



# Infor System21 Service Management

Product Guide

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# Contents

- About this guide..... 21**
  - Intended audience ..... 21
  - Related documents..... 21
  - Contacting Infor..... 21
  
- Chapter 1 Overview ..... 23**
  - Introduction ..... 23
  - Relationship to Other Applications ..... 23
  - Application Configuration..... 24
  - Application Reference Data..... 25
    - Standard Codes and Descriptions ..... 26
    - Customers ..... 26
    - Models ..... 27
    - Installations..... 27
    - Engineers..... 28
    - Service Territories and Engineer Assignment..... 28
    - Contract Types ..... 28
    - Job Categories ..... 29
    - Price Lists ..... 29
    - Contract Rates..... 29
    - Scheduled Visit Profiles..... 30
  - Contract Processing ..... 30
    - Contract Maintenance ..... 30
    - Contract Pricing and Invoicing..... 31
    - Contract Renewal ..... 32
    - Contract Quotations..... 33
    - Contract Credits..... 33
  - Job Processing ..... 33
    - Planned Maintenance Job Generation..... 34

Call Logging.....	34
Addition of New Job.....	34
Amendment to an Existing Job.....	35
Engineer Work Allocation .....	36
Engineer Technical Reporting .....	37
Job Pricing and Invoicing .....	37
Engineer Diary .....	39
Diary Entries .....	39
Job Escalation .....	39
Example of Call Escalation .....	40
Remote Communications Links to and from Engineers.....	41
Time Zones.....	41
Enquiries .....	41
Loading Service Management Data .....	42
Basic (Parameter) Data .....	42
Major Data .....	45
<b>Chapter 2    Company Parameters Database.....</b>	<b>47</b>
Introduction .....	47
Relationship to Other Modules .....	47
Setting Up Service Management.....	48
Company Profile File [1/SSP] .....	49
Company Profile Maintenance Selection Window .....	50
Company Profile Maintenance General Window .....	50
Company Profile Maintenance Accounts Window .....	53
Company Profile Maintenance Charges Window .....	56
Company Profile Maintenance Hours Window .....	58
Codes/Parameter File & Codes/Parameter Maintenance [2/SSP, 3/SSU].....	59
Codes/Parameter Maintenance Selection Window.....	60
Codes/Parameter Maintenance Window for Types .....	61
Parameter Code Selection Window .....	64
Codes/Parameter Maintenance Window for IDs.....	64
List of Parameter Types.....	65
ABSC - Engineer Absence .....	65
ACTN - *Action Codes.....	65
CCAL - Alternative Calendars .....	65
CCRC - Contract Cancellation Reason.....	66

---

CHGT - Miscellaneous Charge Types .....	66
CHST - *Contract Header Status .....	66
CLMT - Warranty Claim Type.....	66
CLST - *Contract Line Status .....	66
CODC - Condition Code.....	67
COLM - Collection Method .....	67
CONC - Condition Code.....	67
CONF.....	68
CORA - Corrective Actions.....	68
CRDR - Credit Assessment Reason Codes.....	68
CREA - Call Cancellation Reason.....	68
CRTP - *Credit Type.....	69
DAYS - *Days Description .....	69
DAYT .....	69
DEFC .....	70
DESM - Despatch Methods.....	70
DFDM - Default Despatch Methods .....	70
DISC - Discount Reasons .....	70
DSST - *Default Action Codes .....	70
EDAY - Elapsed Days .....	71
EGRD - Engineer Job Grades.....	71
ERRC - *Remote Communications Error Codes .....	71
ESQU - *Estimate Request Type .....	73
ETAR - *Engr Assignment Error Codes .....	74
FLTC.....	75
GLPR - Global Price Increase Code .....	75
GLTX - *GL Deferred Revenue Transaction Text.....	75
GTXT - General System Text.....	76
INVT - *Invoice Type .....	76
JETT - *Job Entry Type .....	76
JHST - *Job Header Status .....	76
JLAB - *Job Line Abbreviated Status .....	77
JLST - *Job Line Status.....	77
LHTY.....	78
LOAN - Loan Types.....	78
MAJF - Major Fault Flag.....	78
MROV - Reason for Override .....	78
MRSR - Meter Reading Source.....	78

MTHS - *Months Descriptions .....	79
OPER - Physical Condition Code.....	79
OWNP - Warranty Claim Ownership Code .....	79
PAYT - Payment Method.....	79
PCDF - Remote Comms Process Indicator .....	79
PTCH - Territories .....	80
REAS - Reason Codes.....	80
RCTX - Remote Comms Process ID.....	80
RECT - *Invoice Line Type.....	80
REC2 - *Invoice Line Type Short Descriptions .....	81
REGN - Regions.....	81
REPC - Repair Code .....	81
RJCD - *Warranty Claim Reject Codes.....	81
RRES.....	82
RVTY .....	82
SECT - Machine Section Repaired .....	82
SRVC - *Special Revenue Categories .....	82
SSCT - Machine Sub Section Repaired.....	83
STAT - Equipment Status.....	83
STA1 - Statistical Family (Models) .....	83
SYM1 - Symptom Code 1.....	83
SYM2 - Symptom Code 2.....	83
S2SE - *Serious Error Codes .....	84
TEAM - Team Description .....	84
TRPT - Report Type .....	84
TRST - *Technical Report Status.....	84
TTYP - *Remote Comms Trans Type .....	85
TXTI - Text Types.....	85
TXTO - Text Destination Codes .....	86
TYDS - *Billing Type Description.....	86
T411 - *Text Printing - Miscellaneous Codes.....	86
UNSP - *Unspecified Machine .....	86
VATC - Tax Codes and Rates.....	86
VLDN - *Validation Rules .....	87
VSTP - Scheduled Visit Profiles.....	87
WAIT - Wait Times for Sleeper Jobs.....	87
WCLC - Warranty Claim Labour Credit Notes .....	87
WRFL - Warranty Claim Flag .....	87

---

WVAL - Warranty Claim Value Limits .....	88
XTYP - *Text Types.....	88
ZONE - Zone Charge Description .....	89
240P - *W240 Options.....	89
Inventory Descriptions .....	89
DEPT (Departments) .....	89
MANT (Mantle codes).....	90
MFID (Manufacturer's ID) .....	90
OTHR (Customer search parameters) .....	90
PTYP (Item type) .....	90
SPED (Urgency indicator) .....	91
STKU (Stockroom usage code).....	91
TIMZ (Time zones) .....	91
Calendar File Control [3/SSP] .....	91
Calendar Control Maintenance Window.....	92
Daily Calendar File [4/SSP] .....	93
Daily Calendar Selection Window .....	93
Daily Calendar Maintenance Window .....	94
Enquire on Daily Calendar File [14/SSP] .....	95
Daily Calendar Enquiry Selection Window.....	95
Daily Calendar Enquiry Window.....	95
Branch File [5/SSP] .....	96
Branch Maintenance Selection Window.....	96
Branch Maintenance Detail Window .....	96
User/Branch Authorities [6/SSP] .....	98
Authority Maintenance Selection Window.....	98
Branch Selection Window .....	99
Escalation Parameters [7/SSP] .....	100
Escalation Control Maintenance Selection Window.....	101
Escalation Control Maintenance Detail Window .....	101
Rebuild of Period End Data File [8/SSP].....	103
System Parameters File [9/SSP] .....	104
System Parameters Maintenance Response Window.....	104
System Parameters Maintenance General Window .....	106
System Parameters Maintenance Meterage Window.....	107
System Parameters Maintenance Assignment Window .....	109
System Parameters Maintenance Calls Window .....	112

Working Days Calendar File [10/SSP] .....	114
Working Days Calendar Maintenance Selection Window.....	114
Working Days Calendar Maintenance Base On Window .....	114
Working Days Calendar Maintenance Year Window.....	115
Working Days Calendar Maintenance Detail Window .....	116
Shift Profile [11/SSP] .....	117
Shift Profile Selection Window .....	117
Shift Profile Maintenance Window.....	118
Enquire on Codes/Parameters File [12/SSP].....	119
Codes/Parameter File Enquiry Selection Window .....	119
Parameter Code Enquiry Selection Window.....	120
Codes/Parameter File Enquiry Window for IDs .....	120
Enquire on Daily Calendar File [14/SSP] .....	120
Daily Calendar Enquiry Selection Window.....	120
Enquire on Branch File [15/SSP].....	120
Branch Enquiry Selection Window .....	121
Branch Enquiry Window .....	121
Enquire on Period End Dates [18/SSP].....	121
Period End Dates Enquiry Initial Window.....	122
Period End Dates Enquiry Detail Window.....	122
Enquire on Working Days Calendar File [20/SSP].....	122
Working Days Calendar Enquiry Selection Window .....	122
Working Days Calendar Enquiry Details Window .....	123
Enquire on Shift Profile [21/SSP].....	123
Shift Profile Enquiry Selection Window.....	123
Shift Profile Enquiry Window .....	124
<b>Chapter 3 Customers and Equipment .....</b>	<b>125</b>
Introduction .....	125
Customer Additional Details [1/SSE].....	125
Additional Details Maintenance Customer Selection Window .....	126
Additional Details Maintenance Customer Confirmation Window .....	126
Additional Details Maintenance Location Selection Window .....	127
Additional Details Maintenance Customer Defaults Window.....	127
Additional Details Maintenance Details Window.....	130
Additional Details Maintenance Customer Hours Window .....	133
Model File [2/SSE] .....	133



---

Model Maintenance Selection Window .....	134
Model Maintenance Hierarchy Window.....	134
Model Maintenance Details Window .....	136
Warranty Parts Maintenance Pop-up .....	139
Installation Details [3/SSE] .....	139
Installation Maintenance Selection Window.....	140
Installation Name and Address Detail Window .....	142
Installation Equipment Maintenance Window .....	145
Equipment Detail Maintenance Window .....	146
Equipment/Warranty Part Pop-up .....	150
Send a Machine Message Window.....	150
Machine Messages Pop-up.....	151
Equipment Configuration Window .....	152
Serial Number Maintenance Window.....	153
Division Code [4/SSE] .....	153
Division Selection Window .....	153
Division Maintenance Window .....	154
Model Group [5/SSE].....	154
Model Group Selection Window .....	154
Model Group Maintenance Window .....	155
Model Sub-group [6/SSE].....	155
Model Sub-Group Selection Window .....	155
Model Sub-Group Maintenance Window .....	156
Equipment Movement [7/SSE] .....	156
Equipment Movement Maintenance Initial Window .....	157
Equipment Selection Window.....	157
Move All Equipment Window.....	158
Move Single Piece of Equipment Window .....	158
Volume Segment [8/SSE].....	161
Volume Segment Maintenance Selection Window .....	161
Volume Segment Maintenance Detail Window.....	161
Zone Charges [9/SSE].....	162
Zone Charges Maintenance Initial Window.....	163
Zone Charges Maintenance Detail Window.....	163
Enquire on Customer Account [31/SSE] .....	164
Customer Account Enquiry Initial Window .....	164
Customer Account Enquiry Detail Window .....	164

Enquire on Installation Addresses [32/SSE].....	168
Installation Address Enquiry Initial Window .....	168
Installation Address Enquiry Detail Window.....	168
Enquire on Customer Additional Details [33/SSE] .....	169
Service Additional Details Enquiry Customer Selection Window .....	169
Service Additional Details Enquiry Location Selection Window.....	169
Service Additional Details Enquiry Customer Defaults Window .....	170
Service Additional Details Enquiry Customer Details Window .....	172
Service Additional Details Enquiry Customer Hours Window.....	174
Enquire on Model File [34/SSE] .....	174
Model Enquiry Selection Window.....	174
Model Enquiry Hierarchy Window .....	174
Model Enquiry Details Window.....	175
Warranty Parts Enquiry Pop-up.....	178
Enquire on Installation Details [35/SSE].....	178
Installation Details Enquiry Selection Window .....	178
Installation Address Enquiry Window/Ownership Address Enquiry Window.....	180
Equipment Detail Enquiry Window .....	180
Equipment/Warranty Part Enquiry Pop-up .....	181
Equipment Configuration Enquiry Window.....	181
Machine Messages Pop-up .....	181
Enquire on Division Code [36/SSE].....	182
Division Enquiry Selection Window .....	182
Division Enquiry Window .....	182
Enquire on Model Group [37/SSE] .....	182
Model Group Enquiry Selection Window.....	182
Model Group Enquiry Window.....	183
Enquire on Model Sub-group [38/SSE] .....	183
Model Sub-Group Enquiry Selection Window .....	183
Model Sub-Group Enquiry Window .....	184
Enquire on Volume Segment [40/SSE] .....	184
Volume Segment Enquiry Window.....	184
Enquire on Zone Charges [41/SSE] .....	184
Zone Charges Enquiry Selection Window.....	184
Zone Charges Enquiry Detail Window .....	185
SOP Transfer to Service [50/SSE] .....	185

---

Process Customer Returns [51/SSE] .....	186
<b>Chapter 4 Contracts Database .....</b>	<b>189</b>
Contracts [1/SSC] .....	189
Contract Maintenance Initial Window .....	190
Contract Selection Window .....	190
Contract Header Maintenance Window .....	191
Service Parameters Pop-up .....	198
Billing Parameters Pop-up.....	200
Contract Header Maintenance Contract Conditions Pop-up.....	205
Contract Billing History Window .....	207
Contract Equipment Maintenance Detail Window.....	208
Contract Conditions Pop-up .....	211
Service Visit Profile Selection Pop-up.....	215
Contract Equipment Peripherals Window .....	216
Peripheral Conditions Pop-up .....	216
Contract Line Billing History Window .....	217
Meter Reading History Window.....	217
Meter Statistics Window .....	218
Scheduled Visits Maintenance Window .....	218
Delete Record Pop-up.....	220
Contract Type [2/SSC].....	220
Contract Type Maintenance Initial Window.....	221
Contract Type Maintenance Window .....	221
Scheduled Visit Profile [3/SSC] .....	225
Scheduled Visit Profile Maintenance Selection Window.....	225
Scheduled Visit Profile Maintenance Detail Window .....	226
Enquire on Scheduled Visit Profile [13/SSC].....	227
Scheduled Visit Profile Enquiry Initial Window.....	227
Scheduled Visit Profile Enquiry Detail Window.....	227
Recommended Service Visits [4/SSC] .....	228
Recommended Visits Maintenance Initial Window .....	228
Recommended Visits Maintenance Detail Window .....	228
Cover Type [5/SSC].....	229
Cover Type Maintenance Selection Window .....	230
Cover Type Maintenance Window .....	230
Enquire on Cover Type [15/SSC] .....	230

Cover Type Enquiry Selection window.....	230
Cover Type Enquiry Window.....	231
Contract Rates [6/SSC] .....	231
Contract Rates Maintenance Initial Window .....	232
Contract Rates Maintenance Window.....	233
Enquire on Contracts [11/SSC] .....	234
Contract Enquiry Initial Window .....	234
Contract Header Enquiry Detail Window.....	235
Service Parameters Pop-up .....	240
Billing Parameters Pop-up.....	241
Contract Conditions Pop-up .....	245
Contract Billing History Window .....	247
Contract Equipment Enquiry Detail Window .....	248
Enquire on Contract Type [12/SSC] .....	249
Contract Type Enquiry Initial Window .....	249
Contract Type Enquiry Detail Window .....	249
Enquire on Recommended Service Visits [14/SSC] .....	253
Recommended Visits Enquiry Initial Window.....	253
Recommended Visits Enquiry Detail Window .....	253
Enquire on Contract Rates [16/SSC].....	254
Contract Rates Enquiry Initial Window.....	254
Contract Rates Enquiry Detail Window .....	254
Contract Quotation Print [20/SSC].....	255
Contract Renewal [21/SSC].....	256
Contract Renewal Selection Window .....	257
Contract Updating [22/SSC] .....	257
Request Quotes from Contract [23/SSC] .....	258
Request Quotes from Contract Detail Window .....	258
Generate Deferred Request Quotes from Contracts [24/SSC].....	260
Global Price Update [25/SSC].....	260
Global Price Update Detail Window .....	260
Copy Kit Batch Job [26/SSC].....	262
Contract Credit Selection [27/SSC].....	263
Selection of Contracts for Credit Window .....	264
<b>Chapter 5 Service Maintenance.....</b>	<b>265</b>

---

Engineer Master File [1/SSM].....	265
Engineer Maintenance Initial Window .....	265
Engineer Maintenance Window.....	265
Additional Details Pop-up .....	268
Engineer Maintenance Skills Matrix .....	270
Alternative Engineer Maintenance Window .....	271
Job Category [4/SSM].....	271
Job Category Maintenance Selection Window .....	272
Job Category Maintenance Window .....	272
Cover Type/Job Category [5/SSM].....	274
Cover Type/Job Category Maintenance Initial Window .....	274
Cover Type/Job Category Maintenance Detail Window .....	275
Charging Overrides Pop-up.....	278
Parts Selection Pop-up.....	278
Include/Exclude Pop-up.....	279
Tax Codes [6/SSM].....	280
Tax Code Maintenance Initial Window .....	280
Tax Code Maintenance Detail Window .....	281
District File [7/SSM] .....	282
District File Maintenance Initial Window.....	282
District File Maintenance Detail Window.....	282
FSG/Territory/Team [8/SSM].....	283
FSG/Territory/Team Maintenance Selection Window.....	283
FSG/Territory/Team Maintenance List Window .....	284
FSG/Territory/Team Maintenance Copy Window .....	284
FSG/Territory/Team Maintenance Details Window.....	285
Field Service Group [9/SSM] .....	288
Field Service Group Maintenance Initial Window .....	289
Field Service Group Maintenance Detail Window.....	289
3-D Matrix [10/SSM] .....	290
3-D Matrix Maintenance Detail Window .....	291
Special Serial Numbers [11/SSM] .....	291
Special Serial Number Selection Window.....	291
Special Serial Number Detail Window .....	292
Enquire on Engineer Master File [21/SSM].....	293
Engineer Enquiry Initial Window.....	293
Engineer Enquiry Detail Window.....	293

Skills Matrix Window.....	295
Alternative Engineer Enquiry Window.....	296
Enquire on Job Category [24/SSM].....	296
Job Category Enquiry Initial Window .....	297
Job Category Enquiry Detail Window.....	297
Enquire on Cover Type/Job Category [25/SSM].....	298
Cover Type/Job Category Enquiry Initial Window.....	298
Cover Type/Job Category Enquiry Detail Window.....	298
Charging Overrides Enquiry Pop-up .....	300
Enquire on Tax Codes [26/SSM].....	301
Tax Codes Enquiry Initial Window.....	301
Tax Codes Enquiry Detail Window.....	301
Enquire on District File [27/SSM].....	302
District Enquiry Detail Window .....	302
Enquire on FSG/Territory/Team [28/SSM] .....	302
FSG/Territory/Team Enquiry Selection Window .....	302
FSG/Territory/Team Enquiry List Window.....	303
FSG/Territory/Team Enquiry Details Window .....	303
Enquire on Field Service Group [29/SSM] .....	304
Field Service Group Enquiry Detail Window .....	304
Enquire on 3-D Matrix [30/SSM].....	305
3-D Matrix Enquiry Detail Window.....	305
Enquire on Special Serial Numbers [31/SSM].....	305
Serial Number Enquiry Initial Window.....	305
Serial Number Enquiry Detail Window .....	306
<b>Chapter 6 Service Operations .....</b>	<b>307</b>
Service Call Logging [1/SSS] .....	307
Job Maintenance Selection Window .....	308
Job Header/Line Selection Window .....	310
Job Line Customer Window .....	312
Call History Pop-up.....	313
Job Line Details Window .....	315
Job Line Details - Selection of Engineers in a Team Pop-up .....	322
Job Audit Enquiry Pop-up.....	323
Assisting Engineer Maintenance Window .....	323
Verify Installation Address Window.....	324

---

Engineer Work Allocation [2/SSS] .....	325
Engineer Work Allocation Initial Window .....	327
Scheduled/Appointment Calls Window .....	329
Engineer Diary Window .....	330
Non-job Activity Maintenance Pop-up .....	331
Engineer Work Allocation Window .....	332
Assign Engineer Pop-up .....	336
Job Schedule Pop-up .....	337
Job Despatch Window .....	337
Change ETA Pop-up .....	338
Service Call Enquiry Window .....	338
Engineer Work Allocation Call Maintenance Window .....	338
Return Visits Pop-up .....	339
Cancel Job Line Reason Pop-up .....	340
Engineer Technical Reporting .....	340
Call Reporting Window .....	341
Call Reporting Interactive Job Pricing Pop-up .....	347
Call Reporting Parts Used Window .....	347
Call Reporting Miscellaneous Charges Window .....	349
Call Reporting Serial Number Maintenance Window .....	351
Call Reporting Model Maintenance Window .....	352
Call Reporting Additional Job Line Hours Pop-up .....	353
Call Reporting Return Visits Pop-up .....	354
Credit Call Maintenance [4/SSS] .....	355
Credit Call Maintenance Initial Window .....	356
Credit Call Maintenance Detail Window .....	356
Load Planned Maintenance Jobs [10/SSS] .....	357
Load Planned Maintenance Jobs Window .....	358
Reassign Calls for a Team [22/SSS] .....	359
Reassign Calls for a Team Window .....	359
Reassign Undespatched Calls [23/SSS] .....	359
Reassign Undespatched Calls Window .....	360
Enquire on Job History [30/SSS] .....	360
Job History Initial Window .....	360
Job History Selection Window .....	362
Job History Line Selection Window .....	363
Job History Line Detail Window .....	364

