UNLIMITED

Consolidated Service Director
4301 Dean Lakes Blvd
Shakopee, MN 55379
UNITED STATES
(952)-403-5700

PAGE 1

INVOICE DATE 12/16/2013
INVOICE NO 37

SOLD TO
Cel017
Celebris Systems
Arnie Morris
1209 Bramphur Street
Warren, MI 48089

SHIP TO
WH 1
Celebris Systems
Luke Nelson
523 Lexington Ave N
Suite 120
St. Paul, MN 56326

NET DUE 17,868.14

SLS1	SLS2	DUE DATE	DISC DUE DATE	ORDER NO	ORDER DATE	COMPLETED DATE
JSK	GJL	1/15/2014	12/26/2013		11/28/2013	12/27/2013

TERMS DESCRIPTION	CUSTOMER PO NO
3% /10, Net 30	7785

RESOURCE ID	TX CL	UNITS	ORDERED	SHIPPED	UNIT PRICE	EXTENSION
Crew T1	0	HR	2.500	3.000	80.000	240.00
Other Services						
Crew T1	0	HR	7.000	7.000	120.000	840.00
Furnace and Air Labor						
200350	0	EA	1.0000	1.0000	14,999.0000	14,999.00
Deluxe Air Conditioner						
Signature Collection Air Conditioner						
Lot No			Qty			
CA-0001-1			1.0000			
	0		0.0000	0.0000	0.0000	150.00
Freight						
AWS	0	HR	3.500	4.000	120.000	480.00
Inspection						

Inspected their existing system and determined they need a new air conditioner. I suggested unit XC25 and they agreed to it.

We appreciate your business.

TAXABLE	NONTAXABLE	SALES TAX	TOTAL
16,559.00	150.00	1,159.14	17,868.14

NET DUE 17,868.14

POST WORK ORDERS OVERVIEW

When you Post Work Orders, the system creates open invoices in Accounts Receivable for each invoiced Work Order Dispatch. The Due Date for each Invoice is calculated using the Invoice Date and the number of due days for the Customer's Terms Code (set up in the Accounts Receivable Customers function). The Invoice's Discount Date (if applicable) is also calculated using the Invoice Date and the number of discount days from the Customer's Terms Code. Use the Accounts Receivable Cash Receipts function to apply payment to these open invoices.

If Service Director interfaces with General Ledger, debit and credit entries are created in the GL Journal. If you post detail information, the system makes entries for each line Item. If you post summary information, the system makes one entry for each Account. If the GL accounting period is closed, you can either edit Work Orders or use the System Manager Period Conversion function, to open the accounting period for posting. See the System Manager Training Manual for more information.

Posting completed Work Orders also:

- Posts line Item and totals information from temporary tables. The system creates these temporary tables while you work with Service Director to store line Item entries and totals information. When all line Items are posted, summary GL entries are calculated.
- Updates balance and sales history fields in the Customer's records.
- Updates System Manager Tax Location records with Work Order Taxable and Nontaxable totals.
- Updates Work Order history with all information entered in the Work Order Entry function.
- Updates Customer equipment information with the Work Order, Dispatch, and Technician ID if a piece of equipment was serviced.
- Updates historical information for the Company, Customer, and Item.

When you post Invoices for Work Orders on credit, entries are made to these Accounts:

Receivable	Tax Liability	Freight	Sales	Misc
DB	CR	CR	CR	CR

The General Ledger Account in the Tax Location record determines the Sales Tax Account. The Freight and Misc Accounts are from the defaults in Business Rules. The Sales Acct is determined by either the IN Item Account Code, Labor Code or the default Sales Acct in the Business Rules.

The costs for each line Item update these accounts:

Costs

COGS/Debit		**Inventory/Credit**	
DB			CR

The Inventory and COGS accounts come from the Account Code assigned to the Item if you are interfaced to Inventory and you selected an Inventory Item. If you selected an SM Description Item the Inventory and COGS accounts come from the Accounts set up for that Item. If you entered a Freight or Miscellaneous transaction the Credit and Debit Accounts come from the defaults set up in the Business Rules. If you entered Labor for a Tech the Accounts come from the Labor Code setup.

You also can manually select the Sales, COGS/Debit and Inventory/Credit account when Editing Billings.

POST WORK ORDERS

When you **Post Work Orders**, the system creates open invoices in Accounts Receivable for each Work Order Invoiced and calculates Due Dates for these Invoices as appropriate. Posting also updates Work Order history, Site Equipment information, and historical information for the Company, Customer, and Item. If Service Director interfaces with General Ledger, posting completed Work Orders creates debit and credit entries in the GL Journal. If Service Director interfaces with Inventory, posting updates history, dates, and balances in Inventory for parts used on Work Orders.

Before you post, complete the following tasks:

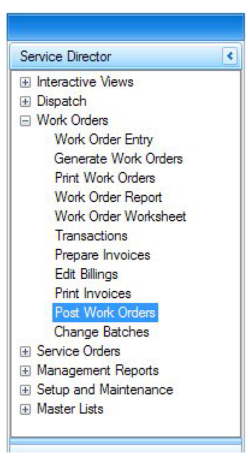
- Complete billing entry and print reports and Invoices.
- If you have a multi-user system and are not using batch processing, verify no one else is using the billings function.
- Print the **Billing Journal** and **Invoices** (invoices cannot be reconstructed after they have been posted).

  The **Transfer Billings** function provides information for the Billing Journal. Posted entries are cleared from these functions to make room for the next group of entries.

To **Post Work Orders**, follow these steps:

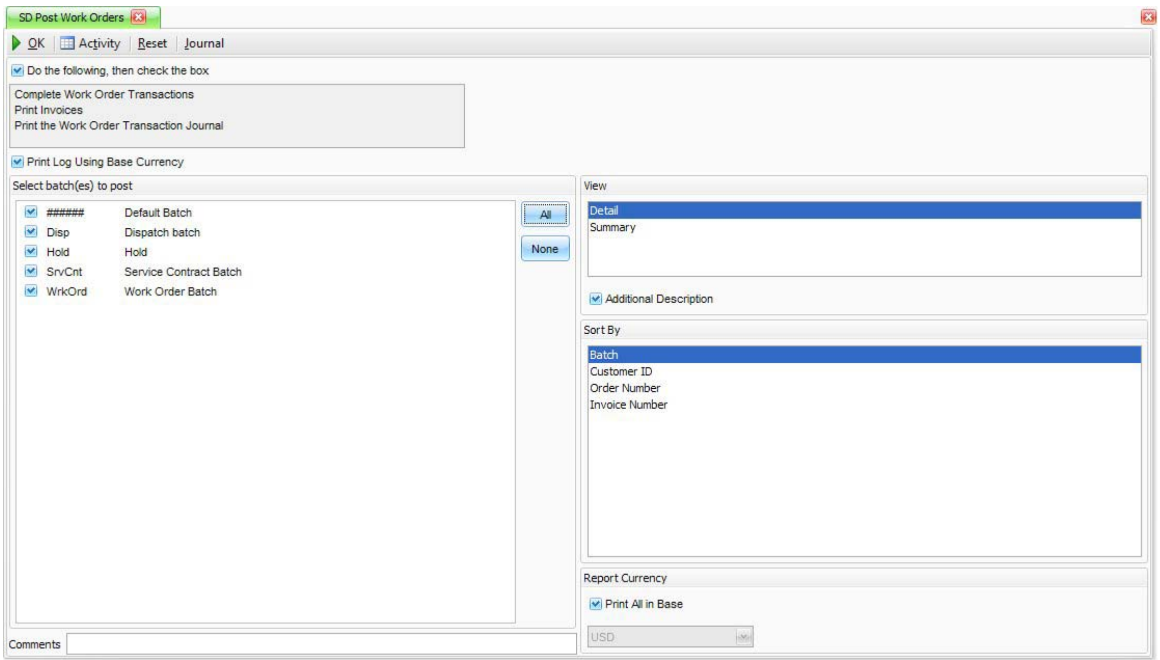
1. Select **Post Work Orders** from the **Work Orders** menu.

Post Work Orders Menu



2. The **Post Work Orders** screen appears.

Post Work Orders Screen



3. Before you post the work orders, ensure you have **Completed Work Order Transactions**, **Printed Invoices**, and used the **Journal** button to **Print the Work Order Transaction Journal**, then mark the **Do the following** check box.

4. If you use the multi-currency functions, select the check box to **Print Log Using Base Currency**. Clear the check box to print in the GL Account's currency.

5. Select the **Batches** to include in the post. You will only see the available batches if you have selected Yes to Use Batch Processing in the Business Rules function. Select the **All** button to select all available batches. Select the **None** button to clear the check box for all selected batches.

6. Select a **View**:

   - **Summary** to see only a summary of the options.
   - **Details** to see the details of the Work Orders.

7. Select the **Additional Description** check box if applicable to include the Additional Descriptions in the journal.

8. Select a **Sort By** option by which to sort the journal: **Batch**, **Customer ID**, **Order Number**, or **Invoice Number**.

9. If you use multi-currency, these print options are available:

   - To print Work Orders that were entered in the base currency, select the base currency as the report **Currency** and clear the **Print All In Base Currency** box. Only Work Orders that were entered in the base currency are printed on the journal.
   - To print Work Orders that were entered in a foreign currency, other than the base currency, select that **Currency** as the report currency. Only Work Orders that were entered in the currency you select are printed on the journal.
   - To print all Work Orders (regardless of the currency in which they were entered), select the base currency as the report **Currency** and select the **Print All In Base Currency** check box.
   - TRAVERSE converts all Work Order amounts from their original currency to the base currency (if necessary), then prints all Work Orders on the journal.

10. Enter **Comments** for the post, if applicable.

11. Select a command button:

Command Buttons

Name	Description
Reset	Return the value of all fields on the list or report screen to their default values.
Activity	Opens the Activity dialog box to allow you to reprint post logs.
OK	Executes the post.
Journal	Print the work order journal.

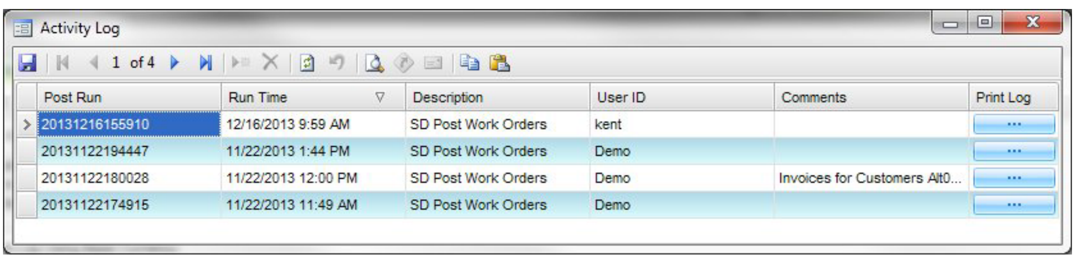
A message appears when the post completes successfully. After you click **OK** to close this message box, the Post Billings Log appears.

Activity Log

Use the **Activity Log** to view all post activity for administrative purposes.

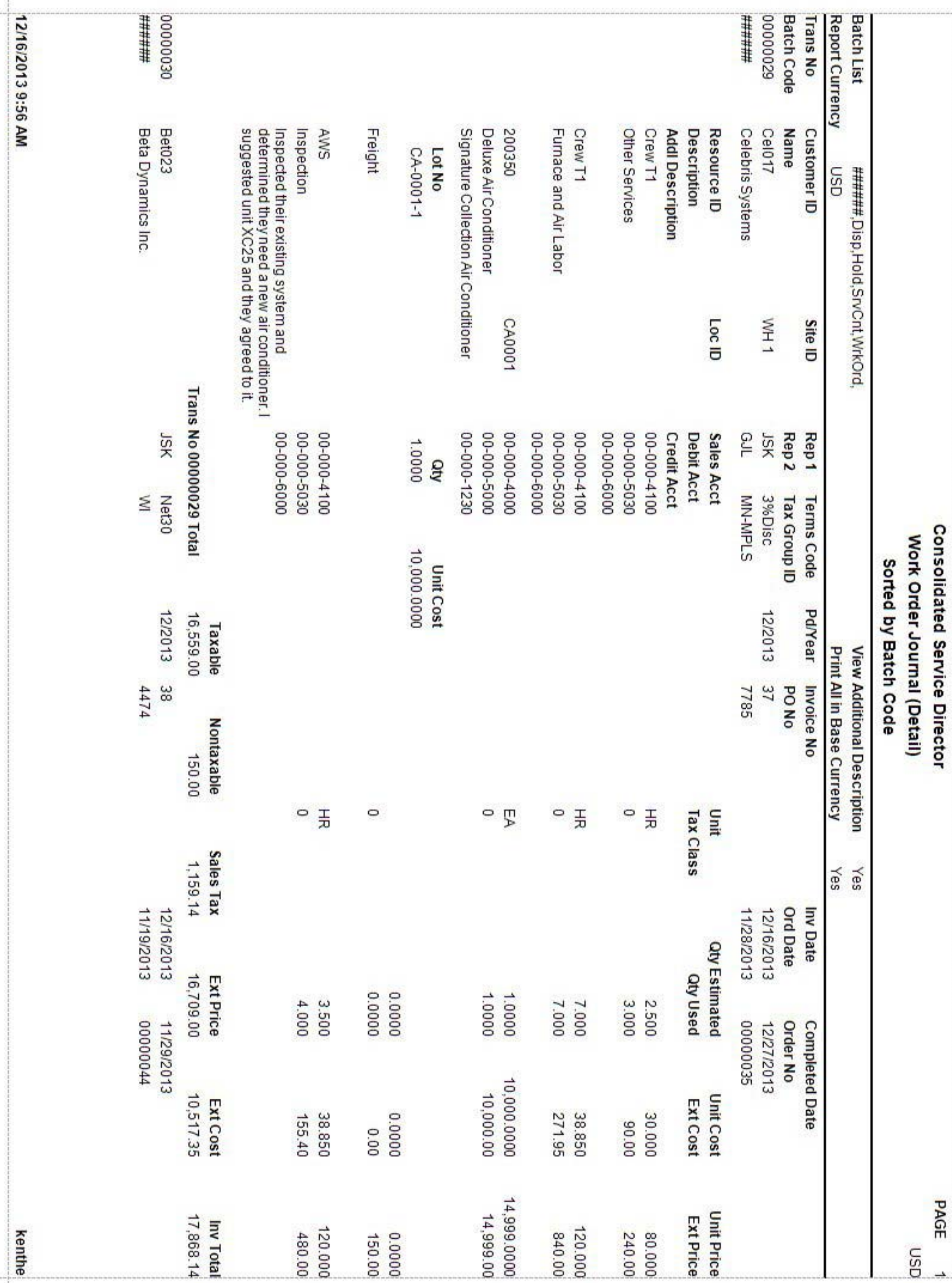
Name	Displays
Post Run	The system assigned post run ID.
Run Time	The date and time the post was made.
Description	The post description.
User ID	The user who performed the post.
Comments	The comments, if applicable, entered in the Comments field.
Print Log	A PDF version of the original log file if you click the ... button.

Activity Log Dialog Box



NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Work Orders Journal



Consolidated Service Director PAGE 1
Work Order Journal (Detail) USD
Sorted by Batch Code

Batch List ######,Disp,Hold,SrvCnt,WrkOrd, **View Additional Description** Yes
Report Currency USD **Print All in Base Currency** Yes

Trans No	Customer ID	Site ID	Rep 1	Terms Code	Pd/Year	Invoice No		Inv Date	Completed Date	
Batch Code	Name		Rep 2	Tax Group ID		PO No		Ord Date	Order No	
00000029	Cel017	WH 1	JSK	3%Disc	12/2013	37		12/16/2013	12/27/2013	
######	Celebris Systems		GJL	MN-MPLS		7785		11/28/2013	00000035	
	Resource ID	**Loc ID**	**Sales Acct**				**Unit**	**Qty Estimated**	**Unit Cost**	**Unit Price**
	Description		**Debit Acct**				**Tax Class**	**Qty Used**	**Ext Cost**	**Ext Price**
	Addl Description		**Credit Acct**							
	Crew T1		00-000-4100				HR	2.500	30.000	80.000
	Other Services		00-000-5030				0	3.000	90.00	240.00
			00-000-6000							
	Crew T1		00-000-4100				HR	7.000	38.850	120.000
	Furnace and Air Labor		00-000-5030				0	7.000	271.95	840.00
			00-000-6000							
	200350	CA0001	00-000-4000				EA	1.0000	10,000.0000	14,999.0000
	Deluxe Air Conditioner		00-000-5000				0	1.0000	10,000.00	14,999.00
	Signature Collection Air Conditioner		00-000-1230							
	Lot No		**Qty**	**Unit Cost**						
	CA-0001-1		1.0000	10,000.0000						
								0.0000	0.0000	0.0000
	Freight						0	0.0000	0.00	150.00
	AWS		00-000-4100				HR	3.500	38.850	120.000
	Inspection		00-000-5030				0	4.000	155.40	480.00
	Inspected their existing system and determined they need a new air conditioner. I suggested unit XC25 and they agreed to it.		00-000-6000							
					Taxable	**Nontaxable**	**Sales Tax**	**Ext Price**	**Ext Cost**	**Inv Total**
			Trans No 00000029 Total		16,559.00	150.00	1,159.14	16,709.00	10,517.35	17,868.14
00000030	Bet023		JSK	Net30	12/2013	38		12/16/2013	11/29/2013	
######	Beta Dynamics Inc.			WI		4474		11/19/2013	00000044	

12/16/2013 9:56 AM **kenthe**

Post Work Orders Summary Log

Consolidated Service Director
Post Work Orders
Page 1

Batch List ######,Disp,Hold,SrvCnt,WrkOrd
Comments

Posted to Fiscal Year 2013
Fiscal Period 12

Total Transactions	57,062.67
Net Posted To	**Amount**
Open Invoice Table	57,062.67
Customer Table	57,062.67

Grand Total

Total Transactions	57,062.67
Net Posted To	**Amount**
Open Invoice Table	57,062.67
Customer Table	57,062.67

12/16/2013 9:59 AM OPEN_SYSTEMS\kenthe

Post Work Orders GL Log

Consolidated Service Director
Post Work Orders
GL Entries

Page 2

20131216155910

Posted to Fiscal Year 2013
Fiscal Period 12

Reference	Description	GL Account	Debit	Credit
Com028	Furnace and Air	00-000-6000		233.10
Com028	Furnace and Air	00-000-5030	233.10	
Com028	Furnace and Air	00-000-4100		720.00
Com028	Sales Tax/ MI	01-000-2020		43.20
Com028	39/A/R	01-000-1100	763.20	
Det030	Misc Charges	01-000-5110		100.00
Det030	Freight Charges	01-000-5100		75.00
Det030	Furnace and Air	00-000-6000		310.80
Det030	Other Services	00-000-6000		180.00
Det030	Furnace and Air	00-000-5030	310.80	
Det030	Other Services	00-000-5030	180.00	
Det030	Furnace and Air	00-000-4100		960.00
Det030	Other Services	00-000-4100		480.00
Det030	Sales Tax/ MN	01-000-2020		93.60
Det030	Sales Tax/ MN-MPLS	01-000-2020		7.20
Det030	40/A/R	01-000-1100	1,715.80	
Bur056	Misc Charges	01-000-5110		50.00
Bur056	Misc Cleaning Supplies	01-000-5110		75.00
Bur056	Prep Work Labor	00-000-6000		310.80
Bur056	Cleaning Work	00-000-6000		233.10
Bur056	Prep Work Labor	00-000-5030	310.80	
Bur056	Cleaning Work	00-000-5030	233.10	
Bur056	Prep Work Labor	00-000-4100		960.00
Bur056	Cleaning Work	00-000-4100		720.00
Bur056	Sales Tax/ MN	01-000-2020		109.20
Bur056	Sales Tax/ MN-MPLS	01-000-2020		8.40
Bur056	41/A/R	01-000-1100	1,922.60	
Arg026	Deluxe Air Conditioner	00-000-1230		10,000.00
Arg026	Furnace and Air	00-000-6000		349.65
Arg026	Furnace and Air Labor	00-000-6000		233.10
Arg026	Nut 3/8	00-000-1230		0.20
Arg026	Other Services	00-000-6000		210.00
Arg026	Deluxe Air Conditioner	00-000-5000	10,000.00	
Arg026	Furnace and Air	00-000-5030	349.65	
Arg026	Furnace and Air Labor	00-000-5030	233.10	
Arg026	Nut 3/8	00-000-5000	0.20	
Arg026	Other Services	00-000-5030	210.00	
Arg026	Deluxe Air Conditioner	00-000-4000		14,999.00
Arg026	Furnace and Air	00-000-4100		1,080.00
Arg026	Furnace and Air Labor	00-000-4100		720.00
Arg026	Nut 3/8	00-000-4000		1.00
Arg026	Other Services	00-000-4100		560.00
Arg026	42/A/R	00-000-1101	17,360.00	
Cel017	Freight	01-000-5100		150.00
Cel017	Other Services	00-000-6000		90.00
Cel017	Furnace and Air Labor	00-000-6000		271.95
Cel017	Deluxe Air Conditioner	00-000-1230		10,000.00
Cel017	Inspection	00-000-6000		155.40
Cel017	Other Services	00-000-5030	90.00	
Cel017	Furnace and Air Labor	00-000-5030	271.95	
Cel017	Deluxe Air Conditioner	00-000-5000	10,000.00	

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CHANGE BATCHES

Use the **Change Batches** function to change the Batch Codes on all the Work Orders in a batch. To Change Batches for individual Work Orders use the Edit Billings function (page 4-79). Select the Work Orders you want to move to a different batch, select Update and change the Batch Code. This will move the Work Orders to a different batch.

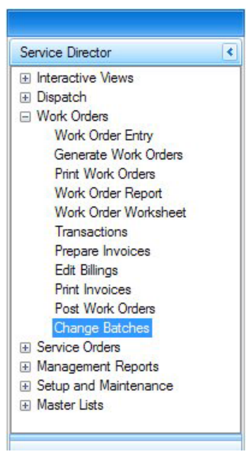
You may need to change the Batch Code if the batch processing option is turned on after a period of not using it, or if batch processing is turned off after a period of using it. You may want to Change Batches to make sure that your backorders are in the same batch.

The Change Batches function is available only if you selected Yes to Use Batch Processing in the Business Rules function (page 3-5).

To **Change Batches** for transactions, follow these steps:

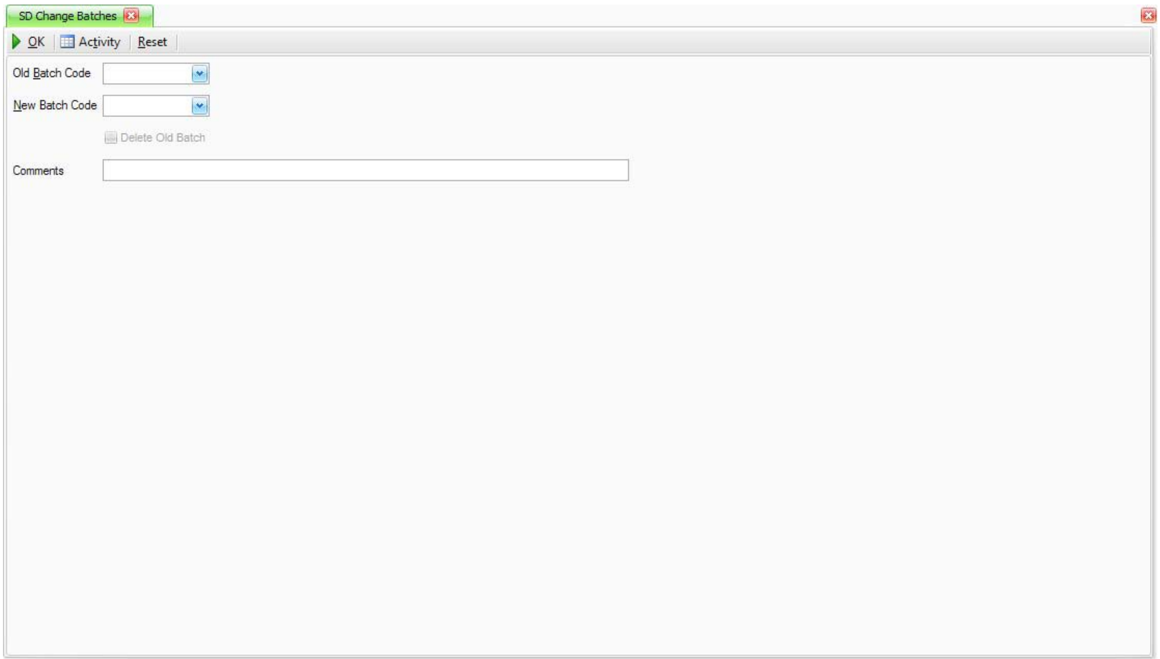
1. Select **Change Batches** from the **Work Orders** menu.

Change Batches Menu



2. The **Change Batches** screen appears.

Change Batches Screen



3. Select the **Old Batch Code**. The Batch Code currently containing the Work Orders to be moved.
4. Select the **New Batch Code**. The Batch Code into which you want the Work Orders moved.
5. Select the check box to **Delete The Old Batch**; otherwise, clear the check box. This option is disabled if batch ######, which is the main batch, is selected.
6. Enter **Comments** about the Changing Batches. These Comments will be seen on the Activity screen when the Activity button is selected.

7. Select a command button:

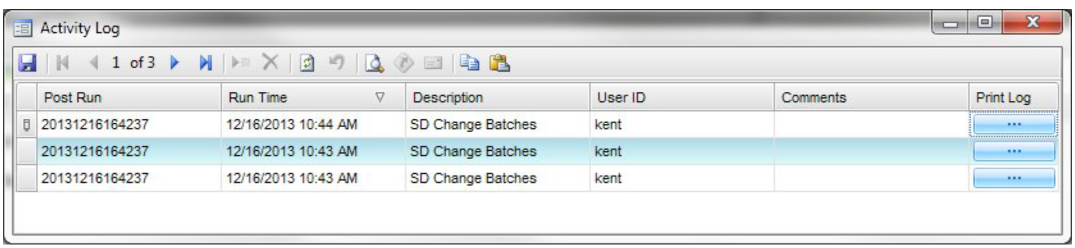
Command Buttons

Name	Description
OK	Select **OK** to continue moving transactions from the selected batch to a newly selected batch.
Activity	Select **Activity** to view the activity log.
Reset	Select **Reset** to remove values entered and begin again.

Activity Log

Use the **Activity Log** to view all post activity for administrative purposes.

Activity Log Screen



Field Descriptions

Name	Displays
Post Run	The system assigned post run ID.
Run Time	The date and time the post was made.
Description	The post description.
User ID	The user who performed the post.
Comments	The comments, if applicable, entered in the Comments field.

Name	Displays
Print Log	Not available for this function.

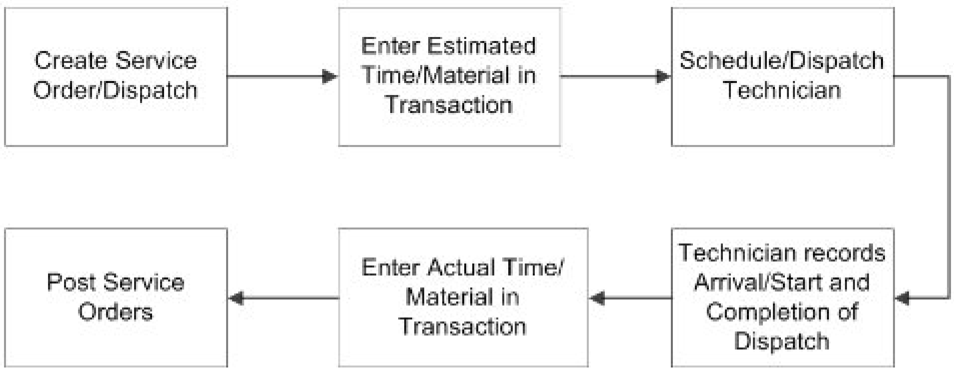
5

SERVICE ORDERS

OVERVIEW

Service Orders are your way to track work to be done on equipment belonging to your company. Use Service Orders to organize and track equipment service, parts used, and activity related to your equipment.

The flow of the service order process is illustrated in the flowchart below:



Before you use the functions on the Service Orders menu, set up your Equipment, Categories, Skills, Billing Type, Codes, Work To Do Descriptions, and Technicians using the functions on the Setup and Maintenance menu, and verify your Items, codes, and IDs using the functions on the Master Lists and Interactive View menus.

To work with Service Orders do the following steps:

- Enter **Service Orders** (page 5-5) for work to be done on your equipment.
- **Generate Service Orders** (page 5-29) for the equipment that has scheduled services.
- **Print Service Orders** (page 5-35) for entered and generated Service Orders.
- Print the **Service Order Report** (page 5-39) to view details on the Service Orders.
- Print the **Service Order Worksheet** (page 5-45) to send with the Technicians that are scheduled to do work on the Service Orders.
- Enter **Transactions** (page 5-51) to record the work done and parts used to complete the Service Orders.
- **Post Service Orders** (page 5-65) to update history and make General Ledger entries.

SERVICE ORDER ENTRY

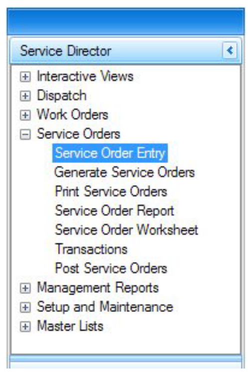
The **Service Order Entry** function handles activity performed on your company's internal equipment, such as new service calls, schedules dispatches, and tracks Labor and Parts used to complete the Service Order.

Select Service Order Entry from the Service Orders menu, then use the fields at the top of the screen to enter or edit basic information. Use the Site Information and Dispatch tabs to record Site, Dispatch, Equipment, and other information for the Service Order.

To enter **Service Orders**, follow these steps:

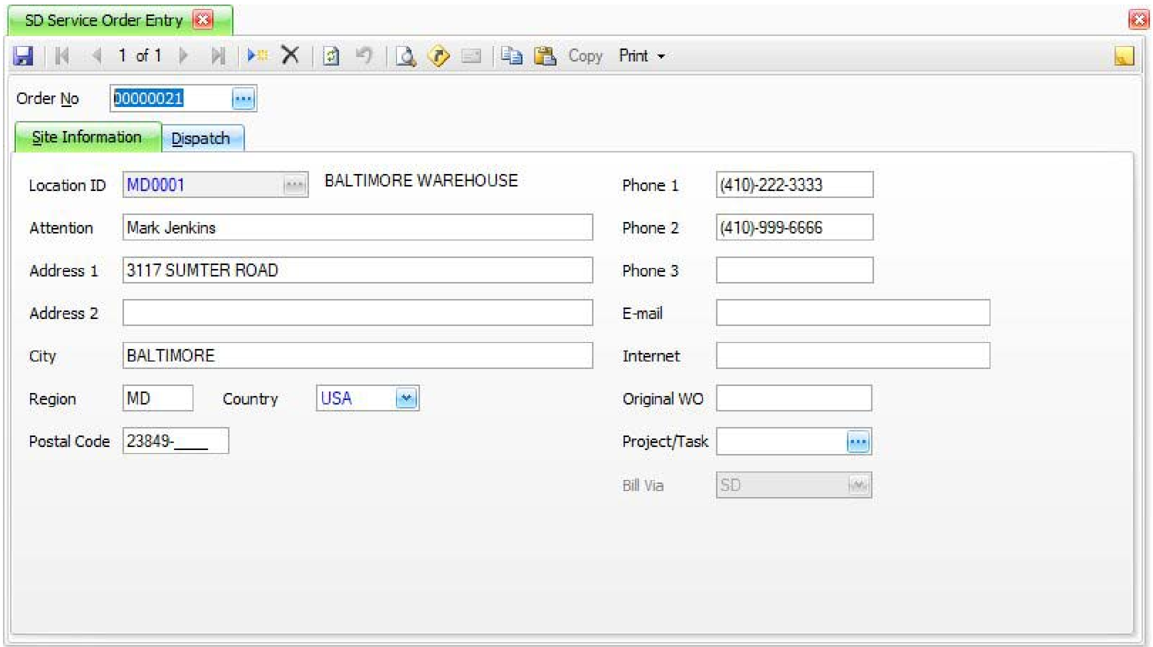
1. Select **Service Order Entry** from the **Service Orders** menu.

Service Order Entry Menu



2. The **Service Order Entry** screen appears.

Service Order Entry Screen



3. Click the **New Record** button , on the toolbar, to open a blank Service Order record.

Maint

4. Select a **Location ID** for this Service Order.

   The Location ID and the information listed in the Address, City, Region and Postal Code fields will come in from Inventory Location ID set up in Inventory.

5. Location Details will fill into the following fields and may be edited.

   These fields display information for the location you selected in the Location ID.

   - **Attention**: the name of the contact listed in the location information.
   - **Address 1** and **Address 2**: the Address for the selected Location ID.
   - **City**, **Region**, and **Postal Code**: the City, Region (State), and Postal Code for the selected Location ID.
   - **Phone**, **E-mail**, and **Internet**: the Phone number(s), E-mail address, and Internet website for the selected Location ID.

Maint

   - The **Country** field displays the Country Code listed in the address of the Location ID you selected in the Location ID field. You may also select a Country Code in this field.

6. If this Service Order is a continuation of another Service Order, enter the original Service Order number in the **Original WO** field.

Maint

7. Use the **Project Task** field to tie the service order to a current Project by selecting the Project from the drop-down list.

    This field will only be available if you have Project Costing installed and the interface from Service Director to Project Costing set to Yes.

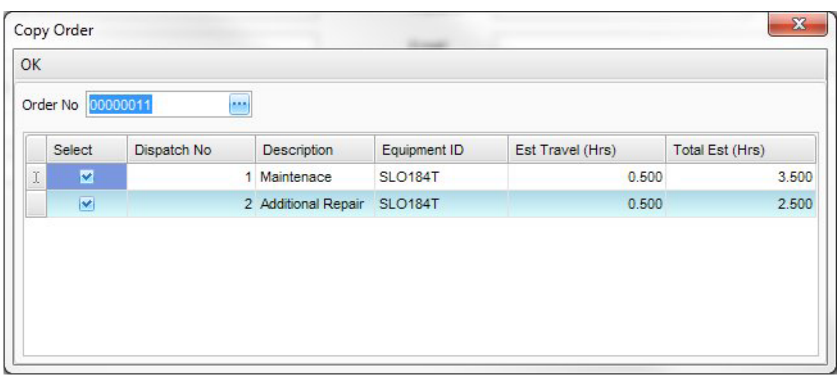
8. In the **Bill Via** field, select whether you want to bill the Work Order through Service Director or Project Costing.

    This is only applicable if you have selected a Project/Task. See SD Link to PC (page 4-25) for more information regarding billing via SD or PC.

Command Buttons

Name	Description
Copy	Allows you to copy service order information from another service order.
Print	Gives you the option of printing the service order or the invoice associated with the current service order.