Job History Labour Hours Window.....	365
Job History Parts Used Window.....	367
Job History Miscellaneous Charges Window.....	368
Enquire on Escalation [31/SSS] .....	370
Example of Call Escalation .....	371
Escalation Enquiry Initial Window .....	371
Job Escalation Enquiry Detail Window.....	373
Job Line Detail Window.....	375
Enquire on Branch Workload [32/SSS] .....	376
Branch Workload Enquiry Detail Window .....	377
Enquire on Outstanding DRP Orders [33/SSS].....	377
Outstanding DRP Order Enquiry Window.....	377
Outstanding Parts Orders Enquiry List Window.....	378
Outstanding Parts Orders Enquiry Details Window .....	378
Engineer Messages [40/SSS].....	379
Engineer Messages Initial Window .....	379
Send an Engineer Message Window.....	380
Machine Messages [41/SSS] .....	380
Machine Messages Initial Window .....	381
Send a Machine Message Window.....	382
<b>Chapter 7 Remote Communications.....</b>	<b>385</b>
Remote Communications for Service Management.....	385
Print Audit Report [5/SSR].....	386
Request Incoming Transaction Reports/Purge Window .....	386
Incoming Transaction Maintenance [6/SSR].....	387
Transaction Maintenance Window .....	387
Purge Transaction Files [7/SSR] .....	387
Maintain Remote Pick Lists [11/SSR].....	388
Pick List Maintenance Window.....	388
Remote Pick Lists Maintenance Details Window .....	388
Maintain Tasks [12/SSR] .....	389
PM Device Task List Maintenance Window .....	389
PM Device Task List Maintenance Details Window.....	389
Maintain Equipment Tasks [13/SSR].....	390
PM Equipment Task List Reference Maintenance Window.....	390



---

PM Equipment Task List Reference Maintenance Details Window.....	390
<b>Chapter 8 Invoicing.....</b>	<b>393</b>
Contract Pricing and Invoicing.....	393
Maintain Labour Price List [1/SSI] .....	396
Labour Price List Maintenance Window.....	396
Labour Price List Maintenance Details Window.....	397
Labour Price List Maintenance Labour Rates Window.....	398
Maintain Contract Credits [2/SSI] .....	399
Contract/Invoice Selection Window.....	400
Override Conversion Parameters Pop-up.....	401
Contract Header Prices Window .....	402
Contract Header Line Prices Window .....	404
Contract Detail Window .....	405
Deferred Revenue Enquiry Window.....	406
Enquire on Labour Price List [11/SSI] .....	407
Labour Price List Enquiry Initial Window.....	407
Labour Price List Enquiry Rates Window.....	407
Enquire on Invoice [12/SSI] .....	408
Invoice Enquiry Initial Window.....	408
Statement Account Window .....	409
Site Address Window .....	410
Job Invoice Summary Window .....	411
Job Invoice Detail Window .....	412
Contract Invoice Summary Window .....	416
Contract Invoice Detail Window .....	418
Sundry Invoice Detail Window.....	419
Credit Note Invoice Reversal Window.....	420
Price Contracts [20/SSI] .....	423
Price Contracts Selection Window .....	424
Price Jobs [21/SSI] .....	425
Generate and Print Invoices [22/SSI] .....	428
Generate and Print Invoices Window.....	430
Create Sundry Invoices [23/SSI] .....	431
Sundry Invoice Entry Window .....	432
Sundry Invoice Entry Detail Window .....	433
Create Sundry Credit Notes [24/SSI].....	433

Credit Note Entry Window .....	434
Credit Note Entry Detail Window .....	436
Credit Notes Invoice Reversal Window .....	437
Print Sundry Invoice/Credit Notes [25/SSI] .....	446
Request Copy Invoice/Credit Note [26/SSI] .....	446
Request Copy Invoice/Credit Note Window .....	447
Request Copy Invoice Window .....	447
Enter Meter Corrections [27/SSI].....	447
Meter Corrections Entry Window.....	447
Meter Corrections Entry Details Window .....	448
Job History Misc Charges Window.....	449
Meter Correction Entry Summary Window.....	449
Pending Invoice Maintenance [28/SSI] .....	449
Pending Job Invoice Selection Window .....	450
Pending Job Invoice Maintenance List Window.....	450
Pending Job Invoice Maintenance Details Window .....	451
Generate Estimates [30/SSI] .....	453
Estimate Generation Request Window .....	453
Enter Meter Readings [31/SSI].....	454
Meter Reading Entry Selection Window.....	454
Meter Reading Entry Details Window .....	454
Meter Reading Override Pop-up .....	455
Meter Reading History Window.....	456
Enter Service Readings [40/SSI].....	456
Service Meter Reading Entry Selection Window .....	456
Equipment by Model Window.....	457
Contract Selection Pop-up .....	457
Service Meter Reading Entry Details Window .....	457
Meter Reading History Window.....	458
Contract Audit Report [50/SSI] .....	459
Contract Audit Report Window .....	459
<b>Chapter 9 Housekeeping.....</b>	<b>461</b>
Day End Routines [1/SSH] .....	461
Period End Routines [2/SSH] .....	461
Engineer Work Points [10/SSH] .....	463

---

Message Deletion [11/SSH] .....	463
Message Deletion Window .....	463
Serious Error Report [12/SSH] .....	464
Serious Errors Report Window .....	464
<b>Chapter 10 Utilities .....</b>	<b>467</b>
Copy Company Utility [1/SSU].....	467
Copy Company Utility Window .....	469
Delete Company Utility [2/SSU].....	470
Delete Company Utility Window .....	470
Recreate Customer Search Index [4/SSU].....	470
Install AFI Control Data [5/SSU] .....	471
Change Branch [17/SSU] .....	472
Change Branch Selection Window.....	472
Contract Initial Load [11/SSU] .....	472
<b>Appendix A Glossary.....</b>	<b>475</b>



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## About this guide

The purpose of this document is to describe the functions that can be used within the Service Management Module.

## Intended audience

The guide is intended for any users of the SS Service Management business module.

## Related documents

You can find the documents in the product documentation section of the Infor Xtreme Support portal, as described in the "Contacting Infor" section.

## Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal at [www.infor.com/inforxtreme](http://www.infor.com/inforxtreme).

If we update this document after the product release, we will post the new version on this Web site. We recommend that you check this Web site periodically for updated documentation.

If you have comments about Infor documentation, contact [documentation@infor.com](mailto:documentation@infor.com).



## Introduction

Service Management is designed to operate independently or as an integrated part of other applications.

The package will support multi-[branch](#) operations within each of a number of companies.

[Contract](#) maintenance is supported by [quotations](#), pricing and renewal to the production of maintenance invoices, including In Advance, Arrears or By Instalment.

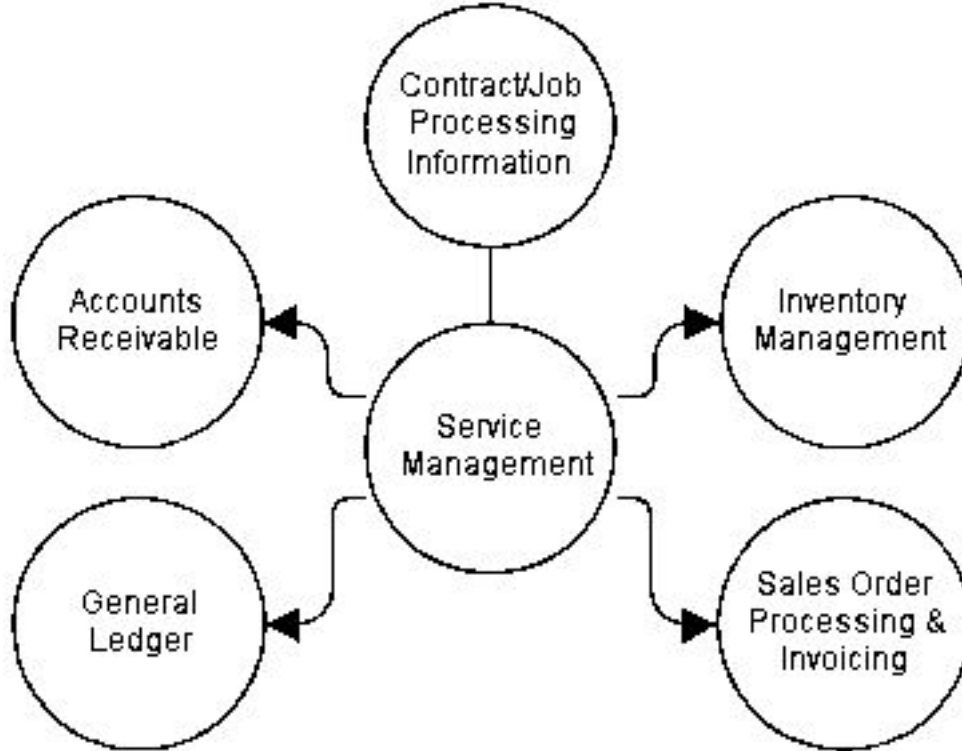
[Job](#) processing is controlled by service [call](#) logging, engineer allocation and planned maintenance. Job escalation facilities are also provided. Full enquiry features enable access to master files, transaction history, job status, and financial data.

Where System Manager is installed, security is provided by restricting access to certain functions by operator ID. This means that operators can be prevented from accessing specific functions, or information belonging to certain companies.

## Relationship to Other Applications

Service Management operates under the control of System Manager. The full benefits of the system are gained by integrating it with the following prerequisite applications:

- Accounts Receivable
- General Ledger
- Inventory Management
- Sales Order Processing



You can also optionally integrate it with the following:

- Advanced Financial Integrator (AFI)
- Distribution Requirements Planning
- Customer Returns
- World Trade
- Forecasting

## Application Configuration

As with all applications, Service Management can be operated for a number of companies, the characteristics of each being maintained on a control file. The application is controlled by setting up data for the [company](#) and then for each [branch](#) within the company. This would normally be done after the Accounts Receivable, Inventory Management and Sales Order Processing companies have been created.

Accounts Receivable, Inventory, Sales Order Processing and Service Management applications will all use the same company codes. Branches may be added after the application has been started.

Certain data and policies are defined at the company level. These include:



- Document reference numbers: invoice, credit note, contract, job
- General Ledger accounts
- Default labour price list
- Default scheduled visit profile
- Working day start/finish times
- Hours entry only, for Call Reporting

Additionally, the details of service and [accounting periods](#) are defined at [company](#) level. Up to 99 [service periods](#) per year are allowed, and are used mainly for the scheduling of planned maintenance [visits](#). Each day of the year may be defined as a working or non-working day, to enable calculation of target response date/time for service [jobs](#).

Up to 99 accounting periods per year are allowed and these should be consistent with those specified in the ledgers. The number of days in the accounting periods is used to enable the apportionment of deferred revenue from [service contracts](#) invoiced in advance.

Once the control parameters for a company have been defined, at least one [branch](#) will be defined. A branch is a physical or logical [location](#) that has responsibility for servicing specific customer [sites](#).

Certain data and policies are defined at the branch level. These include:

- Branch name and address
- Printer output queue for job audit log
- Job escalation parameters: escalation time fence
- Escalation reporting interval
- Users to be alerted at each escalation level
- Default response hours

Each user must be authorised to access at least one branch within a company, but may be authorised to several or all branches if required. This authorisation by branch will restrict the data to which a user has access.

## Application Reference Data

Service Management uses a number of reference files that hold data which rarely changes, as follows:

- Standard codes and descriptions
- System parameters
- Customers
- Divisions, model groups, model sub-groups and models
- Installations
- Contract types
- Job categories

- Labour rate price lists
- Service territories, teams and field service groups
- Engineers
- Contract rates
- Scheduled visit profiles

## Standard Codes and Descriptions

A Descriptions (or Codes/Parameters) file enables codes to be set up with standard descriptions. This provides for validation at the time of data entry and also the display of descriptions on both windows and reports. In some specific instances a parameter or number is also stored, as for example in the case of value added tax percentages.

Certain standard codes and parameters must be present for the successful operation of Service Management, and these are supplied with the system. Examples of code types and values that might be set up are as follows:

Code Type	Type Description	Code Value	Code Description
FLTC	Fault Code	OVH	Overheating
		ELE	Electrical Fault
EGRD	Engineer Grade	GR1	Grade 1
		GR2	Grade 2
LHTY	Labour Hours Types	BASE	Basic
		DBLE	Double Time

## Customers

Service Management shares a common customer database with Accounts Receivable and Sales Order Processing, with maintenance routines in each application reflecting its specific requirements. For example, Accounts Receivable controls credit limits and payment [terms](#), Sales Order Processing controls stock allocation, pricing of sold items and Sales Analysis coding, and Service Management controls pricing of service items and [invoice consolidation levels](#).

The structure of the customer information can be manipulated to match the structure of the customer's organisation. On the one hand there may be a simple single account, on the other a statement account with many invoice to accounts each with many different delivery or [installation](#) accounts.

### Statement Account

This is shared with Accounts Receivable and is normally created and maintained by it. The data includes credit details, Accounts Receivable parameters and statistical codes.

### **Invoice Account**

Invoices may be sent to an invoice only address.

### **Delivery or Installation Account**

Each account may have many delivery or [installation addresses](#). These are defined by Sales Order Processing and/or Service Management, by adding a three-character address code suffix to the account code.

### **Additional Information**

Each account address at which equipment is to be serviced must have additional information set up, which is used solely by Service Management. The information includes the invoice destination address, [invoice consolidation level](#) (account, address code or [contract/job](#)), service region, and price list for service parts.

Identification of a customer can be made either by entering the account code and address code or by using the powerful name and address search routines that are available in the system.

## **Models**

Each piece of equipment defined to Service Management is identified by its [model](#) code and, normally, its [serial number](#). Standard model codes/numbers are used to describe the different types/configurations of equipment that can be installed. Each model code is linked firstly to a model sub-group which in turn is linked to a model group.

Models may be specified as individual machines, or as peripherals to a machine.

[Contract](#) rates for different types of [service contract](#) can be held at model group, model sub-group or model code level; engineers can be assigned to perform work only on specific model groups, model sub-groups or models within a service territory.

The labour rates to be charged for service work are determined by the model on which the work is performed, since each model code holds a pointer to its appropriate labour price list.

## **Installations**

An [installation](#) within Service Management can be defined as a customer address at which equipment or systems are installed.

The customer address is identified by an account code and address code and can have many items of equipment or systems installed. This configuration of equipment or systems at a customer [location](#) constitutes an installation record. Records should be set up for all installations irrespective of whether they are covered by [service contracts](#).

Each piece of equipment at an installation is identified by the unique combination of its [model](#) number and [serial number](#). If serial numbers are not known, the model number and model quantity can be used.

The data held for each piece of equipment at an installation includes details of age, dates of delivery and installation, warranty period, location/department, complexity points and product [division](#).

## Engineers

Each engineer who will carry out service/repair work is defined in the Engineer Master file. Details include his name and address, radio page number, team code, grade, hourly cost rate, service region and stockroom code, together with his skills matrix.

The stockroom code provides the link to Inventory Management and must be defined therein. It represents a discrete area within a [company](#) where stock is recorded and controlled separately from other company stocks. In the case of service engineers, the stockroom could be the specific van or car of the engineer himself, or a common store or depot from which spare parts are drawn.

## Service Territories and Engineer Assignment

Service Management facilitates the automatic assignment of engineer teams to service [jobs](#), provided that certain details have been defined:

- The customer records must hold the geographic or postcode of the customer address.
- The geographic area covered by the company must be divided into service territories; each territory will be defined by a list of full or partial geocodes/postcodes.
- The engineers' teams who cover each territory must be specified.
- The field service group for the team must be defined, to show which product divisions, model groups, model sub groups and models the team will service. The field service group record contains a skills matrix to define these limits.

The system can map the customer's address to a service territory and allocate work to the team of engineers designated to operate in that territory.

The allocation of an individual engineer within the team, to a specific job, can be handled automatically or manually. Further specialisation is used in job selection according to the engineer's skill level, i.e. an engineer can be assigned to service specific [model](#) groups (and optionally sub-groups) and/or to perform work of a specific type (i.e. job category), and/or to perform work on equipment belonging to a specific [division](#).

## Contract Types

[Contract types](#) are used to define the different types of [service contract](#) offered by the [company](#) to its customers. Along with its description, each contract type record holds the normal duration of the [contract](#), guaranteed response hours, invoice schedule (in advance, in arrears, or on completion of each scheduled maintenance [visit](#)), and whether a [quotation](#) or contract is generated at renewal time.

Billing parameters, which may be applied to the contract type, are also selected (i.e. to indicate if service charges, rental charges or various meterage conditions will apply).

All contracts created in the system will have a user-defined contract type code. The system will default a contract type code of **\*NO** for work on equipment not covered by a service contract.

The parameters set up for the [contract type](#) will act as defaults for the [contract](#), but can be changed if required.

## Job Categories

[Job](#) category codes are used to describe the different types of service work to be performed. A number of categories can be defined as system defaults for breakdowns, warranty and repeat [calls](#) etc, to save time at call logging.

Additionally, a table of valid job category codes for each contract type must be defined. This table is used to specify whether the customer should be charged for travel and labour hours (both fixed and hourly charges), for up to four parts groups and for miscellaneous charges, when work of a certain job category is carried out on equipment covered by the specific contract type.

## Price Lists

Two types of price list are used by Service Management, for labour rates and for parts.

Labour rate price lists define the hourly labour rates to be charged to customers, where appropriate, for [contract](#), non-contract and workshop work. The price lists include an hourly travel rate; they carry effectivity dates, to control the application of new prices, and are linked to models: the [model](#) code of the equipment being serviced/repaired determines the labour rates to be charged.

Parts price lists and discount lists define the prices and discounts to be applied when charging for spare parts fitted or used by an engineer. These lists, which also carry effectivity dates, are maintained in Sales Order Processing, but are linked to the customer additional details records in Service Management: the prices charged for service parts are determined by the customer [site](#) at which the work is done.

## Contract Rates

[Contract](#) rates are defined for each [contract type](#) at [model](#) group, model sub-group or individual model code level.

Contract rates specify the charge per scheduled maintenance [visit](#) and/or a fixed charge for each piece of equipment covered by the contract type. Contract rates carry effectivity dates to control the application of new rates, and are used by the contract pricing routines in Service Management.

Contract rates can only be used when the system has been defined for [term](#) processing; they cannot be used for monthly processing.

## Scheduled Visit Profiles

[Scheduled visit profiles](#) are used to define standard schedules of planned maintenance/service [visits](#) to equipment under [contract](#). The schedules are defined in [terms](#) of the number, type and frequency of visits.

A visit profile can be associated with a contract, [model](#) or model group, and enables the automatic generation of the service visit schedule for any piece of equipment added to a [service contract](#).

## Contract Processing

Service Management provides flexible and comprehensive facilities for [contract](#) management, as follows:

- Maintenance
- Pricing and invoicing
- Renewal
- Quotations
- Credits

## Contract Maintenance

[Service contracts](#) are identified by a combination of [contract](#) number, type and start date. Each contract relates to one or more [locations](#) of a single customer account code, and may cover one or more pieces of equipment installed at these locations.

When a new contract is entered on to the system, the contract number, type, start date, customer account code and address code are specified. Contract header and equipment records are created.

The contract header record includes the contract duration and end date, order reference and date, and invoice destination. The service parameters include response hours, [scheduled visit profile](#), allow service cover while the contract is pending, and the rates to be applied. The billing parameters set the [invoice term](#), invoicing frequency and whether charges are in advance, in arrears or per [visit](#). The service conditions provide for setting up service, visit and rental charges at contract header level: the service and visit charges override the contract rates set by [model](#) group, model sub-group or model; the service conditions can be overridden at equipment and peripheral levels.

Once the header has been validated and updated, the contract equipment records are set up. The system will provide a list of all the equipment defined for locations of the account code. Those items

to be placed on the new contract can be selected. Equipment can only be placed on a contract if it has been previously specified as resident at a location of the account to which the contract applies. Service conditions at equipment and peripheral levels can be added to the contract. For each item on a contract, a schedule of planned service [visits](#), by [service period](#) for the duration of the contract, can be created. This can be performed automatically by the system using the service visit profile associated with the [contract](#) header, [model](#), or model group, but the schedule can be amended if required.

## Contract Pricing and Invoicing

[Contracts](#) which are invoiced in advance or in arrears are priced and invoiced as follows:

### **Service Pricing**

- A contract is priced for a defined period of time (invoice term) which may be the same as the contract duration itself, or may be less. The charge for an invoice term can in turn be split into instalments for invoicing purposes; for example a one-year term can be invoiced in quarterly instalments. Additionally, the system will pro-rata the charge for equipment added to a contract partway through its invoice term.
- To price a contract, each piece of equipment covered is priced individually and accumulated to give a total contract price. If the piece of equipment and its peripherals have special prices held, these are the prices to charge.
- If no special price exists, the contract rates file is accessed (term processing only), to obtain the price per maintenance visit and any supplement fee. The total number of maintenance visits scheduled for the piece of equipment in the invoice term is then multiplied by the price per visit and the supplement fee added. The result is the gross charge for the piece of equipment.

**Note:** [Service contracts](#) may include fixed [visit](#) charges, to be invoiced after each visit: the contract's billing parameters may be set accordingly. Such visits are invoiced through [job](#) invoicing at [call](#) completion, not through contract invoicing.

### **Rental Pricing**

- A rental charge may be made for equipment on contract (if rental is defined on the contract type). The charge may be applied on the contract header, in which case it will be used as the default price for each item added to the contract, or may be maintained on the contract equipment line. The charge entered will be per month if monthly processing is selected on the system parameter file or per term if term processing has been selected.

### **Meterage Pricing**

- The following meterage charges may be applied (if selected on the contract type). Meterage charges can only be used with monthly processing.
- A minimum volume can be defined on the contract header or equipment line. The minimum volume will be multiplied by the price per copy, to reach a minimum monthly charge, which may be invoiced in single or multiple months.

- A minimum charge can be defined on the contract header or equipment line, which will be the minimum monthly charge; this may be invoiced in single or multiple months.
- Up to five copy charge bands, for each of two meters, can be defined for each contract equipment line.
- Interim pricing allows for charges to be made according to a meter estimate, or actual reading returned by the user, based on the minimum units already charged for, (or actual units used if no minimum has been entered). The frequency of interim pricing is defined on the contract header.
- Reconciliation pricing allows for charges to be made according to an actual meter reading and allows for additional meterage charges to be applied, or credits given for overcharges. The reconciliation term must be a multiple of the interim period.
- Meterage pricing can be pooled; i.e. the minimum volumes/values can be spread across all of the equipment on the contract, allowing the excess units on one machine to be offset against the under-usage on another machine.

### **Invoicing**

- Contract pricing creates records on an invoice's pending file. A second function, generate and print invoices, generates invoice header and line records. At this stage, invoice consolidation, the grouping of invoice pending lines into invoices, takes place as specified on the customer additional details records, i.e. by account, account/location or contract. tax is calculated according to the parameters set on the customer account record. The invoice documents are then printed.
- Invoice generation posts the relevant transactions to the sales and general ledgers. Where advance invoicing is performed, the revenue (i.e. income) value of the invoice is deferred in the General Ledger, by generating additional postings which transfer period revenue values from a deferred income account into a sales account each period.

## Contract Renewal

This function can be run at any time and prompts the user for a date representing the expiry date limit of [contracts](#) for renewal. The system reads through all active contracts and determines which ones to renew, by comparing the contract end date with the entered date. If the contract end date is less than or equal to the entered date, renewal is performed.

In order to renew a contract, the equipment on the contract must still be eligible for the [contract type](#); i.e. the contract charge rates must be in effect.

A new set of contract records will be generated with either the same contract number or a new, system-assigned contract number depending on an indicator on the [company](#) profile. The contract start date for the new contract will be the day after the existing contract end date. Other contract details are copied to the new contract.

The status of new contracts will be set as either Pending Start Date or [Quotation](#), depending on the Quotation Required at Contract Renewal flag on the contract type record. The user can, if required, amend the contract details generated (through contract maintenance procedures) before quotations or invoices are generated.



## Contract Quotations

[Quotations](#) are created in the same way as [contracts](#), but have a special status of Quotation. They may only be created for contracts with service and [visit](#) charges; rental and meterage contracts cannot have system-generated quotations.

Contract quotations can be produced on pre-printed stationery, to show account/[site](#) details, contract number, type, start date, duration, customer order number, equipment covered, number of scheduled maintenance visits and price. The quotation price is calculated in the same way as the contract invoice price.

Quotations can be converted to contracts, by using the contract maintenance facility to change the status from Quotation to Pending Contract. A facility is also provided for generating quotations from existing contracts. This can be used, for example, if a customer requires a quotation for a different type of contract, covering the same equipment as his existing contract.

## Contract Credits

Credits can be processed at any time, to refund part, or all, of a [contract](#) invoice, and to cancel any pending invoice records.

The contract, or the invoice, or the pending [invoice period](#) from/to is selected. The selected record(s) may be amended to affect the operative date and value(s) involved. The selected record may be discarded, a full or partial credit may be given, or the original charge may be credited and a different amount re-invoiced.

The resultant invoices and credit notes are produced when the [task](#) to Generate and Print (Contract) Invoices is next taken. Any cancelled pending invoice records are removed from the work file at the same time.

## Job Processing

An important function of any service organisation is to complete, in an efficient and timely manner, both ad hoc customer service requests and planned maintenance work according to the [contractual terms](#) agreed.

On completion of service [jobs](#), any chargeable work should be invoiced promptly in order to optimise cash flow.

Service Management provides the following facilities to enable these objectives to be met:

- Planned maintenance job generation
- Call logging
- Engineer work assignment and diary
- Engineer technical reporting

- Job pricing and invoicing
- Job escalation
- Remote communications links to and from engineers

## Planned Maintenance Job Generation

This is a process that is run as required. Load PM Jobs creates a service [job](#) for each [installation](#) that has a planned maintenance [visit](#) scheduled for periods falling within a user-specified range. The function allows the schedule to be created for up to six periods in advance of the current period. The service schedule details, held for equipment covered by [contract](#), provide the base data for processing.

The process will attempt to assign an engineer team to each service job, by comparing the customer geographic code with the territory definitions, and the [model](#) type requiring service with the [field service group](#) that covers the [division](#), model group, model sub-group and model. If a specific engineer was entered against the equipment on the installation record, this engineer will always be assigned (if this method of selection is defined in the Codes/Parameters file).

If there is more than one piece of equipment at an [installation address](#), on the same contract, requiring a service visit in the same period, this procedure will normally generate only one job covering all the equipment. However, an option can be set in the [company](#) profile to generate an individual job for each piece of equipment.

## Call Logging

This facility enables unscheduled/breakdown [calls](#) from customers to be recorded, and corresponding service [jobs](#) generated, for subsequent allocation to engineers. It also enables the details of existing jobs outstanding to be amended.

## Addition of New Job

The logging of a new job requires entry of the customer account code (or the account can be found using alpha search data), the [service contract](#) number, the [serial number](#) or the [model](#) number/serial number. Any of these enables access to the customer [installation](#) record which holds the details of the equipment at the customer [site](#). A new job can only be logged if an installation record exists for the customer address requesting service. A facility to create installation details for non-account customers is provided at this point.

If the customer is on credit hold/stop, a warning message is displayed and the call status is set to Credit Hold, but the job may still be entered.

If a [contract](#) number has been entered, all the equipment on the contract is displayed. If an account code and address code have been entered, all the equipment at the installation is displayed. Each

item to be included on the new [job](#) can then be selected from the displayed list. If a specific [model](#) and [serial number](#) have been entered, the job details for the item are prompted for immediately.

If the customer has a number of items of equipment on [site](#) and cannot identify which of them requires the service, the job can be logged against any available machine line. When the engineer completes the job and reports on it, the true model/serial number must then be identified to the system.

The system will check for previous [calls](#) (for qualifying job categories), to determine if this is considered to be a repeat call: this compares the number of days and/or meter units which have elapsed since the previous call, with the values defined on the volume segment file for the model. The system allocates a job number; the account name and address is displayed and may be amended just for this job. [Job line](#) details are displayed, showing the [contract](#)/warranty cover; response hours are calculated by reference to the special serial numbers file, the contract line, the contract header or the [contract type](#) (possibly reduced by the 3-D Matrix percentages). A target start date and time is set by adding the retrieved hours to the date and time the call is logged. The date and time the call is logged may be altered while the call is in Addition mode, to allow for calls taken out of hours (e.g. by overnight answering service).

A history enquiry, showing details of previous jobs on the piece of equipment, is displayed if the call is a repeat, or can be accessed by a function key. A customer order number may be entered; it is essential if requested on the customer additional details record and any elements of the call are chargeable.

The job category displayed for the call defaults to the value determined by the user in job category maintenance and may be amended. Customer contact name and fault code/description, for the item of equipment to be serviced/repaired under the new job number, are entered. The response hours can be altered if required, which will re-calculate the target response date/time for the job, which can then be monitored by the escalation procedure. Alternatively, if the customer requires an engineer to [visit](#) at a specific date/time, an appointment date and time can be entered. At this stage, an engineer can be assigned to the job, by displaying a selection of the engineers in the team and their skills.

## Amendment to an Existing Job

Access to existing service [job](#) records can be achieved through various routes - by entry of customer account code/address code, or [serial number](#), or [model](#)/serial number, or [contract](#) number/type (if the customer has a [service contract](#)), or customer order number, or job number. Alternatively, the customer account can be accessed by specifying up to three search parameters (relating to pre-defined alpha search data fields from the account/address record).

A list of all current jobs on the system for the [installation](#) is displayed; the list includes both scheduled service and unscheduled/breakdown jobs. On selection of a job number, a list of all the equipment included on the job is displayed (a job may cover one, or more than one piece of equipment at an installation depending on the setting in the Codes/Parameters file), along with job header information, i.e. the job number, creation date and time, customer order number, customer contact, service contract number and type. On selection of an individual piece of equipment the details of job category, engineer assigned, customer contact, fault code, are displayed and can be amended as required.

## Engineer Work Allocation

Engineer work allocation may be carried out by running the automatic [call](#) allocation program, or manually.

If automatic call allocation is required, the program is initiated by running a [task](#) from the Service Operations menu. In addition, the Service Management subsystem must be running. If the subsystem needs to be started, use the task within Utilities.

Automatic call allocation is a sleeper [job](#), which will automatically schedule engineers within a team, to the jobs which have been assigned to the team in job logging. Assignment takes place on the basis of finding an available engineer, based on his current workload and skill profile, and who can achieve an estimated time of arrival that is equal to or less than the target date and time for the call. If the selection criteria cannot be met, an error message is displayed for the call, and a non-assignment reason code is entered on the call detail window.

Calls can be scheduled manually, in which case the same criteria and checks for engineer selection are applied.

The function allows outstanding jobs to be despatched to service engineers, who phone or call in, to request work. It also enables entry of status updates from engineers on their current jobs, to indicate for example, that parts are awaited or the work is complete.

A list of jobs assigned to a specific engineer or team of engineers, or a list of all jobs for the [branch](#) can be displayed. Further selection parameters enable either planned jobs or unscheduled (call out) jobs, and jobs of certain status, to be extracted. The list of jobs displayed will be sequenced in order of target date/time with the most urgent jobs first.

Jobs for a team can be displayed graphically: colour blocks represent each job and the colour denotes the urgency of the job. Unscheduled jobs for the team are displayed in the lower part of the window; scheduled jobs are shown under each engineer in the upper part of the window. Jobs can be moved with the cursor and a function key. Job line details can be displayed, for team and engineer work queues, by positioning the cursor on any job and pressing Enter.

The valid status codes for a piece of equipment on a job are:

- Open
- Assigned
- Scheduled
- Despatched
- Work in Progress
- Requires Telephone Call
- Awaiting Parts
- Complete: Not Documented

Status codes can be amended as required.

## Engineer Technical Reporting

This is the facility used to enter the details of completed work from the engineer's reports, and is accessed by selecting the completed job line with 99.

A [technical report](#) is made up of four sections:

### **Header Details**

Details of the engineer number, [job](#) number, [visit](#) date, report reference, time on [site](#), customer and engineer travel time, are entered for each new technical report. Distance travelled can also be recorded and charged

### **Labour Hours**

Labour hours spent on each piece of equipment are entered, qualified by fault code, job category, machine section and sub-section repaired, and corrective action. Hours can be booked at up to four different labour rates, i.e. basic plus three overtime rates. The hours are classified as non-chargeable (0%), or chargeable (100%), according to the charge matrix for the [contract type](#)/job category combination defined; the charge percentage can be changed to any intermediate value between 0% and 100%.

### **Parts Used**

Spares parts used in carrying out the service or repair of each piece of equipment are entered, analysed by job category. For each part number, the quantity used is entered. The parts are classified as non-chargeable (0%), or chargeable (100%), according to the charge matrix for the contract type/job category combination defined. The charge percentage can be changed to any intermediate value between 0% and 100%.

### **Miscellaneous Costs**

Miscellaneous costs incurred in carrying out the service or repair of each piece of equipment are entered, analysed by job category. For each cost, a cost/charge type code (with its file, or user overwritten description), the cost value and charge value are entered/displayed, or the charge is derived by entering a percentage uplift.

A service job may require more than one engineer visit to complete the work, in which case several [technical reports](#) can be entered. The prime report is given the suffix 00, with each subsequent report suffix being incremented by the system. After the final report is entered, the user indicates that the job is finished and fully documented. At this point, the job becomes eligible for pricing and invoicing.

## Job Pricing and Invoicing

Service [jobs](#), which are not fully covered under the [terms](#) of a [service contract](#), need to be charged to the customer. The pricing and invoicing of jobs is performed after they have been completed through the [technical reporting](#) function.

The decision as to which jobs, or elements of jobs, are chargeable is made by referencing the user-defined matrix of [contract types](#) and job categories. For the particular combination, the matrix

indicates whether labour and/or travel distance and/or travel time and/or miscellaneous costs and/or four types of parts are chargeable to the customer.

Six types of charge can potentially appear on a [job](#) invoice:

### **Contract Visit Fee**

[Service contracts](#) can include fixed [visit](#) charges, to be invoiced after each visit: the [contract's](#) billing parameters being set accordingly. Such visits are invoiced through job invoicing at [call](#) completion.

The fixed visit charge is obtained from the [contract conditions](#) at equipment or header levels, or from the contract rates file.

### **Labour**

The labour charge is calculated from the number of hours booked on the [engineer report](#), multiplied by the hourly rate on the labour price list held for the [model](#). The hourly rate used will be either a contract, or a non-contract, rate depending on whether the piece of equipment was covered by contract when the job was logged. The hourly rate will be uplifted by a premium factor for work performed at overtime rates.

A fixed labour charge may be applied, if required by the job's charge matrix set up in the [Cover Type/Job Category task](#).

### **Travel Labour**

The travel time is calculated from the number of customer travel hours and minutes booked on the engineer's [technical report](#), multiplied by the hourly travel rate from the labour price list held for the model.

A fixed travel labour charge may be applied, if required by the job's charge matrix set up in the Cover Type/Job Category task.

### **Parts**

The charge for parts used by the engineer is calculated according to the price list and discount list defined for the customer [site](#). The price and discount list details are obtained from Sales Order Processing.

### **Miscellaneous Costs**

The charges are based on the values entered through the [technical reporting](#) function.

### **Chargeable Travel**

The charges may be based on a standard distance value, the actual distance driven, or zones. Data is set up on the Additional Service Details record for each site.

All jobs, even non-chargeable ones, should be processed through the [job](#) pricing and invoicing functions, since the cost values of labour, engineer travel time, miscellaneous costs and parts, for all jobs, are calculated by these routines.

## Engineer Diary

Service Management provides an engineer diary, which enables the planning and scheduling of non-machine-related [jobs](#) and other commitments for each engineer. Job appointments are automatically entered in the diary for the engineer, at the time they are made in [call](#) logging or in work allocation.

The next five working days (as defined in the daily calendar file) are displayed, starting from the system (current) date. Each day in the diary is free format; bookings can be entered for any date, time and duration, or for a date and time From with a date and time To.

## Diary Entries

Diary entries are made as required and are used to reserve the times for events such as holidays, training courses, sickness, dental appointments, etc. As entries for engineers are scheduled for a date and time, they will appear both in the engineer's work queue and in the graphical display of his jobs.

The diary is accessible from the Engineer Work Allocation [task](#).

## Job Escalation

Service Management provides facilities for alerting you to any service [jobs](#) that are approaching their designated response time and are still outstanding. Job escalation is started and ended by [tasks](#) within Utilities, and runs so long as the Service Management subsystem is active. If the subsystem is inactive, start it by using the task within Utilities.

All service jobs created in the system will be stamped with a target response date and time, which is calculated as follows:

For [call](#) out jobs (i.e. those entered to the system using the Job Logging/Maintenance function), the target response date and time is calculated as:

Date/time call logged + response hours

where response hours is derived from the special [serial numbers](#) file, or the [contract](#) which covers the piece of equipment if a contract exists. If the equipment is not covered by contract, the response hours default to the value for the [contract type](#) \*NO. Manual overrides of the response hours may be made, if special circumstances arise.

In calculating target response date/time, the system takes into account working/non-working days, and the standard service window for the [company](#), i.e. the times of the day between which service is provided. These are all user-defined.

For planned jobs (i.e. those generated from the service schedules defined for contracts), the target response date and time is calculated as:

Target date = Date of last working day of the [service period](#) in which the job is scheduled

Target time = Start time of the working day

Parameters which determine the escalation time fence, the interval between each escalation step, and the users who are to be alerted at each step, are all user-defined. The system monitors each outstanding [job](#), comparing its target date/time with the current system date/time. Once the job enters the defined escalation time fence, it will start to escalate and will have its escalation step recalculated at frequent intervals, the escalation step moving from high to low value as the job approaches its target date/time. Escalation step zero denotes that the job has reached (or gone beyond) its target time.

**Note:** *The system assumes a 7-day working week. If less than this is actually worked, the system still escalates what would be Monday's work on a Sunday, not on the preceding Friday.*

As a job moves from one escalation step to the next, the system can send a message to pre-defined users to alert them to the fact that the job has been escalated to the next level, thereby allowing them to take appropriate action.

Jobs will be removed from the escalation procedure once they reach a certain status. This is user-defined within the [Job Line](#) Status Code record; for example, escalation may be required to stop once the job is allocated to an engineer, or once the engineer has arrived and started work. An enquiry allows the escalation status of jobs to be viewed easily, using various selection parameters.

## Example of Call Escalation

Escalation Step	Reporting Times - (1 Hour Intervals)
0	16:00 Target Time
1	15:00
2	14:00
3	13:00
4	12:00 Escalation Time Fence (4 hours) starts

In the above example, the escalation time fence is set to 4 hours and the reporting interval to 1 hour.

A [job](#) with target time of 16:00 will start to escalate at 12:00.

Between 12:00 and 12:59, the escalation step will be calculated as 4, because the job is within 4 hours of target.

Between 13:00 and 13:59, the escalation step will be calculated as 3, because the job is within 3 hours of target, etc.

At 16:00, or later, the escalation step will be calculated as 0, because the job has reached or passed its target time.



## Remote Communications Links to and from Engineers

Outgoing and incoming [job](#) processing records can be held on files interfaced to a communications gateway. Records are validated and may be corrected centrally, or returned to the appropriate engineers for correction.

A variety of carriers and mobile [terminals](#) can be integrated with Service Management. Users are able to select their own preferred route for the gateway, the communications link and the remote devices.

Whether or not the [Remote Communications](#) link is active, normal job processing routines continue without any apparent change.

## Time Zones

This function enables you to operate across different time zones. The zones are specified as a number of hours difference (called the offset time) from the system time. You can specify zones at [branch](#) level and at customer additional details level.

Once you have specified the offset time, when service [calls](#) are received the customer's date and time is recorded with them, and are used to calculate target times.

The time zone offset times are set up in the Inventory Descriptions file, under major code TIMZ.

## Enquiries

Service Management provides a comprehensive range of enquiries:

### **Master Files**

These generally show the same details as their counterpart maintenance routines.

### **Transaction History**

A [job](#) history enquiry is available for viewing details of historical service work performed against equipment. An invoice enquiry is available for viewing details of a service invoice, whether it is a [contract](#), job or sundry invoice.

### **Status**

An escalation enquiry provides up-to-date information on the escalation status of service jobs.

## Loading Service Management Data

The following data must be loaded for each service [company](#) which is to be processed within the live application.

The data is divided into two groups:

- Basic data - data used mainly for reference purposes, which is low in volume and not subject to ongoing change, e.g. codes.
- Major data - data which constitutes the bulk of the application and is subject to regular change, e.g. customers, contracts, etc.

Some of the data listed below is marked Optional. This means that, in system [terms](#), the data is not essential to running the application; but note that, in practice, the data may well be essential, e.g. [contracts](#).

### Basic (Parameter) Data

- Company Profile
- System Parameters File
- Branch Records

One for each service branch

- User/Branch Authority Records

One for each user and branch (to which the user is authorised) combination

- Codes/Parameter File Records

System-required parameters are identified by \* in the first position of the Parameter Type description. These must be set up or copied from the demonstration data supplied. In addition, set up appropriate code values for each of the following types:

- ABSC (Engineer absent)
- CCRC (Contract cancellation reasons)
- CHGT (Miscellaneous costs/charges)
- CORA (Corrective actions)
- DAYT (Day types)
- EGRD (Engineer grades)
- FLTC (Faults)
- LHTY (Labour hours/overtime types)
- REGN (Service regions)
- RRES (Credit release reason)
- STAT (Equipment status)
- TXTO (Text destinations)
- Calendar Control Record

- Daily Calendar File (and Rebuild Period End Dates)  
For all years over which current service contracts are spread
- Division Records  
One for each service division
- Model Group/Sub-Group Records  
One for each model group/sub-group combination
- Geocode/Territory Records (optional)  
One for each service territory, with a list of geocodes (postal codes) within the territory
- Field Service Group  
One for each group or equipment (division/model family/model to be serviced)
- Team  
One for each engineer team
- District  
One for each work controller, to authorise work on teams
- Engineer Records  
One for each service engineer
- Labour Rates Price List Records  
One for each set of labour rates to be linked with models (and for different currencies where World Trade and Multi-Currency are active)
- Zone Charge (optional)  
One for each zone (and currency where World Trade and Multi-Currency are active)
- Model Records  
One for each model code
- Volume Segment  
Minimum one, optionally more for each model, or group of models
- Job Category Records  
One for each job category code
- Scheduled Visit Profile Records (optional)  
One for each standard schedule of planned maintenance visits
- Contract Type Records  
One for each contract type code
- Contract Type/Job Category Records

One for each valid combination of contract type, job category, (and Currency where World Trade and Multi-Currency are active) with invoicing indicators

- Contract Rates Records (optional)
- Escalation Parameters (optional)
- Tax Codes (for World Trade and Multi-Currency only.)