Service Order Entry Screen - Copy

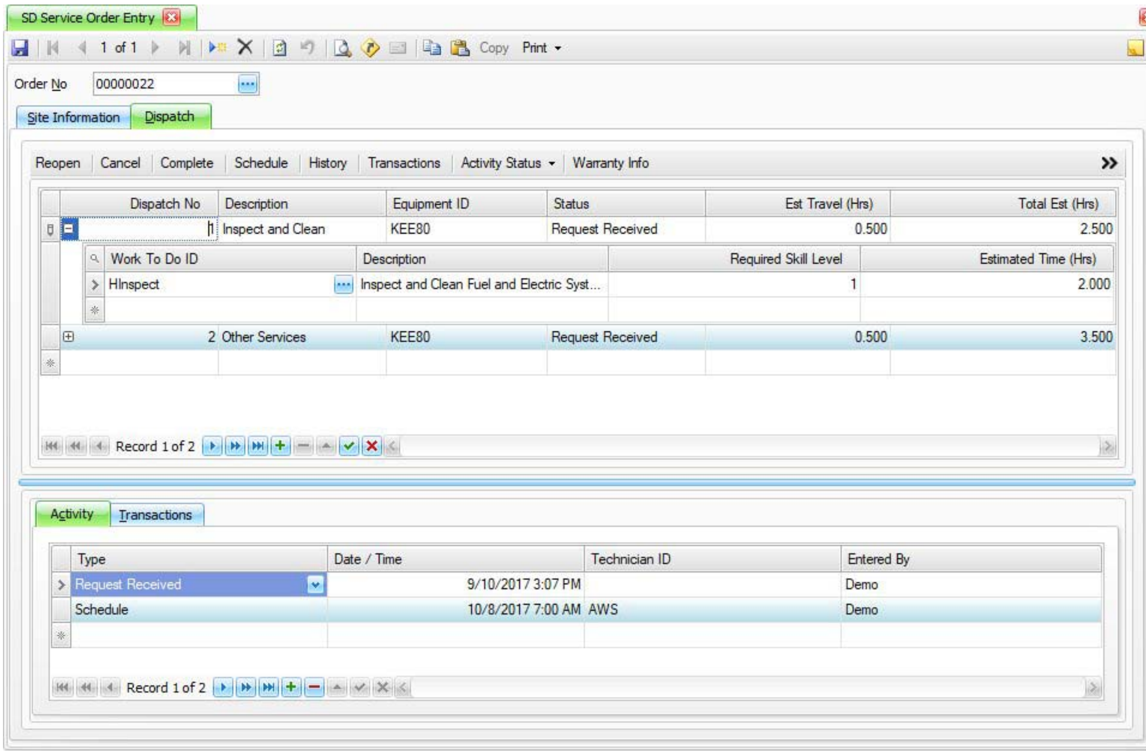


The **Copy** function allows you to copy Service Order information from Service Orders that have been posted to history.

1. Click the **Copy** button to bring up the **Copy Order** screen.
2. Select a Service **Order No** from the list of Service Orders from history.

3. The **Dispatch No** entered and completed for the selected Service Order are listed. Select the Dispatches you want to copy into the new Service Order.
4. Click **OK** to copy the selected Dispatches into the new Service Order.

Service Order Entry Screen - Dispatch Tab



1. Click the **Append** button (+) in the **Dispatch** section, to open a new Dispatch record. The **Dispatch No** is generated by the system.
2. Enter a Description for the Dispatch in the **Description** field.
3. Maint

   Select the Equipment ID to which this Service Order applies, from the drop-down list in the **Equipment ID** field.
4. The **Status** field will default to **Request Received** when a new Dispatch is created. The Status of the Dispatch will change depending on what has been done with the Dispatch.
   - **Request Received** - When the Dispatch is entered and nothing has yet been done to the Dispatch the status will be Request Received.
   - **Canceled** - The Dispatch has been canceled.

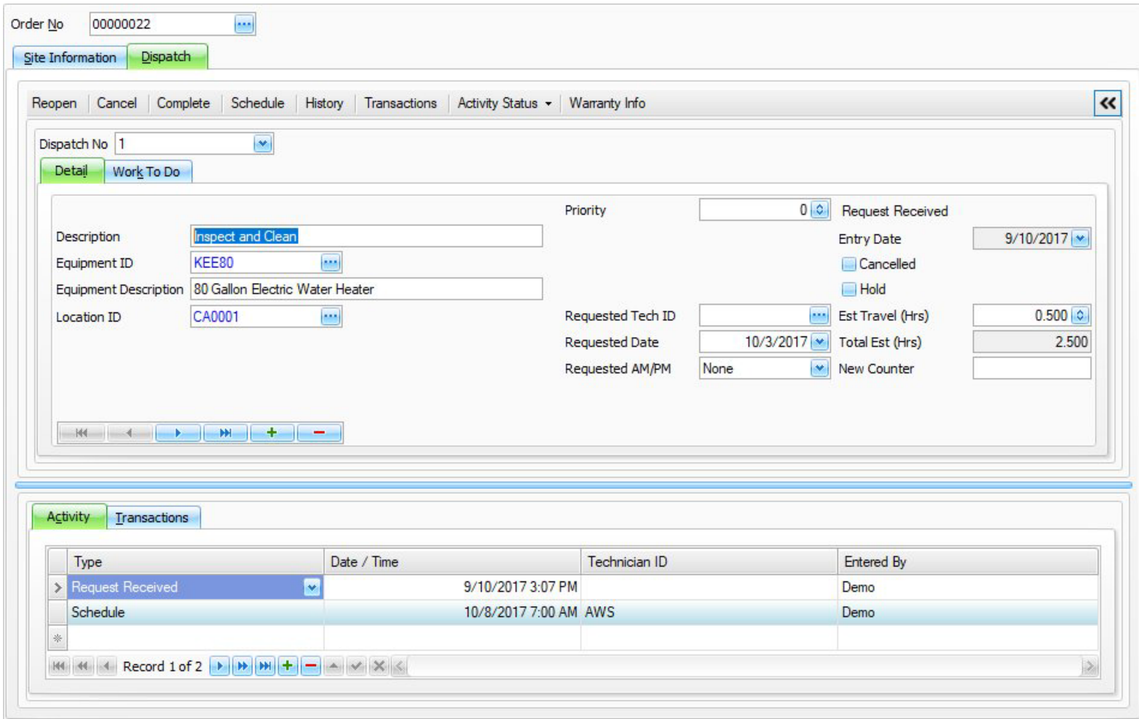
- **Reopen** - A canceled Dispatch has been reopened.
- **Posted** - A Billed dispatch has been posted using the Post Service Orders function.
- **Completed** - The dispatch has been Billed and Posted and is now completed. The status gets changed to completed when the Complete button is selected and completion information is entered.

NOTE: The Status of the Dispatch will be based on system updates and selections made from the Activity Status button menu.

5. Enter the Estimated Travel time in hours in the **Est Travel (Hrs)** field.
6. The Total Estimated time for the Dispatch in hours displayed in the **Total Est (Hrs)** field, is the sum of the Estimated Travel time and the **Work To Do IDs** for the Dispatch.
7. Press the Enter key or the Tab key to add **Work To Do** detail. If the Work To Do detail rows do not appear, a Plus sign (+) will appear next to the Dispatch No. Click the Plus sign to add Work To Do IDs to the Dispatch.
8. Select a Work To Do ID from the drop-down list in the **Work To Do ID** field. The **Description** and **Required Skill Level** fields will display the information from the Work To Do record.
9. Enter or edit the Estimated Time to perform the Work To Do in hours in the **Estimated Time (Hrs)** field. The Estimated Time will default from the Work To Do ID setup.
10. Repeat Steps 7-9 for each Work To Do ID you want to add to the Dispatch.
11. To finish changes to the Dispatch, click the **End Edit** button ( ).

Use the Toggle button (») to switch from Summary (grid) View to Detail (field) View. Use the Detail View to see additional information about the Dispatch.

Service Order Entry Screen - Dispatch - Detail (field) View - Detail Tab



1. Click the **Append** button (+) in the **Dispatch** section, to open a new Dispatch record. The Dispatch Number is generated by the system.
2. Enter a description for the Dispatch in the **Description** field.
3. Maint Select the Equipment ID to which this Service Order applies from the drop-down list in the **Equipment ID** field. If you have the SD Notify Warranty/Contract Business Rule set to “Yes”, a notification window will appear if the Site Equipment has a warranty or contract associated with it.
4. The **Equipment Description** appears. Accept or edit the Description.
5. Maint Accept or edit the **Location ID**, as applicable.
6. Accept or edit the **Priority** level for the dispatch.

   The Priority field allows you to set a priority for the Service Order. You can assign a default Priority level via the SD Business Rules. This field is for information only.

7. The **Status** field will display the current Status of the Dispatch.

8. The **Entry Date** will default in, and cannot be edited.

9. If the dispatch has been canceled, the **Canceled** check box will be marked.

10. If the dispatch has been put on hold, the **Hold** check box will be marked.

Maint

11. Select a Technician for the entire Dispatch from the **Requested Tech ID** drop-down list, if applicable. Otherwise, you can select multiple Technicians for the Dispatch on the Transactions tab at the bottom of the screen.

12. Enter the estimated travel time in hours in the **Est Travel (Hrs)** field.

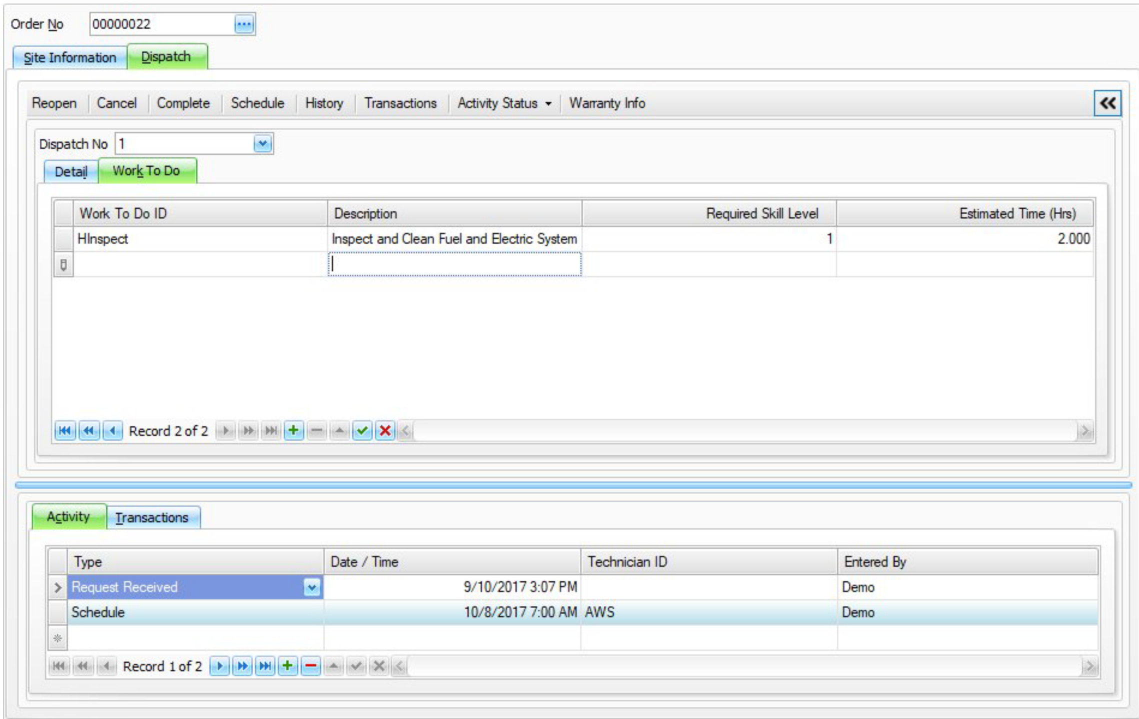
13. Enter a date and time into the **Requested Date** and **Requested AM/PM**, as applicable.

14. The estimated time to perform the work to do in hours will appear in the **Total Est (Hrs)** field.

    The total estimated time for the Dispatch in hours displayed in the Total Est (Hrs) field is the sum of the estimated travel time and the work to do IDs for the dispatch.

15. Enter the internal meter number in the **New Counter** field, if applicable. Examples of counters include the number of hours run, copies made, or pages printed. You can use these information-only numbers as diagnostic tools.

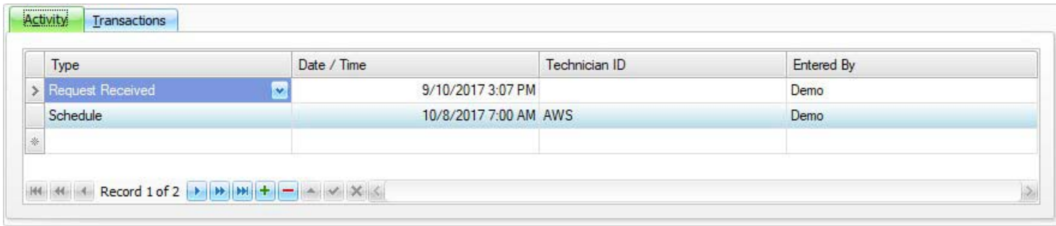
Service Order Entry Screen - Dispatch - Detail (field) View - Work To Do



16. Accept or select a **Dispatch Number** to which you want to assign work to do from the drop-down list, as necessary.
17. Click the **Append** button ( ) to add a new Work To Do record.
18. Select a Work To Do ID from the drop-down list in the **Work To Do ID** field.
19. The **Description** and **Required Skill Level** fields should display the information from the Work To Do record.
20. Accept or edit the **Estimated Time (Hrs)** for the work.
21. Repeat Steps 16-20 for each Work To Do ID you want to add to the Dispatch.
22. To finish changes to the Dispatch, click the **End Edit** button ( ).
23. Click the **Save** button on the toolbar to save your work.

Use the **Dispatch Activity** area of the screen to enter Activities done to the Dispatch.

Service Order Entry Screen - Dispatch - Activity Tab



24. Click the **Append** button (+) in the **Dispatch Activity** section, to open a new Dispatch Activity record.

25. Select the **Type** of activity you are entering for this dispatch.

    Some activity types will automatically be added to the Dispatch as things are done to the Dispatch. Below is a list of Activity Types and a description of those types.

    - **Request Received** - When the dispatch is first entered and saved an Activity is automatically added to indicate the request for the dispatch as been received.
    - **Schedule** - Select Schedule to schedule a Technician to use for this Dispatch. A record will be added if you have used the Schedule button to Schedule the Technician.
    - **Arrive/Start** - Select Arrive/Start when the Technician has arrived on the site of the Dispatch.
    - **Complete** - When the Complete button is selected and completed information is entered and saved, a record will be added to indicate the Dispatch is Complete.
    - **Cancel** - When the Cancel button has been selected and **Yes** is selected in the dialog box, a record will be added to indicate the dispatch has been Canceled.
    - **Reopen** - When the Reopen button has been selected and **Yes** is selected in the dialog box, a record will be added to indicate the Dispatch has been Reopened.
    - **Post** - When the dispatch has gone through the Prepare Invoices, Print Invoices, and Post Work Orders functions, a record will be added to indicate the Dispatch has been Billed to the Customer and Posted.

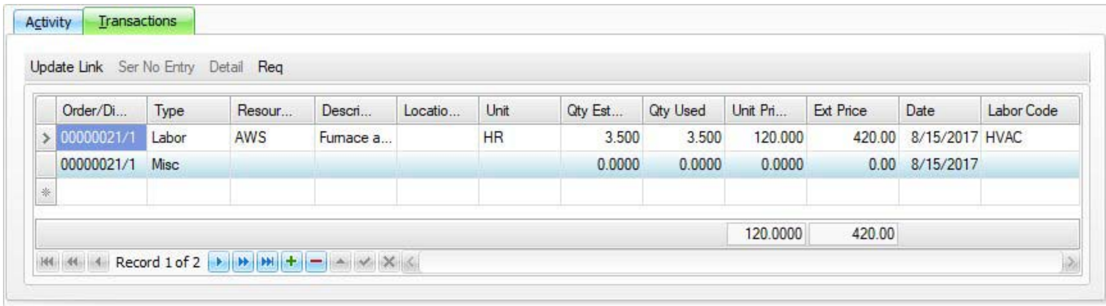
26. The **Date/Time** field will indicate the date and time the Activity was entered. When scheduling a Dispatch enter the date and time to schedule the Dispatch. When adding an Arrived/Start record enter the date and time the Technician arrived at the site and started their work.

Maint

27. Select the **Technician ID** for the Technician that has been scheduled for the Dispatch, arrived on site or completed the Dispatch.

28. When an activity record has been added the **Entered By** field will be filled in with the User ID of the user that entered or generated the Activity.

Service Order Entry Screen - Dispatch Tab - Transactions Tab



Use the **Transactions** tab to determine whether a Service Order Dispatch should have activity added, including Parts Costs, Freight Costs, or Labor Resources.

Transactions allow you to track your expenses on a Dispatch. These lines belong to the selected Dispatch, allowing you to generate unique labor and parts lists and record Dispatch completion details. The information on Transactions tab is then used to post costs for the Service Order.

If Service Director interfaces with Inventory, part quantities update Inventory on hand quantities online. Posting completed Service Orders updates dates, summary and detail history, and Serial and Lot information.

NOTE: Transactions may also be entered using the Transactions button on the Dispatch tab. Using the Transactions button will open the Transactions function (page 5-51).

29. Select a Dispatch for which to add Transactions.

30. Click the **Append** button (+), at the bottom of the tab, to add a record.

31. Select the Type of transaction you are adding from the **Type** field drop-down list: **Labor**, **Part**, **Freight**, or **Misc**.

    The **Order/Dispatch** will fill in automatically from the Work Order you are working with, and the Dispatch you selected.

Maint

32. If applicable, select a **Resource ID** from the drop-down list.

    - If you selected **Labor** in the **Type** field, the drop-down list will show your Technicians.

- If you selected **Part** in the **Type** field, the drop-down list field will show your parts.
- This field is disabled for **Freight** and **Misc** types.

33. Enter a Description into the **Description** field. If the resource is a Part, the Item description will display in this field; otherwise enter a Description.

Maint

34. If you selected a **Part** in the **Resource ID** field, select a Location from the **Location ID** field drop-down list. Otherwise, the **Location ID** field will be blank. This field is disabled for **Freight** and **Misc** types.
35. The **Unit** field will display the Units of measure for the Part selected in the **Resource ID** field, or the value **HR** if **Labor** is selected in the **Type** field. This field is disabled for **Freight** and **Misc** types.
36. Enter the estimated quantity of the **Part** or **Labor** into the **Qty Estimated** field. This field is disabled for **Freight** and **Misc** types.
37. Enter the quantity used into the **Qty Used** field. This field is disabled for **Freight** and **Misc** types.
38. If you selected **Labor** or **Part** in the **Type** field, the Unit Price displays in the **Unit Price** field. You may change the Unit Price. This field is disabled for **Freight** and **Misc** types.
39. If you selected **Labor** or **Part** in the **Type** field, the **Ext Price** is calculated using the **Qty Used** and the **Unit Price** amounts. This field is disabled for **Freight** and **Misc** types.
40. Select or enter a transaction date in the **Trans Date** field. By default, this field will display the current date.

Maint

41. If you selected **Labor** in the **Type** field, select a Labor Code from the drop-down list in the **Labor Code** field.

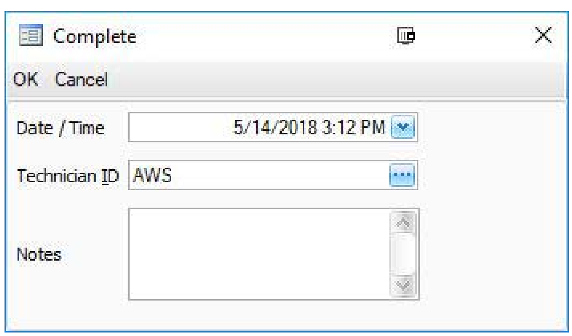
NOTE: To include a Freight or Misc amount on the invoice, use the column chooser to bring the Ext Cost field into your grid, and enter the amount to be billed into this Ext Cost field.

42. Click the **Save** button , on the toolbar to save your work.

Command Buttons

Name	Description
Reopen	Open a closed dispatch.
Cancel	Cancel a dispatch.
Complete	Complete a dispatch.
Schedule	Open the Schedule Info and the Calendar windows and allow you to schedule a technician or crew to a date and time to perform the dispatch work to do.
History	Display the Equipment History View for the equipment used in the selected Dispatch.
Transactions	Opens the Transactions function.
Activity Status	Add an Activity from the list of Activity Statuses.
Warranty/Contract	Include prompts for Warranty and Contract information for the Site Equipment in the Dispatch.

Service Order Entry Screen - Complete

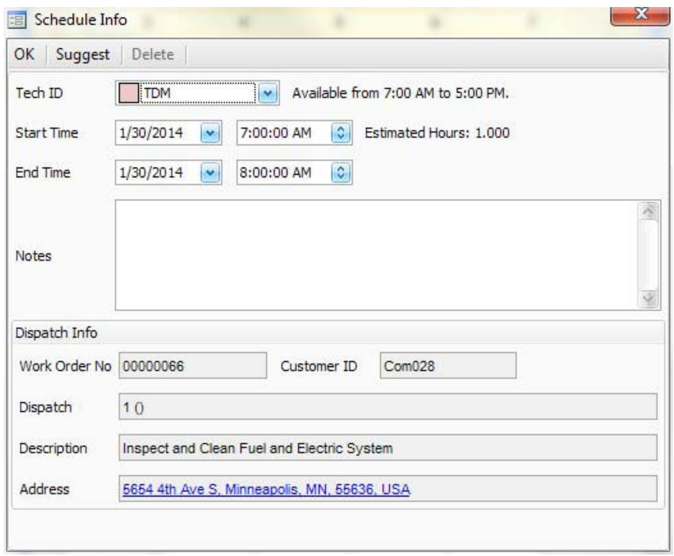


Use the **Complete** button to change the Status of the Dispatch to Complete. This is saying the work has been done on this Dispatch and it is ready to be posted. Once the Dispatch has been completed no more transactions can be saved to the Dispatch.

Multiple Dispatches may be closed at the same time by selecting the first Dispatch to close, hold your Shift key and select the last dispatch to close. This will select the range of dispatches and close all at once. To close non-consecutive dispatches select one dispatch and hold the Ctrl key and select the next Dispatch to close.

1. Enter or select the **Date/Time** the Dispatch was completed.
2. Select the **Technician ID** for the Technician that completed the Dispatch.
3. Enter any **Notes** referring to the completion of the Dispatch.

Work Order Entry Screen - Schedule



The **Schedule Information** window allows you to select a Technician or Crew, set Start and End Times, and add Notes to the calendar entry for a Dispatch.

The **Dispatch Info** section of the window displays details of the Dispatch. If you have a default mapping program selected and Allow Web Features enabled in the SM Business Rules, and click on the Address link, your default mapping program will display a map of the address.

A Calendar window will also be opened and displayed behind the Schedule Info screen so you may see on the Calendar the Dispatches that have already been Scheduled.

1. Select a **Tech ID** from the list of Technicians to Schedule for this Dispatch. Information about the availability of the Technician will be displayed next to the Tech ID field.
2. Select the **Start Time** and date for the time the Dispatch work should start.
3. Select the **End Time** and date for the time the Dispatch work should end.

4. Enter **Notes** about the Dispatch for the Technician working on the Dispatch.

Command Buttons

Name	Description
OK	Add the entry to the calendar.
Suggest	Have TRAVERSE suggest a schedule time based on Dispatch Requested Date (if available), Requested Tech ID (if entered), Work To Do Labor Code, and the Schedules of the available Technicians who can do the work.
Delete	Delete the scheduled entry from the Calendar.

Activity Status Button

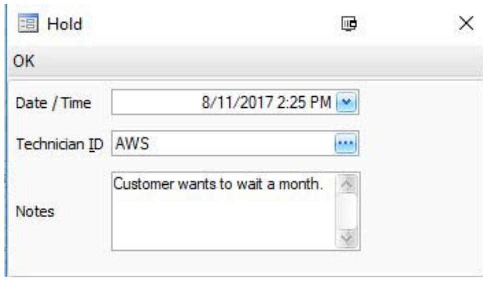
Select the **Activity Status** button to add an Activity for the Dispatch. The Activity Status gives you more options for defining and managing dispatches while ensuring the business logic triggered by a change in status remains. See the Activity Status setup function for details (page 3-113).

Clicking on the Activity Status button will give you a menu list of Activity Statuses that have been set up by the system or manually in the Activity Status function.

When Activity Statuses were set up, an Action was assigned to the Activity Status, which affects the Type of Activity added, and the Status of the Dispatch:

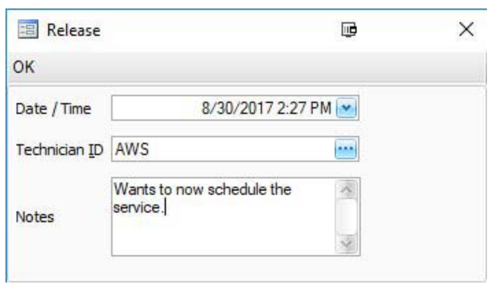
- **None** - No action is performed. An Activity is added for reference purposes.

- **Hold** - Put the dispatch on Hold to prevent any transactions from being entered, or any scheduling of the Dispatch to a Technician. When an Activity Status with the Action of Hold is selected, a dialog box will be displayed to enter the **Date/Time**, **Technician ID**, and **Notes** about putting the Dispatch on Hold.



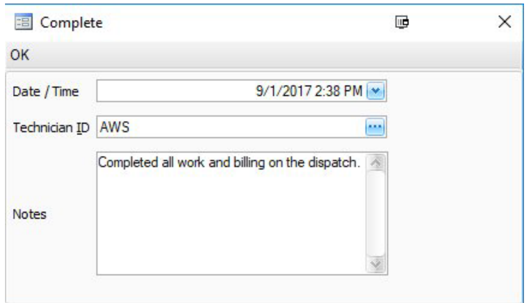
Click **OK** to add an Activity and change the Status of the Dispatch to Hold.

- **Release** - If the status of the Dispatch is Hold, the status of the Dispatch will change to Released. When an Activity Status with the Action of Release is selected, a dialog box will be displayed to enter the Date/Time, Technician ID, and Notes about releasing the on Hold Dispatch.



Click **OK** to add an Activity and change the Status of the Dispatch to Released.

- **Complete** - When all the transactions and services for the Dispatch is completed, the status will change to Completed. When an Activity Status with an Action of Complete is selected a dialog box will be displayed to enter the Date/Time, Technician ID, and Notes about the completion of the Dispatch.



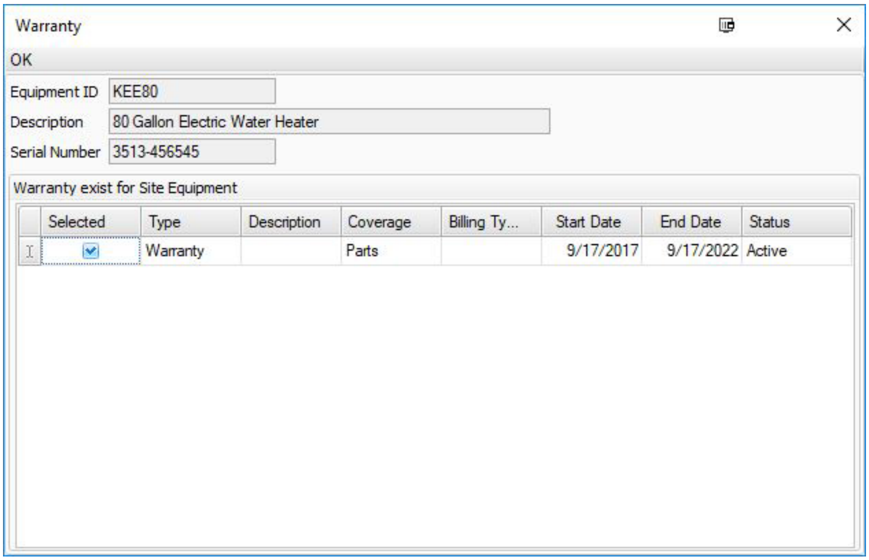
Click **OK** to add an Activity and change the Status of the Dispatch to Complete.

- **Cancel** - If the status of the Dispatch is Open, and no transactions exist for the Dispatch Cancel the Dispatch. A Canceled Dispatch can be reopened using an Activity Status that has an Action of Reopen. A confirmation message will be displayed asking if you are sure you want to Cancel the Dispatch. Select **Yes** to Cancel the Dispatch.
- **Reopen** - If the Dispatch is Canceled, set the status of the Dispatch to Open. A confirmation message will be displayed asking if you are sure you want to Reopen the Dispatch. Select **Yes** to Reopen the Dispatch.

Warranty/Contract Button

Use the **Warranty/Contract** button to include any warranty and/or contract information for the Site Equipment entered into the Dispatch.

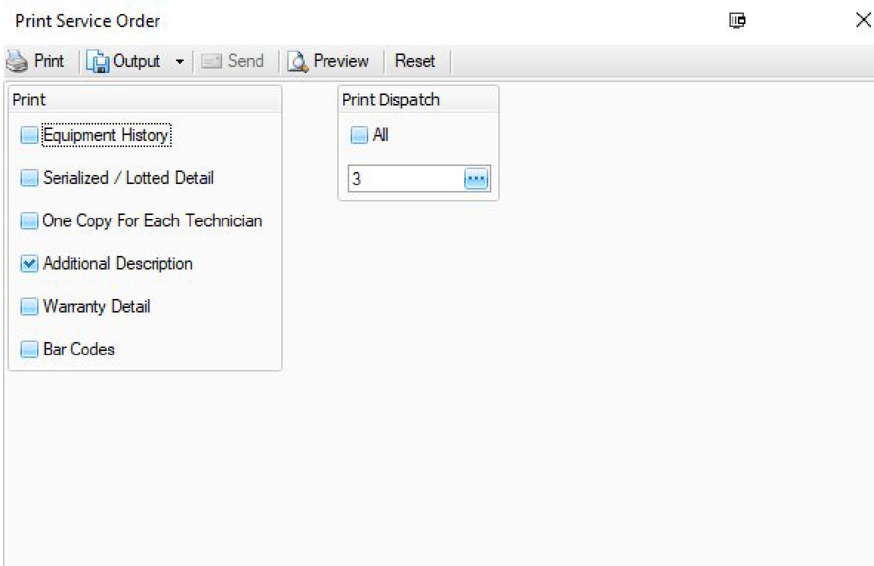
Work Order Entry Screen - Warranty/Contract



- The **Equipment ID**, **Description**, and **Serial Number** of the Equipment entered into the Dispatch is displayed.
- Any Warranty and Contract information set up for the Equipment is displayed with the **Type**, **Description**, **Coverage**, **Billing Type**, **Start Date**, **End Date**, and **Status** are displayed.
- Check the **Selected** check box for the Warranty and Contract information you want included in the Dispatch; otherwise clear the check box.
- Click **OK** to save the Selected Warranty and Contract information for the Dispatch's Equipment.

Printing a Service Order online

Print Online Service Order Dialog Box



You may print a Service Order for the current Service Order you have displayed on your screen. Follow the steps below to print the Service Order online.

1. The Print Online Service Orders screen appears when you click **Print** and **Order** on the Service Orders screen.
2. To **Print** the **Equipment History** information on the Service Order, select the check box; otherwise, clear it.
3. To **Print Serialized/Lotted Detail** on the Service Order, select the check box; otherwise, clear it.
4. To **Print Prices** on the Service Order, select the check box; otherwise, clear it.
5. To **Print One Copy for Each Technician** for the Service Order, select the check box; otherwise, clear it.
6. To **Print Additional Descriptions** for the Service Order, select the check box; otherwise, clear it.
7. To **Print Warranty Detail** for the Service Order, select the check box; otherwise, clear it.
8. To **Print Barcodes** for the Service Order, select the check box; otherwise, clear it.

9. Select the **All** check box in the **Print Dispatch** area to print the Service Order for all Dispatches. Otherwise clear it, and select the Dispatch to print from the list of Dispatches.

10. Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the work order on your monitor.
Output	Output the work order as a .pdf file and save it.
Print	Print the work order.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Online Service Order

PAGE 1

TRAVERSE

Continental Products Unlimited
4301 Dean Lakes Blvd
Shakopee, MN 55379
UNITED STATES
(952)-403-5700

Order No 00000021

LOC INFO

MD0001
Mark Jenkins
3117 SUMTER ROAD
BALTIMORE, MD 23849

Contact
Phone (410)-222-3333

Dispatch No 1 **Received Date** 9/10/2017 3:07 PM **Requested Tech ID** **Status** Request Received

Serial No 3513-456545 **Tag No**
Item ID **Equipment Description** 80 Gallon Electric Water Heater
Equipment ID KEE80 **Priority** 0
Description Inspect and Clean

Notes

Work To Do

Work To Do ID	Description	Required Skill Level	Estimated Time (Hrs)
HInspect	Inspect and Clean Fuel and Electric System	1	2.000
ERepair	General Electrical Repair	3	1.500

Warranty

Coverage Type	Start Date	End Date
Parts	9/17/2017	9/17/2022

Transactions

Type	Resource ID	Description	Qty Estimated	Qty Used	Unit
Labor	AWS	Furnace and Air	3.500	3.500	HR

Working with a Dispatch

Schedule a dispatch

1. Click the **Schedule** command button to open the Calendar. A Schedule Info window will appear.
2. Select the **Tech ID**, **Start Time**, and **End Time** from the associated field drop-down lists.
3. Click **OK** to set the time for the selected Technician on the Calendar. The Calendar will open and display the scheduled Dispatch. Close the Calendar to return to the Service Order Entry function.

Record arrive/start time on a dispatch

1. Click on a new line in the **Activity** section to start a new record.
2. Select **Arrive/Start** from the drop-down list in the **Type** field. The workstation's current date and time will display in the **Date/Time** field. Change the date or time if necessary, and select the Technician from the **Technician ID** drop-down list.
3. Select the **Tech ID**, **Start Time**, and **End Time** from the associated field drop-down lists.
4. Click the **End Edit** button ( ) to complete the entry.
5. Click the **Save** button on the toolbar to save your work.

Complete a dispatch

1. Click the **Complete** command button to open the Complete window.
2. Enter or Select the completion date and time from the **Date/Time** field drop-down list. This will default to the current date and time.
3. Select the **Technician ID** from the drop-down list. This field will default to the Technician listed for the **Arrive/Start** activity.
4. Enter **Notes** about the Complete activity.
5. Click the **OK** button to complete the entry. The dispatch status now shows **Completed**, and a **Complete** entry will appear in the **Activity** section of the **Dispatch** tab.
6. Click the **Save** button on the toolbar to save your work.