For each country's contract type/job category combinations

- Inventory Descriptions file

DEPT (Departments)

- SS - Service workshop
- S3 - Service

MANT (Mantle groupings)

- A - Attack customers
- C - Central Govt. Depts.
- L - Local Govt. Depts.
- M - Multi-nationals
- S - Special customers

MFID (Manufacturer's ID)

- \* - Mfr not specified
- BRIT - Briton Ferry Steel Co Ltd
- EAGL - Eaglesbush Nuts and Bolts
- FALC - Falcon Electrical
- GRU - Herbert Grudgings (Spares)
- JONE - Jones Britannia Foundry Ltd
- ROKI - Rock Island Arsenal (NJ) Ltd
- STEP - Steptoe and Son Precision Engrs
- TAY - Taylor Engineers (Rothley)
- WRAY - Wray Optical Co Ltd
- OTHR (Customer search parameters)

END1 - Cust account no. 9

END2 - Phone no.332

START1 - Cust account no. 2

START2 - Phone no. 313

PTYP (Item type)

4 codes are essential to categorise parts:

- C - Consumables
- J - Major spares
- N - Minor spares
- S - Supply items

2 codes assist analysis of machine sales:

- M - Machine sale via SOP
- P - Peripheral sale via SOP

SPED (Urgency indicator)

- 1 - Special courier: ETA TBA
- 2 - By noon tomorrow: promised
- 3 - By noon tomorrow: guaranteed
- 4 - 24 hour delivery: guaranteed
- 5 - By 17:30 today
- 6 - By 22:00 Monday

STKU (Stockroom usage code)

- B - Service spares stockroom
- W - Service workshop: [company](#) stock
- X - Service workshop: customer stock

TIMZ (Time zones)

- E01 - East + 1 hour
- E02 - East + 2 hours
- E03 - East + 3 hours
- W01 - West - 1 hour
- W02 - West - 2 hours
- W03 - West - 3 hours

## Major Data

- Customer Account Records  
One for each customer account
- Installation Address Records  
One for each site address, within a customer account
- Customer Additional Details (Service Management) Records  
One for each customer site
- Installation Records

For each customer site, details of each piece of equipment at the site

- Contract Records (optional)

One for each active service contract, with details of each piece of equipment covered and service schedules

## Introduction

Service Management can operate independently or be integrated with other modules.

You can set up [quotations](#) and [contracts](#), price the contracts and renew them, and produce maintenance invoices in advance, in arrears or by instalment.

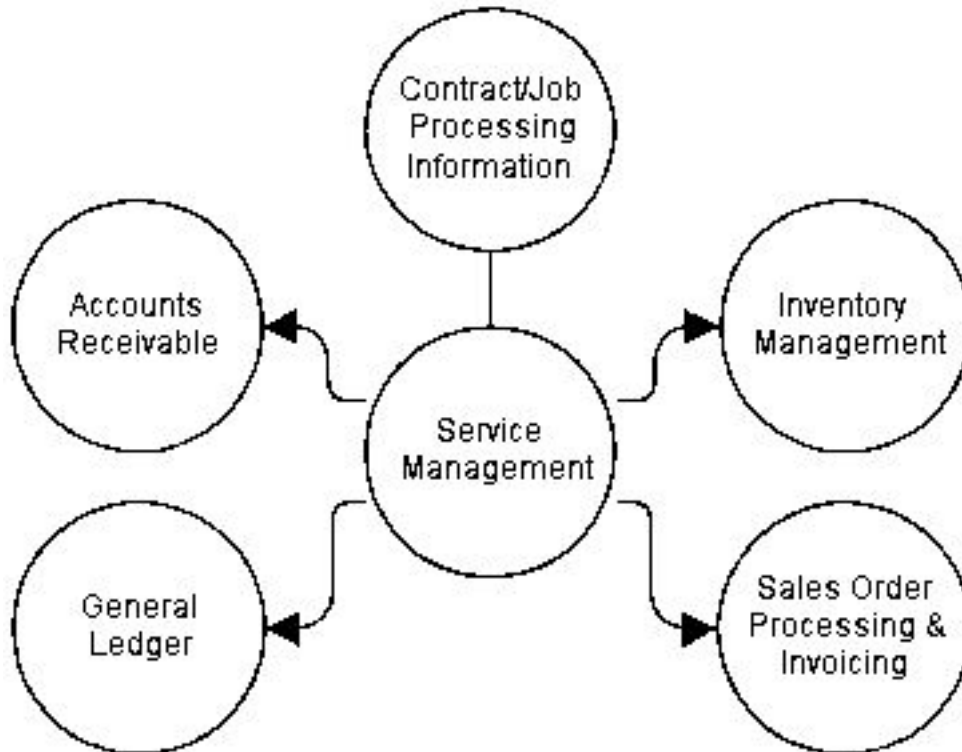
[Jobs](#) are logged using the Service [Call](#) Logging [task](#), and processed by the Engineer Work Allocation task and you can incorporate planned maintenance. Job escalation is also provided, to alert you to jobs that are nearing their target response time. Enquiries show the master files, transaction history, job status and financial data.

Where System Manager is installed, security is provided by restricting access to certain functions by operator ID. This means that operators can be prevented from accessing specific functions, or information belonging to certain companies.

## Relationship to Other Modules

Service Management operates under the control of System Manager. There are three prerequisite modules:

- Accounts Receivable
- General Ledger
- Inventory Management



You can also integrate it with the following modules to use more of the Service Management functions:

- Sales Order Processing (SOP)
- Advanced Financial Integrator (AFI)
- Distribution Requirements Planning
- Customer Returns
- World Trade
- Forecasting

## Setting Up Service Management

As with all System21 modules, you can set up a number of companies within Service Management. You can then set up a number of [branches](#) within each [company](#), to reflect the branches of your company.

You are advised to set up your companies in any integrated modules, such as Accounts Receivable, Inventory Management and Sales Order Processing, before you set up your Service Management branches.



Accounts Receivable, Inventory Management, Sales Order Processing and Service Management modules all use the same company codes.

The company profile is where you set up certain operating parameters and defaults, including:

- Document reference numbers for invoices, credit notes, contracts and jobs
- General Ledger accounts
- A default labour price list and scheduled visit profile

This is also where you set up separate service and [accounting periods](#). You can have up to 99 [service periods](#) per year. These are used mainly for scheduling planned maintenance [visits](#).

You can have up to 99 accounting periods per year, and these should match those in your General Ledger. The number of days in the accounting periods is used to apportion deferred revenue from [service contracts](#) that are invoiced in advance.

Once you have completed your [company](#) profile you can set up your [branches](#). You must set up at least one of these. A branch is a physical or logical [location](#) that has responsibility for servicing specific customer [sites](#).

Certain data and policies are defined at the branch level. These include:

- Branch name and address
- Printer output queue for job audit log
- Job escalation set-up
- Default response hours

No user can enter a Service Management branch unless their password is authorised, so branch data security is assured.

## Company Profile File [1/SSP]

Use this [task](#) to set up and maintain the fields that control how you want Service Management to work for a specific [company](#). You make some key decisions here.

You would normally use this task when you install the system, and infrequently thereafter.

**Note:** *This procedure requires exclusive use of the system.*

A company is completely self-contained within the module. You can sub-divide it into [branches](#), but these branches all operate under the controlling parameters that you define for the company here.

The company profile is where you decide which other modules (ledgers, Sales Order Processing, Inventory Management and so on) you want to integrate with Service Management.

These modules provide the following functions:

- Use Inventory Management to check and update your engineers' van stock.
- SOP can price parts.

- Technical reporting can automatically send information to update Inventory Management stock movements, and generate invoices.

## Company Profile Maintenance Selection Window

To display this window, select the Company Profile Maintenance [task](#).

This window lists all the companies that exist for this module.

### **Fields**

#### **Select (1)**

Select the [company](#) you wish to maintain.

#### **Enter Company Code to Maintain**

If you are setting up a new company, enter the two-character company code here. You can also enter an existing company, if you do not wish to scroll through the list to select the one you want.

Select a company or enter a code and then press Enter to display the Company Profile Maintenance General window.

## Company Profile Maintenance General Window

To display this window, select a [company](#) or enter a company and then press Enter on the Company Profile Maintenance Selection window.

This window displays various general company settings.

### **Fields**

#### **Company Name**

For a multi-company environment the name will default from the Maintain Company Parameters [task](#) in Application Manager.

For a stand-alone [installation](#), enter up to 30 alphanumeric characters for the company name.

#### **Last Job Number**

Enter the number to start off the [job](#) numbering. When the software assigns the next job number, this field is incremented by one, so the field always shows the last job number used. Once you have started using Service Management, do not change this number.

#### **Last Invoice Number**

Enter the number to start off the invoice numbering. When the software assigns the next invoice number, this field is incremented by one, so the field always shows the last invoice number used. Once you have started using Service Management, do not change this number.

### Last Credit Note Number

Enter the number to start off the credit note numbering. When the software assigns the next credit note number, this field is incremented by one, so the field always shows the last credit note number used. Once you have started using Service Management, do not change this number.

**Note:** When posting invoices and credits from other System21 modules into the General Ledger, the software attaches a prefix that shows where the invoice or credit originated.

**Note:** The software attaches I to Service Management invoices, and C to Service Management credits. This means that you should avoid using I and C as prefixes in other modules, for example, Sales Order Processing.

### Last Contract Number

Enter the number to start off the [contract](#) numbering. When the software assigns the next contract number, this field is incremented by one, so the field always shows the last contract number used. Once you have started using Service Management, do not change this number.

### New Contract Number at Renewal?

Enter one of the following:

0 - To continue with the existing contract number after the renewal

This is often easier for the customer to remember.

1 - To assign a new contract number when the contract is renewed

### Validate Post Codes?

Enter one of the following:

0 - Not to validate any code entered in the postcode fields

You can use the postcode fields for any geocode you devise.

1 - For the software to check that data entered in postcode fields conforms to the UK postcode format standards

This is particularly useful because the postcode defaults from Accounts Receivable and, if it is not formatted correctly there, it is highlighted here.

### Use Geocode/UK Post Code Rules for Team Assignment

When you log a [call](#), the software assigns a team to the call by matching the geocode on the customer's additional service details to the corresponding team's territory. The matching depends on which of these values you choose:

1 - Geocode

The software first looks for a complete geocode match between customer and team. If no match is found, it makes successive tests, reducing the customer's geocode by one character each time. The final test tries to match on just the first character of the customer's geocode.

2 - UK Postcode

The software first looks for a complete postcode match between customer and team. If it does not find a match, it makes successive tests, reducing the customer's postcode by one character each time. However, as long as the postcode starts with two alphanumeric characters, the final test will try to match on the first two characters of the customer's postcode. No test is made on the first character on its own (so BR for Bristol will never be reduced to B for Birmingham, for example).

If there is no match, the software assigns the [job](#) to a default team \*DF that is authorised to service anything. You can assign the actual team to work on the job during [call](#) logging, or in Engineer Work Allocation.

### **Manual Engineer Allocation across Branch?**

Enter one of the following:

- 0 - To assign engineers manually from the service branch of the piece of equipment to a job
- 1 - To assign an engineer manually from any service branch to a job within job maintenance

### **Assign by Territory or Alternative Engineer**

There is only one valid setting for this field.

- 1 - To assign another engineer from the same territory

The software uses this field if automatic assignment finds that a selected engineer's absence code is not blank, that is, that engineer is not available for work and another engineer must be selected instead.

### **Hard Copy Job Audit Log Required?**

Enter one of the following:

- 0 - If you do not require an audit report of all changes to jobs
- 1 - If you require an audit report that prints every job added, deleted or modified

### **Accounting Period**

The software uses this value as the posting period during all invoice-generating routines in Service Management. Accounts Receivable postings will be made to the Accounts Receivable open period, if it is later than the period indicated here.

You must re-set this manually at each period end.

### **Accounting Year**

The year value is used as the posting year during all invoice-generating routines in Service Management. Accounts Receivable postings will be made to the Accounts Receivable open period/year, if it is later than the year indicated here.

You must re-set this manually at each year end.

Press Enter to display the Company Profile Maintenance Accounts window.

## Company Profile Maintenance Accounts Window

To display this window, press Enter on the Company Profile Maintenance General window.

Use this window to define the relationships with the other modules and to set up General Ledger accounts.

If you do not want financial transactions from Service Management to be posted to Accounts Receivable or to the General Ledger, set the Sales & General Ledgers Active field to **0**.

If you want the financial transactions to be posted, but do not want to use the Advanced Financial Integrator (AFI), switch off the AFI link within the AFI Maintain Application [task](#). The system will use the Basic Financial Integrator (BFI) instead, and postings will be made to the accounts you specify on this window.

If you are using the AFI, that is where you specify the General Ledger accounts you want to use. However, you still have to enter accounts on this window, but they will not be used.

### **Fields**

#### **Sales & General Ledgers Active?**

Enter one of the following:

0 - Not to integrate Service Management with System21 Accounts Receivable or with the General Ledger

Use this setting if you do not want any Service Management financial transactions to be posted to Accounts Receivable or the General Ledger.

1 - To integrate Service Management with Accounts Receivable and with the System21 General Ledger

For most systems, the General Ledger and Accounts Receivable modules are prerequisites to running Service Management. We therefore recommend that you enter **1** in this field unless your software consultant advises you otherwise.

Service Management uses Accounts Receivable customer details. Service Management sends invoice details to the General Ledger.

#### **Inventory Active?**

Enter one of the following:

0 - To use Service Management as a stand-alone module

1 - To integrate Service Management with System21 Inventory Management

For most systems, the Inventory Management module is a prerequisite to running Service Management. We therefore recommend that you select integrated Inventory Management unless your software consultant advises you otherwise.

Service Management uses Inventory Management for checking the engineer's stockrooms for necessary spare parts.

#### **S.O.P. Active?**

Enter one of the following:

0 - To use Service Management as a stand-alone module

System21 SOP is not a prerequisite to the running of Service Management. If you enter **0** in this field, you will still have access to some SOP files to enable you to set up the necessary price lists.

1 - To integrate Service Management with System21 Sales Order Processing (SOP)

SOP is not a prerequisite to the running of Service Management.

Service Management uses SOP for customer-based pricing for spare parts.

### **Currency Rate Code?**

Enter an existing currency rate. You set these up in the General Ledger.

The currency rate converts [contract](#) or [job](#) invoice and credit note values from the customer's prime currency to the customer's base currency. You can overwrite this default value at both customer and sundry invoice and credit note levels.

**Note:** *The field is only displayed if Accounts Receivable is operating as a multi-currency ledger.*

When you add a new [company](#), this field defaults to the currency rate in the Accounts Receivable company profile (if one is set up).

### **Sales Ledger Control**

Enter the GL debtors control account for posting sales revenue.

Although this field is not used if you are using AFI, you still have to enter an account here.

### **TAX Control**

Enter the GL tax output account for posting sales revenue.

Although this field is not used if you are using AFI, you still have to enter an account here.

### **Service Sales**

Enter the GL sales account for posting sales revenue.

Although this field is not used if you are using AFI, you still have to enter an account here.

### **Deferred Income**

Enter the GL account for posting deferred revenue from [service contracts](#) invoiced in advance.

Although this field is not used if you are using AFI, you still have to enter an account here.

### **Default Labour Rate Price List Code**

Enter a price list.

The [job](#) pricing function uses this default price list when calculating labour charges. Job pricing will only use this [company](#) default if no price list exists for the [model](#) concerned.

### **Default Scheduled Service Visit Profile**

Enter a [scheduled visit profile](#).

This default [visit](#) profile is used in [contract](#) maintenance and contract renewal, when the software is generating a maintenance visit schedule for a piece of equipment on the contract. If there is no profile defined for the contract, the [model](#) or the model group, the software uses this.

The software uses a [scheduled visit profile](#) (SVP) to generate scheduled service visits for each piece of equipment on a contract. The software looks for the relevant profile according to the following hierarchy:

- 1 Use the SVP on the contract header.
- 2 If there is none, use the model file SVP.
- 3 If there is none, use the model group file SVP.
- 4 If there is none, use the [company](#) profile SVP.
- 5 If there is none, the software will not generate any visits.

You can generate visits for the equipment line on the contract, using the first SVP code found, by taking the Generate Visits option on the Contract Equipment Maintenance Detail window.

#### **No. of Service Periods to be Loaded**

This value sets the maximum number of [service periods](#) for which scheduled maintenance visits will be generated. The scheduled visit profile (SVP) for a contract lasting for more than a year should include a repeat indicator (\*RP), otherwise visits will only be generated for the first year of the contract.

As an example, let us suppose you define monthly service periods and set this field to 24 (that is, 2 years). If you then select an SVP that generates four visits a year and add \*RP to it, this will result in eight visits being generated.

You must run the Load Planned Maintenance [Jobs task](#) to convert these new visits to actual jobs.

#### **Minimum No. of Loaded Service Periods**

This field is used at period end, to limit the extension of scheduled service [visit](#) generation.

When you run the Period End Routines [task](#), you extend the schedule of planned service visits. You also specify a period in the Start Next Profile Load From field on the Scheduled Visits Maintenance window.

When the Period End Routines task generates further scheduled visits, these will be for  $n$  periods (the minimum number entered here) ahead of the Start Next Profile Load From date.

You must run Load Planned Maintenance Jobs to convert these new visits to actual jobs. Planned maintenance jobs can be limited to one machine only, or can cover all machines on the [site](#) due for maintenance in the same period.

Press Enter. If there are control accounts in the control account fields, and you use extension codes in your General Ledger chart of accounts, an extension code pop-up is displayed for each account, so that you can select the correct extension codes.

Press Enter on each extension code pop-up until the Company Profile Maintenance Charges window is displayed.

If you do not enter any control accounts, when you press Enter the Company Profile Maintenance Charges window is displayed immediately.

## Company Profile Maintenance Charges Window

To display this window, press Enter on the Company Profile Maintenance Accounts window and on each extension code pop-up, if any are displayed.

This window displays various settings, mainly related to Service Management charges.

### **Fields**

#### **One Machine per PM Job**

Enter one of the following:

0 - To list all the items due for service on the [site](#) and for the same [service period](#) on the one [job](#) number

1 - To generate separate job numbers for each item requiring servicing using the Load Planned Maintenance Jobs [task](#)

See the System Parameters Maintenance Assignment window if you want to allow more than one machine on a breakdown job.

#### **Apportion Travel Time across Job Categories?**

Enter one of the following:

0 - To accrue travel time to the first job category entered

1 - To split travel time for a job across the job categories in proportion to the labour time booked for each job category

**Note:** *This will affect where the travel time cost is allocated.*

#### **Revenue Analysis Period Based on Visit Date or Invoice Date?**

Enter one of the following:

0 - To base the analysis of revenue and cost on the date when you invoiced the service [visit](#)

1 - To base the analysis of revenue and cost on the date the engineer made a visit

#### **Break Times Entry in Technical Reporting Required**

This field is for future development.

#### **Technical Reporting by Times or Hours**

You must enter **0** in this field. You can only report in hours and minutes.

You cannot report by actual clock time.



## Engineers Diary Active

This field is for future development.

If you enter **1** in this field, the Reserved Time Buffer fields are displayed on the [Company](#) Profile Maintenance Hours window, but these are for future development. We advise you to set this field to **0**.

A separate engineer diary is currently available for non-[job](#) activities and [job](#) appointments. You access it by selecting **Diary (F10)** on the Engineer Work Allocation Initial window.

### Mileage to be Charged By

#### Standard Mileage Value

Enter one of the following:

0 - Not to charge mileage by the standard mileage value

1 - To charge mileage by the standard mileage value

The software will initially set the Charge Standard Mileage Value field on a customer's Additional Service Details to **1**. You enter the charge for making the round trip to the customer [site](#) in a separate field.

You can set only one of the three mileage fields to **1**.

**Note:** *If you have set the Zone Code Mandatory field to 1 on the System Parameters Maintenance Response window, this field should be set to 0 (No).*

#### Mileage Zones

Enter one of the following:

0 - Not to charge mileage by zone

1 - To charge mileage by zone

The software will initially set the Charge Mileage Zones field on a customer's Additional Service Details to 1. You can enter the zone code, which holds the zone charge, into a separate field.

You can set only one of the three mileage fields to 1.

**Note:** *If you have set the Zone Code Mandatory field to 1 on the System Parameters Response Maintenance window, this field should be set to 1 (Yes).*

#### Actual Miles Driven

Enter one of the following:

**0** - Not to charge mileage by distance driven

**1** - To charge mileage by distance driven

The software will initially set the Charge Actual Miles field on a customer's Additional Service Details to 1. You would enter the actual distance driven at [technical reporting](#).

You can only set one of the three mileage fields to 1.

**Note:** *If you have set the Zone Code Mandatory field to 1 on the System Parameters Response Maintenance window, this field should be set to 0 (No).*

Press Enter to display the [Company](#) Profile Maintenance Hours window.

## Company Profile Maintenance Hours Window

To display this window, press Enter on the Company Profile Maintenance Charges window.

The service window start and finish times denote the standard working hours per day. The software uses them to ensure that target response dates and times for service [jobs](#) are within working hours.

### Fields

#### **Service Window - Start**

Enter the time at which your service operations start, that is, when your engineers are available for work. Use the 24-hour clock.

When a [call](#) is logged on the system, the software calculates the target time of arrival using the service times you enter here, unless the customer, [contract](#) or machine has its own calendar and shift pattern defined (using the Working Days Calendar File [task](#)).

#### **Service Window - Finish**

Enter the time at which your service operations close, that is, when your engineers are no longer available for work. Use the 24-hour clock.

When a call is logged on the system, the software calculates the target time of arrival using the service times you enter here, unless the customer, contract or machine has its own calendar and shift pattern defined (using the Working Days Calendar File task).

**Note:** *These service window start and finish times are only effective for day types defined as working days in the Codes/Parameters File task (major type DAYT).*

**Note:** *You set up the day types against dates in the Daily Calendar File and Working Days Calendar File tasks.*

#### **Display Diary From**

This field is for future development. It is only displayed if you enter 1 in the Engineers Diary Active field on the [Company](#) Profile Maintenance Charges window.

#### **Allow Override Shift Flag**

Select one of the following:

**0** - If you do not want to use the shift profile function in Service Management

**1** - If you want to use the shift profile function in Service Management

You can use this to define separate shift profiles for any customer, [contract](#) or machine, and you can specify different shift profiles for each working day if necessary. Once you have set this field to **1** and defined an override shift profile, you cannot then change it back to **0**.

### **Reserved Time Buffer**

These fields are for future development. They are only displayed if you enter **1** in the Engineers Diary Active field on the Company Profile Maintenance Charges window.

### **Display Reserved Time as Available Time**

This field is for future development. It is only displayed if you enter **1** in the Engineers Diary Active field on the Company Profile Maintenance Charges window.

Select **Update (F8)** to save your data and leave the [task](#).

If you are setting up a new [company](#), the Branch Maintenance Selection window will be displayed, for you to set up your first [branch](#). Every Service Management company must have at least one branch.

See the relevant section of the Company Parameters Database chapter of this product guide for more details of that window.

## Codes/Parameter File & Codes/Parameter Maintenance [2/SSP, 3/SSU]

There are two [tasks](#) for setting up the many codes that are used throughout the software for data entry, validation and analysis:

- The first is the Codes/Parameter File maintenance task, which is one of the Company Parameters Database tasks.
- The second is the Codes/Parameter Maintenance task, which is one of the Utility tasks.

Apart from setting up and maintaining codes, these tasks can also create additional parameters to control processing. For example, the Field to be Mandatory field for parameter type VLDN only appears for that parameter type, and is used to determine whether the engineer and the fault code must be entered at [call](#) logging on the [Job Line](#) Details window.

The two tasks have exactly the same windows and you use them in the same way. The difference between them is that the Codes/Parameter Maintenance task in the Utilities section displays, and allows you to maintain, the system-supplied parameters. These are supplied with Service Management when it is installed and they are essential to its operation.

You can identify system-supplied parameter types by the asterisk (\*) in the first position of the parameter type description.

You are strongly advised not to amend or delete system-supplied parameter types, their descriptions or their parameter IDs. You can amend the parameter ID descriptions if the amendment is advised or approved by your software support organisation.

**Caution:** You should only use this task in special circumstances, and then only under the guidance of an experienced technical adviser on Service Management.

**Caution:** The corruption of reserved codes would cause severe problems. For this reason, access to the task must be restricted to the most senior person(s) responsible for data integrity.

**Note:** *Exclusive use of the module is required if you are using the Utilities version of the [task](#).*

You can change a user code into a system-supplied code by adding an asterisk (\*) to the beginning of the description. It will then only appear in the Utilities version of the task.

## Codes/Parameter Maintenance Selection Window

To display this window, select the Codes/Parameter File task.

There are two kinds of parameter type in Service Management, those that are set up in advance and are installed with the software (these are called system-defined parameter types), and those that you set up (user-defined parameter types).

System-defined parameters have a description that starts with an asterisk (\*).

Any parameter, whether system-defined or user-defined, consists of:

- The parameter type (that is, the four-character code itself)
- Any number of parameter IDs, which are the codes that exist within that parameter type.

**Note:** *The parameter type corresponds to the major type parameter in other modules, and the parameter ID to the minor type.*

There are two main functions you can perform from this window:

- You can amend an existing parameter type or add a new one. To do this, enter PTDS in the Parameter Type field and the new or existing parameter type in the Parameter ID field.
- You can amend an existing parameter ID or add a new one.
  - Enter **1** against the parameter type you are interested in. The software will display the Parameter Code Selection window, where you enter **1** against the parameter ID you are interested in, or else enter the new parameter ID.
  - Enter the parameter type in which you are interested in the Parameter Type field and the parameter ID (new or existing) in the Parameter ID field and then press Enter. The Codes/Parameter Maintenance window For IDs is displayed.
  - Enter the parameter type in which you are interested in the Parameter Type field and then select **Prompt (F4)**. The software displays the Parameter Code Selection

window, where you enter **1** against the parameter ID you are interested in, or else enter the new parameter ID.

## **Fields**

### **Parameter Type**

If you want to create a whole new parameter type, or amend an existing one, enter PTDS in this field, enter the code of the parameter type in the Parameter ID field, and then press **Enter**.

If you want to create a new parameter ID, or maintain an existing one, for a parameter type that already exists, enter the relevant parameter type in this field, enter the parameter ID in the Parameter ID field and then press Enter.

### **Parameter ID**

If you want to create a whole new parameter type, or amend an existing one, enter PTDS in the Parameter Type field, enter the code of the parameter type in this field and then press **Enter**.

If you want to create a new parameter ID, or maintain an existing one, for a parameter type that already exists, enter the relevant parameter type in the Parameter Type field, enter the parameter ID in this field and then press Enter.

### **Select (1)**

Enter **1** against a parameter type to display the existing parameter IDs that are set up for it.

**Caution:** Do not amend or delete any of the system-supplied parameter types unless specifically advised to do so by your agent, as unpredictable results may occur.

If you entered PTDS in the Parameter Type field and the code of a parameter type in the Parameter ID field, when you press Enter, the Codes/Parameter Maintenance window for Types is displayed.

If you entered a parameter type in the Parameter Type field and a parameter ID in the Parameter ID field, when you press Enter, the Codes/Parameter Maintenance window for IDs is displayed.

If you entered 1 against a listed parameter type, to the Parameter Code Selection window is displayed.

## **Codes/Parameter Maintenance Window for Types**

To display this window, enter PTDS in the Parameter Type field and the code of a parameter type in the Parameter ID field and then press Enter on the Codes/Parameter Maintenance Selection window.

Use this window to set up or maintain a parameter type. If users will need to set flags against the parameter type, set them up using the Character 1, 2 and 3 fields.

## **Fields**

### **Description (Maximum) Size**

Enter a value between 1 and 30 to define the length of the description of the parameter IDs for this parameter type.

### **ID Size**

Enter a value between 1 and 4 to define the length of the parameter IDs for this parameter type.

### **Format**

Enter one of the following:

- C - To create character-based parameter IDs
- N - To create numerical-based parameter IDs

### **Description**

Enter a parameter type description of up to 30 characters.

As a security measure, any description with the character \* can only be maintained from the Utilities version of this [task](#).

**Caution:** A description marked with the character \* (asterisk) identifies the parameter type as system-defined. Do not change these without advice from your software supplier.

### **Value Required**

Enter one of the following:

- Blank - If Parameter IDs for this parameter type do not require a value
- 1 - To enter a value (either an absolute value or a percentage) when you maintain parameter IDs of this parameter type

### **Value Description**

If you entered **1** in the Value Required field, any text entered in this description field will be displayed on the Parameter ID Maintenance window next to the field where the value has to be entered.

### **Value Type Description**

If you entered **1** in the Value Required field, any text entered in this description field will be displayed on the Parameter ID Maintenance window next to the one-character field where **P** for percentage or **V** for value can be entered.

### **Character 1 Req**

Enter one of the following:

- 0 - If no field is required
- 1 - If a single numeric field is required when maintaining parameter IDs of this parameter type

The entry is held under a system maintained parameter type PMC1.

### **Character 1 Description**

If you entered **1** in the Character 1 Req field, this description indicates how the character flag will be used.

The entry is held under a system maintained parameter type PMC1.

**Character 2 Req**

Enter one of the following:

- 0 - If no field is required
- 1 - If a single numeric field is required when maintaining parameter IDs of this parameter type

The entry is held under a system maintained parameter type PMC2.

**Character 2 Description**

If you entered **1** in the Character 2 Req field, this description explains what the character flag is for.

The entry is held under a system maintained parameter type PMC2.

**Character 3 Req**

Enter one of the following:

- 0 - If no field is required
- 1 - If a single numeric field is required when maintaining parameter IDs of this parameter type

The entry is held under a system maintained parameter type PMC3.

**Character 3 Description**

If you entered **1** in the Character 3 Req field, this description indicates how the character flag will be used.

The entry is held under a system maintained parameter type PMC3.

**Allow Blanks**

Enter one of the following:

- 0 - To force the entry of **1** or **0** in the Character 1 or Character 2 fields when maintaining the parameter IDs
- 1 - To allow blank entries in the Character 1 or Character 2 fields when maintaining the parameter IDs

**Note:** *The rule does not apply to entries or blanks in the two-character Character 3 field.*

**Caution:** Do not amend or delete any of the system-supplied parameter type definitions unless specifically advised to do so by your agent, as unpredictable results may occur.

Press Enter to update the data and return to the Codes/Parameter Maintenance Selection window.

## Parameter Code Selection Window

To display this window, enter 1 against a listed parameter type on the Codes/Parameter Maintenance Selection window.

Use this window to set up or amend parameter IDs. The window lists all parameter IDs already set up for the selected parameter type.

### **Fields**

#### **Select (1)**

Enter 1 against a parameter code to display the Codes/Parameter Maintenance window for IDs.

Select a parameter ID to display the Codes/Parameter Maintenance window for IDs.

## Codes/Parameter Maintenance Window for IDs

To display this window, enter a parameter type in the Parameter Type field and a parameter ID in the Parameter ID field and then press Enter on the Codes/Parameter Maintenance Selection window.

Alternatively, enter 1 against a parameter ID on the Parameter Code Selection window.

Use this window to set up or amend the description for a parameter ID.

If this parameter type has additional fields set up for it (using the Character 1, 2 or 3 fields on the Codes/Parameter Maintenance window for Types), they are displayed here.

### **Fields**

#### **Description**

Enter the parameter ID description. You specified the length of this field in the Description Maximum Size field on the Codes/Parameter Maintenance window for Types.

#### **Value or Percentage Code**

Enter one of the following:

P - Percentage

V - Value

#### **Actual Percentage or Value Figures**

Enter the required value, either a percentage or absolute value.

#### **Value Field(s)**

These are not standard fields that will always appear on this window. You only see these fields if you specified extra values and characters for the parameter type on the Codes/Parameter Maintenance window for Types, using the Character 1, 2 or 3 fields.

Enter the required value(s). The software stores these under system-generated parameter types PMC1, PMC2 or PMC3, depending on whether it is for line 1, 2 or 3.



Press Enter to save any entries you have made.

## List of Parameter Types

### ABSC - Engineer Absence

Enter one of the following single-character codes:

0 - Logged Off

1 - Logged On

You can define other possible reasons, for example, holiday or sickness.

There is an additional flag specified on this parameter to indicate whether the engineer should have work scheduled while the absence code is present.

### ACTN - \*Action Codes

Enter a two-character code to define the possible action codes that can be used within the [company](#). The details of the action code's associated processing are held within the action code file itself.

### CCAL - Alternative Calendars

As a default, Service Management takes its working days as being the days set up in the Daily Calendar File [task](#), and its working hours as being those set up in the Company Profile File task.

You might require an alternative calendar, if for example:

- Your branches in different countries observe different national holidays.
- A customer wants to purchase service cover for days you do not normally work.

You set up the alternative calendar using the Working Days Calendar File task. You can then specify this calendar against the relevant [branch](#), customer, [contract](#) or machine, and Service Management will use this when calculating target response times.

If you want to specify different working hours for days on the alternative calendar, you must use shift profiles.

## CCRC - Contract Cancellation Reason

Enter a one-character code to define the reason for cancelling a contract, for example, Too Expensive.

## CHGT - Miscellaneous Charge Types

Enter a three-character code to define the expenses incurred when doing a [job](#), for example, Hotel Costs.

This parameter has an additional value field specified which allows the entry of standard charges. These are retrieved during [technical reporting](#) but can be overwritten.

## CHST - \*Contract Header Status

Enter a one-character code to define the possible status of a [contract](#) header.

For example:

- A - Active
- D - To deleted
- E - Expired
- P - Pending
- Q - [Quotation](#)
- S - Suspended

## CLMT - Warranty Claim Type

Enter a one-character code to define the possible different types of Warranty Claim.

For example:

- 1 - Labour only
- 2 - Parts only
- 3 - Labour and parts

## CLST - \*Contract Line Status

Enter a one-character code to define the status of a [contract](#) line.

For example:

- A - Active
- D - To deleted
- E - Expired
- P - Pending

## CODC - Condition Code

Enter a one-character code to define the physical condition of accessories received with the master machine.

## COLM - Collection Method

Enter a two-character code to define how you get the equipment, for example, Courier, Customer Delivers.

## CONC - Condition Code

Enter a one-character code to define those condition codes which are part of the IRIS code hierarchy. This code, and its associated symptom codes, allow the accurate identification of any reported fault on a piece of equipment.

For example:

- 1 - Constantly
- 2 - Intermittently
- 3 - After a while
- 4 - In a hot environment
- 5 - In a cold environment
- 6 - When switching
- 7 - Under vibration
- 8 - In a damp/wet environment
- 9 - In a dry environment
- B - Liquid Contamination
- C - Only on certain station(s)/software mode

D - Only on certain standards

E - Only on one channel

F - Only with certain input(s)

G - Only in certain output(s)

These are examples of one type of condition code, but all of the codes are optional so you can set up any appropriate codes.

Condition codes are related to the [model](#) group of a model hierarchy. In turn, symptom codes are related to the condition code.

## CONF

### Configuration Code

Enter a one-character code to define configuration codes used against peripheral models when they are created in the Model file. During [call](#) logging, the attached peripheral list for a given machine is read and any of the peripherals found have a configuration code it will be displayed. Only the first five configuration codes found will be displayed to give a shorthand configuration profile immediately visible on the [Job Line](#) Details window.

## CORA - Corrective Actions

Enter a three-character code to define the action taken to correct the fault, for example Replace Part, Soldered Joint.

## CRDR - Credit Assessment Reason Codes

Enter a two-character code to define the credit note reason codes. These are used when a piece of equipment arrives at the workshop and the [owner](#)/customer requires a credit note. The reason for the credit request must be coded and logged with the [job](#).

## CREA - Call Cancellation Reason

Enter a two-character code to define the reason why you can cancel a logged [call](#), for example, Customer Cancelled, Not Covered by [Contract](#).

---

## CRTP - \*Credit Type

Enter a one-character code to define the stages that a Credit Assessment procedure can follow.

For example:

- 0 - Credit not applicable
- 1 - Credit required
- 2 - Proposed for credit
- 3 - Awaiting authorisation
- 4 - Accepted for credit
- 8 - Proposed for reject for credit
- 9 - Rejected

Once a piece of equipment has moved to credit type 4, it will be included in the next batch generation of Sales Order Processing Credit Notes. Once the Sales Order Processing Credit Note has been generated, the credit type cannot be maintained.

If a piece of equipment is moved to credit type 8, it will be included in the next Print Credit Refusal and the credit type will then be set to 9. [Jobs](#) with a credit type of 9 can be maintained so that the job can be re-processed through the Credit Assessment System if the customer does not agree with the refusal. Jobs with a credit type of 9 can be archived using the Archive routines.

## DAYS - \*Days Description

Enter a three-character code to define the day descriptions used for the days of the week.

For example:

- D01 - Monday
- D02 - Tuesday
- D03 - Wednesday
- D04 - Thursday
- D05 - Friday
- D06 - Saturday
- D07 - Sunday

## DAYT

Enter a one-character code to define the type of day, for example Working, Saturday Non-Working, or Bank Holiday. This field is used during Calendar file maintenance to classify each day of the year.

There can be either two or three additional flags:

Working Day 0/1 - All weekends, bank holidays and factory shutdowns would be classified as non-working and will not be included in the target date and time calculation performed during [call](#) logging.

Deferred Revenue Posting 0/1 - When [contract](#) revenue is posted to the General Ledger, the revenue can be deferred (apportioned) over the General Ledger periods to which the [invoice period](#) is equivalent. Only days marked as deferred revenue posting days are included in the apportionment calculation.

If you have set the Allow Override Shift Flag to 1 in the company profile, you must set up the third flag on the DAYT parameter type. You can choose what to call it; we suggest Base Shift Profile.

## DEFC

Defect Code

Enter a one-character code to define the problem found with any part fitted during a repair. You could use this code in reporting common faults to the manufacturer. This is not a defect found on the master machine.

Defects are associated with the appropriate part repair codes in a separate [task](#).

## DESM - Despatch Methods

Enter a one-character code to define how you return equipment to your customer, for example, Courier, Customer Collected.

## DFDM - Default Despatch Methods

Enter a one-character code to define the default despatch methods, for example, Courier.

## DISC - Discount Reasons

Enter a one-character code to define the reasons for a discount, for example, Major Account, No Discount.

## DSST - \*Default Action Codes

Enter a two-character code to define the default (system) action codes.

There are approximately 20 codes defined that must be associated with a user-defined action code using Action Code Maintenance.

These codes are used automatically, at certain points in processing, to retrieve the correct user-defined action code. For example, if a [job](#) is created with job type 4, this is the booking-in process when equipment arrives on [site](#). Certain software processing needs to be performed and the correct action code assigned. You can [call](#) the book-in action code anything, but the software will retrieve the action code with the default action code 03 attached to it.

Alternatively, once an estimate is printed, the software will retrieve the estimate printed action code and assign it to the job. It does this by searching for the action code with a default action code of 20.

## EDAY - Elapsed Days

Enter a two-character code to define the elapsed days. The code is used in the due date calculation when letters are printed. For example, letters may have been responded to on a date two weeks from the printing date.

**Note:** *This date is not used to calculate the Payment Due on Invoices; this uses information from Accounts Receivable.*

## EGRD - Engineer Job Grades

Enter a two-character code to define engineer grades, for example, Senior Engineer, Technician.

## ERRC - \*Remote Communications Error Codes

Enter a two-character code to define possible errors with [remote communications](#).

For example:

- 01 - Invalid [Company](#)
- 02 - Invalid [Branch](#)
- 03 - Invalid Engineer
- 04 - Invalid Transaction Type
- 05 - Engineer Already Logged On
- 06 - Engineer Already Logged Off
- 07 - Transaction Date Invalid
- 08 - Transaction Time Invalid
- 09 - Invalid Modem Address

- 10 - Invalid Log Off
- 11 - Job/Model/Serial No. Invalid
- 12 - Invalid [Job](#) Received
- 13 - New Sequence No. Invalid
- 14 - Reason for Refusal Invalid
- 15 - Actual [Model](#) Invalid
- 16 - Geocodes Invalid
- 17 - Customer Code Invalid
- 18 - Appointment Already Exists
- 19 - Model No. Invalid
- 20 - Invalid Absence Code
- 21 - New Engineer Invalid
- 22 - [Job Line](#) Status Invalid
- 23 - Arrival Date Invalid
- 24 - Arrival Time Invalid
- 25 - Departure Date Invalid
- 26 - Departure Time Invalid
- 27 - Dep Date/Time < Arr Date/Time
- 28 - Labour Hours Invalid
- 29 - Customer Travel Time Invalid
- 30 - Engineer Travel Time Invalid
- 31 - Invalid Job Category
- 32 - Actual Fault Code Invalid
- 33 - Invalid Job Category - Labour
- 34 - Machine Section Invalid
- 35 - Machine Sub-section Invalid
- 36 - Corrective Action Code Invalid
- 37 - Job Line Details Flag Invalid
- 38 - Parts Line Detail Flag Invalid
- 39 - Source Engineer Invalid
- 40 - Part No. Invalid
- 41 - Part Not Stocked at Eng Loc



- 42 - Parts Quantity Invalid
- 43 - Invalid [Job](#) Category (Parts)
- 44 - Misc Chgs Detail Flag Invalid
- 45 - Misc Chgs Detail Type Invalid
- 46 - Invalid Job Category (Misc)
- 47 - Misc Chgs Value Invalid
- 48 - Tax Code Invalid (Misc)
- 49 - Currency Code Invalid (Misc)
- 50 - Text Details Flag Invalid
- 51 - Engineer Text Not Entered
- 52 - Engineer Invalid for Message
- 53 - Parts Ordered Flag Invalid
- 54 - Part No. Must be Entered
- 55 - Ordered Quantity Invalid
- 56 - DRP Not Active
- 57 - Returned Part Must be Entered
- 58 - Returned Quantity Invalid
- 59 - Flag Not Set for Returned Part
- 60 - Parts Returned Flag Invalid
- 61 - Part No. Invalid

## ESQU - \*Estimate Request Type

Enter a one-character code to define estimates and quotations. You request these either by entering a value during call logging, at the customer's request, or from the model hierarchy when a business decision is made that all models in this hierarchy have estimates or quotations produced for *all* jobs, not just when a customer requests one.

For example:

- 0 - No estimate or [quotation](#) required
- 1 - Estimate required
- 2 - Quotation required
- 3 - Estimate requested
- 4 - Quotation requested

Codes 3 and 4 have an addition charge applied if the estimate or [quotation](#) is not accepted. This is [called](#) an estimate creation fee.

## ETAR - \*Engr Assignment Error Codes

Enter a two-character code to define error codes for Automatic Call Assignment.