Add Parts, Labor, Freight, or Miscellaneous costs to a Dispatch

1. Click the **Transactions** command button, or the Transactions tab, to open the **Work Order Transaction** function. To display all of the available fields, click the Detail Toggle button (»), if you go to the Transactions function.
2. Click the **New Record** button , on the tool bar to add a record. The Work Order Number/Dispatch line will display in the **Dispatch ID** field of the new line.
3. Select the Type of transaction you are adding from the **Type** field drop-down list.
4. If applicable, select a **Resource ID** from the drop-down list. If you selected **Labor** in the **Type** field, the drop-down list will show your Technicians. If you selected **Part** in the **Type** field, the drop-down list will show field will show your Items.
5. Enter a description into the **Description** field. If the resource is a Part, the Item description will display in this field.
6. If you selected a **Part** in the **Resource ID** field, select a location from the **Location ID** field drop-down list. Otherwise, the **Location ID** field will be blank.
7. The **Unit** field will display the units of measure for the part selected in the **Resource ID** field, or the value **HR** if **Labor** is selected in the **Type** field.
8. Enter the estimated quantity of the Part or Labor into the **Qty Estimated** field.
9. Enter the quantity used into the **Qty Used** field.
10. If you selected **Labor** or **Part** in the **Type** field, the Unit Price displays in the **Unit Price** field. You may change the Unit Price.
11. If you selected **Labor** or **Part** in the **Type** field, the extended price is calculated using the **Qty Used** and the **Unit Price** amounts. If you selected **Freight** or **Misc** in the **Type** field, enter a cost in the **Ext Price** field.
12. Select or enter a transaction date in the **Trans Date** field. By default, this field will display the current date.
13. If you selected **Labor** in the **Type** field, select a Labor Code from the drop-down list in the **Labor Code** field.
14. Click the **Save** button on the toolbar to save your work.

Cancel or delete a Dispatch

NOTE: You cannot delete a Dispatch if the Dispatch's status is Posted, Billed, or Completed, or if the Dispatch has transactions.

1. Select the Dispatch you would like to cancel or delete.
2. Click the **Cancel** command button to cancel the Dispatch.
3. A confirmation window will appear. Confirm the cancellation. A **Cancel** activity will be added to the **Activity** section of the **Dispatch** tab.

Reopen a Dispatch

NOTE: You can Reopen a Dispatch if the selected Dispatch status is Open, and the selected Dispatch is Canceled.

1. Select the Dispatch you would like to Reopen.
2. Click the **Reopen** command button to reopen the dispatch.
3. A confirmation window will appear. Confirm the Reopen action. A **Reopen** activity will be added to the **Activity** section of the **Dispatch** tab.

Creating a New Activity

1. Click the **Append** button ( ) in the Activity section, to add a new Activity entry to the Dispatch record.
2. Select a type of Activity from the drop-down list in the **Type** field.
3. The **Date/Time** field will default to the current date and time when a new Activity is created. Enter or select a different date from the calendar control if applicable.
4. If a Technician will perform the Activity, select a Technician from the drop-down list in the **Technician ID** field.
5. The **Entered By** field will display the name of the User who added the Activity to the Dispatch.
6. Enter any notes for the activity in the **Notes** field.
7. To finish changes to the Dispatch, click the **End Edit** button ( ).
8. Click the **Save** button on the toolbar to save your work.

GENERATE SERVICE ORDERS

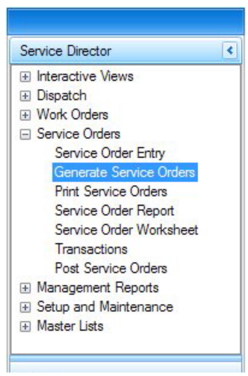
Use the **Generate Service Orders** function to generate Service Orders for all Site Equipment where the Next Due Date is not later than the End Date or the Maintenance Due Date, and the End Date is not earlier than the Maintenance Due Date.

After generating Service Orders, a log report showing the Service Orders generated will display. Each Service Order listed will have a Dispatch record, as well as a Request Received activity record, when you use the Service Order Entry function to maintain the Service Order.

To **Generate Service Orders**, follow these steps:

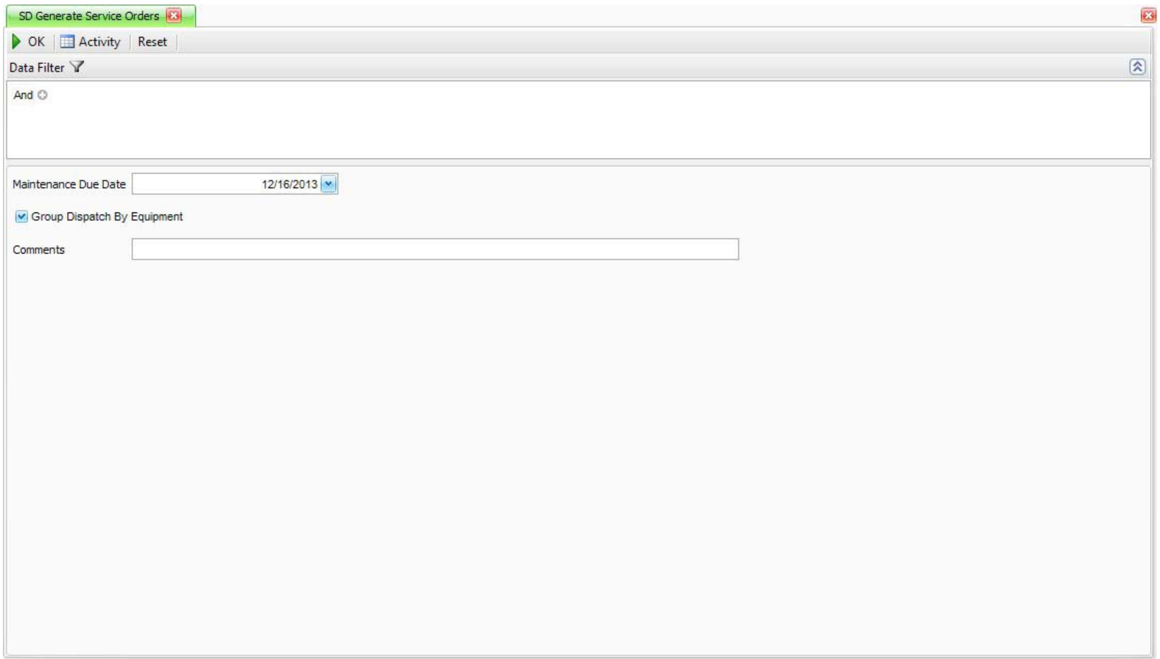
1. Select **Generate Service Orders** from the **Service Orders** menu.

Generate Service Orders Menu



2. The **Generate Service Orders** screen appears.

Generate Service Orders Screen



3. Use the **Data Filter** to select the range of filtering options or leave the filter blank to include all available data.

4. Service Orders with a Maintenance Due Date on or before the value in the **Maintenance Due Date** field will be generated.

5. Marking the **Group Dispatch by Equipment** check will cause the Dispatches to be grouped by Equipment ID.

6. Use the **Comments** to add Comments to the Service Orders.

7. Select a command button:

Command Buttons

Name	Description
OK	Begin processing. A message appears when service orders have been generated successfully.
Reset	Set all fields to their default.
Activity	See a record of the occurrences of generating work orders. Click the **Print Log** button view the Generate Service Orders log from that activity occurrence.

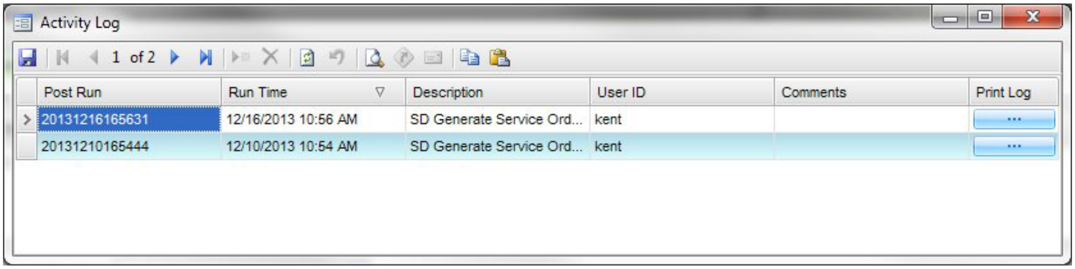
NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

8. Click **Close** to return to the main menu.

Activity Log

Use the **Activity Log** to view all post activity for administrative purposes.

Activity Log Screen



Name	Displays
Post Run	The system assigned post run ID.
Run Time	The date and time the generate orders was made.
Description	The generate orders description.
User ID	The user who performed the generate orders.
Comments	The comments, if applicable, entered in the Comments field.
Print Log	A PDF version of the original log file if you click the ... button.

Generate Service Orders Report

Consolidated Service Director
Generate Orders Log

PAGE 1

Report Filter
Maintenance Due Date 12/16/2013 Group Dispatch By Equipment Yes
Comments

Order No Location ID
00000057 MD0001

Dispatch No Equipment ID Equipment Description
1 KEE80 80 Gallon Electric Water Heater

Work To Do ID Description
HInspect Inspect and Clean Fuel and Electric System

00000058 MN0001

Dispatch No Equipment ID Equipment Description
1 KEE80 80 Gallon Electric Water Heater

Work To Do ID Description
HInspect Inspect and Clean Fuel and Electric System

00000059 MN0002

Dispatch No Equipment ID Equipment Description
1 KEE80 80 Gallon Electric Water Heater

Work To Do ID Description
HInspect Inspect and Clean Fuel and Electric System

00000060 TX0001

Dispatch No Equipment ID Equipment Description
1 KEE80 80 Gallon Electric Water Heater

Work To Do ID Description
HInspect Inspect and Clean Fuel and Electric System

*** End of Report ***

12/16/2013 10:56 AM kenthe

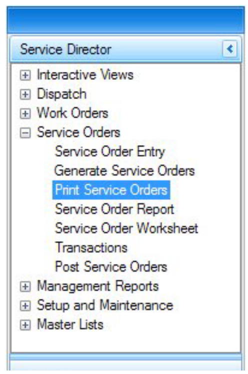
PRINT SERVICE ORDERS

Use the **Print Service Orders** function to print Service Orders. If you printed Service Orders from the Service Order Entry screen the Service Orders will not reprint.

To **Print Service Orders**, follow these steps:

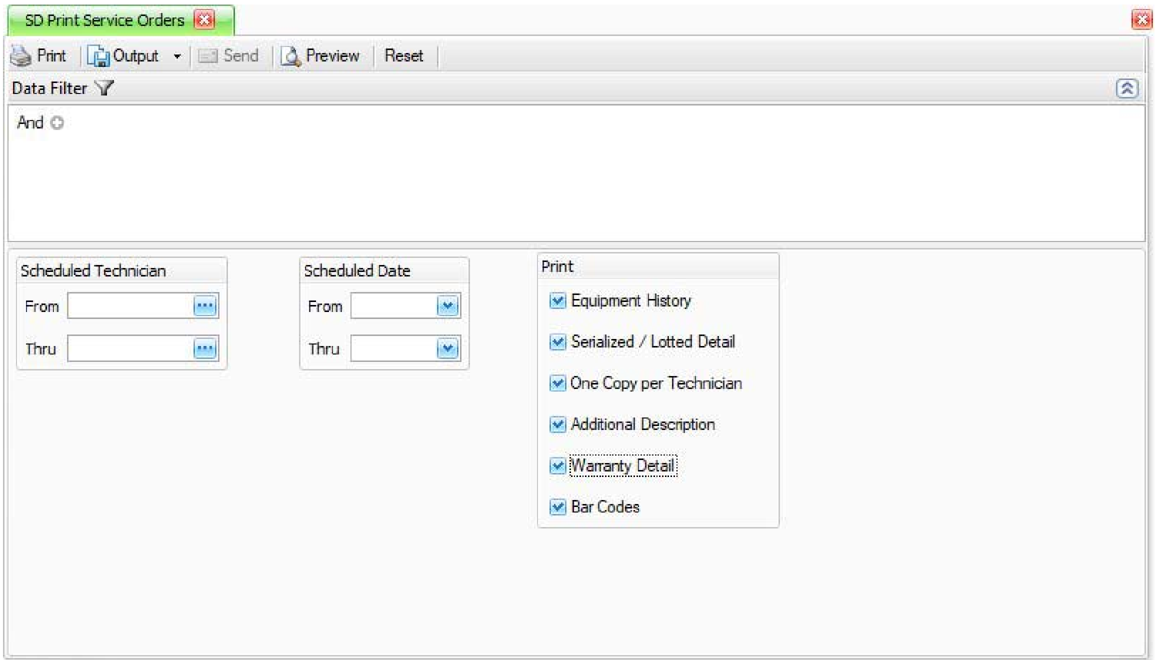
1. Select **Print Service Orders** from the **Service Orders** menu.

Print Service Orders Menu



2. The **Print Service Orders** screen appears.

Print Service Orders Screen



3. Use the **Data Filter** to select the range of filtering options or leave the filter blank to include all available data.
4. Select the range of **Scheduled Technicians From** and **Thru**, for the printed Service Orders. Only Service Orders assigned to Technicians within the range selected will be printed. Leave the From and Thru fields blank to include all Technicians.
5. Select the range of **Scheduled Dates From** and **Thru**, for the printed Service Orders. Only Service Orders scheduled within the range selected will be printed. Leave the From and Thru fields blank to include all Scheduled Dates.
6. Select from the list of additional information to **Print** on the Service Orders.
    - Select the **Equipment History** check box to include historical information for the equipment on the Service Orders.
    - Select the **Serialized/Lotted Detail** check box to include serial or lot details from the parts used on the Service Orders.
    - Select the **One Copy per Technician** check box to print a copy of the Service Order for each Technician assigned to the Service Order.

- Select the **Additional Descriptions** check box to print the Additional Descriptions entered into the Service Order.
- Select the **Warranty Detail** check box to print the Warranty information for equipment with Warranty information entered, on the Service Order.
- Select the **Bar Codes** check box to print Bar Codes on the Service Order.

7. Select a command button:

Command Buttons

Name	Description
Print	Print the order.
Output	Output the report as a .pdf file and save it.
Preview	Preview the order on your monitor.
Reset	Set all fields to their defaults.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Service Order

PAGE 1

TRAVERSE

Continental Products Unlimited
4301 Dean Lakes Blvd
Shakopee, MN 55379
UNITED STATES
(952)-403-5700

Order No 00000021

LOC INFO

MD0001
Mark Jenkins
3117 SUMTER ROAD
BALTIMORE, MD 23849

Contact
Phone (410)-222-3333

Dispatch No 1 **Received Date** 9/10/2017 3:07 PM **Requested Tech ID** **Status** Request Received

Serial No 3513-456545 **Tag No**
Item ID **Equipment Description** 80 Gallon Electric Water Heater
Equipment ID KEE80 **Priority** 0
Description Inspect and Clean

Notes

Work To Do

Work To Do ID	Description	Required Skill Level	Estimated Time (Hrs)
HInspect	Inspect and Clean Fuel and Electric System	1	2.000
ERepair	General Electrical Repair	3	1.500

Warranty

Coverage Type	Start Date	End Date
Parts	9/17/2017	9/17/2022

Transactions

Type	Resource ID	Description	Qty Estimated	Qty Used	Unit
Labor	AWS	Furnace and Air	3.500	3.500	HR

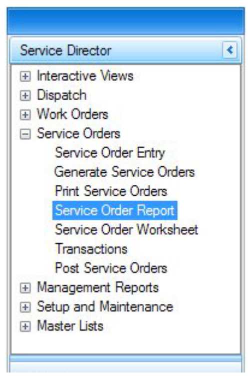
SERVICE ORDER REPORT

Use the **Service Order Report** function to print details about open Service Orders that you have not posted. In summary form, the report lists Dispatch Status and scheduling information on individual Dispatch lines for quick review. In detail form, the report lists Site Equipment, scheduling, and labor and parts information.

To print the **Service Order Report**, follow these steps:

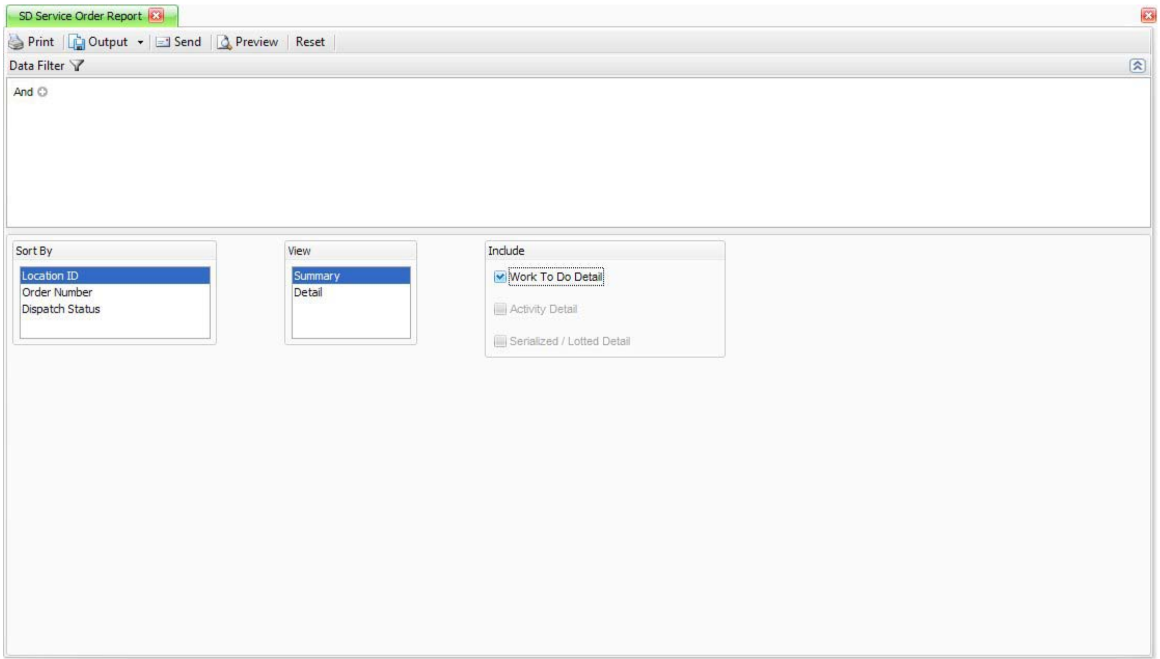
1. Select **Service Order Report** from the **Service Orders** menu.

Service Order Report Menu



2. The **Service Order Report** screen appears.

Service Order Report Screen



3. Use the **Data Filter** to select the range of filtering options or leave the filter blank to include all available data.
4. Select a **Sort By** option to sort the report by: **Location ID**, **Order Number**, or **Dispatch Status**.
5. Select a **View**:
    - **Summary** to see only a summary of the options.
    - **Details** to see the details of the Service Orders.
6. Additional report options to **Include**:
    - Select the **Work To Do Detail** check box to include details of the Work To Do IDs.
    - Select the **Activity Detail** check box to include details of the Activity done on the Service Orders.
    - Select the **Serialized/Lotted Detail** check box to include Serial or Lot details from the parts used on the Service Orders.

NOTE: The Activity Detail, and Serialized/Lotted Detail check boxes will be available when the Detail View is selected.

7. Select a command button:

Command Buttons

Name	Description
Print	Print the report.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Preview	Preview the report on your monitor.
Reset	Set all fields to their defaults.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Service Order Report - Detail

Consolidated Service Director
Service Order Report (Detail)
Sorted by Location ID

PAGE 1

Report Filter

Include Work To Do Detail	Yes	Include Activity Detail	Yes
Include Serialized / Lotted Detail	No		

Order No	00000021	Location ID	MD0001	Loc Address	3117 SUMTER ROAD BALTIMORE, MD 23849
Order Date	11/22/2013				

Dispatch No	1	Entry Date	11/8/2013
Description	Inspect and Clean	Status	Open
Equipment ID	KEE80	Hold	No
Equipment Description	80 Gallon Electric Water Heater	Request Received Date	11/8/2013 3:07 PM
Est Travel (Hrs)	0.500	Requested Date	12/1/2013
Total Est (Hrs)	4.000	Requested AM / PM	None
New Counter		Requested Tech ID	
Location ID	CA0001	Cancelled	No

Work To Do

Work To Do ID	Description	Required Skill Level	Estimated Time (Hrs)
ERepair	General Electrical Repair	3	1.500
HInspect	Inspect and Clean Fuel and Electric System	1	2.000

Dispatch No	2	Entry Date	11/11/2013
Description	Other Services	Status	Open
Equipment ID	KEE80	Hold	No
Equipment Description	80 Gallon Electric Water Heater	Request Received Date	11/11/2013 10:07 AM
Est Travel (Hrs)	0.500	Requested Date	12/11/2013
Total Est (Hrs)	3.500	Requested AM / PM	None
New Counter		Requested Tech ID	
Location ID	CA0001	Cancelled	No

Work To Do

Work To Do ID	Description	Required Skill Level	Estimated Time (Hrs)
Other	Other services	4	3.000

12/16/2013 11:02 AM kenthe

Service Order Report - Summary

Consolidated Service Director
Service Order Report (Summary)
Sorted by Location ID

PAGE 1

Report Filter
Include Work To Do Detail Yes

Order No	Dispatch No	Location ID	Received	Status	Date / Time	Technician ID
00000021	1	MD0001	11/8/2013 3:07 PM	Request Received	11/8/2013 3:07 PM	
	Work To Do ID	**Description**				
	ERepair	General Electrical Repair				
	HInspect	Inspect and Clean Fuel and Electric System				
00000021	2	MD0001	11/11/2013 10:07 AM	Request Received	11/11/2013 10:07 AM	
	Work To Do ID	**Description**				
	Other	Other services				
00000050	1	MD0001	12/10/2013 10:54 AM	Request Received	12/10/2013 10:54 AM	
	Work To Do ID	**Description**				
	HInspect	Inspect and Clean Fuel and Electric System				
00000057	1	MD0001	12/16/2013 10:56 AM	Request Received	12/16/2013 10:56 AM	
	Work To Do ID	**Description**				
	HInspect	Inspect and Clean Fuel and Electric System				
00000022	1	MN0001	11/8/2013 3:07 PM	Scheduled	12/6/2013 7:00 AM	AWS
	Work To Do ID	**Description**				
	HInspect	Inspect and Clean Fuel and Electric System				
00000022	2	MN0001	11/11/2013 10:20 AM	Scheduled	12/11/2013 8:00 AM	AWS
	Work To Do ID	**Description**				
	Other	Other services				
00000051	1	MN0001	12/10/2013 10:54 AM	Request Received	12/10/2013 10:54 AM	
	Work To Do ID	**Description**				
	HInspect	Inspect and Clean Fuel and Electric System				
00000056	1	MN0001	12/16/2013 10:50 AM	Scheduled	12/16/2013 7:00 AM	TDM
	Work To Do ID	**Description**				
	HClean	Ductwork Cleaning				
00000058	1	MN0001	12/16/2013 10:56 AM	Request Received	12/16/2013 10:56 AM	
	Work To Do ID	**Description**				
	HInspect	Inspect and Clean Fuel and Electric System				
00000024	1	MN0002	11/8/2013 3:08 PM	Scheduled	12/3/2013 7:00 AM	AMK
	Work To Do ID	**Description**				
	HInspect	Inspect and Clean Fuel and Electric System				

12/16/2013 11:01 AM **kenthe**

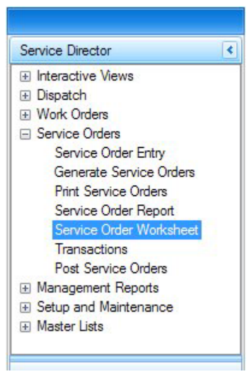
SERVICE ORDER WORKSHEET

Use the **Service Order Worksheet** function to print information about scheduled Service Orders that your Technicians can use to record Notes, equipment problems, detailed fixes, or other information. Only Dispatches with a status of Scheduled appear on the Worksheet. The summary format gives basic Dispatch information on one line for quick review while the detail format lists more information and provides space for notes.

To print the **Service Order Worksheet**, follow these steps:

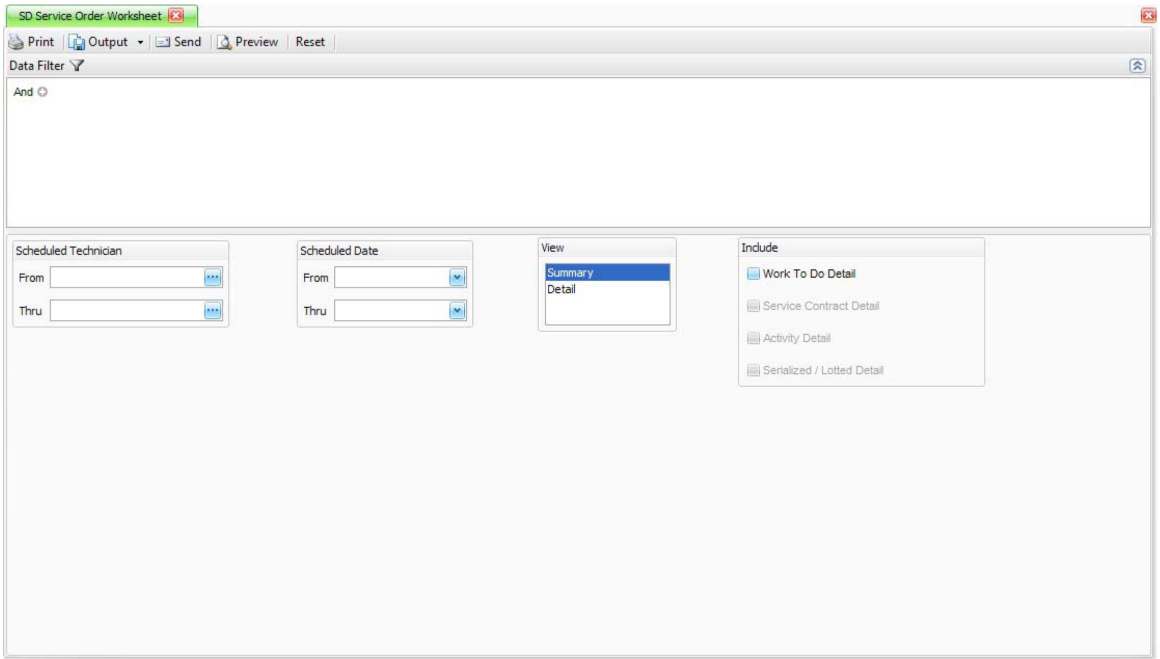
1. Select **Service Order Worksheet** from the **Service Orders** menu.

Service Order Worksheet Menu



2. The **Service Order Worksheet** screen appears.

Service Order Worksheet Screen



3. Use the **Data Filter** to select the range of filtering options or leave the filter blank to include all available data.

4. Select the range of **Scheduled Technicians From** and **Thru**, for the Service Orders. Only Service Orders assigned to Technicians within the range selected will be printed. Leave the From and Thru fields blank to include all Technicians.

5. Select the range of **Scheduled Dates From** and **Thru**, for the Service Orders. Only Service Orders scheduled within the range selected will be printed. Leave the From and Thru fields blank to include all Scheduled Dates.

6. Select a **View**:
    - **Summary** to see only a summary of the options.
    - **Details** to see the details of the Service Orders.

7. Select from the list of additional report options to **Include**:
    - Select the **Work To Do Detail** check box to include details of the Work To Do IDs.

- Select the **Service Contract Detail** check box to include details of the Service Order Service Contracts.
- Select the **Activity Detail** check box to include details of the activity done on the Service Orders.
- Select the **Serialized/Lotted Detail** check box to include Serial or Lot details from the parts used on the Service Orders.

NOTE: The Service Contract Detail, Activity Detail, and Serialized/Lotted Detail check boxes will be available when the Detail View is selected.

8. Select a command button:

Command Buttons

Name	Description
Print	Print the report.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Preview	Preview the report on your monitor.
Reset	Set all fields to their defaults.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Service Order Worksheet - Detail

Consolidated Service Director
Service Order Worksheet (Detail)
PAGE 3

Order No	00000022	Location ID	MN0001	Loc Address	453 LAKE DRIVE MINNEAPOLIS, MN 55355	Contact	Dave Smith
						Phone	(612)-888-8785

Dispatch No 1 Request Received Date 11/8/2013 3:07 PM
Equipment ID KEE80 Equipment Description 80 Gallon Electric Water Heater
Item ID Serial No
Tag No

Est Travel (Hrs) 0.500
Total Est (Hrs) 2.500

Work To Do

Work To Do ID	Description	Required Skill Level	Estimated Time (Hrs)
HInspect	Inspect and Clean Fuel and Electric System	1	2.000

Activity

Status	Date / Time	Technician ID	Entry Date	Entered By
Scheduled	12/6/2013 7:00 AM	AWS	11/11/2013	Demo

12/16/2013 11:06 AM kenthe

Service Order Worksheet - Summary

Consolidated Service Director PAGE 1
Service Order Worksheet (Summary)

Report Filter
Scheduled Technician From **Scheduled Technician Thru**
Scheduled Date From **Scheduled Date Thru**
Include Work To Do Detail Yes

Order No	Dispatch No	Location ID	Phone	Contact	Scheduled Date / Time	Technician ID
00000021	1	MD0001	(410)-222-3333	Mark Jenkins		
Work To Do ID		**Description**				
ERepair		General Electrical Repair				
HInspect		Inspect and Clean Fuel and Electric System				
00000021	2	MD0001	(410)-222-3333	Mark Jenkins		
Work To Do ID		**Description**				
Other		Other services				
00000022	1	MN0001	(612)-888-8785	Dave Smith	12/6/2013 7:00 AM	AWS
Work To Do ID		**Description**				
HInspect		Inspect and Clean Fuel and Electric System				
00000022	2	MN0001	(612)-888-8785	Dave Smith	12/11/2013 8:00 AM	AWS
Work To Do ID		**Description**				
Other		Other services				
00000024	1	MN0002	(612)-456-5566	Chris Nelson	12/3/2013 7:00 AM	AMK
Work To Do ID		**Description**				
HInspect		Inspect and Clean Fuel and Electric System				
00000024	2	MN0002	(612)-456-5566	Chris Nelson	12/5/2013 8:00 AM	AMK
Work To Do ID		**Description**				
Other		Other services				
00000025	1	TX0001	(214)-888-9999	Jason Hill		
Work To Do ID		**Description**				
HInspect		Inspect and Clean Fuel and Electric System				
00000025	2	TX0001	(214)-888-9999	Jason Hill		
Work To Do ID		**Description**				
ERough		Electrical Rough-In				
00000050	1	MD0001	(410)-222-3333	Mark Jenkins		
Work To Do ID		**Description**				
HInspect		Inspect and Clean Fuel and Electric System				
00000051	1	MN0001	(612)-888-8785	Dave Smith		

12/16/2013 11:05 AM **kenthe**

TRANSACTIONS

Use the **Transactions** function to determine whether a Service Order Dispatch should have activity added, including Parts costs, Freight costs, or Labor resources.

Transactions allow you to track your expense Items on a Dispatch. These lines belong to individual Dispatches, allowing you to generate unique Labor and Parts lists and record Dispatch completion details. The information in Transactions is then used to post costs.

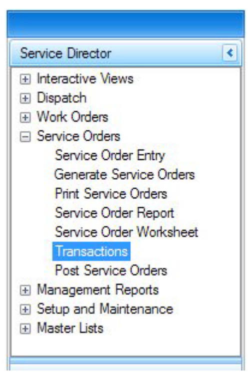
If Service Director interfaces with Inventory, part quantities update Inventory On Hand quantities online. Posting Service Orders updates dates, summary and detail history and serial and lot information.

Transactions added using the Transactions tab on the Service Order Entry, Dispatch tab (page 5-14), will be displayed and can be edited if appropriate.

To work with **Transactions**, follow these steps:

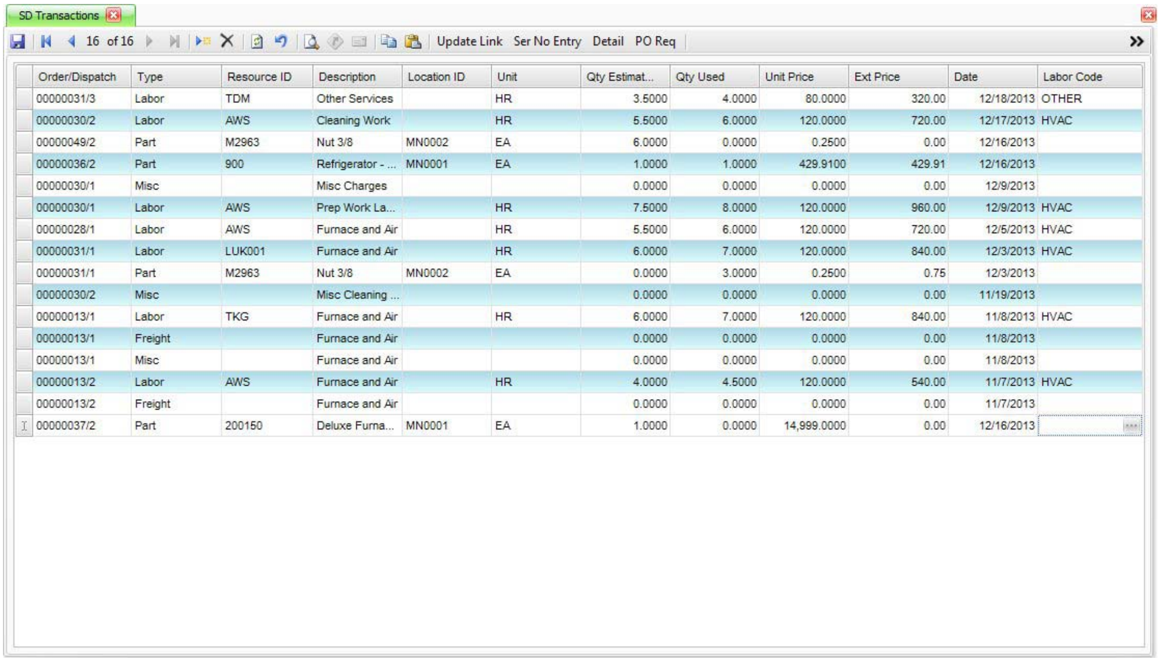
1. Select **Transactions** from the **Service Orders** menu.

Transactions Menu



2. The **Transactions** screen appears.

Transactions Screen - Summary



Order/Dispatch	Type	Resource ID	Description	Location ID	Unit	Qty Estimat...	Qty Used	Unit Price	Ext Price	Date	Labor Code
00000031/3	Labor	TDM	Other Services		HR	3.5000	4.0000	80.0000	320.00	12/18/2013	OTHER
00000030/2	Labor	AWS	Cleaning Work		HR	5.5000	6.0000	120.0000	720.00	12/17/2013	HVAC
00000049/2	Part	M2963	Nut 3/8	MN0002	EA	6.0000	0.0000	0.2500	0.00	12/16/2013	
00000036/2	Part	900	Refrigerator - ...	MN0001	EA	1.0000	1.0000	429.9100	429.91	12/16/2013	
00000030/1	Misc		Misc Charges			0.0000	0.0000	0.0000	0.00	12/9/2013	
00000030/1	Labor	AWS	Prep Work La...		HR	7.5000	8.0000	120.0000	960.00	12/9/2013	HVAC
00000028/1	Labor	AWS	Furnace and Air		HR	5.5000	6.0000	120.0000	720.00	12/5/2013	HVAC
00000031/1	Labor	LUK001	Furnace and Air		HR	6.0000	7.0000	120.0000	840.00	12/3/2013	HVAC
00000031/1	Part	M2963	Nut 3/8	MN0002	EA	0.0000	3.0000	0.2500	0.75	12/3/2013	
00000030/2	Misc		Misc Cleaning ...			0.0000	0.0000	0.0000	0.00	11/19/2013	
00000013/1	Labor	TKG	Furnace and Air		HR	6.0000	7.0000	120.0000	840.00	11/8/2013	HVAC
00000013/1	Freight		Furnace and Air			0.0000	0.0000	0.0000	0.00	11/8/2013	
00000013/1	Misc		Furnace and Air			0.0000	0.0000	0.0000	0.00	11/8/2013	
00000013/2	Labor	AWS	Furnace and Air		HR	4.0000	4.5000	120.0000	540.00	11/7/2013	HVAC
00000013/2	Freight		Furnace and Air			0.0000	0.0000	0.0000	0.00	11/7/2013	
00000037/2	Part	200150	Deluxe Furna...	MN0001	EA	1.0000	0.0000	14,999.0000	0.00	12/16/2013	

3. To display all of the available fields, click the **Summary/Detail** Toggle buttons (>> <<).

Maint

4. Click the **New Record** button , on the tool bar to add a record. Select the Service/Work Order Number/Dispatch in the **Order/Dispatch** field of the new line.

5. Select the Type of transaction you are adding from the **Type** field drop-down list: **Labor**, **Part**, **Freight**, or **Misc**.

Maint

6. If applicable, select a **Resource ID** from the drop-down list.
   - If you selected **Labor** in the **Type** field, the drop-down list will show your technicians.
   - If you selected **Part** in the **Type** field, the drop-down list field will show your parts.
   - This field is disabled for **Freight** and **Misc** types.

7. Enter a Description into the **Description** field. If the resource is a Part, the Item description will display in this field; otherwise enter a Description.

Maint

8. If you selected a **Part** in the **Resource ID** field, select a Location from the **Location ID** field drop-down list. Otherwise, the **Location ID** field will be blank. This field is disabled for **Freight** and **Misc** types.

9. The **Unit** field will display the Units of measure for the Part selected in the **Resource ID** field, or the value **HR** if **Labor** is selected in the **Type** field. This field is disabled for **Freight** and **Misc** types.

10. Enter the estimated quantity of the **Part** or **Labor** into the **Qty Estimated** field. This field is disabled for **Freight** and **Misc** types.

11. Enter the quantity used into the **Qty Used** field. This field is disabled for **Freight** and **Misc** types.

12. If you selected **Labor** or **Part** in the **Type** field, the Unit Price displays in the **Unit Price** field. You may change the Unit Price. This field is disabled for **Freight** and **Misc** types.

13. If you selected **Labor** or **Part** in the **Type** field, the **Ext Price** is calculated using the **Qty Used** and the **Unit Price** amounts. This field is disabled for **Freight** and **Misc** types.

14. Select or enter a transaction date in the **Trans Date** field. By default, this field will display the current date.

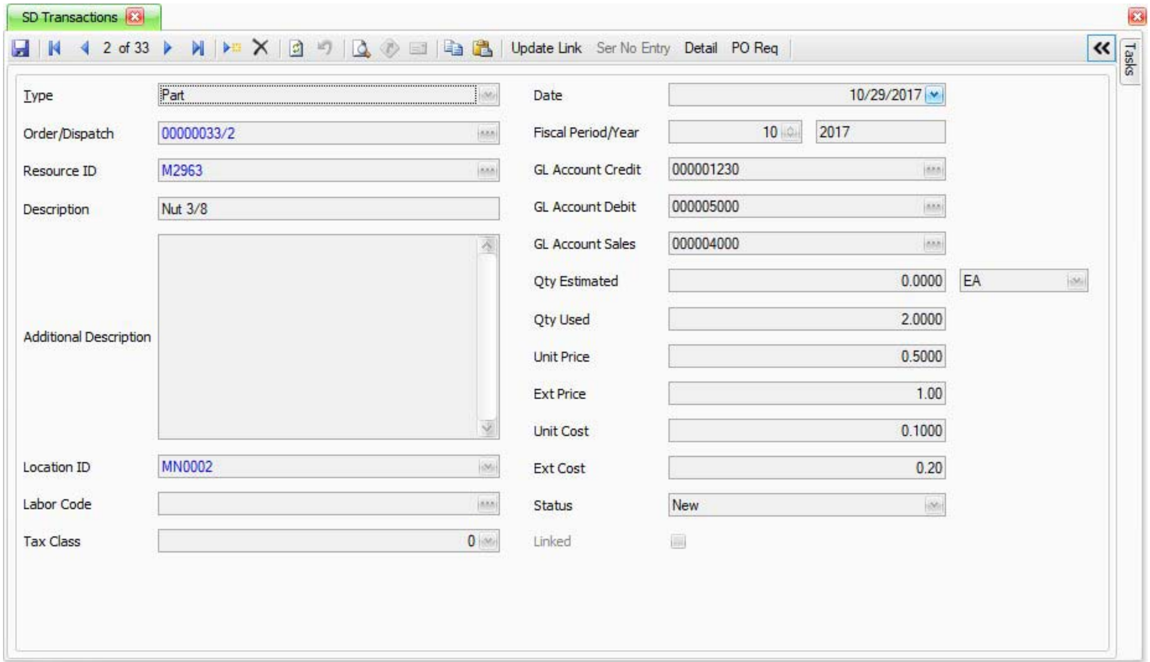
Maint

15. If you selected **Labor** in the **Type** field, select a Labor Code from the drop-down list in the **Labor Code** field.

NOTE: To include a Freight or Misc amount on the order, use the column chooser to bring the Ext Cost field into your grid, and enter the amount to be posted into this Ext Cost field.

16. Click the **Save** button on the toolbar to save your work.

Transactions Screen - Detail



1. To display all of the available fields, click the **Summary/Detail** toggle button (» «).

Maint

2. Click the **New Record** button on the tool bar to add a record. The Work Order Number/Dispatch line will display in the **Order/Dispatch** field of the new line.
3. Select the Type of transaction you are adding from the **Type** field drop-down list: **Labor**, **Part**, **Freight**, or **Misc**.

Maint

4. If applicable, select a **Resource ID** from the drop-down list. If you selected **Labor** in the **Type** field, the drop-down list will show your Technicians. If you selected **Part** in the **Type** field, the drop-down list will show field will show your parts. This field is disabled for **Freight** and **Misc** types.
5. Enter a Description into the **Description** field. If the resource is a **Part**, the Item description will display in this field; otherwise enter a Description.
6. Enter or edit the Additional Description of the Item in the **Additional Desc** field. This field is available only if you selected Yes to Use Additional Descriptions in the **Business Rules** function (page 3-5) of System Manager.

   Available Additional Descriptions appear from System Manager and Inventory if you selected Yes to Copy Additional Descriptions from SM/IN Items in the **Business Rules** function (page 3-5) of System Manager.

Maint

7. If you selected a **Part** in the **Resource ID** field, select a Location from the **Location ID** field drop-down list. Otherwise, the **Location ID** field will be blank. This field is disabled for **Freight** and **Misc** types.

Maint

8. If you selected **Labor** in the **Type** field, select a Labor Code from the drop-down list in the **Labor Code** field.

9. Enter or select the **Tax Class** for the transaction. If you selected **Part** in the **Type** field the Tax Class set up in the Item will display. If you select Labor, Freight, or Misc in the Type field the Tax Class will default to 0.

10. Select or enter a transaction date in the **Date** field. By default, this field will display the current date.

11. Enter the **Fiscal Period/Year**, or accept the default current period and year.

12. Enter or select the **GL Account Credit** to credit for the cost of the Transaction.

    - When **Part** is selected for the **Type**, the Inventory Account from the Inventory Item, Account Code, or the System Manager Description Item will default.
    - When **Labor** is selected for the **Type**, the Payroll Expense Account from the Labor Code will default.
    - When **Freight** is selected for the **Type** for a Service Order, the Freight Account from the Business Rules function will default. When the Transaction is for a Work Order, the field is disabled.
    - When **Misc** is selected for the **Type** for a Service Order, the Misc Account from the Business Rules function will default.

13. Enter or select the **GL Account Debit** to debit for the cost of the Transaction.

    - When **Part** is selected for the **Type**, the COGS Account from the Inventory Item, Account Code, or the System Manager Description Item will default.
    - When **Labor** is selected for the **Type**, the Cost of Revenue Account from the Labor Code will default.
    - When **Freight** is selected for the **Type** for a Service Order, the Expense Account from the Business Rules function will default. When the Transaction is for a Work Order, the field is disabled.
    - When **Misc** is selected for the **Type** for a Service Order, the Expense Account from the Business Rules function will default. When the Transaction is for a Work Order, the field is disabled.

14. Enter or select the **GL Account Sales** to post to for the revenue amount of the Transaction.
    - When **Part** is selected for the **Type**, the Sales Account from the Inventory Item, Account Code, or the System Manager Description Item will default.
    - When **Labor** is selected for the **Type**, the Sales Account from the Labor Code will default.
    - When **Freight** is selected for the **Type**, the field is disabled.
    - When **Misc** is selected for the **Type**, the field is disabled.
15. Enter the estimated quantity of the **Part** or **Labor** into the **Qty Estimated** field. This field is disabled for **Freight** and **Misc** types.
16. The **Unit** field will display the Units of measure for the part selected in the **Resource ID** field, or the value **HR** if **Labor** is selected in the **Type** field. This field is disabled for **Freight** and **Misc** types.
17. Enter the quantity used into the **Qty Used** field. This field is disabled for **Freight** and **Misc** types.
18. If you selected **Labor** or **Part** in the **Type** field, the Unit Price displays in the **Unit Price** field. You may change the Unit Price. This field is disabled for **Freight** and **Misc** types.
19. If you selected **Labor** or **Part** in the **Type** field, the **Ext Price** is calculated using the **Qty Used** and the **Unit Price** amounts. This field is disabled for **Freight** and **Misc** types.

NOTE: To include a Freight or Misc amount on the order enter the amount to be posted into the Ext Cost field.

20. The **Status** of the Transaction is displayed.
21. Click the **Save** button , on the toolbar to save your work.

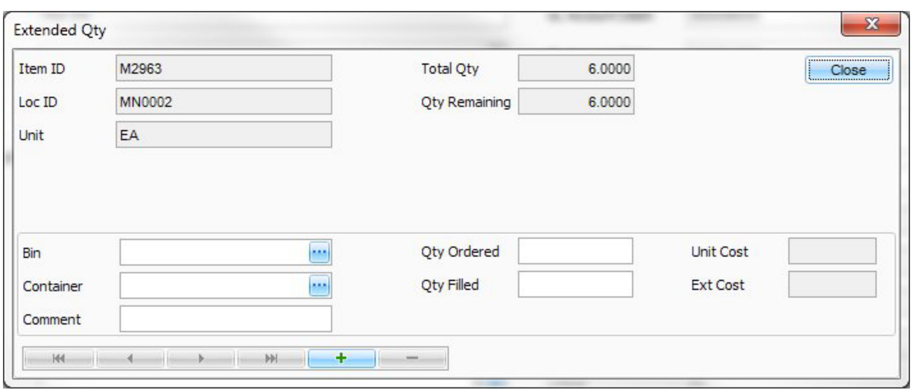
Command Buttons

Name	Description
Update Link	Update the picked/received quantities in inventory if Service Director interfaces with Inventory
Ser No Entry	Enter the serial number of a serialized part if Service Director interfaces with Inventory
Detail	View the details of the extended quantity for the selected part if Service Director interfaces with Inventory
PO Request	Enter a PO Requisition if the business rule for Purchase Order has been set to allow generation of purchases from Service Director

Command Button Functions

Detail

1. If you have the Warehouse Management application installed, click on the **Detail** button to view the **Extended Quantity Entry** screen. On this screen you can select **Bins** and **Containers** from which to take the item to fill the Work Order. You can have several Bins and Containers per Item selected to fill the order.

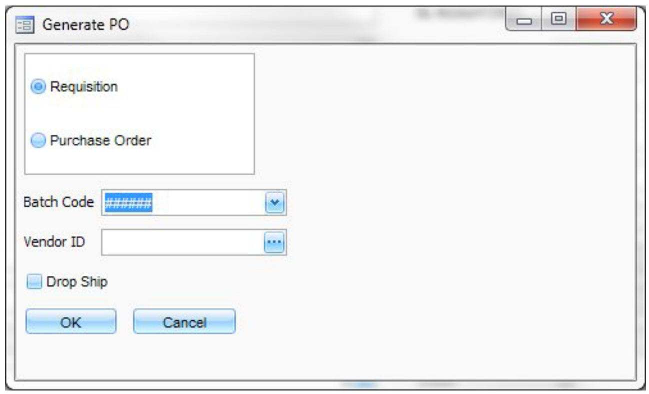


- These Bins and Containers are entered to suggest to the warehouse staff that will be printing the Picking List, in Warehouse Management, where to go to pick the Items in the warehouse. The Bins and Containers selected here will print on the Picking List in Warehouse Management.

2. Close the **Extended Quantity Entry** screen when finished to return to the **Transactions** screen.

PO Req

1. Click **PO Req** to create a new Purchase Order or Requisition for the Item by inserting a record in the Purchase Order **Transactions** or **Requisitions** functions. This button appears only if Purchase Order is installed.



2. Select to generate a **Requisition** or a **Purchase Order** from your Service Order Transaction.

   You will get the option to select either a Requisition or Purchase Order if you selected **Choice** in the Business Rules for Purchase Order, for the **Generate Purchases from Service Director** in the **Business Rules**. If you selected either **Requisitions** or **Purchase Order** you will only be able to generate the type of transaction selected. If you selected **None** for this option the button will be deactivated.

   - Select the **Batch Code** in which you want your Purchase Order to be generated. You will only see this option if you use transaction batching in Purchase Order and you selected to generate a Purchase Order.
   - Select the **Vendor ID** for the Vendor for which you want the Purchase Order to be generated. This Vendor ID will be filled in on the Purchase Order and into the Vendor ID field in the purchase Requisition.
   - Select the check box to have the Item in the Purchase Order **Drop Ship**ped. The Purchase Order Ship To tab will be filled in with the information entered on the Site Information tab in the Work Order.
   - Click **OK** to generate the Requisition or Purchase Order.
   - Click **Cancel** to return to the transactions screen and not generate a Purchase Order or Requisition.

A confirmation message appears when you click **OK** stating the transaction was generated successfully.

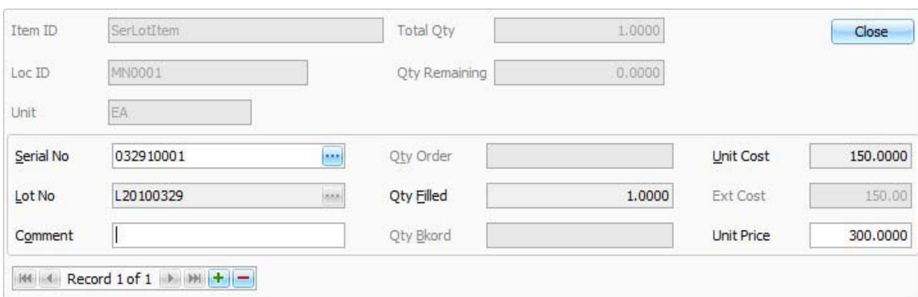
NOTE: When a Purchase Order has been generated from a Service Order, quantity Received for the Item will be filled into the Qty Used field when the Purchase Order Item has been received.

NOTE: The cost from the Purchase Order Item receipt will be transferred directly into the cost of the Service Order Item when the Purchase Order is received.

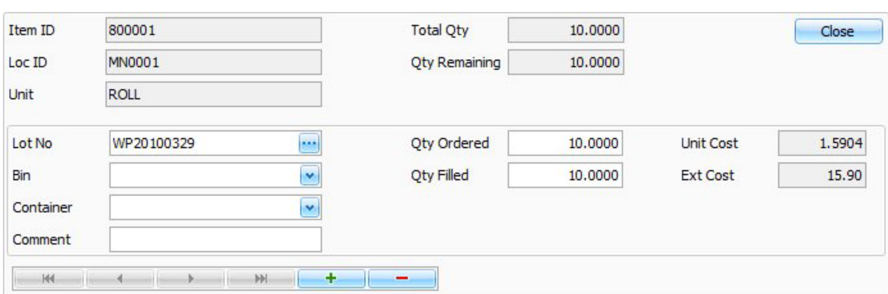
NOTE: When the Drop Ship check box is selected when generating the Purchase Order, Inventory quantities are not affected by the receipt in Purchase Order.

Lot and Serial Entry Details

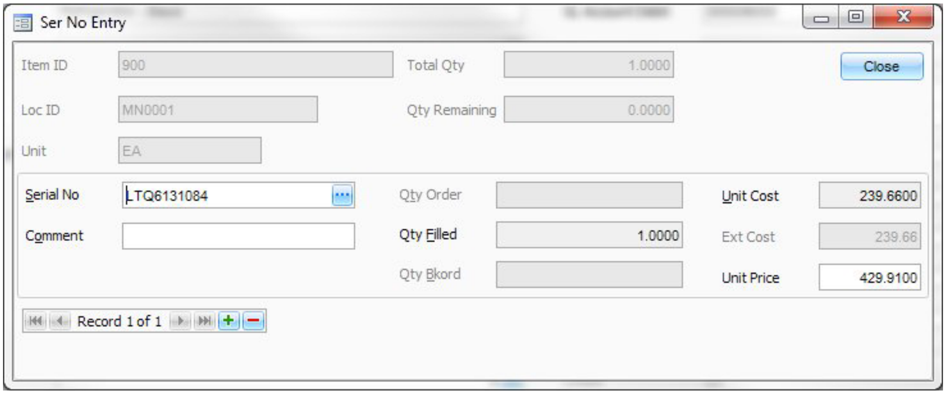
Lot/Ser No Entry Dialog Box



Lot No Entry Dialog Box



Serial No Entry Dialog Box



The Lot/Ser No Entry dialog box appears when you update the **Qty Used** on the Transactions screen, if Lotted or Serialized Items exist for the Transaction, or when you click the **Serial No Entry** button for Serialized Items in the **Transaction**. You must enter Lot and Serial information; if you do not, the amount in the **Qty Used** field on the Transactions screen will be adjusted to zero.

1. Select the Item's Serial Number in the **Serial No** field. This field appears only if the Item is Serialized. You may select Serial Numbers only for available Items.

   If you use an Item in multiple quantities, each with its own Serial Number, enter each Serial Number in a new record on the dialog box. Use the scroll bar to view records.

2. Select the Item's Lot number in the **Lot No** field. This field appears only if the Item is Lotted or Serialized and Lotted.
3. Enter a **Comment**, if desired.
4. Click **Close** to save your changes and return to the Transactions screen. The amount in the **Qty Used** field on the Transactions screen will be adjusted to match the total number of Serial Numbers you entered or to the total of the Lotted quantities you entered, if necessary.

Task Summary

To add Transactions, follow these steps:

1. Select the **New Record** icon , on the toolbar. A blank record appears.
2. Enter the **Order/Dispatch**, **Type**, **Resource ID**, a **Description** of the Transaction or **Item**, **Location ID**, **Unit**, **Qty Estimated**, **Qty Used**, **Unit Price**, **Date**, and **Labor Code** where appropriate.
3. Click the **Save** button to save your work.

To edit Transactions, follow these steps:

1. Select the Transaction to edit.
2. Position the cursor in the field to edit.
3. Change the value in the field.
4. Click the **Save** button to save your work.

To delete a Transaction, follow these steps:

1. Select the Transaction to delete.
2. Select the **Delete** hot key (f3), or click on the **Delete Record** button , on the tool bar.

POST SERVICE ORDERS OVERVIEW

When you post closed Service Orders, the system updates Service Order history, Site Equipment information, and historical information for the Company, Item, and Fixed Asset, if Service Director interfaces with TRAVERSE Fixed Assets. If Service Director interfaces with General Ledger, posting closed Service Orders creates debit and credit entries in the GL Journal. If Service Director interfaces with Inventory, posting updates history in Inventory for parts used on Service Orders.

If Service Director interfaces with General Ledger, debit and credit entries are created in the GL Journal. If you post detail information, the system makes entries for each line Item. If you post summary information, the system makes one entry for each Account. If the GL accounting period is closed, you can either edit Service Orders or use the System Manager Period Conversion function to open the accounting period for posting. See the System Manager Training Manual for more information.

Posting completed Service Orders also:

- Posts line Item and totals information from temporary tables. The system creates these temporary tables while you work with Service Director to store line Item entries and totals information. When all line Items are posted, summary GL entries are calculated.
- Updates Service Order history with all information entered in the Service Order Entry function.
- Updates Site Equipment information with the Service Order, Dispatch, and Technician ID if a piece of equipment was serviced.
- Updates history in Inventory for parts used on Service Orders if Service Director interfaces with Inventory.

The costs for each line Item updates these accounts:

Costs

COGS/Debit	**Inventory/Credit**
DB	CR

The Inventory and COGS Accounts come from the Account Code assigned to the Item if you are interfaced to Inventory and you selected an Inventory Item. If you selected an SM Description Item the Inventory and COGS Accounts come from the Accounts set up for that Item. If you entered a Freight or Miscellaneous Item the Debit and Credit accounts come from the defaults set up in the Business Rules. If you entered time for a Tech the Accounts come from the Labor Code setup.

You also can manually select the COGS/Debit and Inventory/Credit account when entering/editing Transactions.

POST SERVICE ORDERS

When you **Post** closed **Service Orders**, the system updates Service Order history, Site Equipment information, and historical information for the Company, Item, and Fixed Asset, if Service Director interfaces with TRAVERSE Fixed Assets. If Service Director interfaces with General Ledger, posting closed Service Orders creates debit and credit entries in the GL Journal. If Service Director interfaces with Inventory, posting updates history in Inventory for parts used on Service Orders.

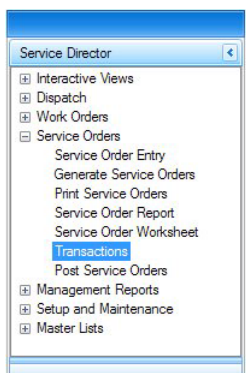
Before you post, complete the following tasks:

- **Service Order Transaction** entry.
- Print the **Service Order Transaction Journal**.

To **Post Service Orders**, follow these steps:

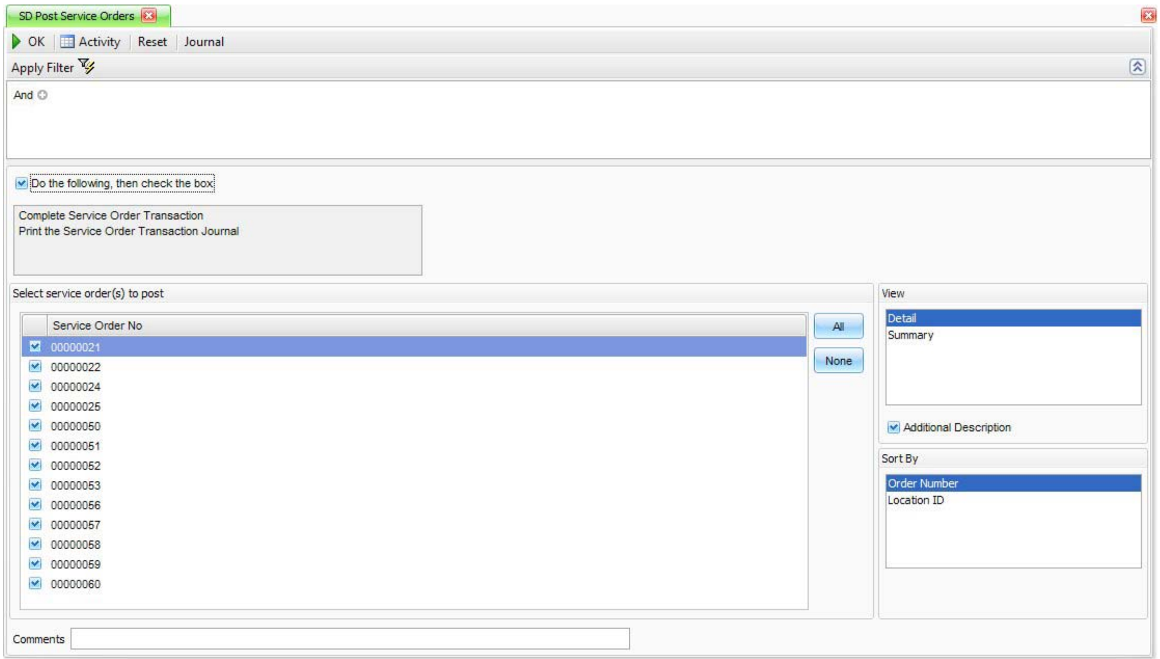
1. Select **Post Service Orders** from the **Service Orders** menu.

Post Service Orders Menu



2. The **Post Service Orders** screen appears.

Post Service Orders Screen



3. Before you post the Service Orders, ensure you have **Completed Service Order Transactions**, and used the **Journal** button to **Print The Service Order Transaction Journal**, then mark the **Do the following**, **then check the box**, check box.

4. If you use the multi-currency functions check the box to **Print Log Using Base Currency**. Leave the box blank to print in the GL Account's currency.

5. Select the **Service Orders** you would like to post. To select all service orders, click the **All** button. To deselect all service orders, click the **None** button.

6. Select a **View**:
   - **Summary** to see only a summary of the options.
   - **Details** to see the details of the work orders.

7. Select the **Additional Description** check box if applicable to include the Additional Descriptions in the journal.

8. Select a **Sort By** option to sort the journal: **Order Number**, or **Location ID**.

9. Enter **Comments** for the post, if applicable.

10. Select a command button:

    - Click **OK** to begin processing. A message appears when the post completes successfully. After you click **OK** to close this message box, the Post Billings Log appears.

Command Buttons

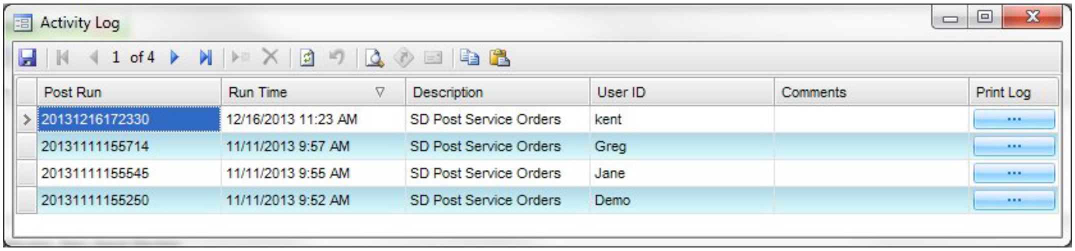
Name	Description
OK	Executes the post.
Activity	Opens the Activity dialog box to allow you to reprint post logs.
Reset	Return the value of all fields on the list or report screen to their default values.
Journal	Print the work order journal.

Activity Log

Use the **Activity Log** to view all post activity for administrative purposes.

Name	Displays
Post Run	The system assigned post run ID.
Run Time	The date and time the post was made.
Description	The post description.
User ID	The user who performed the post.
Comments	The comments, if applicable, entered in the Comments field.
Print Log	A PDF version of the original log file if you click the ... button.

Activity Log Dialog Box



NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Service Orders Journal

Consolidated Service Director
Service Order Journal (Detail)
Sorted by Order No

PAGE 1

View Additional Description Yes

Order No	Location ID	Ord Date	Completed Date
00000050	MD0001	12/16/2013	12/16/2013

Resource ID / Description / Addl Description	Loc ID / Pd/Year	Debit Acct / Credit Acct	Unit / Tax Class	Qty Estimated / Qty Used	Unit Cost / Ext Cost
200150	MN0001	00-000-6600	EA	1.0000	9,700.0000
Deluxe Furnace System	12/2013	00-000-1230	0	1.0000	9,700.00
Lot No: — / Serial No: MN-1234-010 / Unit Cost: 9,700.0000					
200300	MN0001	00-000-6600	EA	1.0000	429.9500
Air Conditioner	12/2013	00-000-1230	0	1.0000	429.95
AWS		00-000-6600	HR	2.000	38.850
Furnace and Air	12/2013	00-000-6000	0	2.000	77.70

Order No 00000050 Total — Ext Cost 10,207.65

Grand Total — Ext Cost 10,207.65

*** End of Report ***

12/16/2013 11:22 AM **kenthe**

Post Service Orders Log

Consolidated Service Director — Page 1

Post Service Orders

Order List: 00000021,00000022,00000024,00000025,00000050,00000051,00000052,00000053,00000056,00000057,00000058,00000059,00000060

Comments

GL Entries — 20131216172330

Posted to Fiscal Year: 2013

Fiscal Period: 12

Reference	Description	GL Account	Debit	Credit
MD0001	Deluxe Furnace System	00-000-1230		9,700.00
MD0001	Air Conditioner	00-000-1230		429.95
MD0001	Furnace and Air	00-000-6000		77.70
MD0001	Deluxe Furnace System	00-000-6600	9,700.00	
MD0001	Air Conditioner	00-000-6600	429.95	
MD0001	Furnace and Air	00-000-6600	77.70	
	Total for Fiscal Period 12		10,207.65	10,207.65
Grand Total			10,207.65	10,207.65

Exceptions

Grand Total

12/16/2013 11:23 AM — *** End of Report *** — OPEN_SYSTEMS\kenthe

DISPATCH

6

OVERVIEW

When you request a Work Order or Service Order be assigned to a Technician or Crew, and Scheduled, you create a Dispatch record for the Work Order or Service Order. Any activity applied to a Work Order or Service Order is recorded as a Dispatch record.

Use the **Calendar** function (page 6-5) to review and make changes to Scheduled Dispatches, assign or reassign Technicians, or schedule unscheduled Dispatches.

Use the **Scheduled Technician View** (page 6-19) to visually review your Technicians and your scheduled Work Orders and Service Orders in one place.

Use the **Scheduled** (page 6-25) and **Unscheduled Dispatch** (page 6-31) reports to review the details for the Dispatches.

CALENDAR

The **Calendar** function provides you with the ability to visually review Work Orders and Service Orders as scheduled. You can add Work Orders or Service Orders, or change the scheduling for them in the Calendar function. By using the buttons at the top of the Calendar window, you can refresh the Calendar or choose to view the calendar by Day, Work Week, Week, Month, or Schedule. You can also sort the calendar by Resource or by Date. Use the Suggest button to have TRAVERSE suggest a schedule time for a selected Dispatch, based on Dispatch Requested Date (if available), Requested Tech ID (if entered), Work To Do Labor Code, and the Schedules of the available Technicians who can do the work.

With the sliding Options menu on the left side, you can choose to filter your Calendar view by Technician and/or by Labor Code. You also have a convenient list of unscheduled Dispatches, where you can double-click on an unscheduled Dispatch, and the Schedule Info window will appear, allowing you to schedule the Dispatch without opening the Work Order Entry or the Service Order Entry function.

The center portion of the Calendar window displays the Calendar, including color-coded entries for Technicians and Labor Codes. To adjust the amount of information you can see on the calendar, use the Plus ( ) and minus ( ) buttons on the lower right border of the Calendar. Double-click on any Calendar entry to open the Schedule Info window to change Technician/Crew, Start or End Times, or add Notes to the entry.

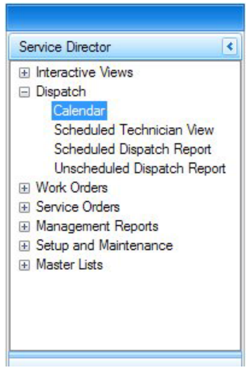
The sliding Date Navigator on the right side of the Calendar window displays full monthly views of the current month plus one month previous to today's date, as well as a few months into the future. This gives you a quick, convenient reference to help you schedule your Dispatches.

You can show or hide the sliding menus with the arrow buttons at the top of the menu borders.

To work with the **Calendar**, follow these steps:

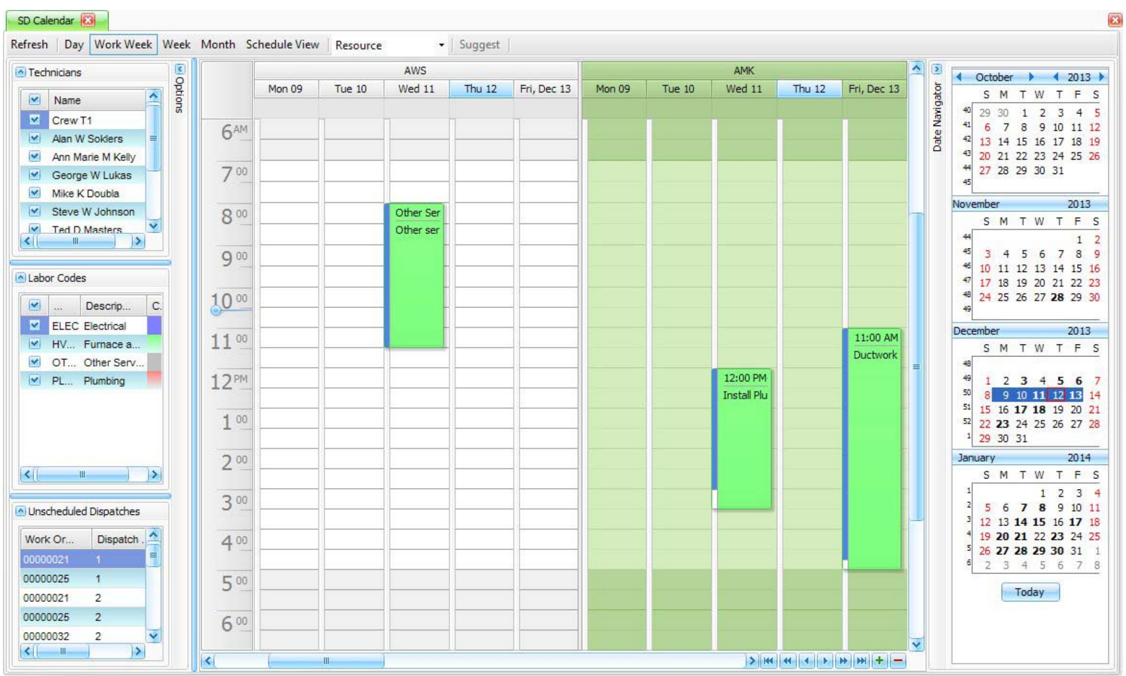
1. Select **Calendar** from the **Dispatch** menu.

Calendar Menu



2. The **Calendar** screen appears.

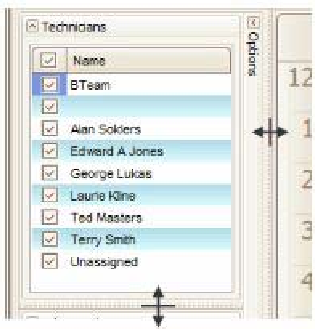
Calendar Screen



Changing the Appearance of the Calendar

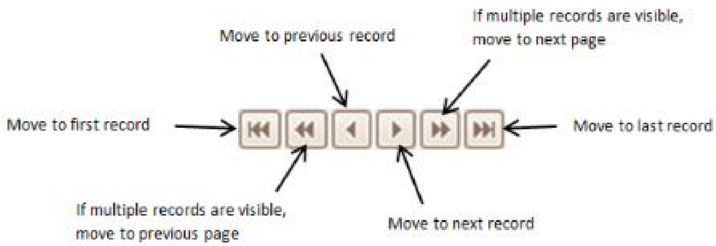
There are many ways you can change how the Calendar looks to give you the best view of your Schedules and Activities.