For example:

\*\* - Job Referral. Status TBA

- 01 - ACA not allowed for [company](#)
- 02 - ACA not allowed for [model](#)
- 03 - ACA not allowed for [job](#) type
- 04 - Call has no target date/time
- 05 - No maint. only engineer available
- 06 - Appointment time already passed
- 07 - Appointed engineer not available
- 08 - Failed - prime [call](#) not assigned
- 09 - Unable to place call in queue
- 10 - No engineer has skills for machine
- 11 - No engineer has kit to fix m/c
- 12 - Original engineer not suitable
- 13 - Preferred engineer not suitable
- 15 - OPEN: re-sched to eng: A Shift
- 16 - OPEN: re-sched to eng: B Shift
- 17 - OPEN: re-sched to eng: C Shift
- 18 - OPEN: re-sched to original eng
- 19 - OPEN: re-sched to alt engineer
- 20 - WIP: Inspection
- 30 - WIP: Travelling to [site](#)
- 35 - WIP: On site
- 40 - WIP: Job accepted
- 51 - Engineer belongs to different team
- 52 - Engineer not available

- 53 - Engineer does not have skills
- 54 - Engineer does not carry kit
- 55 - Engineer unable to fix machine
- 56 - Non-original engineer selected
- 57 - Not preferred engineer for machine
- 58 - [Call](#) will exceed target time
- 59 - This call will exceed target
- 60 - Appointment call cannot be moved

## FLTC

### Faults

Enter a three-character code to define faults reported for equipment, for example, Jammed, Noisy.

The faults reported when you create the [job](#) are stored on the job file and job history file. The faults recorded by the technician are stored on the [technical reporting](#) files and are a true record of the actual fault.

## GLPR - Global Price Increase Code

Enter a two-character code to define groups used to implement a price increase, for example, Dealer Groups' Code, No Price Increase.

## GLTX - \*GL Deferred Revenue Transaction Text

Enter a one-character code to define the text transferred to General Ledger with the deferred value.

For example:

- 1 - [Service Contract](#) Number
- 2 - Service Deferral
- 3 - Multi-service Contracts

## GTXT - General System Text

Enter the text to be displayed for the function key that toggles between creating a [contract](#) and creating a [quotation](#) on the Contract Header Maintenance window in the Contracts [task](#).

The following entries are recommended:

- AC - F22=Accept Contract
- QU - F22=Quotation Only

## INVT - \*Invoice Type

Enter a one-character code to define the description for the invoice type, used on the prompt window when you request the kind of financial document to generate or print.

For example:

- J - [Job](#) invoice
- C - [Contract](#) invoice
- E - Estimate
- Q - [Quotation](#)
- P - Pro forma

## JETT - \*Job Entry Type

Enter a one-character code to define different types of [job](#). These are used during [call](#) logging.

For example:

- 2 - A pre-book job
- 4 - A book in job
- 6 - A warranty claim job

## JHST - \*Job Header Status

Enter a one-character code to define the status of the [job](#) header.

For example:

- O - Open
- Y - Cancelled

Z - Finished (Fully Documented)

## JLAB - \*Job Line Abbreviated Status

Each two-character code has an equivalent abbreviation for the [job line](#) status.

For example:

- 00 - OPN (Open)
- 01 - ASS (Assigned)
- 02 - SCH (Scheduled)
- 03 - DES (Despatched)
- 04 - WIP (Work in progress)
- 05 - TEL (Waiting for a telephone [call](#))
- 06 - PRT (Waiting for spare parts)
- 07 - CRD (On credit hold)
- 08 - COM (Complete)
- 09 - PTL (Partially reported)

## JLST - \*Job Line Status

Enter a two-character code to define the [job line](#) status.

For example:

- 00 - Open
- 01 - Assigned
- 02 - Scheduled
- 03 - Despatched
- 04 - Work In Progress
- 05 - Telephone
- 06 - Parts
- 07 - Credit Hold
- 08 - Complete
- 09 - Partial Report
- 98 - Cancelled

## 99 - Tech Report

### LHTY

#### Labour Hours Type Codes

Sometimes a [job](#) may start in normal working hours but continue into overtime hours. The engineer can log this information in the [technical report](#) if you set up more than one labour hours type code. You can use up to four codes, each indicating a different charge rate.

Each code is a four-character code, and on each you can specify the factor to apply to the standard labour rate. So for example, you would set up a basic rate, BASE, with a factor of 1 because that simply uses the standard labour rate. The rate HALF, for time and a half, would have a factor of 1.5.

The codes appear on the [Call](#) Reporting window.

### LOAN - Loan Types

Enter a one-character code to define the types of loan available, for example, On Service Loan, Demonstration.

### MAJF - Major Fault Flag

Enter a one-character code which is maintainable during parts entry in [Technical Reporting](#). It allows one part to be identified as causing the major fault. This information is stored on the database and could be used for reporting trends back to the manufacturer.

### MROV - Reason for Override

Enter a two-character code to define the reason for a meter reading override, or example, Meter Change, Previous Actual Incorrect.

### MRSR - Meter Reading Source

Enter a one-character code to define methods used for obtaining the meter reading, for example, Customer Reading, Engineer Reading.

## MTHS - \*Months Descriptions

Enter a three-character code to define the monthly descriptions.

For example:

M01 - January

M02 - February

M03 - March, and so on

## OPER - Physical Condition Code

Enter a two-character code to define the physical condition of a returned [model](#). This information is critical when you take responsibility for customer-owned goods.

## OWNP - Warranty Claim Ownership Code

Enter a one-character code to define ownership, for example, Owned by End User. If the equipment is end user owned, you must specify the name and address of the [owner](#).

## PAYT - Payment Method

Enter a one-character code to define the different types of payment method allowed when you record payment, for example, Cash, Cheque. This information is not used to control processing in the financial applications; it is for information only.

**Note:** You must enter a payment method for proforma [job](#) invoices before the equipment can be despatched externally from the software.

## PCDF - Remote Comms Process Indicator

Enter a one-character code to define the process condition of remote [jobs](#).

For example:

0 - Awaiting processing

1 - Processed

2 - Re-submitted to the engineer

- 3 - Rejected
- 4 - Held
- 8 - Fully processed
- 9 - To deleted

## PTCH - Territories

In previous versions of Service Management you set up territories using the Territories/Geocodes maintenance [task](#). This no longer exists, so you must set up territories under this parameter type.

Set up the parameter type with a description 30 characters long, and with parameter IDs of 3 characters. Type the description Territories.

Once the parameter type is set up, go in to set up new territories. You will find that any existing territories will appear under the new parameter type automatically.

## REAS - Reason Codes

Enter a two-character code to define the reason why an action code has been changed. The requirement for a reason code is attached to the action code in Action Code Maintenance.

## RCTX - Remote Comms Process ID

Enter the following:

- 1 - Last Remote Comms Trans No

## RECT - \*Invoice Line Type

Enter a two-character code to define the type of line allowed on an invoice.

For example:

- CN - PM [visit](#) charge
- HF - Fixed labour hours
- HR - Labour hours
- HS - Fixed travel
- HT - Travel hours



MC - Miscellaneous costs  
MD - Act distance driven  
MS - Std distance charge  
MZ - Zone charge  
PR - Parts  
ET - Engineer travel  
01 - Service charge (service invoice line) - if ACV046 = 0  
01 - [Visit](#) charge (visit invoice line) - if ACV046>0  
02 - Rental  
03 - Pre-billed volume charge  
04 - Reconciliation invoice  
05 - Interim invoice  
CR - Negative invoice for reconciliation

## REC2 - \*Invoice Line Type Short Descriptions

Enter a two-character code to define the abbreviations for the invoice lines, for example, MC for miscellaneous charges.

## REGN - Regions

Enter a two-character code to define the regions for a [branch](#), for example, Central, Southern.

## REPC - Repair Code

Enter a one-character code to define the parts repair codes to be associated with a defect code. Defect and repair codes can be entered against parts.

## RJCD - \*Warranty Claim Reject Codes

Enter a two-character code to define reject codes during warranty claim validation.

Enter one of the following:

01 - Reserved for questionnaire processing

02 - Error codes such as [model](#) does not exist, or customer not allowed to make claims

03 - Parts related errors

04 - Information only warnings

The grouping determines the Warranty Claim Reject action code assigned and the kind of letter that will be produced. If the software only finds type 04 errors, the information reject action codes will be assigned to the [job](#) and a request for an information letter will be printed.

If a parts reject code is assigned, the rejected parts action code will be assigned automatically and a parts information letter will be printed, and so on.

## RRES

Credit Release Reason

Enter a one-character code to define the reasons for releasing the credit, for example, Payment Agreed.

## RVTY

Default Return Visits

Enter a two-character code to define the reasons for return [visits](#).

## SECT - Machine Section Repaired

Enter a three-character code to define the section of the machine you have repaired, for example, Processor Board.

## SRVC - \*Special Revenue Categories

Enter one of the following:

\*SC - Sundry Credits

\*IS - Sundry Invoices

## SSCT - Machine Sub Section Repaired

Enter a three-character code to define the sub section of the machine you have repaired, for example, Detection Circuits.

## STAT - Equipment Status

Enter a one-character code to define the equipment status and [owner](#), for example, Leased. This field can be maintained on the [Installation](#) Equipment Maintenance window in the Installation Details [task](#).

## STA1 - Statistical Family (Models)

Enter a three-character code to define the statistical groups for the [models](#), for example, Imperial Measurement.

## SYM1 - Symptom Code 1

Enter a one-character code to define the possible symptom code for the equipment. Symptoms 1, 2 and 3 are used in combination to indicate the exact error.

Examples of Symptom 1 in the IRIS coding system are:

- 1 - General
- 2 - Communication
- 3 - Picture
- 4 - Colour
- 5 - Audio
- 6 - Mechanism

## SYM2 - Symptom Code 2

Enter a one-character code to define symptom code 2 for equipment.

For example:

- 1 - No action
- 2 - Level

- 3 - Quality
- 4 - Noise
- 5 - Unstable
- 6 - Recording
- 7 - Recording and Physical Problems
- 8 - Special Functions
- 9 - Other Conditions

Symptom 1 and 2 codes are used in the Symptom Code maintenance [task](#) where they are related together to form composite codes with a third symptom code.

For example:

- 110 - Power problem
- 111 - No power on AC
- 120 - Charging problem
- 310 - Picture problem
- 320 - Picture level problem

## S2SE - \*Serious Error Codes

Enter the following:

- 01 - End of Calendar File Reached

## TEAM - Team Description

Enter a three-character code to define the name of service teams.

## TRPT - Report Type

Enter a one-character code to define the type of [technical report](#) that you can enter, for example, Technical, Estimate.

## TRST - \*Technical Report Status

Enter a one-character code to define the status of the technical report.

For example:

- 1 - Avail
- 2 - Jb Fin
- 3 - Rp Fin
- 4 - On Rep
- 5 - Intel

## TTYT - \*Remote Comms Trans Type

Enter a two-character code to define the remote transmission type.

For example:

- 00 - Engineer log off
- 01 - Engineer log on
- 02 - New [job](#) details
- 03 - Changed job details
- 04 - Status change
- 90 - Acknowledgement of receipt
- 91 - Received by remote
- 92 - Re-sequence job
- 93 - Parts processing
- 94 - Update engineer [location](#)
- 95 - Job declined/referred
- 96 - Message
- 98 - Job cancellation/transfer
- 99 - [Technical reporting](#)

## TXTI - Text Types

Enter a two-character code to define the valid text types that can be used within the software. Each text type will be associated with a document, usually a letter, the document layout being defined in the Text Maintenance [task](#).

The text type and hence the associated document are then attached, where appropriate, to an action code. When the action code is processed, the document will be printed.

This code has a number of associated overrides which are used to control the document printing process.

## TXTO - Text Destination Codes

Enter a three-character code to define the people you can send text to, for example, Sales Manager, Operator.

## TYDS - \*Billing Type Description

Enter a two-character code to define the type of billing allowed.

For example:

- 01 - Fixed Service
- 02 - Rental
- 03 - Pre-billing
- 04 - Copy Meterage Interim
- 05 - Copy Meterage Reconciliation

## T411 - \*Text Printing - Miscellaneous Codes

These are two-character codes used by the document printing program.

## UNSP - \*Unspecified Machine

MACH - Unknown (Model Code)

## VATC - Tax Codes and Rates

Enter a three-character code to define the tax codes available to Service Management.

**Note:** *This code will appear in the code list issued but is no longer used within the software. Tax codes and values are retrieved from the General Ledger application, which is a prerequisite application for Service Management and Equipment Servicing.*

## VLDN - \*Validation Rules

Enter one of the following four-character codes:

221A - Engineer number on SS221

If the additional flag attached to this code is equal to **1**, the engineer number on the call details window will become mandatory.

221B - Fault code on SS221

If the additional flag attached to this code is equal to **1**, the fault code on the call details window will become mandatory.

## VSTP - Scheduled Visit Profiles

Enter a three-character code to define the quantity of [visits](#) produced using the [scheduled visit profile](#), for example, Fortnightly, Monthly.

## WAIT - Wait Times for Sleeper Jobs

Enter one of the following one-character codes to define the delay time for specific [jobs](#):

1 - Incoming Transaction Monitor

2 - Outgoing Transaction Monitor

## WCLC - Warranty Claim Labour Credit Notes

Enter a three-character code to define valid labour credit codes and their descriptions. The labour credit codes can then be attached to all customers who can make warranty claims.

If a warranty claim is accepted and if the warranty claim includes labour, the labour value to be credited will be retrieved using the labour credit code.

## WRFL - Warranty Claim Flag

Enter a one-character code to indicate the warranty claim customers are allowed to make.

Enter one of the following:

0 - Warranty claims not allowed

1 - Claims allowed

- 2 - Parts warranty claims allowed
- 3 - Labour warranty claims allowed
- 7 - Questionnaire to be sent

## WVAL - Warranty Claim Value Limits

Enter one of the following four-character codes:

PCVL - Parts Control Value

This is used to prompt you to enter an Invoice number if the value of the claimed part is greater than the value held against this code.

COVL - Price Limit for Return of Parts

This is used to prompt you to make sure that the part has been returned because its price is greater than the value held against this code.

## XTYP - \*Text Types

Enter a two-character code to define the type of text allowed.

For example:

AC - [Site](#) address text

AT - Corrective action text

CN - [Contract](#) text

CU - Tech report customer text

EG - Tech report engineer text

EN - Engineer text

HR - Booked hours text

I - Equipment text

IC - Miscellaneous invoice/credit text

JH - [Job](#) header text

JL - [Job line](#) text

JS - [Job](#) story text

MC - Sundry charge text

PR - Booked parts text



## ZONE - Zone Charge Description

Enter a one-character code to define the codes you use for zones, for example, Inner City, Suburbs.

## 240P - \*W240 Options

Enter a two-character code to define the options you can enter against [job lines](#) using Work Control.

For example:

- 00 - Open [job](#)
- 01 - Assign job
- 02 - Schedule job
- 03 - Put job on the bench
- 04 - Work in progress
- 05 - Telephone [call](#) required
- 06 - Held awaiting parts
- 08 - Completed but not documented
- 11 - Change action code
- 22 - Change job duration
- 23 - Job story maintenance
- 24 - Enquire on job
- 25 - To maintain job
- 98 - Call cancellation
- 99 - [Technical report job](#) (or to enter estimate or [quotation](#))

## Inventory Descriptions

The following codes are set up in Inventory Management. If you run Inventory Management integrated with Service Management, these codes will affect you. Some examples of parameter IDs are given.

## DEPT (Departments)

A list of valid departments.

## MANT (Mantle codes)

If you want to apply global price changes to your [contracts](#), one method is to specify a mantle code on the contract, and then select the relevant mantle code when you perform the price change.

- A - Attack customers
- C - Central Govt. Depts
- L - Local Govt. Depts
- M - Multi-nationals
- S - Special customers

## MFID (Manufacturer's ID)

- \* - Manufacturer not specified
- EAGL - Eaglesbush Nuts & Bolts
- FALC - Falcon Electrical
- GRU - Herbert Grudgings (Spares)
- TAY - Taylor Engineers (Rothley)

## OTHR (Customer search parameters)

- END1 - Cust account no. 9
- END2 - Phone no.332
- START1 - Cust account no. 2
- START2 - Phone no. 313

## PTYP (Item type)

If you want to invoice for spare parts within Service Management, those spare parts must be set up in Inventory Management with an item type that is specified on the System Parameters Maintenance Meterage window.

- C - Consumables
- J - Major spares
- N - Minor spares
- S - Supply items

2 codes help analyse machine sales:

- M - Machine sale via SOP

- P - Peripheral sale via SOP

## SPED (Urgency indicator)

- 1 - Special courier: ETA TBA
- 2 - By noon tomorrow: promised
- 3 - By noon tomorrow: guaranteed
- 4 - 24 hour delivery: guaranteed
- 5 - By 17:30 today
- 6 - By 22:00 Monday

## STKU (Stockroom usage code)

- B - Service spares stockroom
- W - Service workshop: company stock
- X - Service workshop: customer stock

## TIMZ (Time zones)

- E01 - East + 1 hour
- E02 - East + 2 hours
- E03 - East + 3 hours
- W01 - West - 1 hour
- W02 - West - 2 hours
- W03 - West - 3 hours

## Calendar File Control [3/SSP]

Use this [task](#) to define the number of [service periods](#) per year and set the current period and year at system set-up time.

**Note:** This task requires exclusive use of the [company](#).

A service period is a specific number of days, defined by a start and end date.

The software allows anything between one and 99 [service periods](#) per calendar year, but typically they are a week, 4 weeks, or a month long.

**Note:** You must set up the current service period and year when you install Service Management. Thereafter, running the Period End Routines task automatically increments the period (and year, when necessary).

## Calendar Control Maintenance Window

To display this window, select the Calendar File Control [task](#).

This window displays the current settings for week, period, year, and so on.

### **Fields**

#### **Current Year**

Enter the current year as two digits in the range 00 to 99.

#### **Current Week**

Enter the week number in the range 01 to 53.

**Note:** The week must not be later than the week you enter in the No. of Weeks This Year field.

#### **Current Period**

Enter the current Service Management period number, in the range 01 to 99.

**Note:** The period must not be later than the period you enter in the No. of Periods This Year field.

Once set, the Period End Routines task updates this field.

#### **No. of Weeks This Year**

Enter the number of weeks this year. The value entered must be 52 or 53.

#### **No. of Weeks Last Year**

Enter the number of weeks in last year. The value entered must be 52 or 53.

#### **No. of Periods This Year**

Enter the number of periods in this (current) year as two digits in the range 01 to 99.

**Note:** Once set up, these fields are system-maintained.

Press Enter to update the data.

## Daily Calendar File [4/SSP]

Use this maintenance [task](#) to define and maintain a calendar of working days, [service periods](#) and [accounting periods](#).

You use this task when you install Service Management to define the calendar for current, previous and future years. After [installation](#), you use the task whenever necessary, to define all future years.

**Note:** *You must create an extra dummy year, one year previous to the first year actually required in the software, at system set-up time. This allows the definition of service or accounting years, or both, which span two calendar years. The Rebuild of Period End Data File task will not create period end date records for the first year defined in the Daily Calendar file.*

**Note:** *This maintenance task requires exclusive use of the [company](#).*

The software uses Service Management periods widely, to control the scheduling of planned maintenance [jobs](#) and to monitor all jobs processed.

The software uses accounting periods to control the postings to Accounts Receivable and the General Ledger from job and [contract](#) invoicing. They are used particularly for apportioning deferred revenue from contract invoices.

The calendar file data is essential to the software. Without it, you cannot create contracts, process jobs, or raise invoices.

**Note:** *After making changes in the maintenance task you must run the Rebuild of Period End Data File task. This ensures that the period end dates on the software accurately reflect these daily calendar details. Check the period dates after the rebuild, using the Enquire on Period End Dates task.*

## Daily Calendar Selection Window

To display this window, select the Daily Calendar File task.

Use this window to specify the year you want to set up or maintain.

### **Fields**

#### **Year**

Enter the year you want to add or update.

If you are installing Service Management for the first time, create a dummy year, one year previous to the first calendar year required.

Make sure that you have set up the calendar far enough into the future to allow the software to generate scheduled [visits](#).

Press Enter to display the Daily Calendar Maintenance window.

## Daily Calendar Maintenance Window

To display this window, enter the appropriate year and then press Enter on the Daily Calendar Selection window.

For each month, all the days are classified by day type (for example, bank holiday, or Saturday/Sunday, or working day and so on, as defined in the Codes/Parameter File Maintenance [task](#) under DAYT). In addition, the letter E indicates the end of service and [accounting periods](#).

### **Fields**

#### **1st Service Period End Date**

Enter the date of the first [service period](#) end.

#### **1st Account Period End Date**

Enter the date of the first accounting period end.

#### **Day Type**

Enter a valid day type code against each day of the month. You set up day type codes on the Existing Parameter IDs window under parameter type DAYT.

Every day type holds a definition that specifies whether it is a working day or not.

#### **Service Pd**

Service Pd and Account Pd fields must be **blank** or **E**.

Enter **E** under the date that represents the last day of a service period. You can set up more than one service period in a calendar month.

You must enter **E** for the date specified as the 1st Service Period End Date.

**Note:** *The service period and the accounting period end dates, for the year being entered, could be in a previous calendar year. You must still indicate the dates in the previous year with an E in both the Service Pd and Accounting Pd fields. To allow this, you must always enter a dummy year one year previous to the first calendar year required.*

#### **Account Pd**

Service Pd and Account Pd fields must be **blank** or **E**.

Enter **E** under the date that represents the last day of an [accounting period](#). You can set up more than one accounting period in a calendar month.

You must enter **E** for the dates specified as the first Account Period End Date.