3. The side panels can be hidden to allow more room for the main central panel. Use each panel's Hide-Show buttons(or) on each panel's main bar to hide or show the panel.
4. Each section of the Options side panel can be rolled up to allow other sections to expand. To roll up a section, use the Roll Up-Roll Down buttons(or) for the section you would like to expand or retract.
5. To adjust the width or height of a panel or section, move the mouse over the edge of the panel or section until the cursor becomes a two-headed arrow. Then click and drag the edge of the panel or section until it is the size you want. Release the mouse button to stop sizing the panel or section.



6. Use the check boxes in the sections of the Options panel to show only the Schedules that match what you've selected.
7. If you have selected a grouping option for the Schedule View, you will have the option of zooming in or out of the calendar to see more or less data. Use the increase visible data ( ) or decrease visible data ( ) buttons in the lower right corner of the Calendar view's central panel to adjust the amount of data you can see on the Calendar in the central panel.

8. If you have a grouping option selected for the Calendar, you can move through the records that make up a group by using the record navigation buttons in the lower right corner of the calendar's central panel.



Calendar Actions

9. When you right-click on the calendar, you can use shortcuts on the context menu to perform various actions.
10. The context menu commands will change depending on where you right-click.
11. If you right-click when your mouse is on an empty area of the calendar, you will get the following options:

Command Buttons

Name	Description
New Work Order	Open the Work Orders screen to add a new work order.
New Service Order	Open the Service Orders screen to add a new work order.
Go to This Day	Show the schedule for the day you right clicked.
Go to Today	Jump to today's date
Go to Date	Jump to a particular date
Change View To	Change the view of the calendar without using the command buttons at the top of the screen.

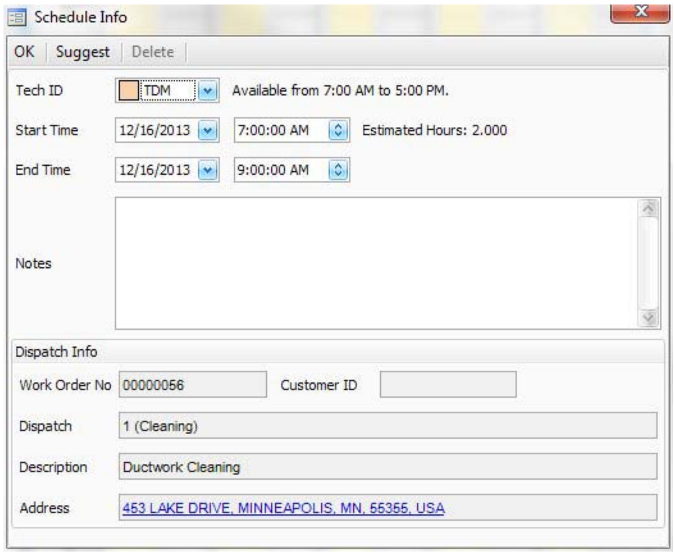
12. If you right-click when your mouse is on a scheduled activity block on the calendar, you will get the following options:

Command Buttons

Name	Description
Open Schedule	Open the Schedule Info window to change details for the activity
Open Work Order (Service Order)	Open the source for the scheduled activity
Delete Schedule	Delete the selected schedule from the calendar

13. When you select Open Schedule the Schedule Info window opens.

Calendar Screen - Schedule



The **Schedule Information** window allows you to select a Technician or Crew, set Start and End Times, and add Notes to the calendar entry for a Dispatch.

The **Dispatch Info** section of the window displays details of the Dispatch. If you have a default mapping program selected and Allow Web Features enabled in the SM Business Rules, and click on the Address link, your default mapping program will display a map of the address.

14. Select a **Tech ID** from the list of technicians to schedule for this Dispatch. Information about the availability of the Technician will be displayed next to the Tech ID field.

15. Select the **Start Time** and date for the time the Dispatch work should start.

16. Select the **End Time** and date for the time the Dispatch work should end.

17. Enter **Notes** about the dispatch for the Technician working on the Dispatch.

When you have the Work Week calendar format selected and right click in the gray Time column you will get a menu that will allow you to do a variety of things.

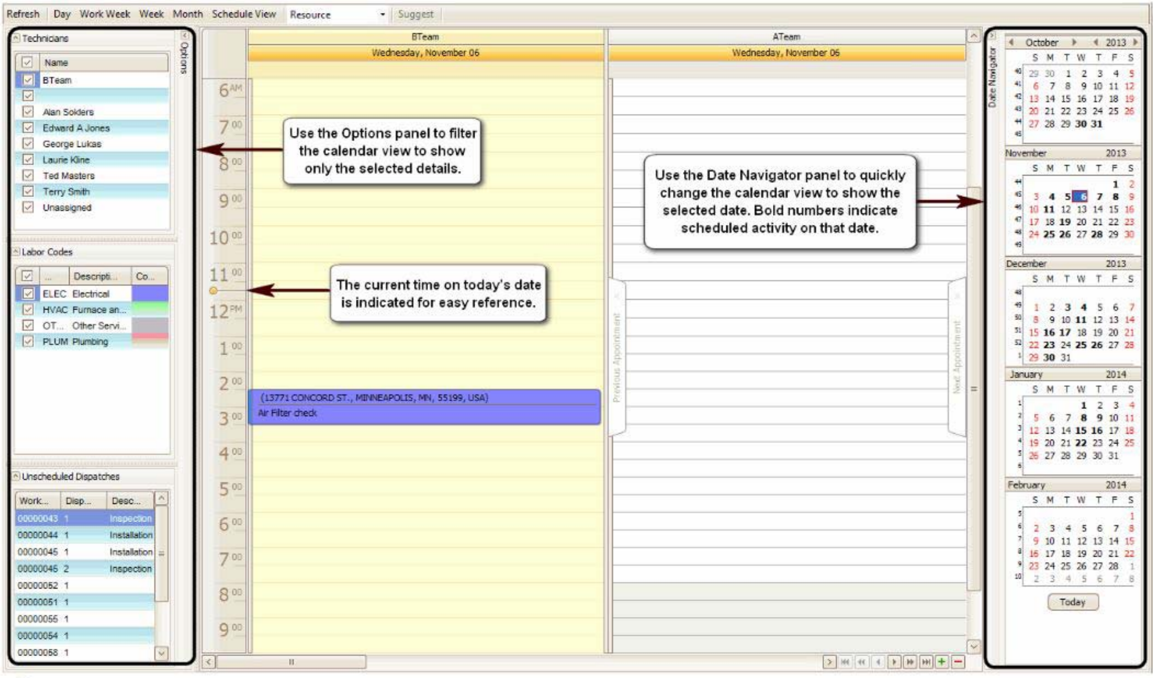
Command Buttons

Name	Description
New Appointment	Open the Work Orders screen to add a new work order.
New All Day Event	Open the Work Orders screen to add a new work order.
New Recurring Appointment	Open the Work Orders screen to add a new work order.
New Recurring Event	Open the Work Orders screen to add a new work order.
Change View To	Change the view of the calendar without using the command buttons at the top of the screen.
Customize Time Ruler	Open the Time Ruler Dialog box.
60 to 5 Minutes	Adjust the time increments to be displayed.

Command Buttons

Name	Description
OK	Add the entry to the calendar.
Suggest	Have TRAVERSE suggest a schedule time based on dispatch requested date (if available), requested tech ID (if entered), work to do labor code, and the schedules of the available technicians who can do the work.
Delete	Delete the scheduled entry from the calendar.

Calendar Screen



18. Use the command buttons at the top to change the calendar display:

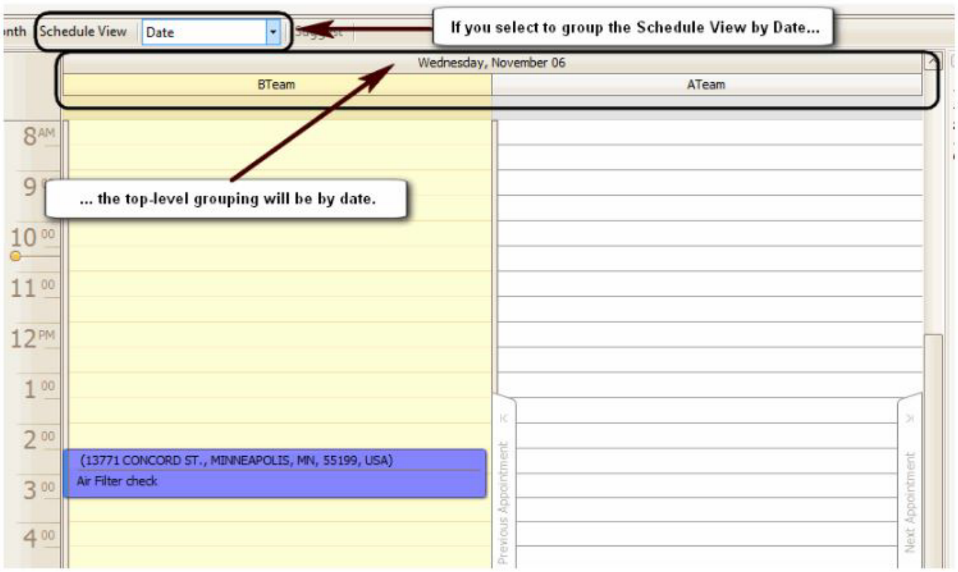
Command Buttons

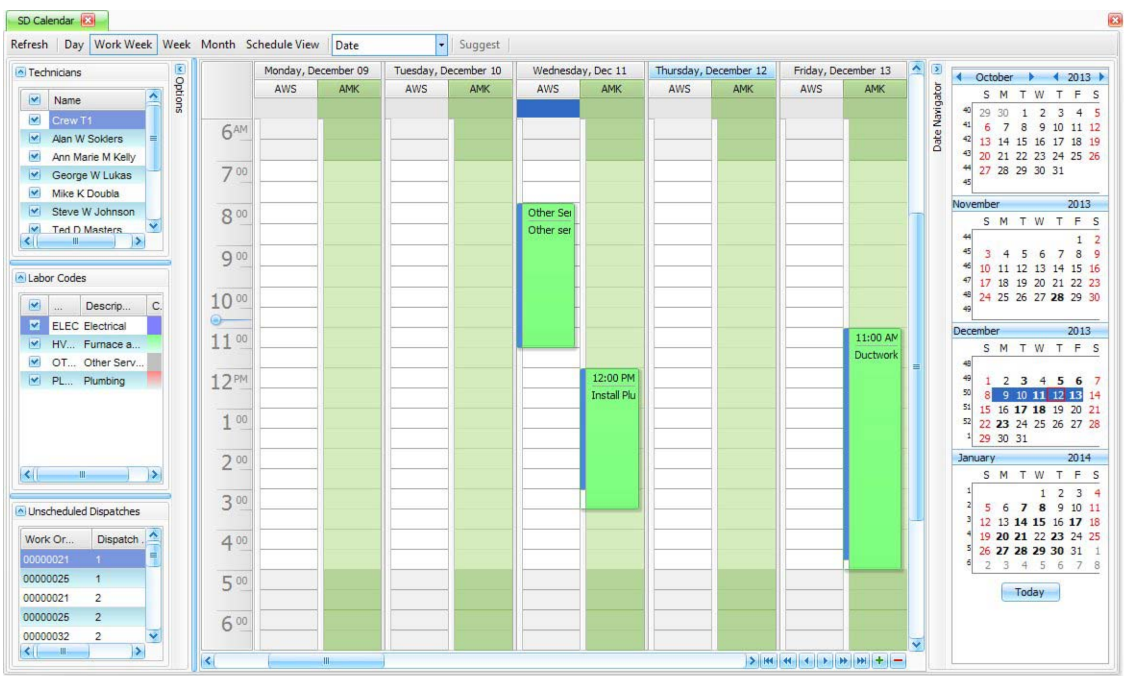
Name	Description
Refresh	Refresh your calendar with the latest updates and changes to the calendar
Day	Show only the selected day’s schedule
Work Week	Display the calendar with scheduled dispatches for the work week selected
Week	Display the calendar with scheduled dispatches for the selected week (not just the work week)
Month	Display the calendar with scheduled dispatches for the selected month

19. Use the **Schedule View** options to group the schedules on the Calendar. If you group the schedules by **Date**, the top-level grouping for the Calendar will be by Date, then the next level of grouping, such as **Resource**. If you choose a different level of grouping, your selection will be the top-level grouping, and the next level will be **Date**. If you choose **None**, the Calendar will remove any grouping categories.

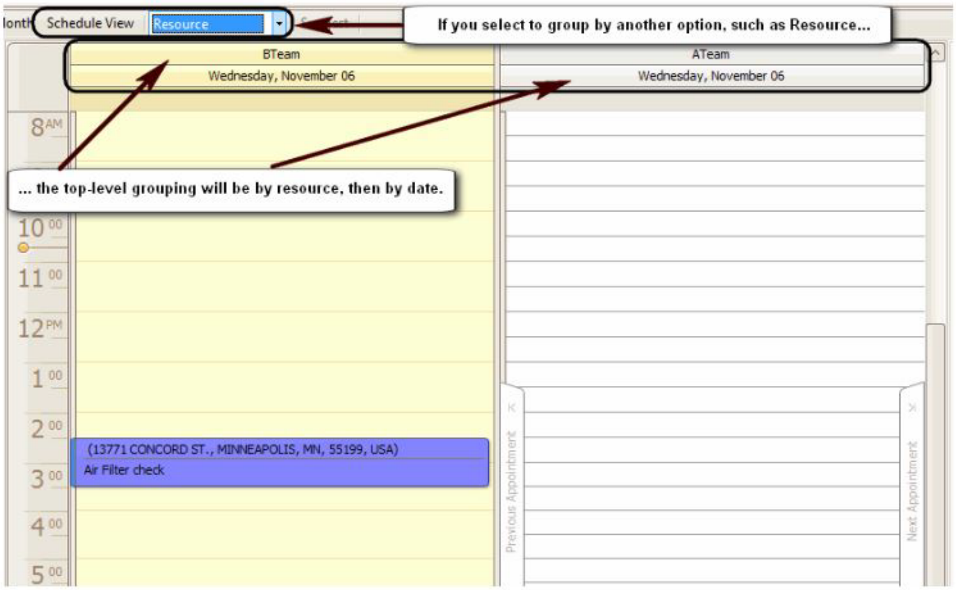
Examples:

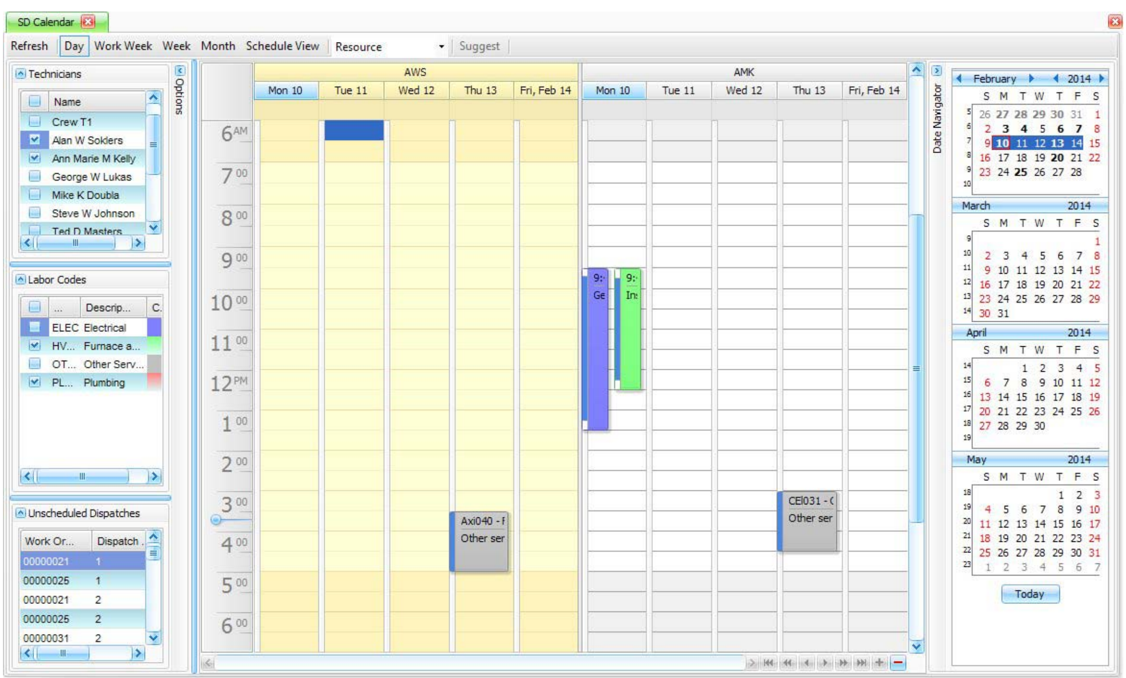
Schedule View by Date



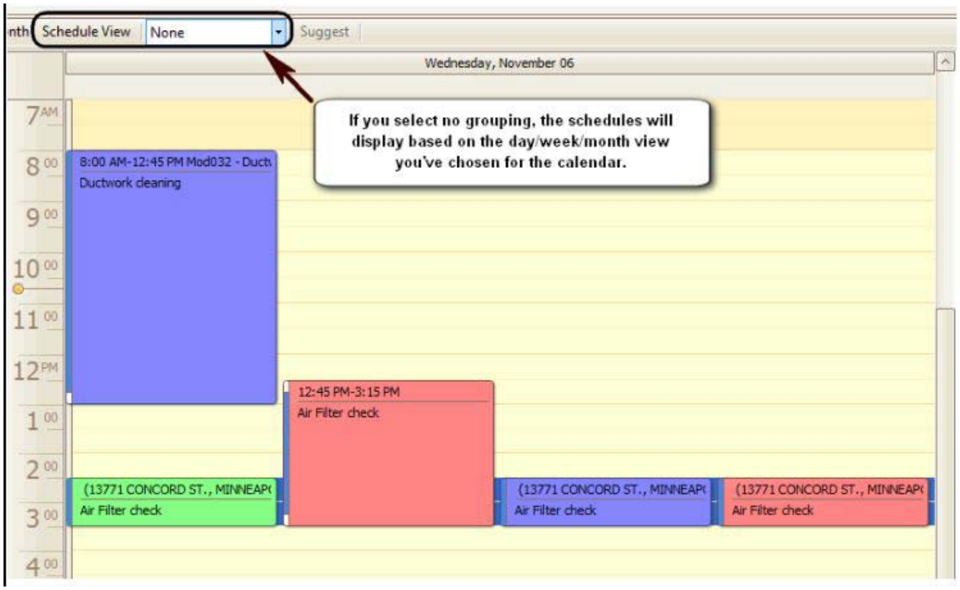


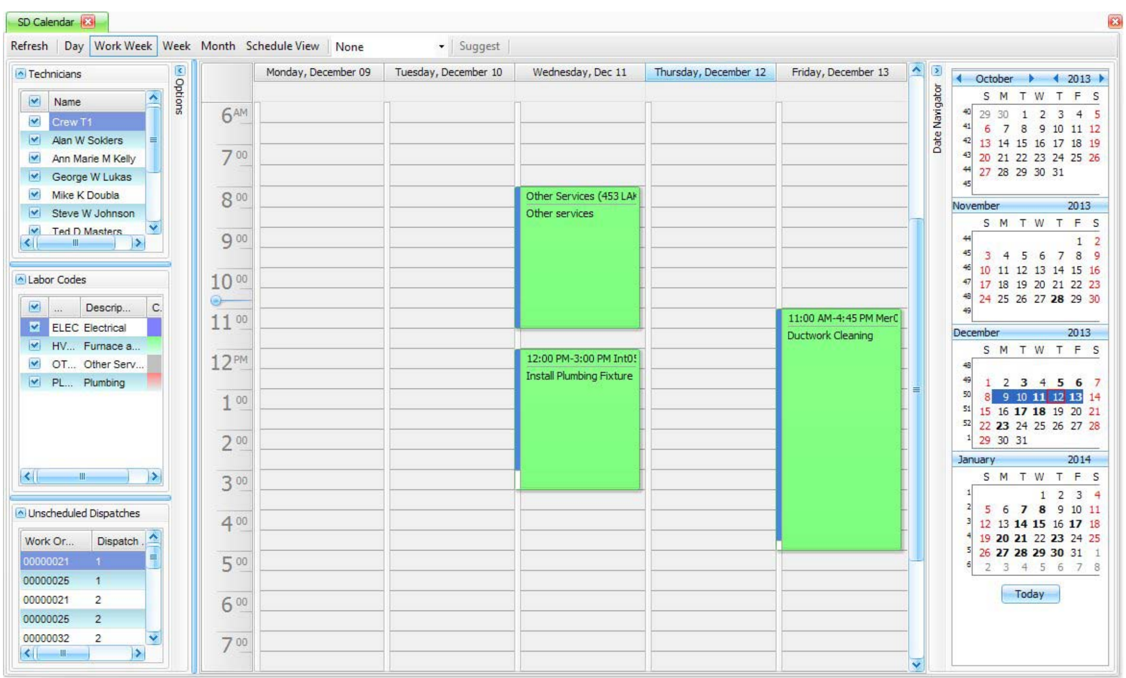
Schedule View by Resource





Schedule View with no grouping





20. In the **Options** section on the left side of the screen select the Technicians and/or Labor Codes you would like to display by selecting or clearing the check boxes next to each selection.

    When you select or clear a **Technician**, the corresponding Labor Code the Technician(s) belong to will be selected, or cleared.

    When you select or clear a **Labor Code**, the corresponding Technicians within the Labor Code(s) will be selected, or cleared.

21. Double click on an Unscheduled Dispatch from the **Unscheduled Dispatches** list, to open the **Schedule Info** dialog box. See (page 6-10) for more details on using the Schedule Info box.

22. Double click on a scheduled dispatch in the Calendar area to open the **Schedule Info** dialog box. See (page 6-10) for more details on using the Schedule Info box.

23. You may also drag and drop an Unscheduled Dispatch to the date you want scheduled. The **Schedule Info** dialog box will appear when you drop the Dispatch on the desired date. See (page 6-10) for more details on using the Schedule Info box.

24. A scheduled Dispatch can be rescheduled to the same time on a different date, by dragging and dropping the scheduled event to a different date on the calendar, when in the Month view.

25. A scheduled Dispatch can be rescheduled to a different time on the same date, by dragging and dropping the scheduled event to a different time on the calendar, when in the Day view.

26. A scheduled Dispatch can be rescheduled to a different Tech ID, date, and time, by dragging and dropping the scheduled event from one Tech to a different Tech, date, and time, when grouping by Resource or Date.

SCHEDULED TECHNICIAN VIEW

The **Scheduled Technician View** function provides you with the ability to visually review your Technicians and your Scheduled Work Orders and Service Orders and Dispatches in one place.

The Scheduled Technician View allows you to select ranges of information so you can quickly locate specific Technician schedule information by defining your search criteria. This allows you to see all the Scheduled Work Orders or Service Orders and Dispatches for a given Technician, Schedule, or Location.

Using Interactive Views

Using Interactive Views you can easily and quickly build and manipulate tables to display information. After selecting from the available criteria to display as filter fields, data items, column fields, or row fields, you can highlight columns and rows to have the selected rows and columns display as a graph below the table. To include multiple rows or columns in the graph, you can use the CTRL+ click (to select multiple rows or columns) and SHIFT+ click (to select all rows or columns between the first and second click) shortcuts, after selecting the first row and column.

Sorting and Filtering

When you arrange the columns to your liking, you can sort, group, or filter the data by the column's contents. To sort and filter the data, right-click a column heading and use the functions outlined in the table below.

Button	Name	Select To
	Sort Ascending	Sort the selected column's data in ascending order. **NOTE: You can also accomplish this task by clicking the column heading until appears.**
	Sort Descending	Sort the selected column's data in descending order. **NOTE: You can also accomplish this task by clicking the column heading until appears.**
	Clear Sorting	Remove all sorting options and revert to the default view.
	Group By This Column	Group the identical entries from this column into a single group. **NOTE: If you group by column entry, you can right-click on the grouped column heading to select from the options outlined in this table, or choose Full Expand to expand all of the grouped entries, Full Collapse to collapse all of the grouped entries, or UnGroup to undo the grouped entry.**
	Column Chooser	Open the Customization window. With the Customization window open, you can click and drag columns to the window to remove them from the screen or click and drag columns from the window to place them back onto the screen. **NOTE: You can also remove a column from the form by clicking on the heading of the column and dragging it to the bottom of the screen and releasing it when your cursor changes to an *X*.**
	Best Fit	Adjust the selected column to resize the column for the best view of that column's data.
	Clear Filter	Remove all filter options and revert to the default view.
	Filter Editor	See "Filtering Across All Columns" in the General Information guide for more information.
	Best Fit (all columns)	Adjust all columns to resize for the best view all of the data at once.

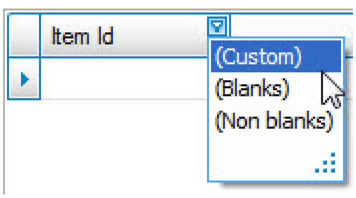
Filtering by an Individual Column

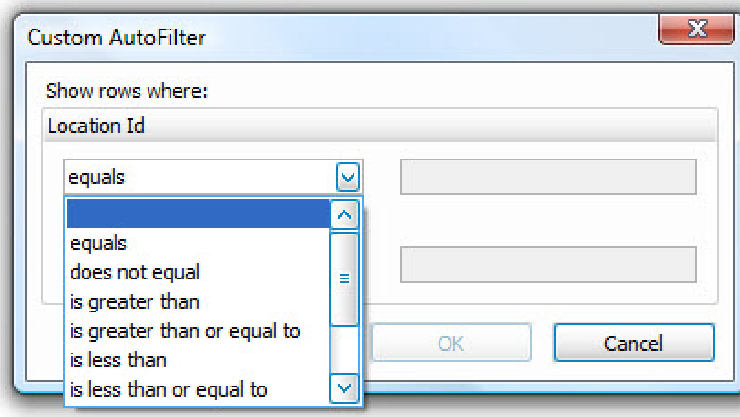
To create a filter for a single column, click the funnel icon that appears once you place the cursor in the associated column and then select a filter option from the dropdown menu.

Select	To
(Custom)	Enter criteria for filtering the selected column. **NOTE: View the following paragraph for additional information.**
(Blanks)	Display only entries with blank information in the selected column.
(Non blanks)	Display only entries with information in the selected column.

From the drop down menu, you can also select from the entries in the selected column to group the column by the selected entry.

If you select (**Custom**), the Custom AutoFilter function appears. Select up to two filtering criteria for the selected column from the drop down menus, then enter a string of text or numbers to complete the condition and click **OK**.





Sorting and Filtering Pivot Chart Data

Right-click on the pivot table gray area or a field button when in Pivot Chart View for each application, to use the following functions:

Select	To
	Refresh the data in the tables.

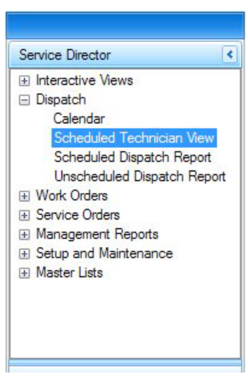
Select	To
Hide	Remove the selected criterion from the table.
Order	Move the selected criterion to the beginning, left, right, or end of the list of criteria.
Show Field List	Open the PivotGrid Field List, then click and drag the applicable fields to the desired locations.
Hide Field List	Close the PivotGrid Field List.

NOTE: Note: See instructions in the “Filtering Across All Columns” section for more information on filtering.

To use the **Scheduled Technician View**, follow these steps:

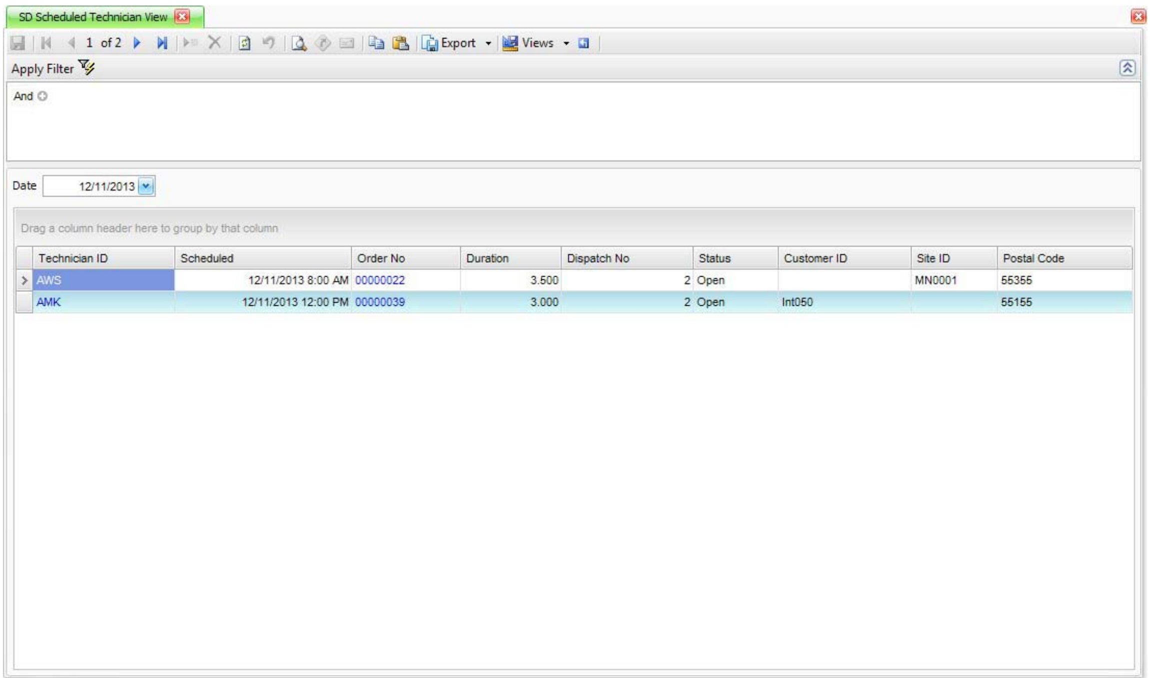
1. Select **Scheduled Technician View** from the **Dispatch** menu.

Scheduled Technician View Menu



2. The **Scheduled Technician View** screen appears.

Scheduled Technician View Screen



3. Select the range of **Filter Criteria** to include in the View. Leave the filter criteria blank to include all records.
4. Select the **Date** to view the Scheduled Technician's Dispatches for the selected date.
5. Select **Apply Filter** to populate the grid with data the meets your selection criteria.
6. Double click on the blue **Technician ID** field to drill down to the Technician setup screen.
7. Double click on the blue **Order No** field to drill down to the Order View with the selected order filtered.
8. Refer to the **Using the Interactive Views** section a the beginning of this chapter for more details on using the Scheduled Technician View.

NOTE: Refer to the How to Use Grids Section in the General Information guide for more details on how to add or take away columns from the grid screen.

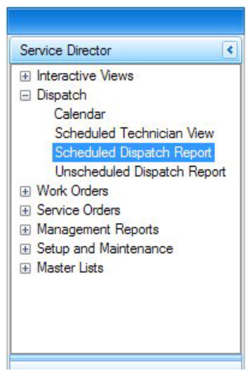
SCHEDULED DISPATCH REPORT

Use the **Scheduled Dispatch Report** function to print details about Scheduled Dispatches. In summary form, the report lists Dispatch Status and scheduling information on individual Dispatch lines for quick review. In detail form, the report lists Customer Equipment, Scheduling, and Labor and Parts information.

To print the **Scheduled Dispatch Report**, follow these steps:

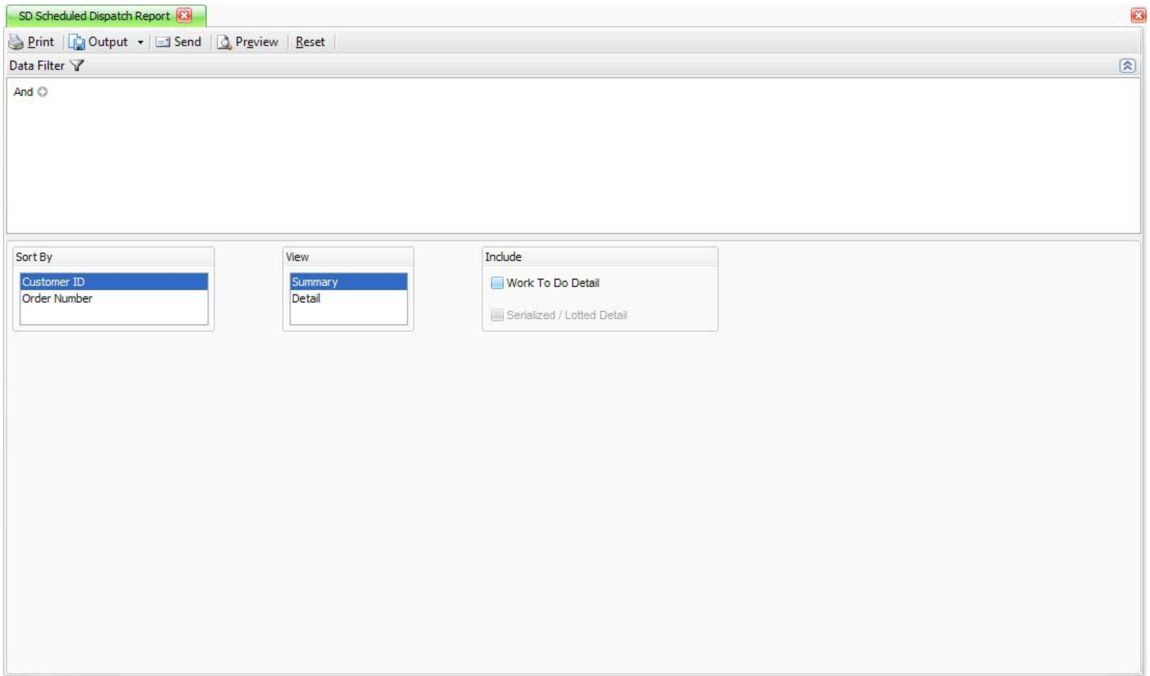
1. Select **Scheduled Dispatch Report** from the **Dispatch** menu.

Scheduled Dispatch Report Menu



2. The **Scheduled Dispatch Report** screen appears.

Scheduled Dispatch Report Screen



3. Use the **Data Filter** to select the range of filtering options or leave the filter blank to include all available data.
4. Select a **Sort By** option to sort the report: **Customer ID** or **Order Number**.
5. Select a **View**:
   - **Summary** to see only a summary of the options.
   - **Details** to see the details of the Orders.
6. Additional report options:
   - Select the **Work To Do Detail** check box to include details of the Work To Do IDs.
   - Select the **Serialized/Lotted Detail** check box to include Serial or Lot details from the parts used on the Work Orders or Service Orders.