**Note:** *The service period and the accounting period end dates, for the year being entered, could be in a previous calendar year. You must still indicate the dates in the previous year with an E in both the Service Pd and Accounting Pd fields. To allow this, you must always enter a dummy year one year previous to the first calendar year required.*

The Rebuild of Period End Data File [task](#) will never generate period end dates for the first calendar year you enter on the daily calendar.

**Note:** After making changes in this task you must run the Rebuild of Period End Data File task. This ensures that the period end dates on the software accurately reflect the daily calendar detail. Check the period dates after the rebuild, using the Enquire on Period End Dates task.

Use Page Up and Page Down to see the different months of the year. When you have entered all months, select **Update (F8)** to update.

## Enquire on Daily Calendar File [14/SSP]

Use this [task](#) to enquire on daily calendars.

### Daily Calendar Enquiry Selection Window

To display this window, select the Enquire on Daily Calendar File task.

#### **Fields**

##### **Year**

Enter the year on which you want to enquire.

Press Enter to display the Daily Calendar Enquiry window.

### Daily Calendar Enquiry Window

To display this window, enter a year and then press Enter on the Daily Calendar Enquiry Selection window.

This window displays all the details of the calendar year selected. The software displays each calendar month in the year in turn. For each month, the software displays the day type code for each day (bank holiday, Saturday/Sunday, working day and so on) and the date(s) on which the [service period\(s\)](#) and [accounting period\(s\)](#) end.

Select **Exit (F3)** to leave the [task](#).

## Branch File [5/SSP]

You must define at least one [branch](#) for each [company](#) on the software; otherwise no access to the software is possible. (At least one user must be authorised to a branch before the branch can be accessed.)

Use this [task](#) to set up and maintain your service branch or branches.

**Note:** *This task requires exclusive use of the company.*

A branch is a sub-[division](#) of a company and is an organisational unit that controls its own service operations but shares certain data with other branches.

When you enter the Service Management software, you must select a particular branch. You can have authority to access one or more branches. If you have access to more than one, you can switch between them using the Change Branch task.

## Branch Maintenance Selection Window

There are two ways to get to this window:

- Select the Branch File task.
- Set up a new company profile in the Company Profile File task. When you select **Update (F8)** in that task, this window is displayed immediately to set up a branch within that new company.

### Fields

#### **Branch Code**

Enter either a new or existing [branch](#) code.

Press Enter to display the Branch Maintenance Detail window.

## Branch Maintenance Detail Window

To display this window, select a [branch](#) code and then press Enter on the Branch Maintenance Selection window.

### Fields

#### **Branch Name**

Enter the name of the branch, using up to 35 alphanumeric characters.

#### **Address**

Enter the branch address. Five lines are available.



**Post Code**

Enter the first section of the branch postcode, in the official postcode format.

**Untitled**

Enter the second section of the branch postcode, in the official postcode format.

**Telephone**

Enter the branch telephone number, using up to 15 alphanumeric characters.

**Time Zone ID**

You can operate the software across different time zones. The zones are specified as a number of hours' difference (called the offset time) from the system time. You can specify zones at branch level and at customer additional details level.

Once you have specified the offset time, when service [calls](#) are received the customer's date and time are recorded with them, and are used to calculate target times.

This function is best used where your [company](#) branches are in different time zones. It is more problematic when used for your customer [locations](#), and if you do not use it carefully it can lead to impractical work allocation. For example, a customer in a particular time zone may prefer a branch that, though in a different time zone, is in fact nearby.

The time zone offset times are set up in the Inventory Descriptions file, under major type TIMZ.

Enter the correct time zone for this branch, if the time zone is different from that of the system.

**Mileage Travel Rate**

This is a memo field only, since the Charge Per Mile/Km field in the customer's additional service details gives the rate.

**Average Travel Time**

Enter the default travel time for the branch. The field is five numeric characters, formatted hhh:mm.

This is a flat, best-guess figure that gives the amount of travel time to be scheduled between [jobs](#). The software uses this when scheduling calls.

**Calendar Code**

This is a memo field.

Leave this field blank to use the standard calendar that is set up in the Daily Calendar File [task](#). You would always leave this field blank if you only use one [branch](#) in Service Management.

If you want this branch to use a different working calendar to the standard, enter the code of the alternative calendar that is set up using the Working Days Calendar File task. You would do this if, for example, you had a branch that observed different bank holidays from the standard branch.

### **Job Audit Log Queue**

This field displays the name of the output queue to which the Job Audit Log report (an audit list of [job](#) maintenance [tasks](#)) will be sent. If you leave this field blank, the software will use the queue specified in Application Manager.

### **Error Message Queue**

This field is only displayed if you are using [remote communications](#). You specify this on System Parameters Maintenance Assignment window.

Enter the user or queue identity for receiving the reports on validation and transmission errors arising from remote communications.

Select **Update (F8)** to save any changes you have made.

## User/Branch Authorities [6/SSP]

Use this [task](#) to authorise users to [branches](#).

**Note:** You can authorise a user to all branches for a [company](#) by entering a special branch code of \*A, instead of specifying each branch individually.

## Authority Maintenance Selection Window

To display this window, select the User/Branch Authorities task.

### **Fields**

#### **User ID**

Enter a valid user ID, using up to 10 alphanumeric characters.

#### **Branch Code**

If you want to authorise this user to a particular branch, enter the branch code and then press Enter. The Branch Marker field will appear on the window.

If you want to see a list of all the branches to which this user is currently authorised, leave this field blank and then press Enter. You will see the Branch Selection window.

If you want to authorise this user to all branches, enter the code \*A and then press Enter. The Default Branch Code field will appear on the window.

#### **Branch Marker**

You only see this field if you enter a user ID and a branch code other than \*A in the Branch Code field.

Every time a user signs on and starts using Service Management, the software has to find out which [branch](#) they want to use. This can mean selecting from a list that the software

automatically displays. The alternative to this is to enter **1** in a user's Branch Marker field; this is then the branch the software will automatically assign to the user each time they sign on.

Bear in mind that a user can only have one branch marker.

Enter one of the following:

0 - If this is not the branch that this user will be in when they sign on to Service Management

1 - If this is the branch that this user will be in when they sign on to Service Management

### **Default Branch Code**

You only see this field if you entered a user ID and the branch code \*A.

Every time a user signs on and starts using Service Management, the software has to find out which branch they want to use. Normally this means selecting from a list, but if you enter a branch here, that is the branch the software will automatically assign to that user each time they sign on.

Enter an existing branch.

Press Enter. If you entered a user and a branch, or a user and the \*A code, the software updates the information.

If you entered a user but left the branch blank, you see the Branch Selection window.

## Branch Selection Window

To display this window, enter a user ID but leave the Branch Code field blank on the Authority Maintenance Selection window.

This window displays all the [branches](#) to which the user is authorised.

### **Fields**

#### **Select (1)**

Enter **1** against a branch to maintain the branch marker. If the user is authorised to code \*A, that is, all branches, if you select it with **1**, you can maintain the Default Branch Code field.

#### **Branch Marker**

This field displays the marker for each branch.

0 - If this is not the branch that this user will be in when they sign on to Service Management

1 - If this is the branch that this user will be in when they sign on to Service Management

A user can only have one branch set to **1**. To change the marker, delete the existing marker before setting up the new one.

#### **Enter a Selection or a Branch Code**

Enter the [branch](#) you wish to maintain, instead of selecting from the list.

Press Enter to return to the Authority Maintenance Initial window, with the Branch Marker or Default Branch Code field showing, as relevant.

## Escalation Parameters [7/SSP]

Use [job](#) escalation if you want the software to alert you to outstanding jobs that are approaching their [contracted](#) response time.

The way you set up this [task](#) controls the way in which job escalation operates for each Service Management [branch](#).

You do not have to use job escalation in Service Management, and if you do decide to use it you can implement it at any time, although you should note that this task requires exclusive use of the [company](#).

You use this task to set the branch response time that [call](#) logging will use. You can define it either by [division](#) and [model](#) group, or as a default for any division and model group combination that is not yet set up. The software will only use the default response time if there is no match at a higher level in the response time hierarchy.

**Note:** Escalation will only take place if you run the Start Job Escalation task.

### **Calculating Target Times**

For unscheduled call out jobs, the software calculates the target date and time as the date and time the call was first logged, (or the appointment date and time if you enter one), plus the response hours.

The response hours are taken from the Special [Serial Numbers](#) file, or the contract which covers the piece of equipment if a contract exists. If the equipment is not covered by contract, the response hours default to the value for the [contract type](#) \*NO. Manual overrides of the response hours may be made, if special circumstances arise.

The software also takes into account the service window as defined in the company profile, and the working and non-working days as defined in the Daily Calendar file.

For scheduled planned maintenance jobs, the target date is set to the last working day of the [service period](#) in which the [visit](#) is due, and the target time is set to the start time of the service window.

A continuous batch job regularly re-calculates the escalation step of all jobs which are within the escalation time fence and are eligible for escalation. The step is calculated as:

target time - current time / reporting interval for escalation

This is rounded up to the nearest integer if necessary. This means that the escalation step will move from high to low value as a [job](#) moves towards its target time. Step 00 means that the job has either reached or gone beyond its target time.

**Note:** Service Management assumes a seven-day working week. If less than this is actually worked, the software still escalates Monday's jobs on Sunday, not on the preceding Friday.

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## Escalation Control Maintenance Selection Window

To display this window, select the Escalation Parameters [task](#).

### **Fields**

#### **Division**

Enter an existing [division](#).

To set up the default response time for the [branch](#), leave the Division and Model Group fields blank.

#### **Model Group**

Enter an existing [model](#) group.

To set up the default response time for the branch, leave the Division and Model Group fields blank.

**Note:** You should set up a default response time for each branch. The software will use the branch default time on the Escalation Control Maintenance Detail window for equipment in a division and model group not otherwise specified, if there is no match at a higher level in the response time hierarchy.

Press Enter to display the Escalation Control Maintenance Detail window.

## Escalation Control Maintenance Detail Window

To display this window, enter the appropriate [division](#) and [model](#) group and then press Enter on the Escalation Control Maintenance Selection window.

### **Fields**

#### **Report PM Jobs**

Enter one of the following:

- 0 - If planned maintenance [jobs](#) will not have messages sent to the appropriate users when the jobs reach the designated escalation steps
- 1 - If planned maintenance jobs will have messages sent to the appropriate users when the jobs reach the designated escalation steps

#### **Report Contracted Responses Only**

Enter one of the following:

- 0 - If all jobs will send messages to the appropriate users
- 1 - If only jobs for pieces of equipment covered by [contract](#) will send messages when they reach the designated escalation steps

### Report Escalation

Enter a valid number of hours and minutes (hh:mm) between 00:15 and 99:45, with the minutes being a multiple of 15. This is the amount of time before a job's target time that it will start to escalate.

### Reporting Interval for Escalation

Enter a valid number of hours and minutes (format hh:mm) between 00:15 and 99:45, with the minutes being a multiple of 15.

This is the time interval between escalation steps for this [model](#) group (within the product [division](#)) within the [branch](#).

### Default Branch Response Time (hhh:mm)

The software calculates a job's target date and time by adding the relevant response hours to the job's date and time at which it was first logged (and adjusting to allow for working hours and days).

The software finds the relevant hours by running through the response time hierarchy, looking for the hours in:

Special [serial numbers](#)

Contract equipment line

Contract header

[Contract type](#) (incl. \*NO)

Default branch response time

**Note:** *The response times you define in a contract can be altered by a percentage in the 3-D matrix.*

### Report Step

Enter a step in the range 00 to 98. The first record will be for step 00, which is when the [job](#) has reached, or passed, its target date and time. The second record is for step 01, and so on, or as determined by the particular escalation pattern set up.

The [call](#) is logged at step 98. The call will stay at this step until it reaches the Report Escalation Before Response Due time. The software then updates the call's report step to the highest step value listed on this window. It decreases as the escalation steps are reached.

### User ID

Enter a valid user ID.

### Screen Message

Enter one of the following:

- 0 - If the software does not issue a message when this step is reached
- 1 - If the software sends a message to this user's message queue

2 - If the software sends a message to this user in break mode

**Note:** *If the job reaches step 00 and needs a break message, the software will send the message on the first occasion. At any later escalation cycle, there will be no message for that job.*

The message includes:

- The sender (for example, QPGMR)
- The message date and time of origin
- The job number
- The escalation step now reached
- The job target date and time, engineer number, customer's name, the model and serial number, and the time to target (in the format hh:mm)

Select **Update (F8)** to save any changes you have made.

## Rebuild of Period End Data File [8/SSP]

Use this [task](#) to rebuild all service and [accounting period](#) end dates for a [company](#), typically after making any changes in the Daily Calendar File task.

A [service period](#) is a specific number of days, defined by a start and end date. The software holds an end date for each service period.

An accounting period is a specific number of days, defined by a start and end date. The software holds an end date for each accounting period.

The task sends a batch [job](#) that deletes all existing period end dates for a company. It rebuilds them for both service and accounting periods, using the details from the Daily Calendar File task, where you have specified the period end markers.

**Note:** *This task requires exclusive use of the system.*

**Tip:** You must run this task after making any changes in the Daily Calendar File task, since the software uses the period end dates extensively.

Use the Enquire on Period End Dates task after the rebuild, to check that the period end dates are correct.

Select **Confirm Submit (F8)** to submit a job to perform the rebuild.

## System Parameters File [9/SSP]

Use this [task](#) to maintain the fields that control the software for a specific [company](#).

**Note:** This task is in effect an extension to the Company Profile File task. It is not a parameter file task in the same sense as the Codes/Parameter File task in Service Management or the Descriptions task in Inventory Management.

You will use this task when you first install the system, but infrequently thereafter.

**Note:** This task requires exclusive use of the system.

A company can be sub-divided into [branches](#), but these branches will all operate under the controlling system parameters defined for the company.

## System Parameters Maintenance Response Window

To display this window, select the System Parameters File task.

### Fields

#### **Call History Window - How Many Calls to Display**

This field is for future development. The [Call](#) History pop-up in the Service Call Logging [task](#) defaults to 5 calls.

#### **Processing by Month or Term**

Enter one of the following:

- 0 - If the prices entered for billing are for a month
- 1 - If the prices entered for billing are for the [term](#) of the [contract](#)

You cannot use term pricing for meterage contracts. You must use this setting if you want to use the Contract Rates task.

**Caution:** You cannot change this parameter once you have priced or invoiced any contract. You must set it correctly before the system goes live.

#### **Zone Code Mandatory**

Enter one of the following:

- 0 - If the zone code entry in the Customer Additional Service Details [task](#) is optional
- 1 - If the zone code entry in the Customer Additional Service Details task is mandatory

**Note:** On the Company Profile Maintenance Charges window you can set up a company default (which you can overwrite at site address level) for mileage to be charged by mileage zones.



### **Allow Service Cover on Pending Contracts**

Enter one of the following:

**0** - If a field on the [contract](#) header (the Allow Service Cover When Contract Pending field on the Service Parameters pop-up) defaults to prevent [calls](#) on a pending contract

If the customer calls with a problem, an engineer will not be sent out unless you change the field on the Service Parameters pop-up.

**1** - If a field on the contract header (the Allow Service Cover When Contract Pending field on the Service Parameters pop-up) defaults to allow calls on a pending contract

If the customer calls with a problem, the software can send an engineer, just as if the contract were active. You may wish to set this on for the sake of customer relations. You can alter it later, on the contract header.

### **No of Repeat Calls in Sequence = Specialist Call**

When the number of repeat calls for the same machine reaches the number defined here, the software displays the default [job](#) category that is defined for a specialist call on the Job Line Details window in the Service Call Logging task.

### **% To Shorten Response on Specialist Call**

When there is a specialist call in call logging, the software reduces the response time retrieved for that call by the percentage you enter here.

### **Minimum Number of Calls between Emergency Calls**

The value entered in this field prevents the use of the emergency indicator until this number of consecutive non-emergency calls has been logged. This is to prevent customers taking advantage of the emergency service.

This emergency indicator is on the Job Line Details window in the Service Call Logging [task](#). When the job is an emergency, the software sets the target date and time to the current system date and time.

### **Allow New Job at Technical Reporting**

Enter one of the following:

**0** - If you cannot create a new [job](#) when [technical reporting](#) within the Engineer Work Allocation task

**1** - If when you go into technical reporting for a job, by entering **99** against a job on the Engineer Work Allocation Team [Job Lines](#) window, the New Job Required field is displayed

Enter **1** there to enter a new job for an existing or new machine at the same customer's [site](#).

### **No of Days before Contract Expires to Shorten Response**

This field is for future development.

### **Shorten Response by Time/Percentage**

This field is for future development

**Time to Shorten Response**

This field is for future development

**Percentage to Shorten Response**

This field is for future development

**Range of Percentages - Minimum**

This field is for future development

**Range of Percentages - Maximum**

This field is for future development

Press Enter to display the System Parameters Maintenance General window.

## System Parameters Maintenance General Window

To display this window, press Enter on the System Parameters Maintenance Response window.

### Fields

**Print Job Documentation**

This field is for future development.

**Minutes in between Job Documentation**

This field is for future development.

**Download Call Information to PC**

This field is for future development.

**Minutes in between PC Download**

This field is for future development.

**Check Kits before Assigning Engineer**

Enter one of the following:

0 - If the software will not check the van's stock kit

1 - If, when assigning a [job](#) to an engineer, the software checks to determine if the kit item number set up on the [model](#) is present in the engineer's stock room

If it is not present, the software enters a reason code for non-allocation on the [Job Line](#) Details window in [call](#) logging.

You must be using System21 Inventory Management to use this function.

**Print Engineer's Name on Service Invoice**

This field is for future development.

**Technical Report Text Mandatory for T&M Calls**

This field is for future development.

**Engineer Resupply Send to Home**

This field is for future development.

**Maximum Calls Displayed on Engineer Work Queue**

This field is for future development.

**Maximum Customer Importance Customer Invoice Level**

You set up a customer's importance in the Customer Priority field on the Customer Details window. The 3-D matrix uses it to help determine response times.

Enter in this field the number of importance rankings you want to use.

For example:

1 - If you only want to use one rank

In this case, all your customers will be of equal importance.

4 - If you want to use four ranks

In this case, 4 indicates an important customer, 3 a less important customer, and so on down to level 1.

**Customer Ref Mandatory on Call Reporting if Tax Free**

This field is for future development.

**Small Invoice Value**

This field is for future development.

Press Enter to display the System Parameters Maintenance Meterage window.

## System Parameters Maintenance Meterage Window

To display this window, press Enter on the System Parameters Maintenance General window.

**Fields****Estimates Allowed for Billing**

Enter one of the following:

0 - If the software will only allow actual readings when it is pricing meterage [contracts](#)

1 - If the software will allow estimated readings when it is pricing meterage contracts

The value you enter in this field defaults into the Service Parameters pop-up, but you can change it there.

### **Maximum Number of Estimates Allowed to Bill**

Enter the number of estimates you want to allow. This must be a number in the range 1-999. The value you enter in this field defaults into the contract itself, but you can change it there.

**Note:** *This field is only used if you set the Estimates Allowed for Billing field to 1.*

### **Estimates Allowed for Reconciliation**

Enter one of the following:

0 - If the software only allows actual meter values for the reconciliation calculation

This is the recommended setting.

1 - If the software allows estimates in the reconciliation calculation

Reconciliation is a type of meter billing where there is a review of usage. You can then raise an invoice for a meter count higher than the minimum agreed in the [contract](#) and not yet billed. You can give a credit where the meter count is greater than the minimum, but is below that which you previously estimated and invoiced.

### **No of Days Prior to Invoice Date to Trigger Estimate**

This sets the maximum number of days before the invoice date that the software is to generate estimated readings.

For example, if an electricity [company](#) sets its invoice date as 31st May, you could enter **20** here to produce estimates on the 11th May. This would allow time for customers to receive their estimates and return their own readings if preferred.

### **No of Days Allowed for Return of Meter Card**

This sets the number of days before the invoice date that customers must return their meter cards in order to enter them in time for invoicing.

### **% Within Estimate Reading Allowed**

Sometimes a customer or user might enter a gross error for a meter reading; a customer might enter a date in the reading box, for example. The software will consider any reading that falls outside this percentage of the estimate as an error.

### **Multiple of Minimum Copies Allowed**

The software uses this value to check for errors in meter readings that you enter from meter cards or in [technical reporting](#).

Whenever you enter a meter reading from meter cards or in technical reporting, the software calculates the difference between the entered reading and the estimate. If this difference is greater than the minimum copies on the [contract](#) multiplied by the multiple factor you enter in this field, the meter reading will fail validation.

For example, suppose that the billing is monthly, with a minimum copy volume of 5000 on the machine's contract. You enter a meter reading of 55000, but the software estimated 44000. The difference is 11000. The copy volume multiplied by 2 is 10000. The meter reading would fail validation.

This field is usually set to 2, an industry standard check.

### **Copy Price Conversion Factor (Pence to Pound)**

You set up the meterage price per copy in the Per Copy field in the Contracts [task](#) on either the Contract Header Maintenance [Contract Conditions](#) pop-up or the Contract Conditions pop-up.

This per copy value is probably much smaller than the smallest unit of your currency. To save your input staff typing several zeroes after the decimal point, they can type a much larger number there, and you can convert it to your currency using this factor.

For example, if you enter 100 in this field, the software moves the decimal point two points to the left. Your input staff can type the notional value of 0.25 per copy and this becomes 0.0025 in the real currency.

We recommend that you test this value before using it in a [multi-currency](#) environment.

### **Item Types to be Invoiced: Type Code**

If you want to record spare parts used in a [job](#) by entering them on the [technical report](#), those spare parts must be set up as items in System21 Inventory Management.