NOTE: The Work To Do Detail and Serialized/Lotted Detail check boxes will be available when the Detail View is selected.

7. Select a command button:

Command Buttons

Name	Description
Print	Print the report.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Preview	Preview the report on your monitor.
Reset	Set all fields to their defaults.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Scheduled Dispatch Report - Detail

Consolidated Service Director
Scheduled Dispatch Report (Detail)
Sorted by Customer ID

PAGE 1

Report Filter

Include Work To Do Detail Yes   Include Serialized / Lotted Detail No

Order No 00000043   Customer ID Atm047   Site Address 960 Parker Street, Deerwood, MN 56444
Order Date 11/19/2013   Site ID

Dispatch No	1	New Counter	
Description	Cleaning	Location ID	CA0001
Equipment ID	CACO16	Create Date	11/18/2013
Equipment Description	Comfort 16 Central Air Conditioner	Hold	No
Billing Type	Billable	Request Received Date	11/18/2013 1:29 PM
Bill To ID		Requested Date	1/15/2014
Est Travel (Hrs)	0.750	Requested AM / PM	None
Total Est (Hrs)	6.750	Requested Tech ID	

Work To Do

Work To Do ID	Description	Required Skill Level	Estimated Time (Hrs)
ERough	Electrical Rough-In	2	2.000
HClean	Ductwork Cleaning	1	4.000

Activity

Status	Date / Time	Technician ID	Entry Date	Entered By
Scheduled	1/27/2014 10:30 AM	AWS	11/18/2013	Demo

Dispatch No	2	New Counter	
Description	Installation	Location ID	CA0001
Equipment ID	KEE55	Create Date	11/18/2013
Equipment Description	55 gallon electric water heater	Hold	No
Billing Type	Billable	Request Received Date	11/18/2013 1:29 PM
Bill To ID		Requested Date	1/20/2014
Est Travel (Hrs)	0.750	Requested AM / PM	None
Total Est (Hrs)	4.750	Requested Tech ID	GER001

Work To Do

Work To Do ID	Description	Required Skill Level	Estimated Time (Hrs)
HFixture	Install HVAC Fixture	2	4.000

Activity

Status	Date / Time	Technician ID	Entry Date	Entered By
Scheduled	1/30/2014 12:30 PM	AWS	11/18/2013	Demo

12/12/2013 10:54 AM   kenthe

Scheduled Dispatch Report - Summary

Consolidated Service Director
Scheduled Dispatch Report (Summary)
Sorted by Customer ID

PAGE 1

Report Filter
Include Work To Do Detail No

Order No	Dispatch No	Customer ID - Name	Site ID	Received	Scheduled	Technician ID
00000043	1	Atm047 - Asynchronous Networking Tech.		11/18/2013 1:29 PM	1/27/2014 10:30 AM	AWS
00000043	2	Atm047 - Asynchronous Networking Tech.		11/18/2013 1:29 PM	1/30/2014 12:30 PM	AWS
00000049	1	Atm053 - ATM Switches Inc.		11/20/2013 9:11 AM	1/20/2014 9:00 AM	AWS
00000049	2	Atm053 - ATM Switches Inc.		11/20/2013 9:11 AM	1/28/2014 9:00 AM	AWS
00000046	1	Axi040 - Axis Electronics	WH 1	11/18/2013 3:28 PM	2/3/2014 11:30 AM	AWS
00000046	2	Axi040 - Axis Electronics	WH 1	11/18/2013 3:28 PM	2/6/2014 3:30 PM	AWS
00000046	3	Axi040 - Axis Electronics	WH 1	11/18/2013 3:29 PM	2/13/2014 3:30 PM	AWS
00000045	1	CEI031 - Cellucom Inc.	WH 1	11/18/2013 3:06 PM	2/4/2014 9:00 AM	AMK
00000045	2	CEI031 - Cellucom Inc.	WH 1	11/18/2013 3:08 PM	2/7/2014 12:00 PM	AMK
00000045	3	CEI031 - Cellucom Inc.	WH 1	11/18/2013 3:08 PM	2/13/2014 3:00 PM	AMK
00000036	1	Ele036 - Electronet Inc.		11/18/2013 10:42 AM	12/18/2013 10:00 AM	AWS
00000036	2	Ele036 - Electronet Inc.		11/18/2013 10:42 AM	12/23/2013 9:00 AM	AWS
00000039	1	Int050 - Integrated Cirquitry		11/18/2013 12:46 PM	11/28/2013 12:00 PM	AMK
00000039	2	Int050 - Integrated Cirquitry		11/18/2013 12:46 PM	12/11/2013 12:00 PM	AMK
00000037	1	Mer037 - Meritec Networks		11/18/2013 10:45 AM	12/13/2013 11:00 AM	AMK
00000037	2	Mer037 - Meritec Networks		11/18/2013 10:52 AM	12/18/2013 11:00 AM	Crew T1
00000022	1		MN0001	11/8/2013 3:07 PM	12/6/2013 7:00 AM	AWS
00000022	2		MN0001	11/11/2013 10:20 AM	12/11/2013 8:00 AM	AWS
00000024	1		MN0002	11/8/2013 3:08 PM	12/3/2013 7:00 AM	AMK
00000024	2		MN0002	11/11/2013 10:24 AM	12/5/2013 8:00 AM	AMK
00000042	1	Mou027 - Mouse Products Inc.		11/18/2013 1:20 PM	1/17/2014 1:00 PM	AMK
00000042	2	Mou027 - Mouse Products Inc.		11/18/2013 1:20 PM	1/21/2014 1:00 PM	AMK
00000042	3	Mou027 - Mouse Products Inc.		11/18/2013 1:21 PM	1/29/2014 1:30 PM	AMK
00000040	1	Nan019 - Nanoprocessing Inc.		11/18/2013 1:02 PM	1/8/2014 1:00 PM	AMK
00000040	2	Nan019 - Nanoprocessing Inc.		11/18/2013 1:02 PM	1/14/2014 1:00 PM	AMK
00000038	1	Sen051 - Sensor Semiconductor		11/18/2013 11:28 AM	12/17/2013 11:00 AM	AMK
00000038	2	Sen051 - Sensor Semiconductor		11/18/2013 11:28 AM	12/23/2013 11:30 AM	Crew T1
00000047	1	Tri021 - Triscitor Corp.		11/19/2013 8:55 AM	2/20/2014 9:00 AM	AMK
00000047	2	Tri021 - Triscitor Corp.		11/19/2013 8:55 AM	2/25/2014 9:00 AM	Crew T1
00000041	1	Xly044 - Xletek Software		11/18/2013 1:09 PM	1/7/2014 1:00 PM	AWS

12/12/2013 10:53 AM **kenthe**

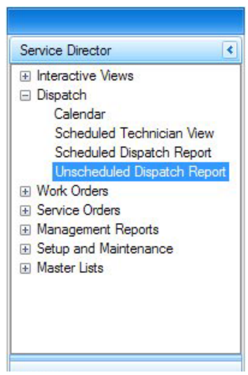
UNSCHEDULED DISPATCH REPORT

Use the **Unscheduled Dispatch Report** function to print details about unscheduled Dispatches. In summary form, the report lists Dispatch Status and scheduling information on individual Dispatch lines for quick review. In detail form, the report lists Customer Equipment, Scheduling, and Labor and Parts information.

To print the **Unscheduled Dispatch Report**, follow these steps:

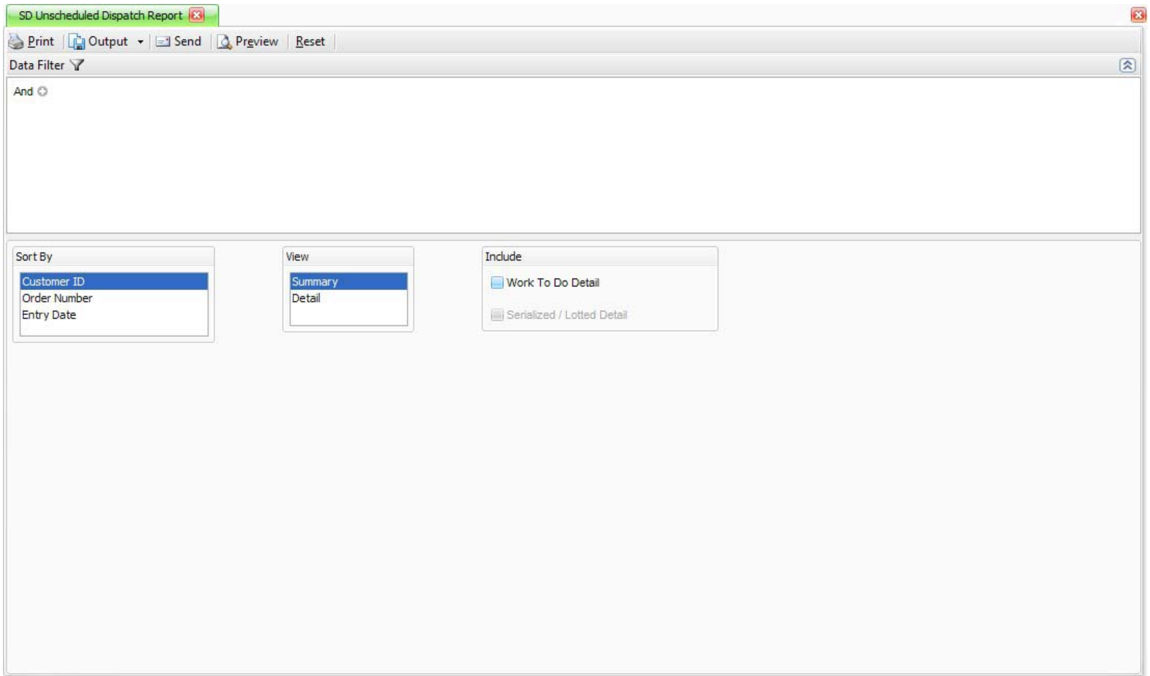
1. Select **Unscheduled Dispatch Report** from the **Dispatch** menu.

Unscheduled Dispatch Report Menu



2. The **Unscheduled Dispatch Report** screen appears.

Unscheduled Dispatch Report Screen



3. Use the **Data Filter** to select the range of filtering options or leave the filter blank to include all available data.
4. Select a **Sort By** option to sort the report: **Customer ID**, **Order Number** or **Entry Date**.
5. Select a **View**:
    - **Summary** to see only a summary of the options.
    - **Details** to see the details of the orders.
6. Additional report options:
    - Select the **Work To Do Detail** check box to include details of the Work To Do IDs.
    - Select the **Serialized/Lotted Detail** check box to include Serial or Lot details from the parts used on the Work Orders or Service Orders.

NOTE: The Work To Do Detail and Serialized/Lotted Detail check boxes will be available when the Detail View is selected.

7. Select a command button:

Command Buttons

Name	Description
Print	Print the report.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Preview	Preview the report on your monitor.
Reset	Set all fields to their defaults.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Unscheduled Dispatch Report - Detail

Consolidated Service Director
Unscheduled Dispatch Report (Detail)
Sorted by Customer ID

PAGE 1

Report Filter

Include Work To Do Detail	Yes	Include Serialized / Lotted Detail	No

Order No	00000032	Customer ID	CEI031	Site Address	938 Marion Steet S Suite 300 St. Paul, MN 55652
Order Date	11/19/2013	Site ID	WH 1		

Dispatch No	1	New Counter	
Description	Preparation Work	Location ID	CA0001
Equipment ID	KEE55	Create Date	11/11/2013
Equipment Description	55 gallon electric water heater	Hold	No
Billing Type	Billable	Request Received Date	11/11/2013 2:39 PM
Bill To ID		Requested Date	1/1/2014
Est Travel (Hrs)	0.250	Requested AM / PM	None
Total Est (Hrs)	5.250	Requested Tech ID	AMK

Work To Do

Work To Do ID	Description	Required Skill Level	Estimated Time (Hrs)
ERough	Electrical Rough-In	2	3.000
HInspect	Inspect and Clean Fuel and Electric System	1	2.000

Dispatch No	2	New Counter	
Description	Cleaning	Location ID	CA0001
Equipment ID	KEE55	Create Date	11/11/2013
Equipment Description	55 gallon electric water heater	Hold	No
Billing Type	Billable	Request Received Date	11/11/2013 2:39 PM
Bill To ID		Requested Date	1/15/2014
Est Travel (Hrs)	0.250	Requested AM / PM	None
Total Est (Hrs)	6.250	Requested Tech ID	TDM

Work To Do

Work To Do ID	Description	Required Skill Level	Estimated Time (Hrs)
HClean	Ductwork Cleaning	1	6.000

Dispatch No	3	New Counter	
Description	Other	Location ID	CA0001
Equipment ID	KEE55	Create Date	11/11/2013
Equipment Description	55 gallon electric water heater	Hold	No
Billing Type	Billable	Request Received Date	11/11/2013 2:40 PM
Bill To ID		Requested Date	2/1/2014
Est Travel (Hrs)	0.250	Requested AM / PM	None
Total Est (Hrs)	5.250	Requested Tech ID	LUK001

Work To Do

Work To Do ID	Description	Required Skill Level	Estimated Time (Hrs)
Other	Other services	4	5.000

12/12/2013 10:57 AM kenthe

Unscheduled Dispatch Report - Summary

Consolidated Service Director
Unscheduled Dispatch Report (Summary)
Sorted by Customer ID

PAGE 1

Report Filter
Include Work To Do Detail No

Order No	Dispatch No	Customer ID - Name	Site ID	Entry Date	Requested Date	Technician ID
00000032	1	CEI031 - Cellucom Inc.	WH 1	11/11/2013 2:39 PM	1/1/2014	AMK
00000032	2	CEI031 - Cellucom Inc.	WH 1	11/11/2013 2:39 PM	1/15/2014	TDM
00000032	3	CEI031 - Cellucom Inc.	WH 1	11/11/2013 2:40 PM	2/1/2014	LUK001
00000054	1	Com028 - Compumarc	WH 1	12/10/2013 10:57 AM	11/28/2013	
00000039	3	Int050 - Integrated Cirquity		11/18/2013 12:46 PM	12/4/2013	
00000021	1		MD0001	11/8/2013 3:06 PM	12/1/2013	
00000021	2		MD0001	11/11/2013 10:07 AM	12/11/2013	
00000050	1		MD0001	12/10/2013 10:54 AM	11/15/2013	
00000051	1		MN0001	12/10/2013 10:54 AM	11/15/2013	
00000052	1		MN0002	12/10/2013 10:54 AM	11/15/2013	
00000047	3	Tri021 - Triscitor Corp.		11/19/2013 8:57 AM	3/1/2014	AWS
00000025	1		TX0001	11/8/2013 3:08 PM	12/20/2013	
00000025	2		TX0001	11/11/2013 10:28 AM	12/23/2013	
00000053	1		TX0001	12/10/2013 10:54 AM	11/15/2013	

*** End of Report ***

12/12/2013 10:56 AM **kenthe**

7

INTERACTIVE VIEWS

USING THE INTERACTIVE VIEWS MENU

With the functions on the Interactive Views menu, you can view but not change the following Service Director information:

- Scheduled Technicians
- Order View
- Transaction information
- Equipment History
- General Equipment History
- Site Equipment History
- Service Contracts

Use these functions if you need to examine (but not change) a Scheduled Technicians, an Order's Status, Transaction information, Equipment history, Site and General Equipment history, or Service Contracts.

Using Interactive Views you can easily and quickly build and manipulate tables to display information. After selecting from the available criteria to display as filter fields, data items, column fields, or row fields, you can highlight columns and rows to have the selected rows and columns display as a graph below the table. To include multiple rows or columns in the graph, you can use the CTRL+ click (to select multiple rows or columns) and SHIFT+ click (to select all rows or columns between the first and second click) shortcuts, after selecting the first row and column.

Sorting and Filtering

When you arrange the columns to your liking, you can sort, group, or filter the data by the column's contents. To sort and filter the data, right-click a column heading and use the functions outlined in the table below.

Button	Name	Select To
	Sort Ascending	Sort the selected column’s data in ascending order. **NOTE: You can also accomplish this task by clicking the column heading until appears.**
	Sort Descending	Sort the selected column’s data in descending order. **NOTE: You can also accomplish this task by clicking the column heading until appears.**
	Clear Sorting	Remove all sorting options and revert to the default view.
	Group By This Column	Group the identical entries from this column into a single group. **NOTE: If you group by column entry, you can right-click on the grouped column heading to select from the options outlined in this table, or choose Full Expand to expand all of the grouped entries, Full Collapse to collapse all of the grouped entries, or UnGroup to undo the grouped entry.**
	Column Chooser	Open the Customization window. With the Customization window open, you can click and drag columns to the window to remove them from the screen or click and drag columns from the window to place them back onto the screen. **NOTE: You can also remove a column from the form by clicking on the heading of the column and dragging it to the bottom of the screen and releasing it when your cursor changes to an *X*.**
	Best Fit	Adjust the selected column to resize the column for the best view of that column’s data.
	Clear Filter	Remove all filter options and revert to the default view.
	Filter Editor	See “Filtering Across All Columns” in the General Information guide for more information.
	Best Fit (all columns)	Adjust all columns to resize for the best view all of the data at once.

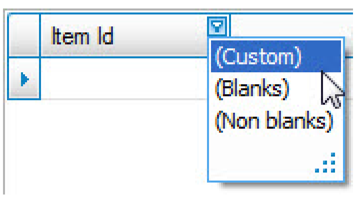
Filtering by an Individual Column

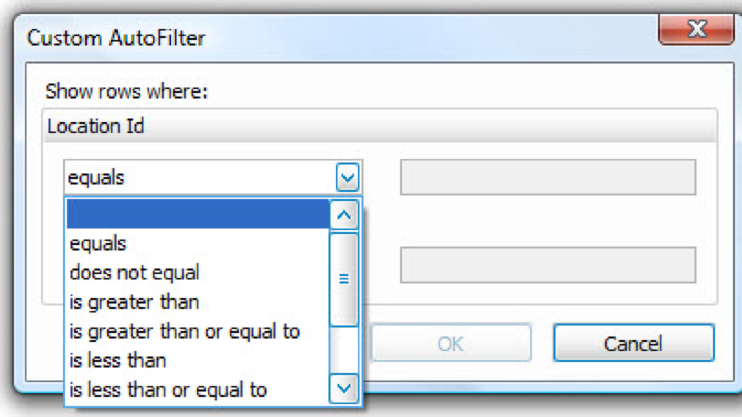
To create a filter for a single column, click the funnel icon that appears once you place the cursor in the associated column and then select a filter option from the drop down menu.

Select	To
(Custom)	Enter criteria for filtering the selected column. **NOTE: View the following paragraph for additional information.**
(Blanks)	Display only entries with blank information in the selected column.
(Non blanks)	Display only entries with information in the selected column.

From the drop down menu, you can also select from the entries in the selected column to group the column by the selected entry.

If you select (**Custom**), the Custom AutoFilter function appears. Select up to two filtering criteria for the selected column from the drop down menus, then enter a string of text or numbers to complete the condition and click **OK**.





Sorting and Filtering Pivot Chart Data

Right-click on the pivot table gray area or a field button when in Pivot Chart View for each application, to use the following functions:

Select	To
	Refresh the data in the tables.

Select	To
Hide	Remove the selected criterion from the table.
Order	Move the selected criterion to the beginning, left, right, or end of the list of criteria.
Show Field List	Open the PivotGrid Field List, then click and drag the applicable fields to the desired locations.
Hide Field List	Close the PivotGrid Field List.

NOTE: Note: See instructions in the “Filtering Across All Columns” section for more information on filtering.

SCHEDULED TECHNICIAN VIEW

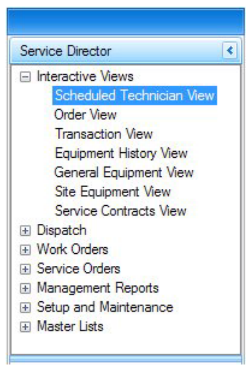
The **Scheduled Technician View** function provides you with the ability to visually review your Technicians and your Scheduled Work Orders and Service Orders and Dispatches in one place.

The Scheduled Technician View allows you to select ranges of information so you can quickly locate specific Technician schedule information by defining your search criteria. This allows you to see all the Scheduled Work Orders or Service Orders and Dispatches for a given Technician, Schedule, or Location.

To use **Scheduled Technician View**, follow these steps:

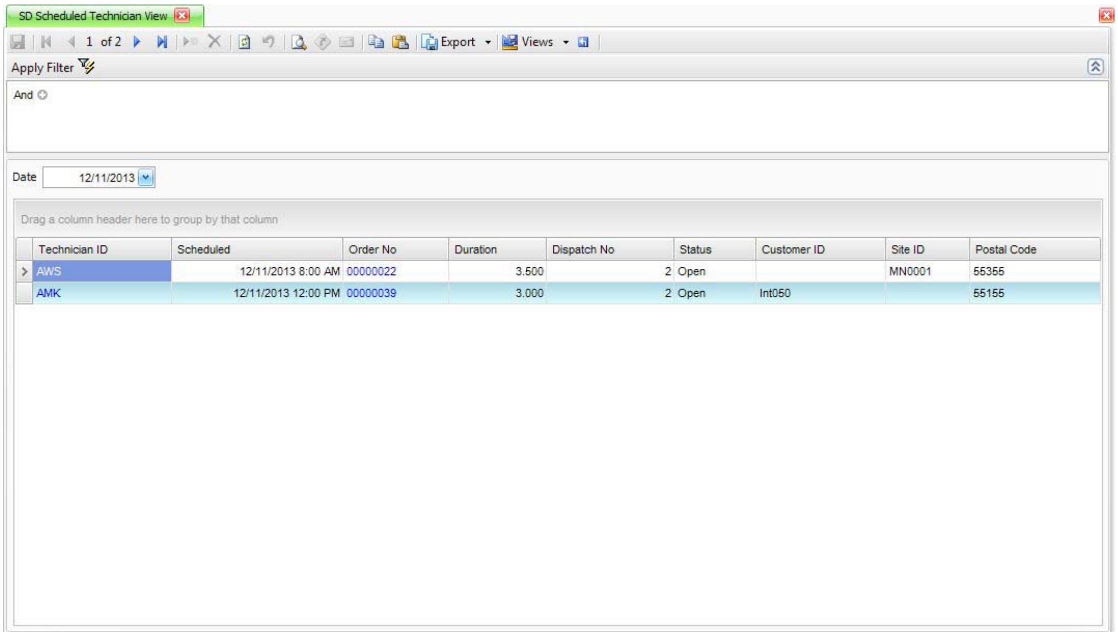
1. Select **Scheduled Technician View** from the **Interactive Views** menu.

Scheduled Technician View Menu



2. The **Scheduled Technician View** screen appears.

Scheduled Technician View Screen



3. The **Order View** screen appears and is blank until you enter your search criteria and click **Apply Filter**. Leave the filter criteria area blank to view all Technicians.
4. Select the **Date** to view the Scheduled Technician's Dispatches for the selected date.
5. Select **Apply Filter** to populate the grid with data the meets your selection criteria.
6. Double click on the blue **Technician ID** field to drill down to the Technician setup screen.
7. Double click on the blue **Order No** field to drill down to the Order View with the selected order filtered.
8. Refer to the **Using the Interactive Views** section a the beginning of this chapter for more details on using the Scheduled Technician View.

NOTE: Refer to the How to Use Grids Section in the General Information guide for more details on how to add or take away columns from the grid screen.

ORDER VIEW

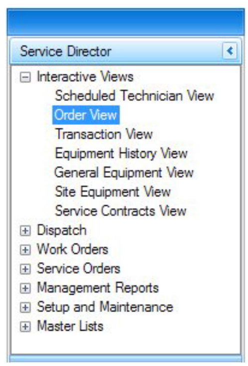
Use the **Order View** function to view information about open and completed Work Orders and Service Orders currently tracked by Service Director.

Use the filtering area at the top of the screen to filter information by Customer, Site, Status, Order No, or Dispatch number. To view the Work Order Entry screen for a Work Order or Service Order, double-click a Order No. When the Order Entry screen opens, you cannot edit any work order information, but you can print the Work Order or Service Order and generate an invoice.

To use the **Order View**, follow these steps:

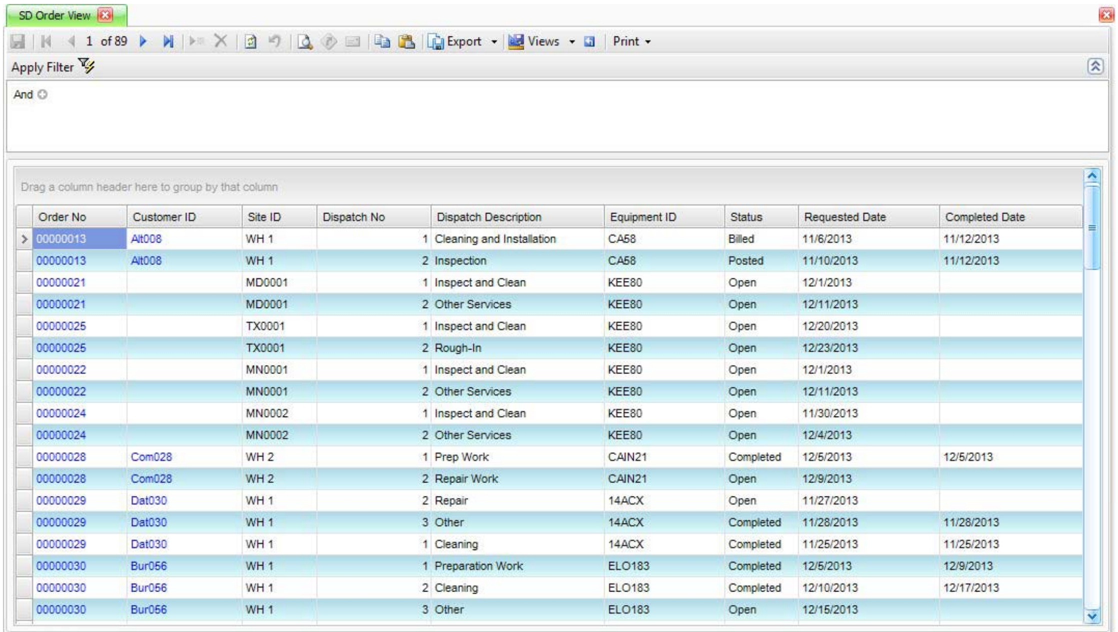
1. Select **Order View** from the **Interactive Views** menu.

Order View Menu



2. The **Order View** screen appears.

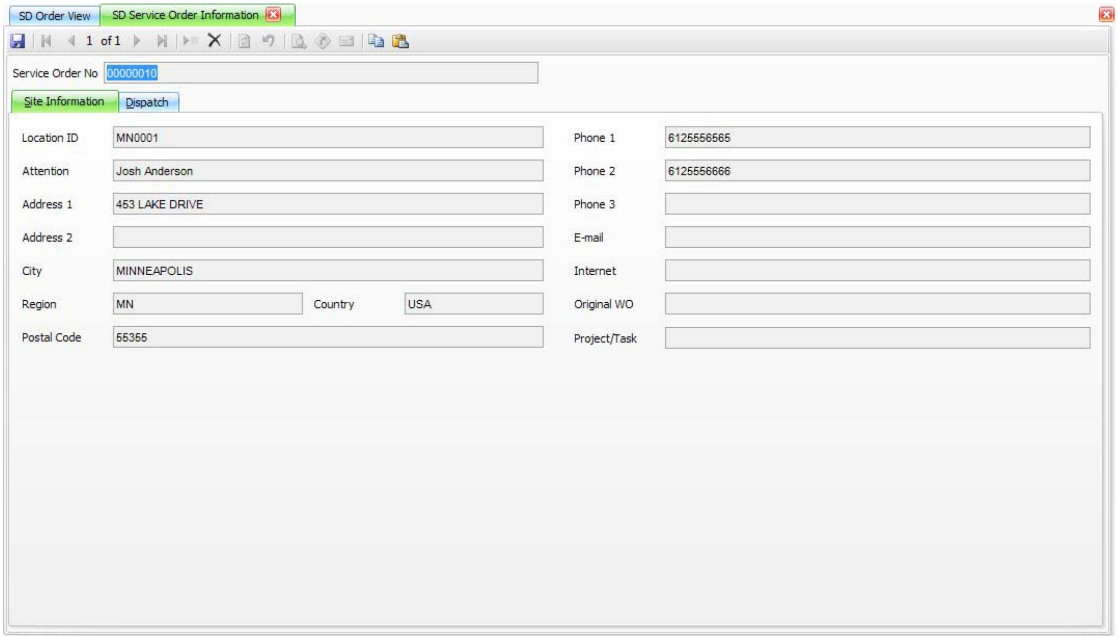
Order View Screen

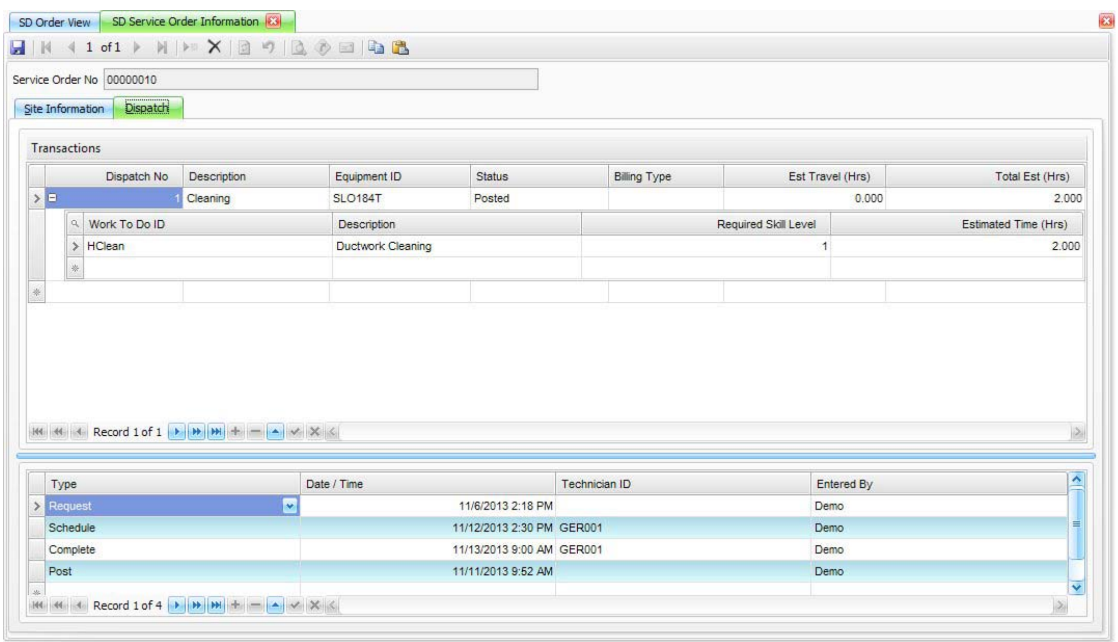


Order No	Customer ID	Site ID	Dispatch No	Dispatch Description	Equipment ID	Status	Requested Date	Completed Date
00000013	Alt008	WH 1	1	Cleaning and Installation	CA58	Billed	11/6/2013	11/12/2013
00000013	Alt008	WH 1	2	Inspection	CA58	Posted	11/10/2013	11/12/2013
00000021		MD0001	1	Inspect and Clean	KEE80	Open	12/1/2013	
00000021		MD0001	2	Other Services	KEE80	Open	12/11/2013	
00000025		TX0001	1	Inspect and Clean	KEE80	Open	12/20/2013	
00000025		TX0001	2	Rough-In	KEE80	Open	12/23/2013	
00000022		MN0001	1	Inspect and Clean	KEE80	Open	12/1/2013	
00000022		MN0001	2	Other Services	KEE80	Open	12/11/2013	
00000024		MN0002	1	Inspect and Clean	KEE80	Open	11/30/2013	
00000024		MN0002	2	Other Services	KEE80	Open	12/4/2013	
00000028	Com028	WH 2	1	Prep Work	CAIN21	Completed	12/5/2013	12/5/2013
00000028	Com028	WH 2	2	Repair Work	CAIN21	Open	12/9/2013	
00000029	Dat030	WH 1	2	Repair	14ACX	Open	11/27/2013	
00000029	Dat030	WH 1	3	Other	14ACX	Completed	11/28/2013	11/28/2013
00000029	Dat030	WH 1	1	Cleaning	14ACX	Completed	11/25/2013	11/25/2013
00000030	Bur056	WH 1	1	Preparation Work	ELO183	Completed	12/5/2013	12/9/2013
00000030	Bur056	WH 1	2	Cleaning	ELO183	Completed	12/10/2013	12/17/2013
00000030	Bur056	WH 1	3	Other	ELO183	Open	12/15/2013	

3. The **Order View** screen appears and is blank until you enter your search criteria and click **Apply Filter**. Leave the filter criteria area blank to view all Orders.
4. Double click the blue **Order No** to drill down to see the details of the Work Order or Service Order and Dispatches.
5. Double click the blue **Customer ID** to view details about the Customer.

Order View Screen - Order Details





6. Refer to the **Using the Interactive Views Menu** section a the beginning of this chapter and the Interactive Views in the General Information guide for more details on using the Order View.

NOTE: Refer to the How to Use Grids Section in the General Information guide for more details on how to add or take away columns from the grid screen.

TRANSACTION VIEW

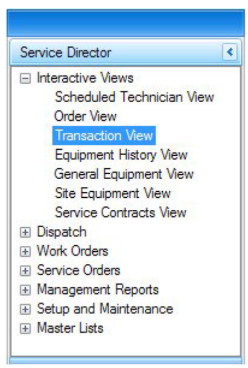
Use the **Transaction View** function to view information about open Work Order and Service Order Transactions for Dispatches, currently tracked by Service Director.

Use the filtering area at the top of the screen to filter information by Dispatch Number, Labor Code, Location, Technician, Type, Order Number, or Scheduled Date. To view the Order View screen for a Work Order or Service Order, double-click an Order No. Double-click the Order No again. When the Work Order or Service Order Entry screen opens, you cannot edit any order information, but you can print the order, and in the case of a Work Order, generate an invoice.

To use the **Transaction View**, follow these steps:

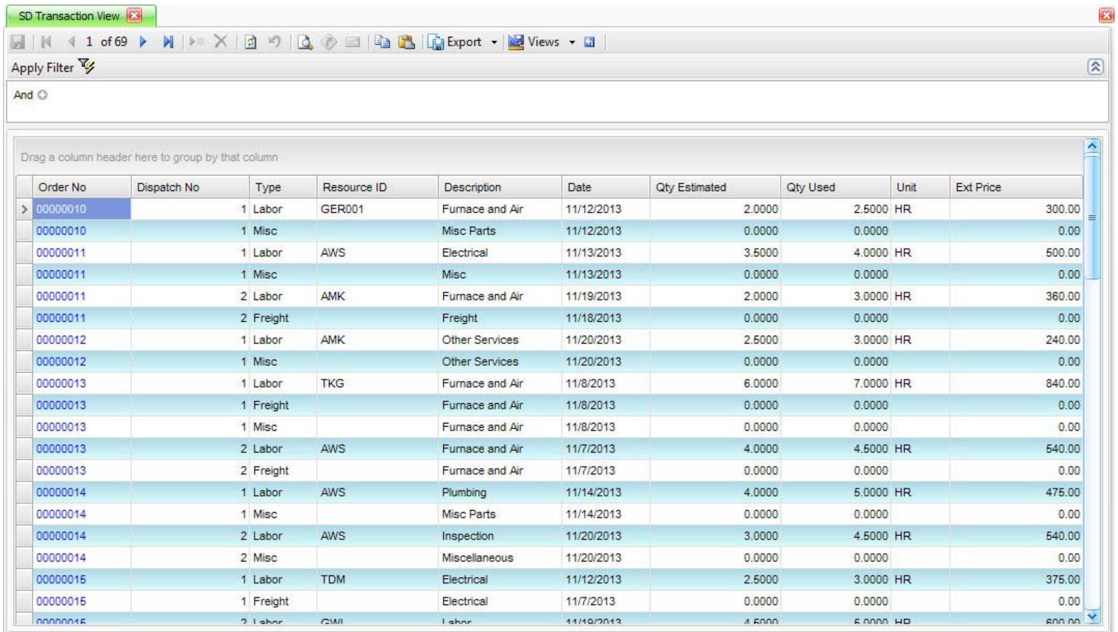
1. Select **Transaction View** from the **Interactive Views** menu.

Transaction View Menu



2. The **Transaction View** screen appears.

Transaction View Screen



Order No	Dispatch No	Type	Resource ID	Description	Date	Qty Estimated	Qty Used	Unit	Ext Price
00000010	1	Labor	GER001	Furnace and Air	11/12/2013	2.0000	2.5000	HR	300.00
00000010	1	Misc		Misc Parts	11/12/2013	0.0000	0.0000		0.00
00000011	1	Labor	AWS	Electrical	11/13/2013	3.5000	4.0000	HR	500.00
00000011	1	Misc		Misc	11/13/2013	0.0000	0.0000		0.00
00000011	2	Labor	AMK	Furnace and Air	11/19/2013	2.0000	3.0000	HR	360.00
00000011	2	Freight		Freight	11/18/2013	0.0000	0.0000		0.00
00000012	1	Labor	AMK	Other Services	11/20/2013	2.5000	3.0000	HR	240.00
00000012	1	Misc		Other Services	11/20/2013	0.0000	0.0000		0.00
00000013	1	Labor	TKG	Furnace and Air	11/8/2013	6.0000	7.0000	HR	840.00
00000013	1	Freight		Furnace and Air	11/8/2013	0.0000	0.0000		0.00
00000013	1	Misc		Furnace and Air	11/8/2013	0.0000	0.0000		0.00
00000013	2	Labor	AWS	Furnace and Air	11/7/2013	4.0000	4.5000	HR	540.00
00000013	2	Freight		Furnace and Air	11/7/2013	0.0000	0.0000		0.00
00000014	1	Labor	AWS	Plumbing	11/14/2013	4.0000	5.0000	HR	475.00
00000014	1	Misc		Misc Parts	11/14/2013	0.0000	0.0000		0.00
00000014	2	Labor	AWS	Inspection	11/20/2013	3.0000	4.5000	HR	540.00
00000014	2	Misc		Miscellaneous	11/20/2013	0.0000	0.0000		0.00
00000015	1	Labor	TDM	Electrical	11/12/2013	2.5000	3.0000	HR	375.00
00000015	1	Freight		Electrical	11/7/2013	0.0000	0.0000		0.00

3. The **Order View** screen appears and is blank until you enter your search criteria and click **Apply Filter**. Leave the filter criteria area blank to view all Transactions.

4. Double click the blue **Order No** to drill down to see the Orders View and double click again on the Order No to view details of the Work Order or Service Order and Dispatches.

5. Refer to the **Using the Interactive Views Menu** section a the beginning of this chapter and the Interactive Views in the General Information guide for more details on using the Transaction View.

NOTE: Refer to the How to Use Grids Section in the General Information guide for more details on how to add or take away columns from the grid screen.

EQUIPMENT HISTORY VIEW

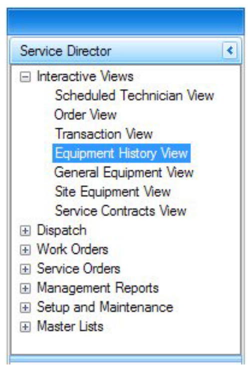
Use the **Equipment History View** function to view historical details for equipment that you've serviced.

Use the filtering area at the top of the screen to filter information by Asset ID, Category, Customer, Site, Manufacturer, Model, Ownership, Status, or Usage. To view the Order entry screen for a posted Work Order or Service Order, double-click an Order entry. Double-click the Order No again. You cannot edit Work Order or Service Orders that you have already posted.

To use the **Equipment History View**, follow these steps:

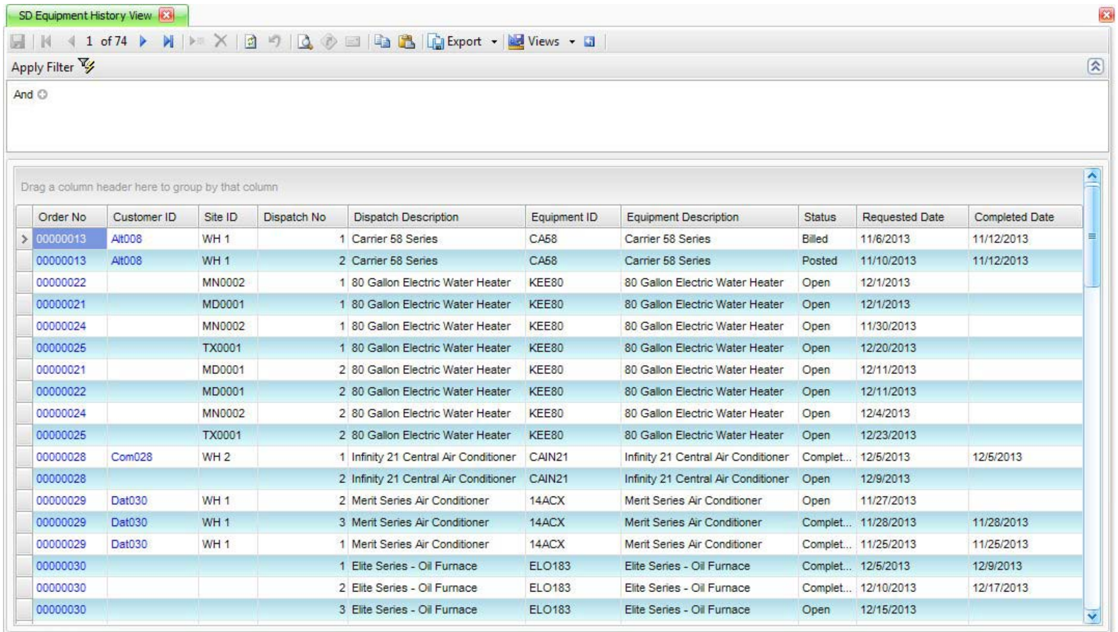
1. Select **Equipment History View** from the **Interactive Views** menu.

Equipment History View Menu



2. The **Equipment History View** screen appears.

Equipment History View Screen



Order No	Customer ID	Site ID	Dispatch No	Dispatch Description	Equipment ID	Equipment Description	Status	Requested Date	Completed Date
00000013	Alt008	WH 1	1	Carrier 58 Series	CA58	Carrier 58 Series	Billed	11/6/2013	11/12/2013
00000013	Alt008	WH 1	2	Carrier 58 Series	CA58	Carrier 58 Series	Posted	11/10/2013	11/12/2013
00000022		MN0002	1	80 Gallon Electric Water Heater	KEE80	80 Gallon Electric Water Heater	Open	12/1/2013	
00000021		MD0001	1	80 Gallon Electric Water Heater	KEE80	80 Gallon Electric Water Heater	Open	12/1/2013	
00000024		MN0002	1	80 Gallon Electric Water Heater	KEE80	80 Gallon Electric Water Heater	Open	11/30/2013	
00000025		TX0001	1	80 Gallon Electric Water Heater	KEE80	80 Gallon Electric Water Heater	Open	12/20/2013	
00000021		MD0001	2	80 Gallon Electric Water Heater	KEE80	80 Gallon Electric Water Heater	Open	12/11/2013	
00000022		MD0001	2	80 Gallon Electric Water Heater	KEE80	80 Gallon Electric Water Heater	Open	12/11/2013	
00000024		MN0002	2	80 Gallon Electric Water Heater	KEE80	80 Gallon Electric Water Heater	Open	12/4/2013	
00000025		TX0001	2	80 Gallon Electric Water Heater	KEE80	80 Gallon Electric Water Heater	Open	12/23/2013	
00000028	Com028	WH 2	1	Infinity 21 Central Air Conditioner	CAIN21	Infinity 21 Central Air Conditioner	Complet...	12/5/2013	12/5/2013
00000028			2	Infinity 21 Central Air Conditioner	CAIN21	Infinity 21 Central Air Conditioner	Open	12/9/2013	
00000029	Dat030	WH 1	2	Merit Series Air Conditioner	14ACX	Merit Series Air Conditioner	Open	11/27/2013	
00000029	Dat030	WH 1	3	Merit Series Air Conditioner	14ACX	Merit Series Air Conditioner	Complet...	11/28/2013	11/28/2013
00000029	Dat030	WH 1	1	Merit Series Air Conditioner	14ACX	Merit Series Air Conditioner	Complet...	11/25/2013	11/25/2013
00000030			1	Elite Series - Oil Furnace	ELO183	Elite Series - Oil Furnace	Complet...	12/5/2013	12/9/2013
00000030			2	Elite Series - Oil Furnace	ELO183	Elite Series - Oil Furnace	Complet...	12/10/2013	12/17/2013
00000030			3	Elite Series - Oil Furnace	ELO183	Elite Series - Oil Furnace	Open	12/15/2013	

3. The **Order View** screen appears and is blank until you enter your search criteria and click **Apply Filter**. Leave the filter criteria area blank to view all Orders.
4. Double click the blue **Order No** to drill down to see the Orders View and double click again on the Order No to view details of the Work Order or Service Order and Dispatches.
5. Double click the blue **Customer ID** to view details about the Customer.
6. Refer to the **Using the Interactive Views Menu** section a the beginning of this chapter and the Interactive Views in the General Information guide for more details on using the Equipment History View.

NOTE: Refer to the How to Use Grids Section in the General Information guide for more details on how to add or take away columns from the grid screen.

GENERAL EQUIPMENT VIEW

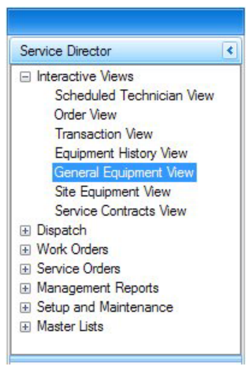
Use the **General Equipment View** function to view details for equipment that you may service, but is not assigned to a specific Customer or your own Company.

Use the filtering area at the top of the screen to filter information by Category, Description, Equipment ID, Manufacturer, Model, Status, or Usage. To open the General Equipment function for a listed piece of equipment, double-click an Equipment ID entry.

To use the **General Equipment View**, follow these steps:

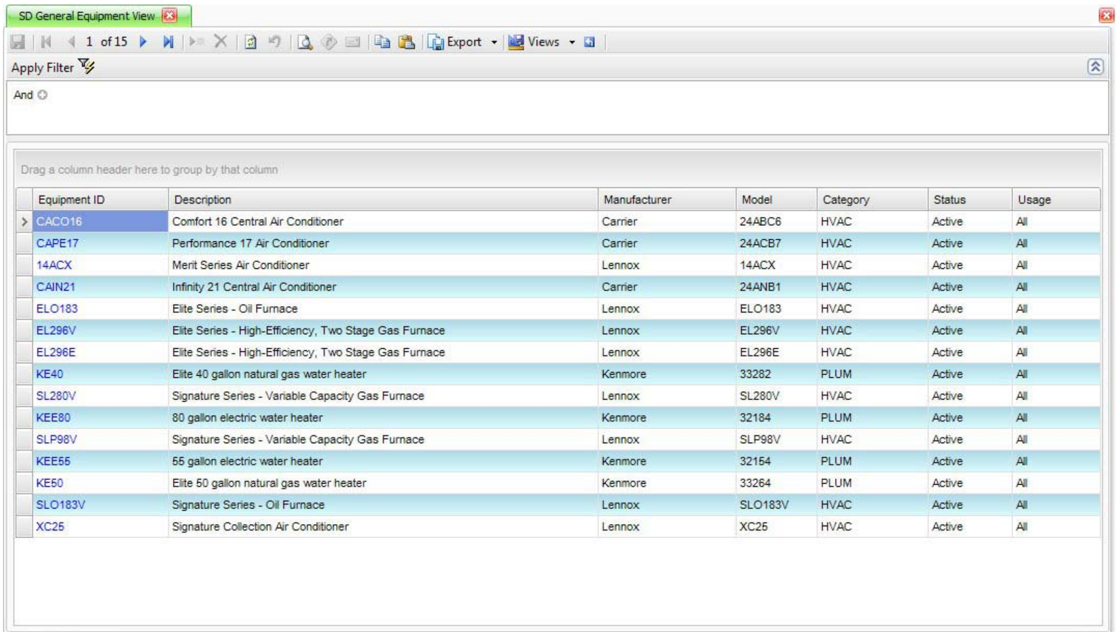
1. Select **General Equipment View** from the **Interactive Views** menu.

General Equipment View Menu



2. The **General Equipment View** screen appears.

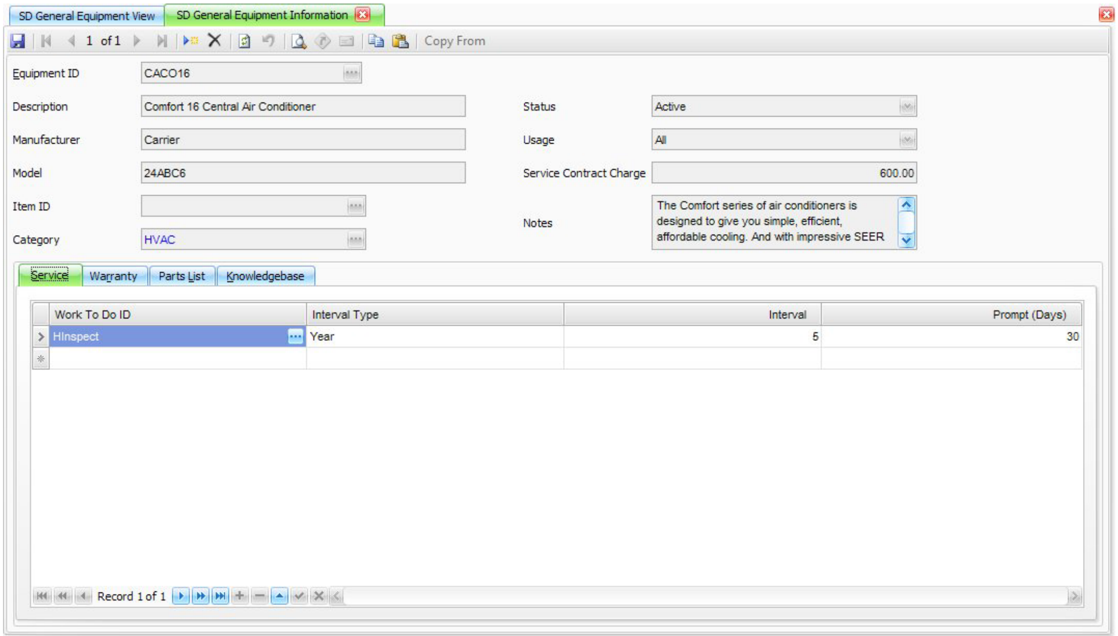
General Equipment View Screen

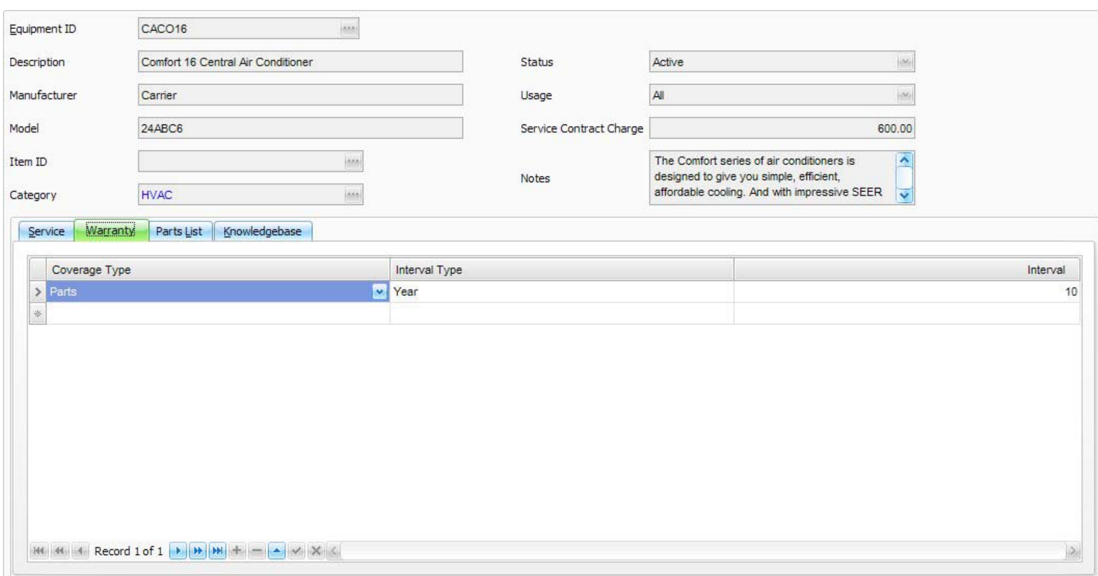


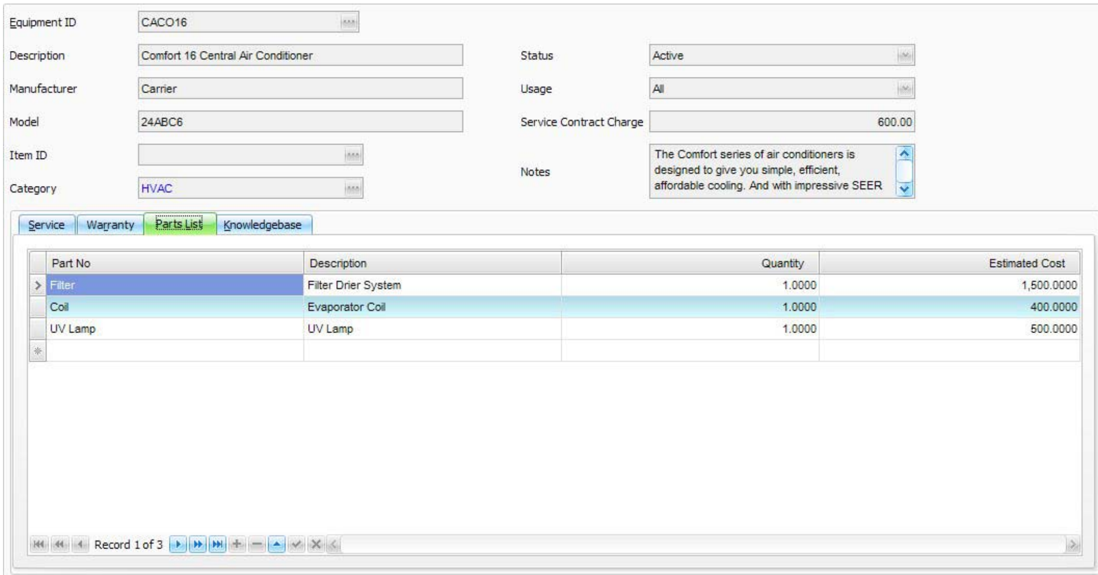
Equipment ID	Description	Manufacturer	Model	Category	Status	Usage
CACO16	Comfort 16 Central Air Conditioner	Carrier	24ABC6	HVAC	Active	All
CAPE17	Performance 17 Air Conditioner	Carrier	24ACB7	HVAC	Active	All
14ACX	Merit Series Air Conditioner	Lennox	14ACX	HVAC	Active	All
CAIN21	Infinity 21 Central Air Conditioner	Carrier	24ANB1	HVAC	Active	All
ELO183	Elite Series - Oil Furnace	Lennox	ELO183	HVAC	Active	All
EL296V	Elite Series - High-Efficiency, Two Stage Gas Furnace	Lennox	EL296V	HVAC	Active	All
EL296E	Elite Series - High-Efficiency, Two Stage Gas Furnace	Lennox	EL296E	HVAC	Active	All
KE40	Elite 40 gallon natural gas water heater	Kenmore	33282	PLUM	Active	All
SL280V	Signature Series - Variable Capacity Gas Furnace	Lennox	SL280V	HVAC	Active	All
KEE80	80 gallon electric water heater	Kenmore	32184	PLUM	Active	All
SLP98V	Signature Series - Variable Capacity Gas Furnace	Lennox	SLP98V	HVAC	Active	All
KEE55	55 gallon electric water heater	Kenmore	32154	PLUM	Active	All
KE50	Elite 50 gallon natural gas water heater	Kenmore	33264	PLUM	Active	All
SLO183V	Signature Series - Oil Furnace	Lennox	SLO183V	HVAC	Active	All
XC25	Signature Collection Air Conditioner	Lennox	XC25	HVAC	Active	All

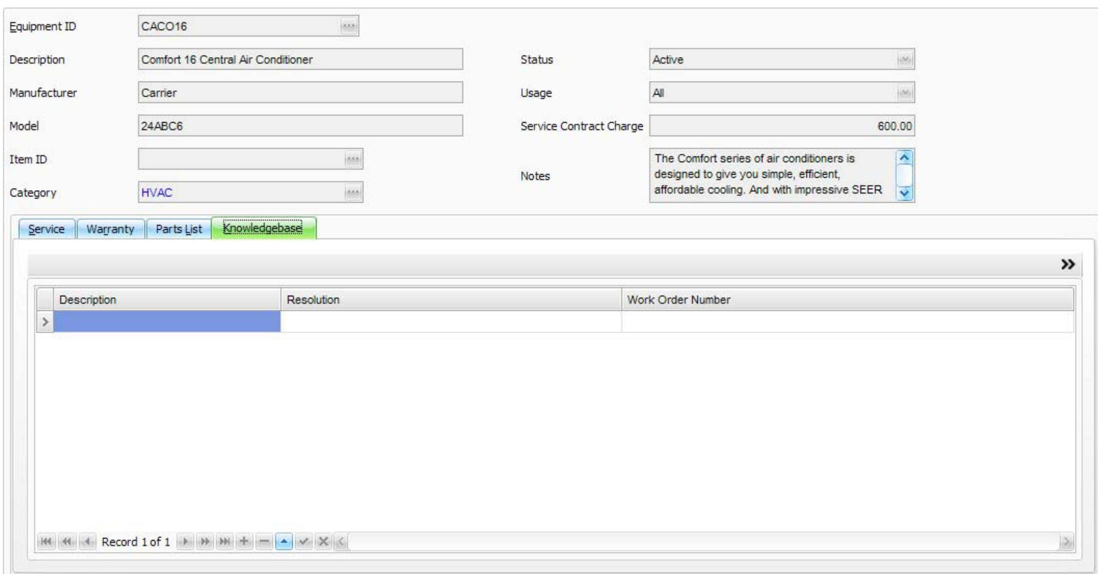
3. The **Order View** screen appears and is blank until you enter your search criteria and click **Apply Filter**. Leave the filter criteria area blank to view all Equipment.
4. Double click the blue **Equipment ID** to drill down to see the details of the General Equipment setup.

General Equipment View Screen - Equipment Details









5. Refer to the **Using the Interactive Views Menu** section a the beginning of this chapter and the Interactive Views in the General Information guide for more details on using the General Equipment View.

NOTE: Refer to the How to Use Grids Section in the General Information guide for more details on how to add or take away columns from the grid screen.

SITE EQUIPMENT VIEW

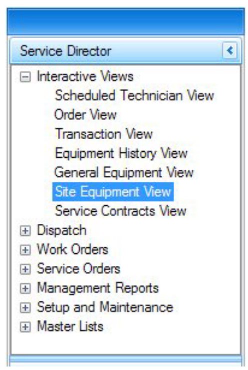
Use the **Site Equipment View** function to view details for equipment assigned to a Customer or to your Company.

Use the filter area at the top of the screen to filter information by Category, Description, Customer, Equipment ID, Manufacturer, Model, Site, Status, or Usage. To open the Site Equipment function for a piece of listed equipment, double-click an Equipment ID entry.

To use **Site Equipment View**, follow these steps:

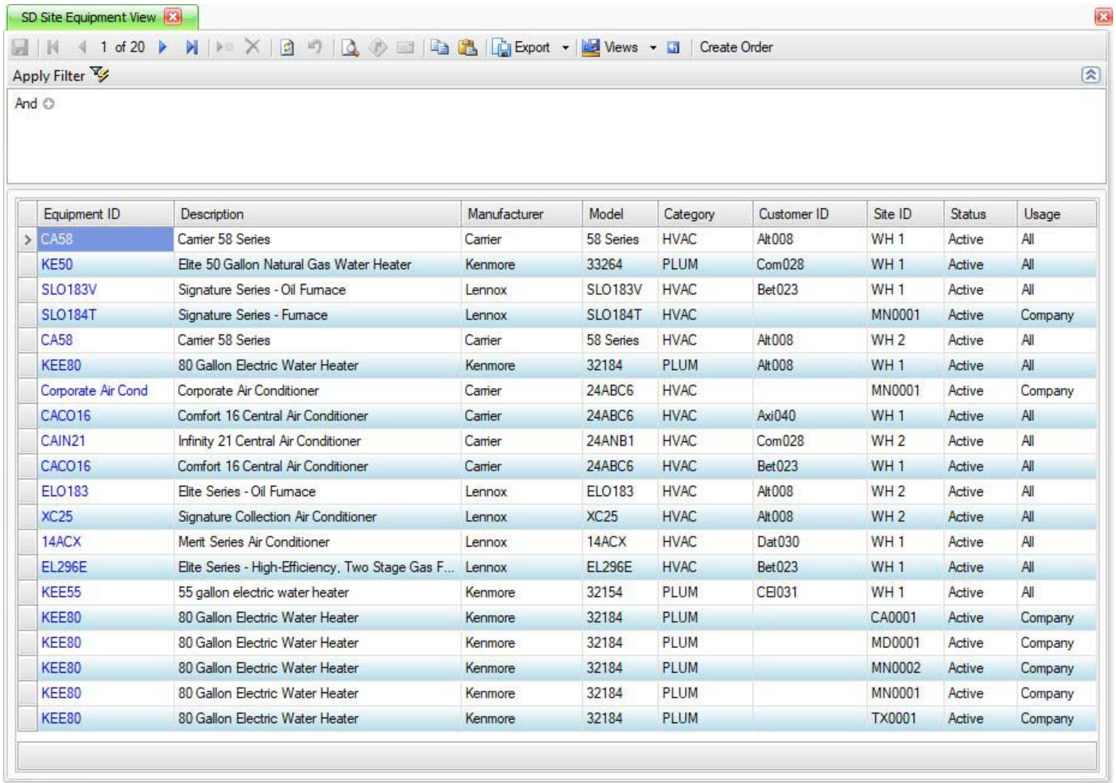
1. Select **Site Equipment View** from the View menu.

Site Equipment View Menu



2. The **Site Equipment View** screen appears.

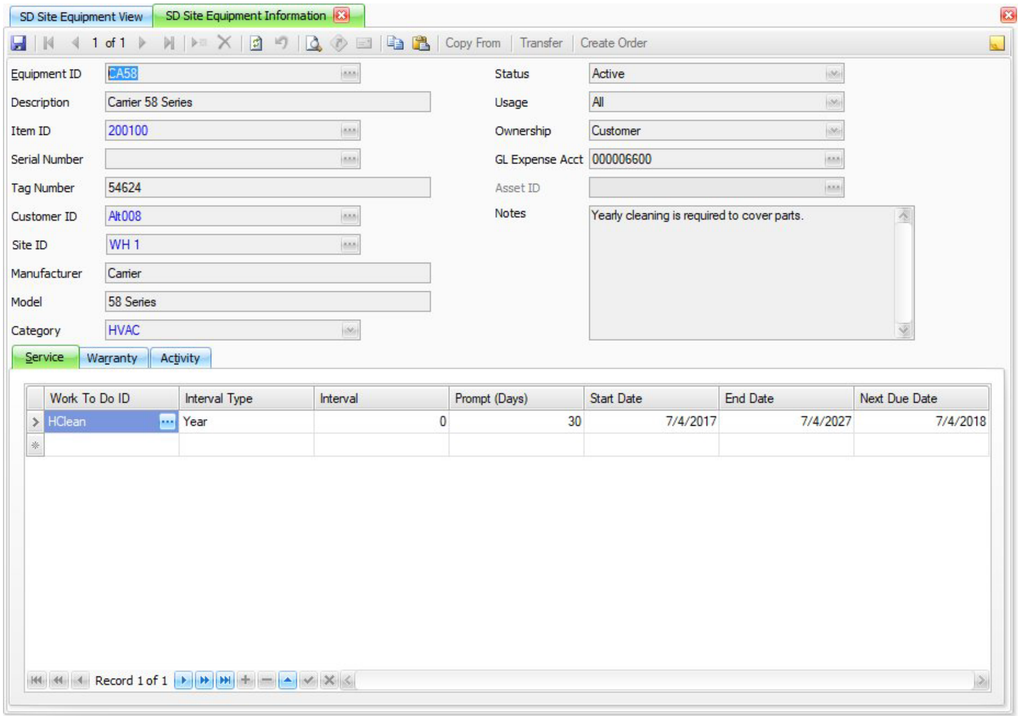
Site Equipment View Screen

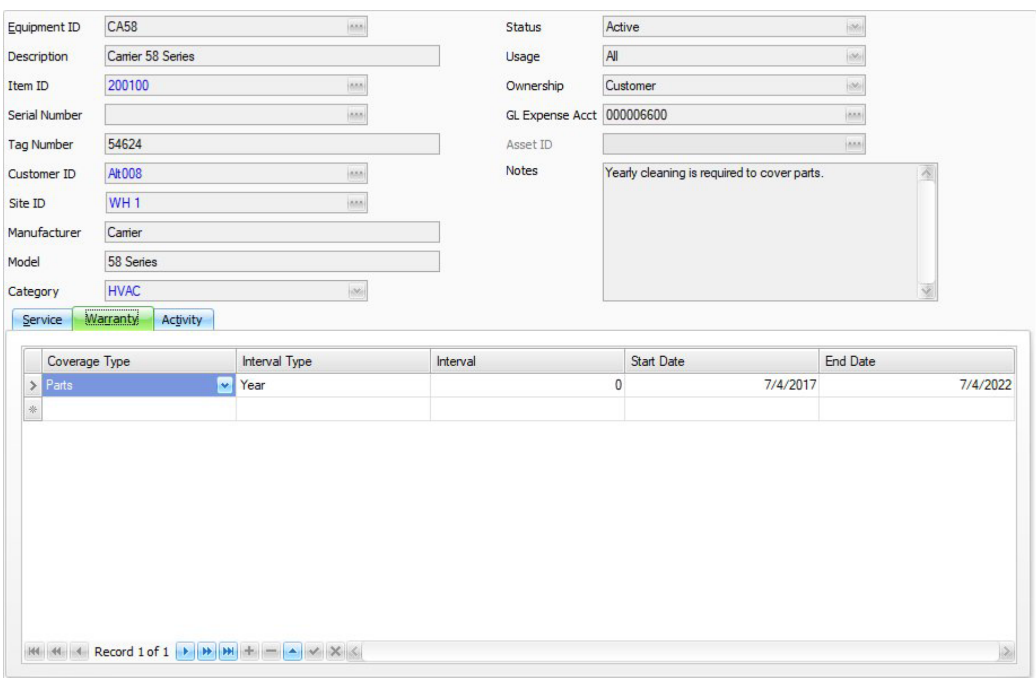


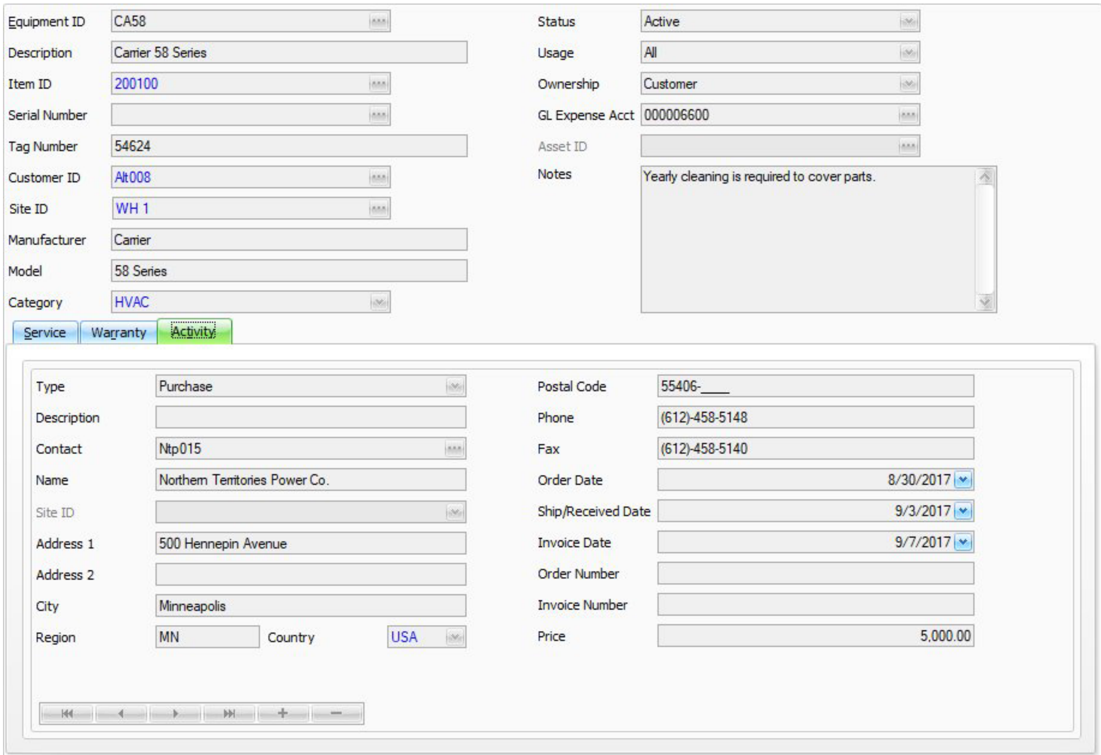
Equipment ID	Description	Manufacturer	Model	Category	Customer ID	Site ID	Status	Usage
CA58	Carrier 58 Series	Carrier	58 Series	HVAC	Alt008	WH 1	Active	All
KE50	Elite 50 Gallon Natural Gas Water Heater	Kenmore	33264	PLUM	Com028	WH 1	Active	All
SLO183V	Signature Series - Oil Furnace	Lennox	SLO183V	HVAC	Bet023	WH 1	Active	All
SLO184T	Signature Series - Furnace	Lennox	SLO184T	HVAC		MN0001	Active	Company
CA58	Carrier 58 Series	Carrier	58 Series	HVAC	Alt008	WH 2	Active	All
KEE80	80 Gallon Electric Water Heater	Kenmore	32184	PLUM	Alt008	WH 1	Active	All
Corporate Air Cond	Corporate Air Conditioner	Carrier	24ABC6	HVAC		MN0001	Active	Company
CACO16	Comfort 16 Central Air Conditioner	Carrier	24ABC6	HVAC	Axi040	WH 1	Active	All
CAIN21	Infinity 21 Central Air Conditioner	Carrier	24ANB1	HVAC	Com028	WH 2	Active	All
CACO16	Comfort 16 Central Air Conditioner	Carrier	24ABC6	HVAC	Bet023	WH 1	Active	All
ELO183	Elite Series - Oil Furnace	Lennox	ELO183	HVAC	Alt008	WH 2	Active	All
XC25	Signature Collection Air Conditioner	Lennox	XC25	HVAC	Alt008	WH 2	Active	All
14ACX	Merit Series Air Conditioner	Lennox	14ACX	HVAC	Dat030	WH 1	Active	All
EL296E	Elite Series - High-Efficiency, Two Stage Gas F...	Lennox	EL296E	HVAC	Bet023	WH 1	Active	All
KEE55	55 gallon electric water heater	Kenmore	32154	PLUM	CEI031	WH 1	Active	All
KEE80	80 Gallon Electric Water Heater	Kenmore	32184	PLUM		CA0001	Active	Company
KEE80	80 Gallon Electric Water Heater	Kenmore	32184	PLUM		MD0001	Active	Company
KEE80	80 Gallon Electric Water Heater	Kenmore	32184	PLUM		MN0002	Active	Company
KEE80	80 Gallon Electric Water Heater	Kenmore	32184	PLUM		MN0001	Active	Company
KEE80	80 Gallon Electric Water Heater	Kenmore	32184	PLUM		TX0001	Active	Company

3. The **Order View** screen appears and is blank until you enter your search criteria and click **Apply Filter**. Leave the filter criteria area blank to view all Equipment.
4. Double click the blue **Equipment ID** to drill down to see the details of the Site Equipment setup.
5. Click the Create Order button to open the Work Order Entry or Service Order Entry screen to create a Work Order or Service Order for the selected equipment.

Site Equipment View Screen - Equipment Details







6. Refer to the **Using the Interactive Views Menu** section a the beginning of this chapter and the Interactive Views in the General Information guide for more details on using the Site Equipment View.

NOTE: Refer to the How to Use Grids Section in the General Information guide for more details on how to add or take away columns from the grid screen.

SERVICE CONTRACTS VIEW

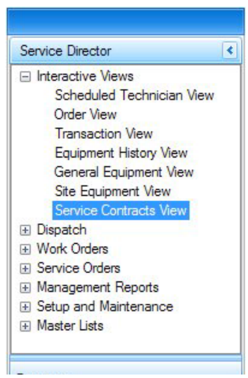
Use the **Service Contracts View** function to view details of Service Contracts for your Customers.

Use the filter area at the top of the screen to filter information by Contract Number, Contract Start or End Dates, Customer, or Description. To open the Service Contracts function for a listed Contract, double-click a Contract Number entry.

To use the **Service Contracts View**, follow these steps:

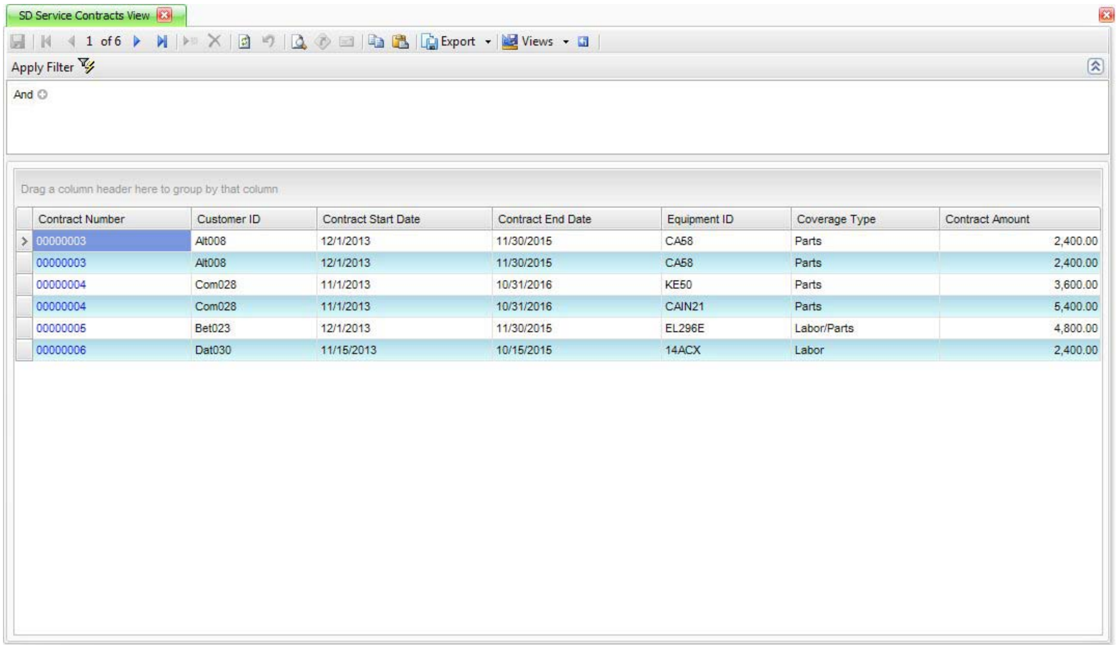
1. Select **Service Contracts View** from the **Interactive View** menu.

Service Contracts View Menu



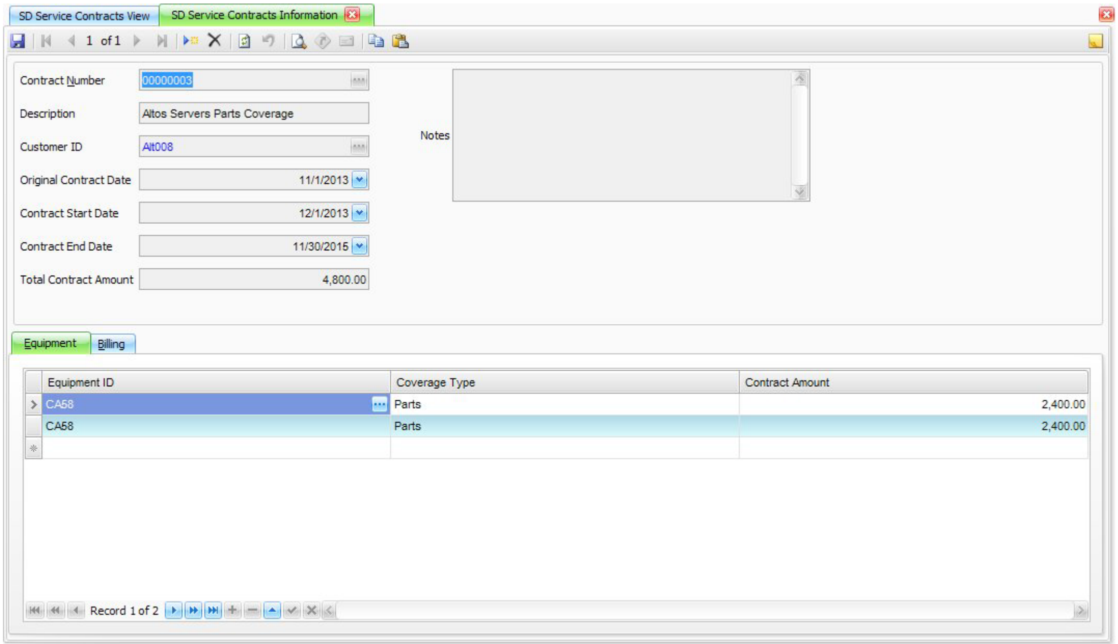
2. The **Service Contracts View** screen appears.

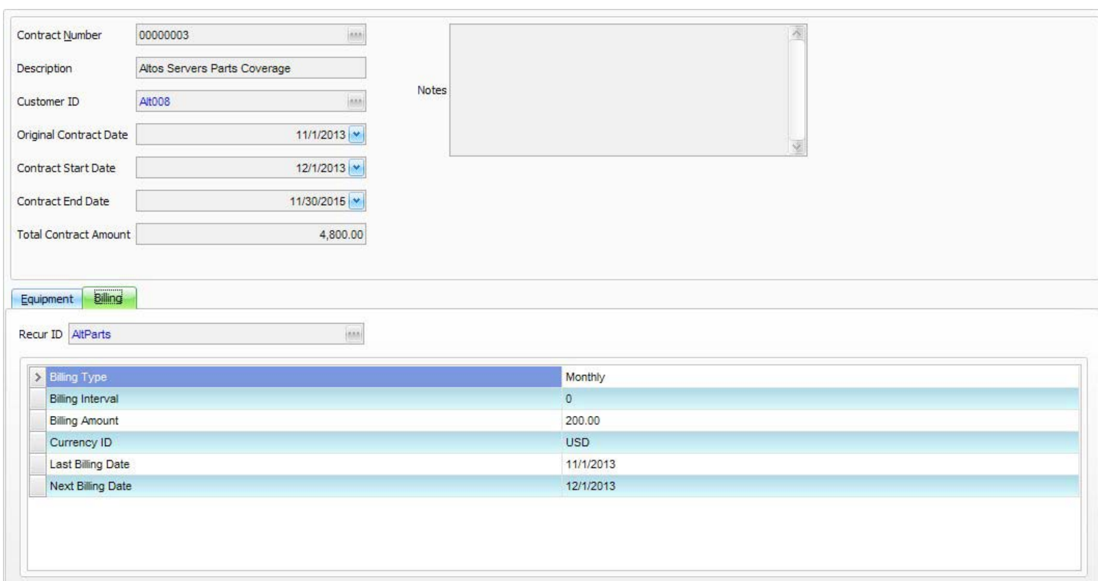
Service Contracts View Screen



3. The **Order View** screen appears and is blank until you enter your search criteria and click **Apply Filter**. Leave the filter criteria area blank to view all Service Contracts.
4. Double click the blue **Contract Number** to drill down to see the details of the service contract setup.

Service Contract View Screen - Service Contract Details





5. Refer to the **Using the Interactive Views Menu** section a the beginning of this chapter and the Interactive Views in the General Information guide for more details on using the Service Contract View.

NOTE: Refer to the How to Use Grids Section in the General Information guide for more details on how to add or take away columns from the grid screen.

8

MANAGEMENT REPORTS

OVERVIEW

Reports are valuable tools that allow you to view Work Order and Service Order details, analyze business practices, and look over Schedule information. Reports can also serve as audit trails.

Print the following reports to analyze productivity, profitability of your Work Orders, Service Orders, and order history.

The **Productivity Report** (page 8-5) shows the actual and estimated time Technicians need to complete certain Dispatches. Only Dispatches with a status of Billed or Posted appear on the report. Use this information to revise estimates as needed.

The **Profitability Report** (page 8-9) shows Dispatch price and costing data. Only Dispatches with a status of Billed or Posted appear on the report. Use the information to identify where your company can cut costs of which services offer the greatest value.

The **Order History Report** (page 8-13) shows details about posted Work Orders and Service Orders. The formats are similar to those for the Work Order Report and Service Order Report: the summary format allows you to view information for several Dispatches while the detail format provides in-depth information about each Dispatch.

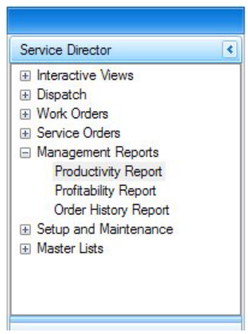
PRODUCTIVITY REPORT

Use the **Productivity Report** to view the actual and estimated time Technicians need to complete certain Dispatches. Only Dispatches with a status of Billed or Posted appear on the report. Use this information to revise estimates as needed.

To print the **Productivity Report**, follow these steps:

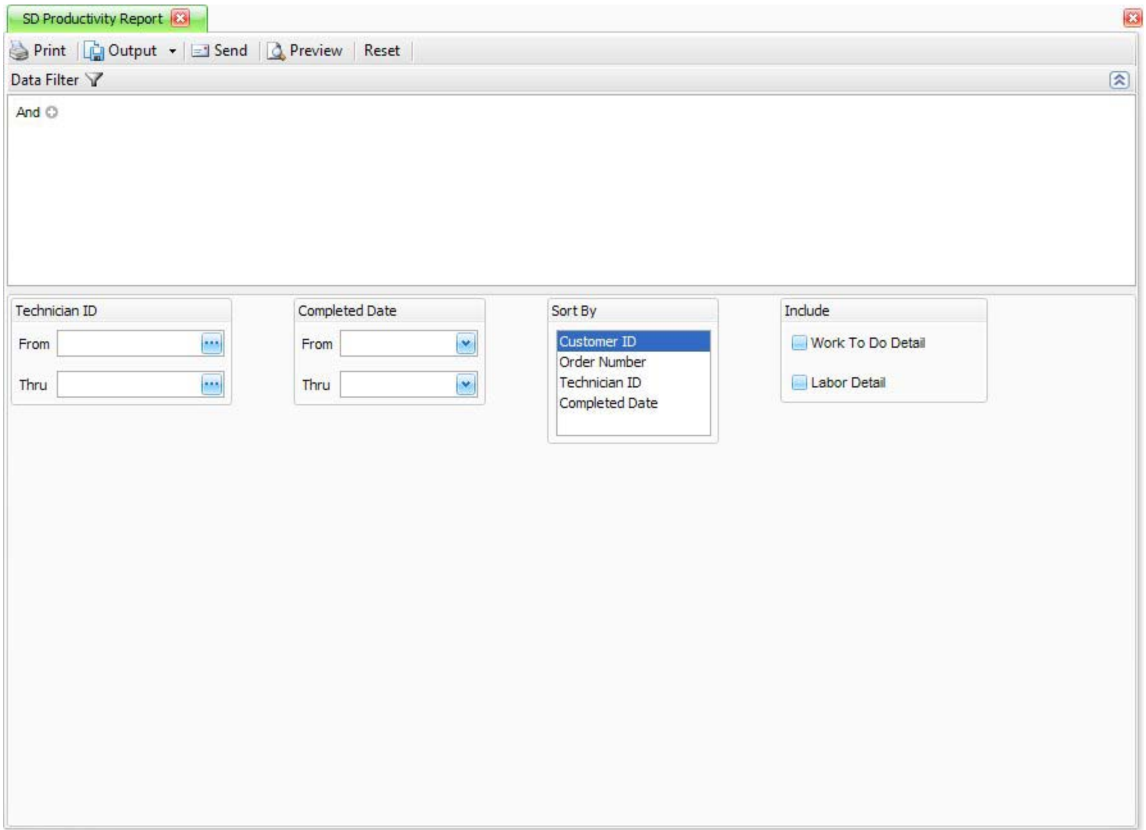
1. Select **Productivity Report** from the **Management Reports** menu.

Productivity Report Menu



2. The **Productivity Report** screen appears.

Productivity Report Screen



3. Use the **Data Filter** to select the range of filtering options or leave the filter blank to include all available data.
4. Select the range of **Technician ID From** and **Thru**, for the report. Only Orders assigned to Technicians within the range selected will be printed. Leave the From and Thru fields blank to include all Technicians.
5. Select the range of **Completed Dates From** and **Thru**, for the report. Only Orders completed within the range selected will be printed. Leave the From and Thru fields blank to include all completed dates.
6. Select a **Sort By** option to sort the report: **Customer ID**, **Order Number**, **Technician**, or **Completed Date**.

7. Additional report options:
    - Select the **Work To Do Detail** check box to include details of the Work To Do IDs.
    - Select the **Labor Detail** check box to include details of the Labor activity done on the Orders.
8. Select a command button:

Command Buttons

Name	Description
Print	Print the report.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Preview	Preview the report on your monitor.
Reset	Set all fields to their defaults.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Productivity Report

Consolidated Service Director
Productivity Report
Sorted by Customer ID

PAGE 1

Report Filter

Technician ID From		**Technician ID Thru**	
Completed Date From		**Completed Date Thru**	
Include Work To Do Detail	Yes	**Include Labor Detail**	Yes

Order No	Dispatch No	Customer ID - Name	Site ID	Technician ID	Arrive / Start Date	Completed Date	Estimate	Actual	Pct Var
00000013	1	Alt008 - Altos Servers Company	WH 1	AWS		11/12/2013 10:12 AM	6.000	7.000	16.67

Work To Do

Work To Do ID	Description	Required Skill Level	Estimated Time (Hrs)
HClean	Ductwork Cleaning	1	3.000
HFixture	Install HVAC Fixture	2	2.000

Labor Detail

Tech ID	Labor Code	Date	Time Spent	Description
TKG	HVAC	11/8/2013	7.000	Furnace and Air

Order No	Dispatch No	Customer ID - Name	Site ID	Technician ID	Arrive / Start Date	Completed Date	Estimate	Actual	Pct Var
00000013	2	Alt008 - Altos Servers Company	WH 1	AWS		11/12/2013 10:12 AM	4.000	4.500	12.50

Work To Do

Work To Do ID	Description	Required Skill Level	Estimated Time (Hrs)
HInspect	Inspect and Clean Fuel and Electric System	1	3.000

Labor Detail

Tech ID	Labor Code	Date	Time Spent	Description
AWS	HVAC	11/7/2013	4.500	Furnace and Air

Order No	Dispatch No	Customer ID - Name	Site ID	Technician ID	Arrive / Start Date	Completed Date	Estimate	Actual	Pct Var
00000014	1	Alt008 - Altos Servers Company	WH 1	AWS		11/15/2013 10:40 AM	4.000	5.000	25.00

Work To Do

Work To Do ID	Description	Required Skill Level	Estimated Time (Hrs)
PFixture	Install Plumbing Fixture	1	3.000

Labor Detail

Tech ID	Labor Code	Date	Time Spent	Description
AWS	PLUM	11/14/2013	5.000	Plumbing

Order No	Dispatch No	Customer ID - Name	Site ID	Technician ID	Arrive / Start Date	Completed Date	Estimate	Actual	Pct Var
00000014	2	Alt008 - Altos Servers Company	WH 1	AWS		11/21/2013 10:44 AM	3.000	4.500	50.00

Work To Do

Work To Do ID	Description	Required Skill Level	Estimated Time (Hrs)
HInspect	Inspect and Clean Fuel and Electric System	1	2.000

Labor Detail

Tech ID	Labor Code	Date	Time Spent	Description
AWS	HVAC	11/20/2013	4.500	Inspection

Order No	Dispatch No	Customer ID - Name	Site ID	Technician ID	Arrive / Start Date	Completed Date	Estimate	Actual	Pct Var
00000018	1	Alt008 - Altos Servers Company	WH 2	AMK		11/19/2013 10:39 AM	7.750	8.250	6.45

2/12/2014 8:49 AM **kenthe**

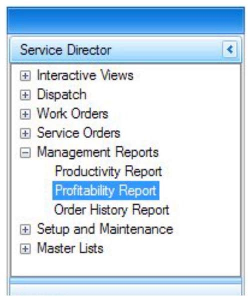
PROFITABILITY REPORT

Print the **Profitability Report** to view Dispatch price and costing data. Only Dispatches with a status of Billed or Posted appear on the report. Use the information to identify where your Company can cut costs of which services offer the greatest value.

To print the **Profitability Report**, follow these steps:

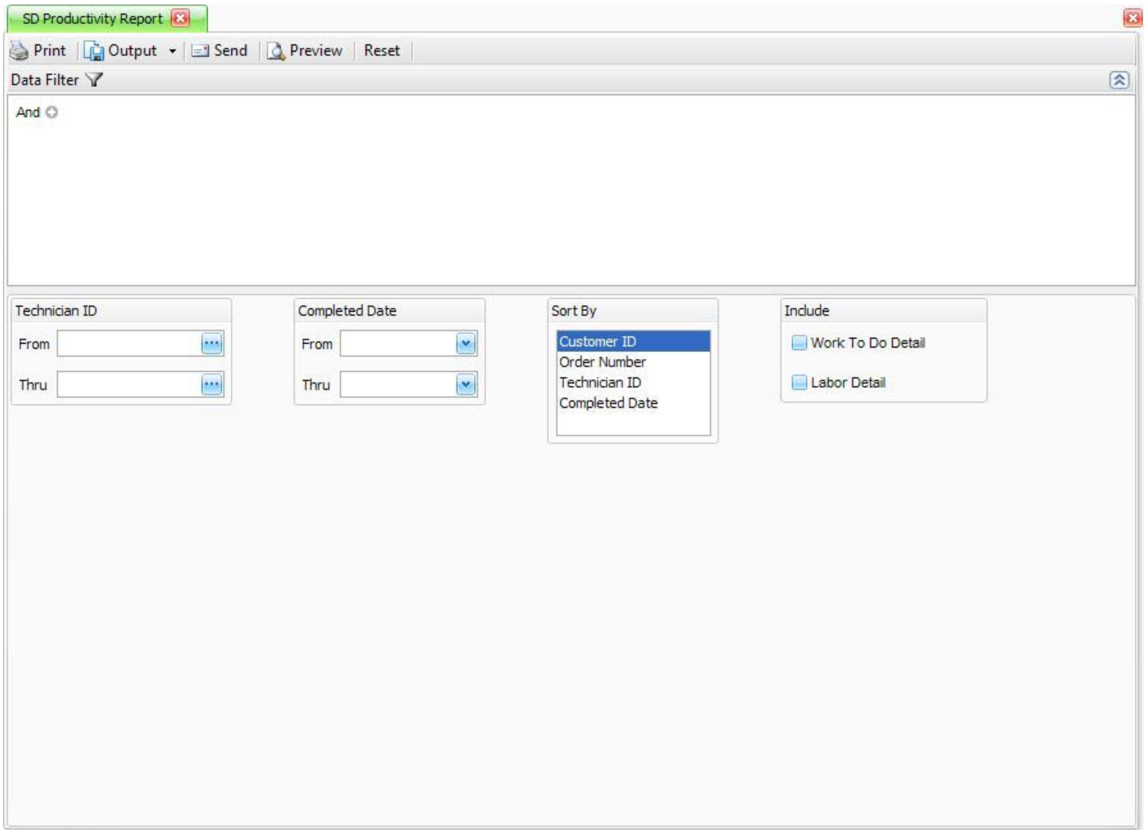
1. Select **Profitability Report** from the **Management Reports** menu.

Profitability Report Menu



2. The **Profitability Report** screen appears.

Profitability Report Screen



3. Use the **Data Filter** to select the range of filtering options or leave the filter blank to include all available data.
4. Select the range of **Technician ID From** and **Thru**, for the report. Only Orders assigned to Technicians within the range selected will be printed. Leave the From and Thru fields blank to include all Technicians.
5. Select the range of **Completed Dates From** and **Thru**, for the report. Only Orders completed within the range selected will be printed. Leave the From and Thru fields blank to include all completed dates.
6. Select a **Sort By** option to sort the report: **Customer ID**, **Order Number**, **Technician**, or **Completed Date**.

7. Additional report options:
    - Select the **Work To Do Detail** check box to include details of the Work To Do IDs.
    - Select the **Transaction Detail** check box to include details of the Transactions entered for the Orders.
8. Select a command button:

Command Buttons

Name	Description
Print	Print the report.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Preview	Preview the report on your monitor.
Reset	Set all fields to their defaults.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Profitability Report

Consolidated Service Director
Profitability Report
Sorted by Customer ID

PAGE 1

Report Filter

Technician ID From		Technician ID Thru	
Completed Date From		Completed Date Thru	
Include Work To Do Detail	Yes	Include Transaction Detail	Yes

Order No	Dispatch No	Customer ID - Name	Site ID	Technician ID	Received	Completed
00000013	1	Alt008 - Altos Servers Company	WH 1	AWS	11/6/2013 2:31 PM	11/12/2013 10:12 AM

Work To Do

Work To Do ID	Description	Required Skill Level	Estimated Time (Hrs)
HClean	Ductwork Cleaning	1	3.000
HFixture	Install HVAC Fixture	2	2.000

Dispatch Totals

Type	Cost	Billed	Profit	Pct
Labor	0.00	0.00	0.00	0.00
Parts	0.00	0.00	0.00	0.00
Total	0.00	0.00	0.00	0.00

Order No	Dispatch No	Customer ID - Name	Site ID	Technician ID	Received	Completed
00000013	2	Alt008 - Altos Servers Company	WH 1	AWS	11/6/2013 2:35 PM	11/12/2013 10:12 AM

Work To Do

Work To Do ID	Description	Required Skill Level	Estimated Time (Hrs)
HInspect	Inspect and Clean Fuel and Electric System	1	3.000

Transactions

Type	Resource ID	Cost	Billed	Profit	Pct
Labor	AWS	174.83	540.00	365.17	67.62

Dispatch Totals

Type	Cost	Billed	Profit	Pct
Labor	174.83	540.00	365.17	67.62
Parts	0.00	0.00	0.00	0.00
Total	174.83	540.00	365.17	67.62

Order Totals

Type	Cost	Billed	Profit	Pct
Labor	174.83	540.00	365.17	67.62
Parts	0.00	0.00	0.00	
Total	174.83	540.00	365.17	67.62

Order No	Dispatch No	Customer ID - Name	Site ID
00000014	1	Alt008 - Altos Servers Company	WH 1

Work To Do

Work To Do ID	Description	Required Skill Level	Estimated Time (Hrs)
PFixture	Install Plumbing Fixture	1	3.000

Transactions

Type	Resource ID	Cost	Billed	Profit	Pct
Labor	AWS	189.50	475.00	285.50	60.11

Dispatch Totals

Type	Cost	Billed	Profit	Pct
Labor	189.50	475.00	285.50	60.11
Parts	0.00	0.00	0.00	0.00
Total	189.50	475.00	285.50	60.11

Order No	Dispatch No	Customer ID - Name	Site ID
00000014	2	Alt008 - Altos Servers Company	WH 1

Work To Do

Work To Do ID	Description	Required Skill Level	Estimated Time (Hrs)
HInspect	Inspect and Clean Fuel and Electric System	1	2.000

Transactions

Type	Resource ID	Cost	Billed	Profit	Pct
Labor	AWS	174.83	540.00	365.17	67.62

2/12/2014 8:51 AM kenthe

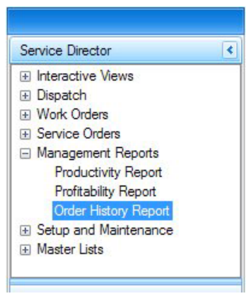
ORDER HISTORY REPORT

Use the **Order History Report** to view details about posted Work Orders and Service Orders. The formats are similar to those for the Work Order Report and Service Order Report: the summary format allows you to view information for several Dispatches, while the detail format provides in-depth information about each Dispatch.

To print the **Order History Report**, follow these steps:

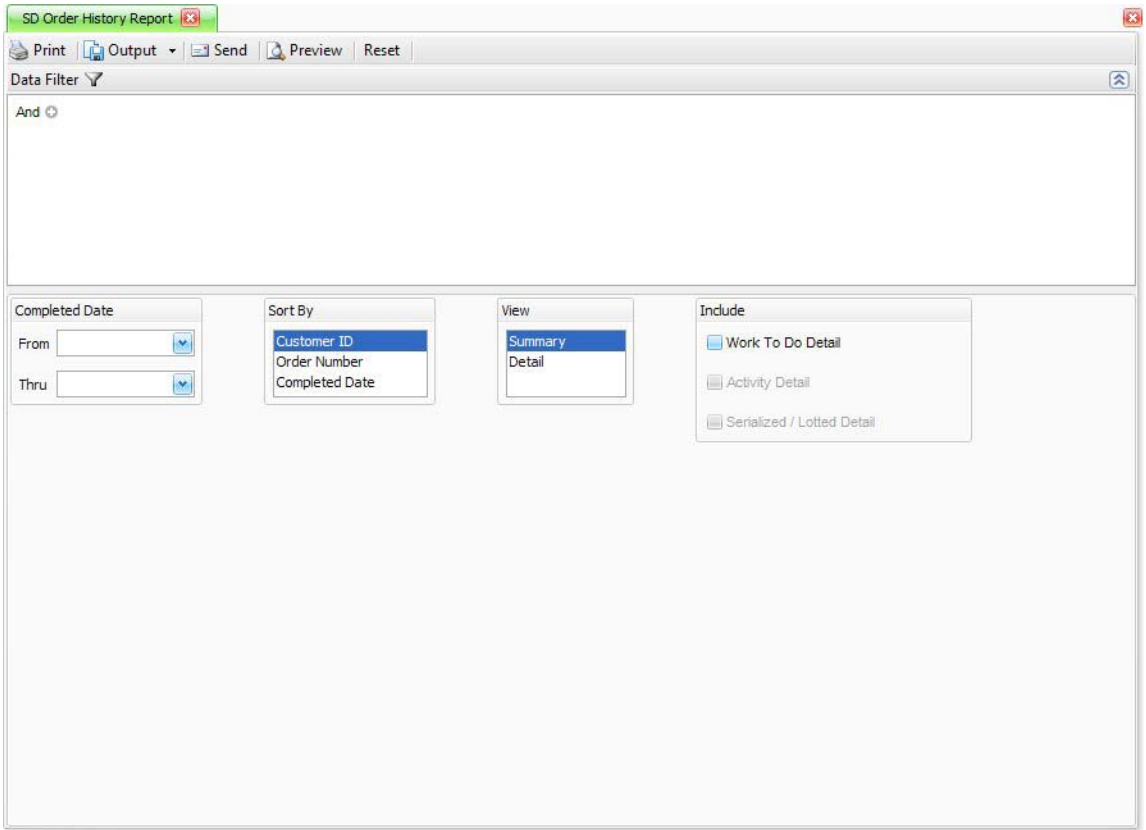
1. Select **Order History Report** from the **Management Reports** menu.

Order History Report Menu



2. The **Order History Report** screen appears.

Order History Report Screen



3. Use the **Data Filter** to select the range of filtering options or leave the filter blank to include all available data.
4. Select the range of **Completed Dates From** and **Thru**, for the report. Only Orders completed within the range selected will be printed. Leave the From and Thru fields blank to include all completed dates.
5. Select a **Sort By** option to sort the report: **Customer ID**, **Order Number**, or **Completed Date**.
6. Select a **View**:
   - **Summary** to see only a summary of the options.
   - **Details** to see the details of the Work Orders or Service Orders.

7. Additional report options:

    - Select the **Work To Do Detail** check box to include details of the Work To Do IDs.
    - Select the **Activity Detail** check box to include details of the Activity done on the Work Orders or Service Orders.
    - Select the **Serialized/Lotted Detail** check box to include Serial or Lot details from the parts used on the Work Orders or Service Orders.

NOTE: The Work To Do Detail, Activity Detail, and Serialized/Lotted Detail check boxes will be available when the Detail View is selected.

8. Select a command button:

Command Buttons

Name	Description
Print	Print the report.
Output	Output the report as a .pdf file and save it.
Send	Email the report with the report attached as a .pdf file.
Preview	Preview the report on your monitor.
Reset	Set all fields to their defaults.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Order History Report - Detail

Consolidated Service Director
Order History Report (Detail)
Sorted by Customer ID

PAGE 1

Report Filter

Completed Date From		Completed Date Thru	
Include Work To Do Detail	Yes	Include Activity Detail	Yes
Include Serialized / Lotted Detail	No		

Order No	00000010	Customer ID		Site Address	453 LAKE DRIVE MINNEAPOLIS, MN 55355
Order Date	11/11/2013	Site ID	MN0001		

Dispatch No	1	New Counter	
Description	Cleaning	Location ID	CA0001
Equipment ID	SLO184T	Entry Date	11/6/2013
Equipment Description	Signature Series - Furnace	Request Received Date	11/6/2013 2:18 PM
Billing Type		Requested Date	11/6/2013
Bill To ID		Requested AM / PM	None
Est Travel (Hrs)	0.000	Requested Tech ID	
Total Est (Hrs)	2.000	Cancelled	No

Work To Do

Work To Do ID	Description	Required Skill Level	Estimated Time (Hrs)
HClean	Ductwork Cleaning	1	2.000

Activity

Status	Date / Time	Technician ID	Entry Date	Entered By
Scheduled	11/12/2013 2:30 PM	GER001	11/11/2013	Demo
Completed	11/13/2013 9:00 AM	GER001	11/11/2013	Demo
Posted	11/11/2013 9:52 AM		11/11/2013	Demo

Transactions

Type	Resource ID	Date	Qty Estimated	Qty Used	Unit	Description
Labor	GER001	11/12/2013	2.000	2.500	HR	Furnace and Air

2/12/2014 8:53 AM kenthe

Order History Report - Summary

Consolidated Service Director
Order History Report (Summary)
Sorted by Customer ID

PAGE 1

Report Filter
Completed Date From **Completed Date Thru**
Include Work To Do Detail Yes

Order No	Dispatch No	Customer ID - Name	Site ID	Received	Date / Time	Technician ID
00000010	1		MN0001	11/6/2013 2:18 PM	11/13/2013 9:00 AM	GER001
Work To Do ID		**Description**				
HClean		Ductwork Cleaning				
00000011	1		MN0002	11/6/2013 2:25 PM	11/14/2013 9:18 AM	TDM
Work To Do ID		**Description**				
ERepair		General Electrical Repair				
00000011	2		MN0002	11/11/2013 9:21 AM	11/11/2013 9:25 AM	AMK
Work To Do ID		**Description**				
HInspect		Inspect and Clean Fuel and Electric System				
00000012	1		MN0002	11/6/2013 2:27 PM	11/21/2013 9:38 AM	AWS
Work To Do ID		**Description**				
Other		Other services				
00000020	1		CA0001	11/8/2013 3:06 PM	11/14/2013 9:45 AM	AWS
Work To Do ID		**Description**				
HInspect		Inspect and Clean Fuel and Electric System				
HFixture		Install HVAC Fixture				
00000020	2		CA0001	11/11/2013 9:42 AM	11/15/2013 9:47 AM	AWS
Work To Do ID		**Description**				
Other		Other services				
00000050	1		MD0001	12/10/2013 10:54 AM	12/16/2013 11:20 AM	AWS
Work To Do ID		**Description**				
HInspect		Inspect and Clean Fuel and Electric System				
00000014	1	Alt008 - Altos Servers Company	WH 1	11/6/2013 2:45 PM	11/15/2013 10:40 AM	AWS
Work To Do ID		**Description**				
PFixture		Install Plumbing Fixture				
00000014	2	Alt008 - Altos Servers Company	WH 1	11/6/2013 2:45 PM	11/21/2013 10:44 AM	AWS
Work To Do ID		**Description**				
HInspect		Inspect and Clean Fuel and Electric System				
00000018	1	Alt008 - Altos Servers Company	WH 2	11/8/2013 10:06 AM	11/19/2013 10:39 AM	AMK

2/12/2014 8:52 AM **kenthe**