If you also want to invoice for these items, you must do the following:

- 1 Set up one or more item types under parameter type PTYP in the Inventory Descriptions file.
- 2 Assign an item type to each spare part by entering it in the Item Type field on the Item Maintenance Static Detail window in the Items [task](#) in Inventory Management.

Enter the item types used for the spare parts here. There is a limit of four.

Select the items for invoicing when you set up your matrices in the [Cover Type/Job](#) Category task.

### **Item Types to be Invoiced: Description**

Enter the descriptions of the four item types you want to invoice.

### **Item Types to be Invoiced: Abbreviation**

Enter an abbreviation for the four item types you want to invoice.

**Note:** *Once you have set up your Item Types to be Invoiced you can only amend them by editing the file SSP04. This is also true if you created a company by copying an existing company.*

Press Enter to display the System Parameters Maintenance Assignment window.

## System Parameters Maintenance Assignment Window

To display this window, press Enter on the System Parameters Maintenance Meterage window.

### **Fields**

### More Than One Machine Allowed on a Breakdown Call

Enter one of the following:

- 0 - If the software will only allow you to log one machine on any [job](#) number
- 1 - If the software will allow you to log additional machines for the [site](#) on one job number, after the [call](#) for the first machine has been updated

See the [Company](#) Profile Maintenance Charges window for the setting of the One Machine Per PM Job field, to allow more than one machine on a planned maintenance job.

### More Than One Breakdown Call Allowed at One Time

Enter one of the following:

- 0 - If only one incomplete job for a machine can exist  
This is not the right setting if you deal with large machines, which might very well have more than one repair logged.
- 1 - If you can log additional breakdown jobs for a machine, even if other jobs are open or in progress

### Position Cursor During Call Logging

This value sets the position of the cursor when you enter the Service Call Logging [task](#).

Enter one of the following:

- 1 - If the cursor will be on the Account Number field
- 2 - If the cursor will be on the [Contract](#) Number field
- 3 - If the cursor will be on the Customer Order Number field

### Credit Control by Branch

Enter one of the following:

- 0 - If the Credit [Call](#) Maintenance Detail window will display all [jobs](#) for the [company](#)
- 1 - If the Credit Call Maintenance Detail window, for jobs that have been set to bad credit status, will only display those jobs for the user's [branch](#)

### Default Expiry Days for Message

This determines how long engineer messages remain in the software. The software uses this value as a default when sending a message, but you can change this value then.

**Note:** The software does not use this value for machine messages, which take a default date of 99/99/99, that is, an indefinite expiry date.

### Default Invoice Start Date to First of the Month

Enter one of the following:

- 0 - If the software will give any new [contract](#) an invoice start date which is the same as the contract start date

You can change this when maintaining the contract.

1 - If the software will give any new contract an invoice start date of the first of the month following the contract start date

In this case, days not invoiced will be included on that invoice. For example, if a contract starts on 8th August, the first invoice will be sent on 30th September, and will include the charge for 8th - 31st August.

**Note:** *You can change the invoice start date when you are maintaining the contract.*

### Technical Report Generated if Receptionist Completes Call

Enter one of the following:

0 - If the software will not generate a [technical report](#) if the [call](#) receptionist solves the problem over the telephone

1 - If the software will generate a technical report if the call receptionist uses the option to complete a call

### Number of Days between Calls to Generate Repeat Call

This field is for future development.

### Automatic Call Assignment Active

When a call is logged in Service Management, the software uses the customer and engineer [location](#) information to allocate a team to the [job](#) automatically.

Automatic call assignment (ACA) is a refinement of this team allocation. It goes through every job and assigns an engineer from within the allocated team. If you want to take individual [models](#), engineers or job categories out of ACA you can do so in the relevant maintenance [tasks](#).

Enter one of the following:

0 - If you do not want to use automatic [call](#) assignment

This setting prevents the software from displaying the System Parameters Maintenance Calls window, and any previous settings on that window are set to **0. Update (F8)** is displayed at the foot of the current window.

1 - If automatic call assignment is available for the [company](#)

The software will display the System Parameters Maintenance Calls window, where you set up the company's Automatic Call Assignment parameters.

### Remote Communications Active

Enter one of the following:

0 - If your engineers do not use [remote communications](#) (for example, hand-held [terminals](#)) to transmit [job](#) details or messages

1 - If your company uses remote communications to communicate with your engineers

When the Service subsystem is active, incoming and outgoing sleeper programs monitor when engineers log on, so that the software can transmit job and message details, or receive the details of [technical reports](#).

### **Default Re-Transmission Flag**

If the Remote Communications Active field is set to **0**, set this field to **9** to condition off the Re-transmit field on the [Job Line](#) Details window in the Service Call Logging [task](#).

If the Remote Communications Active field is set to **1**, select one of the following:

Blank - If you must enter **0** or **1** in the Re-transmit field on the Job Line Details window in the Service Call Logging task

0 - If the software allows transmission of a job, but not re-transmission of any call logging changes

1 - If whenever you spot a problem on an incoming transaction, it will be automatically re-transmitted to the engineer

You can overwrite these defaults on the Job Line Details window in the Service Call Logging task.

### **Functions**

#### **Update (F8)**

Use this to update the parameter settings. This is only available if you set the Automatic Call Assignment field to **0**, and so this is the final window in the [task](#).

If you set the Automatic Call Assignment field to 1 on the System Parameters Maintenance Assignment window, press Enter to display the System Parameters Maintenance Calls window.

## **System Parameters Maintenance Calls Window**

To display this window, press Enter on the System Parameters Maintenance Assignment window.

**Note:** *This window is only displayed if the Automatic Call Assignment Active field on the System Parameters Maintenance Assignment window is set to 1.*

### **Fields**

#### **Time Within Which Calls Are Automatically Assigned**

Enter the number of hours before [call](#) target time at which automatic call assignment will pick up an unassigned call and allocate it to a team (or to the preferred engineer, if the Assign Calls Only to Preferred Engineer for Machine field on this window is set to **1**). This prevents the software allocating [visits](#) too far in advance.

#### **Assign CM Calls Only to Maintenance-only Engineers**

CM is short for [contracted](#) maintenance. CM calls are planned maintenance calls.

Enter one of the following:



0 - If the software will allocate calls to any engineer within the team

1 - If the software will only assign system generated calls (that is, planned visits) to those engineers who have been assigned to contract maintenance

### **Assign Repeat Calls Only to Original Engineers**

Enter one of the following:

0 - If the software assigns any call identified as a repeat call to any engineer within the team

1 - If the software assigns any call identified as a repeat call to the engineer who made the original visit

### **Assign Calls Only to Preferred Engineer for Machine**

0 - If the software assigns calls to any engineer within the team

1 - If the software assigns calls to the engineer defined on the [installation](#), or, if you have not defined an engineer to the installation, to the team

### **Assign Calls Only to Engineers Carrying Kit**

Enter one of the following:

0 - If the software does not check whether the engineer is carrying the correct kit item for the equipment that engineer is visiting

1 - If the software checks the engineer's van stock (defined for that engineer), to see if the engineer is carrying the kit item for the equipment that engineer is visiting

### **Permitted % Increase in Response Time**

Calls which exceed their target time by anything up to the percentage you enter in this field will still be scheduled by automatic [call](#) assignment.

If the target time is exceeded by a greater percentage, the software does not allocate the call, and adds the appropriate reason code (parameter type ETAR) to the [job](#).

### **Permitted Appointed Call Overlap Time**

The software will allow appointments to overlap up to the value in minutes that you enter in this field.

### **Engineer Workload Threshold**

This field is for future development.

### **Automatic Call Assignment Sleeper Wait Time**

The automatic call assignment procedure (which runs in the background) will wait for the number of minutes entered in this field before it runs again.

### **Maximum Calls to Assign between Waits**

Automatic call assignment will only attempt to schedule this number of calls for an engineer each time it runs, to avoid overloading an engineer.

Select **Update (F8)** to update the data.

## Working Days Calendar File [10/SSP]

Use this [task](#) to provide alternative calendars to your normal working daily calendar, which is set up using the Daily Calendar File task.

If, for example, your [branches](#) are spread across the UK, they will have different bank holidays. You would set up the Daily Calendar file for one holiday pattern, and then set up the alternatives using this task.

You can also use this task to set up alternative calendars for your customers, who can purchase extended days' cover. A customer with a particularly vital machine could buy cover for seven days a week and you would set up a calendar here accordingly, and then add the calendar code to that machine's details. Service Management will then use that calendar to calculate the target response time for that machine.

You can add calendars at customer, [contract](#), machine on a contract, or non-contract machine level.

You set up calendar codes and descriptions on the Parameter Type Maintenance window, under parameter type CCAL.

**Note:** Your [company's](#) period end dates, which are set up on a separate file and which are used in the software for service and [accounting period](#) ends, apply to your customers' calendars.

## Working Days Calendar Maintenance Selection Window

To display this window, select the Working Days Calendar File [task](#).

### Fields

#### **Calendar Code**

Enter a calendar code that already exists as a code under the parameter type CCAL in the Codes/Parameter File task.

If the calendar code you selected has already been set up in this task, when you press Enter, the Working Days Calendar Maintenance Year window will be displayed.

If the calendar code you selected has never been set up in this task, when you press Enter, the Working Days Calendar Maintenance Base on window will be displayed.

## Working Days Calendar Maintenance Base On Window

To display this window, select a new calendar code and then press Enter on the Working Days Calendar Maintenance Selection window.

### Fields

#### **Base Upon Existing Calendar Code**

Enter one of the following:

0 - Not to base the calendar on an existing calendar

1 - To base the calendar on an existing calendar

### **Base Upon Calendar Code**

Enter an existing calendar to copy, or leave this field blank if you do not want to copy a calendar.

Press Enter to display the Working Days Calendar Maintenance Year window.

## Working Days Calendar Maintenance Year Window

To display this window, press Enter on the Working Days Calendar Maintenance Base On window.

This window is also displayed if you select a calendar code on the Working Days Calendar Maintenance Selection window that has already been set up in this [task](#).

### **Fields**

#### **Year to Maintain**

Type the last two digits of the year you want to set up within the calendar code.

**Note:** *If you want to set up the year 2000, you must overtype the default zeroes with 00. The software will not recognise the default zeroes as a selected year.*

#### **Base Upon Calendar Code**

Enter an existing calendar to copy, if you want to base the new year on an existing year.

**Note:** *This copy facility is of limited use if you are setting up a different year, as you will have to edit the day types that are copied over.*

**Note:** *It will be useful where you are setting up a different calendar code for the same year.*

#### **And Year**

Enter the year of the calendar you want to copy.

#### **Select (n)**

Enter one of the following:

1 - To amend an existing calendar

4 - To delete an existing calendar

Press Enter to display the Working Days Calendar Maintenance Detail window for the year you have selected.

## Working Days Calendar Maintenance Detail Window

To display this window, select the calendar code and year you want to set up or maintain and then press Enter on the Working Days Calendar Maintenance Year window.

If you are setting up a calendar based on an existing calendar and year, all the source calendar's codes will be copied and will be displayed on this window.

### Fields

#### **Day Types (Untitled)**

Enter valid day types (set up under the parameter DAYT in the Codes/Parameter File [task](#)) for the four months displayed. Use **Page Up** and **Page Down** to display the other months in the year, for entry of their day types.

If you copied an existing calendar, just amend the codes that need changing.

### Functions

#### **Override Shift (F10)**

If you want to enter a different shift for a specific day type, position your cursor on the day for which you want to define the shift and then select **Override Shift (F10)**. This displays the Shift Profile Maintenance window. See the relevant section of this product guide for more details on how to complete the window.

This is only available if the following conditions are satisfied:

- You have set the Allow Override Shift Flag field to **1** on the Company Profile Maintenance Hours window.
- The day type you selected has a shift profile set up for it in the Codes/Parameter File task. You can give this any description, but we suggest Base Shift Profile.
- You have already set up the shift profile that is the Base Shift Profile for the day type.

**Note:** *If you have not yet set up a Base Shift Profile, follow these instructions:*

- Select the Codes/Parameter File task.
- Maintain the parameter type DAYT itself, on the Codes/Parameter Maintenance window for Types.
- Type 1 in the Character 3 Required field, and type Base Shift Profile Code (or a description of your choice) in the Description field.
- Go to the Codes/Parameter File Maintenance window for IDs, and maintain a day type you want to attach to a shift profile. The new field you have just defined will appear.
- Enter the shift you want to use as a base shift profile in the Base Shift Profile Code field.

Select **Update (F8)** to save any changes you have made.

## Shift Profile [11/SSP]

Use this [task](#) to set up the customer hours to be covered by your engineers. You should only use this task if you want to specify shifts that differ from the standard core hours that you have set up on the [Company](#) Profile Maintenance Hours window.

You can define a pattern of shifts (a shift profile) for a single date or a range of dates, for a machine on [contract](#), an entire contract, a non-contract machine, or for all the machines on a customer's [site](#).

The hours of cover might be for standard periods such as the life of a contract (for example, every Monday to Friday, 08:00 to 22:00), or for specific dates, or a combination of both.

Once you have set this up, Service Management will use the shifts when calculating the target response times. Thus response times will always take account of any shift profile that exists for a customer's site, for a machine, or for a contract.

Note that you will have to schedule manually any [call](#) whose target is outside the prime shift for the company.

You can if you want specify the teams or engineers to work particular shifts. You do this by setting up a territory profile code, specifying that code against the shift, and setting up the territory profile with the correct engineers and teams using the FSG/Territory/Team task.

**Note:** In order to use this task you must set the Allow Override Shift Flag to 1 on the [Company](#) Profile Maintenance Hours window.

## Shift Profile Selection Window

To display this window, select the Shift Profile [task](#).

### **Fields**

#### **Shift Profile Code**

Enter a new or existing profile code.

#### **Based on Profile**

If you are setting up a new profile code and you want to base it on an existing one, enter the existing code in this field.

### **Functions**

#### **F10=Add**

Use this if you are setting up a new profile code.

If you are setting up a new profile code, select **Add (F10)**. The Shift Profile Maintenance window will be displayed.

If you are maintaining an existing profile code, press Enter. The Shift Profile Maintenance window will be displayed.

## Shift Profile Maintenance Window

To display this window, select **Add (F10)** or press Enter on the Shift Profile Selection window.

You can also access this window from within the Working Days Calendar File [task](#). Position your cursor on a particular day on the Working Days Calendar Maintenance Detail window and then select F10=Override Shifts.

Use this window to set up the shifts that make up the shift profile.

### **Fields**

#### **Select (Untitled)**

Enter one of the following:

- 1 - To maintain a shift profile line (that is, a shift)
- 4 - To delete a shift

#### **No.**

Enter the sequence number for the new shift. These shifts must be in start time sequence.

#### **Start Time**

Enter the time (format hh:mm) at which the shift starts. Do not type in the separator; just enter the numbers. 5:30pm, for example, would be entered 1730.

#### **Finish Time**

Enter the time (format hh:mm) that the shift ends. Do not type in the separator; just enter the numbers. 5:30pm, for example, would be entered 1730.

#### **Effective From Date**

Enter the date on which this shift comes into effect.

Shifts that overlap in time cannot also overlap in effectivity.

#### **Effective to Date**

Enter the date after which this shift is no longer used.

Shifts that overlap in time cannot also overlap in effectivity.

#### **Comment**

Enter any useful text.

#### **Territory Profile**

You can associate a shift with a territory profile. This links the [field service group](#) information set up in the FSG/Territory/Team [task](#) with the shift. This is how you link the shift with the teams and engineers who cover that shift. Service Management will use the information to schedule the [job](#) to an engineer or team.

Leave this field blank if you do not want Service Management to schedule the jobs. Service Management will still use the shift information to calculate the target response time, but will not schedule the job unless it falls within your core working day.

## Functions

### **Add to Override Shifts (F8)**

This is only displayed if you arrived at this window from within the Working Days Calendar File task and you are attaching this profile to a day type for the first time.

If this profile has already been attached to a day type and this function has already been performed, the words Override Shifts appear towards the top of the window, above the Comment and Territory Profile fields.

If this function has not already been performed, the words Base Shifts appear towards the top of the window and **Add to Override Shifts (F8)** is available.

Press Enter to add your new shift to the list towards the top of the window.

When you have completed your updates, select **Update (F8)** to save and exit.

## Enquire on Codes/Parameters File [12/SSP]

Use this [task](#) to enquire on the details of parameter codes.

## Codes/Parameter File Enquiry Selection Window

To display this window, select the Enquire on Codes/Parameters File task.

### Fields

#### **Parameter Type**

Enter an existing parameter type. To see a list of all the parameter IDs set up under this type, select **Code Selection (F4)**.

To see the details of one particular parameter ID, enter that ID in the field below and then press Enter.

Parameter type descriptions starting with \* are system-required codes. The software restricts access to these codes for maintenance.

#### **Parameter ID**

Enter the parameter ID for which you wish to see details.

If you enter a parameter ID, you must also enter the relevant parameter type.

Enter a parameter type and then select **Code Selection (F4)**.

## Parameter Code Enquiry Selection Window

To display this window, select a valid parameter type and then select **Code Selection (F4)** on the Codes/Parameter File Enquiry Selection window.

### Fields

#### **Select (1)**

Enter **1** against the parameter ID for which you want to display the details.

Select a parameter ID and then press Enter to display Codes/Parameter File Enquiry window for IDs.

## Codes/Parameter File Enquiry Window for IDs

To display this window, select a parameter ID on the Parameter Code Enquiry Selection window.

This window displays the details for the selected parameter ID.

Select **Exit (F3)** to leave the task.

## Enquire on Daily Calendar File [14/SSP]

Use this [task](#) to enquire on the definition of working and non-working days and on service and [accounting period](#) end dates.

## Daily Calendar Enquiry Selection Window

To display this window, select the Enquire on Daily Calendar File task.

### Fields

#### **Year**

Enter the year on which you want to enquire.

Select a year and then press Enter to see the Daily Calendar Enquiry window.

## Enquire on Branch File [15/SSP]

Use this [task](#) to enquire on the details of any service [branch](#) within a [company](#).



## Branch Enquiry Selection Window

To display this window, select the Enquire on Branch File task.

### Fields

#### **Branch Code**

Enter the [branch](#) on which you want to enquire.

Press Enter to see the Branch Enquiry window.

## Branch Enquiry Window

To display this window, enter a [branch](#) and then press Enter on the Branch Enquiry Selection window.

### Fields

#### **Time Zone ID**

If the branch is in a different time zone to the system, this field displays that zone.

#### **Mileage Travel Rate**

This field displays the branch cost rate per mile.

#### **Average Travel Time**

This field displays the default travel time for the branch, for use in [call](#) scheduling calculations. The format of this field is hhh:mm.

#### **Calendar Code**

This is a memo field.

#### **Job Audit Log Queue**

This field displays the name of the output queue to which the software will send the Job Audit Log Report (audit list of [job](#) maintenance [tasks](#)). If this field is blank, the software will use the queue specified for you in Application Manager.

#### **Error Message Queue**

This field displays the user ID to which the software will send any [remote communications](#) error messages.

Select **Exit (F3)** to leave the task.

## Enquire on Period End Dates [18/SSP]

Use this [task](#) to enquire on the [service period](#) end dates for a specific year.

## Period End Dates Enquiry Initial Window

To display this window, select the Enquire on Period End Dates task.

### **Fields**

#### **Year**

Enter the year on which you want to enquire.

Press Enter to display the Period End Dates Enquiry Detail window.

## Period End Dates Enquiry Detail Window

To display this window, enter the appropriate year and then press Enter on the Period End Dates Enquiry Initial window.

All [service period](#) numbers and end dates are displayed.

Select **Exit (F3)** to leave the [task](#).

## Enquire on Working Days Calendar File [20/SSP]

This task is for future use within the software.

The enquiry displays the day types for all twelve months in the year, for a selected calendar code and year.

## Working Days Calendar Enquiry Selection Window

To display this window, select the Enquire on Working Days Calendar File [task](#).

Use this window to select the calendar on which you want to enquire.

### **Fields**

#### **Calendar Code**

When you first enter the window, this is the only field, and it is an input field. Enter the calendar on which you want to enquire and then press Enter, and a list of the years defined to the calendar you have chosen is displayed.

#### **Select (n)**

This field is not displayed until you have selected a calendar and pressed Enter. Enter **1** to view details of a calendar year.

Enter 1 against a calendar year and then press Enter to display the Working Days Calendar Enquiry Details window.

## Working Days Calendar Enquiry Details Window

To display this window, enter 1 against a calendar year and then press Enter on the Working Days Calendar Enquiry Selection window.

This window displays the day type you have set up for each day. You set day types up in the Codes/Parameter File [task](#), under parameter type DAYT.

### **Functions**

#### **Override Shift (F10)**

This is only available if you set the Allow Override Shift Flag field to **1** on the [Company](#) Profile Maintenance Hours window.

If you want to review shifts entered against a day type, select **Override Shift (F10)**. This displays the Shift Profile Enquiry window. See the relevant section of this product guide for more details.

Select **Exit (F3)** to leave the task.

## Enquire on Shift Profile [21/SSP]

Use this task to enquire on shift details.

## Shift Profile Enquiry Selection Window

To display this window, select the Enquire on Shift Profile [task](#).

### **Fields**

#### **Shift Profile Code**

Enter the profile code on which you want to enquire.

#### **As At Date**

Enter the effective date at which you want to see the profile. This will window out ineffective shifts.

Press Enter to display the Shift Profile Enquiry window.

## Shift Profile Enquiry Window

To display this window, press Enter on the Shift Profile Enquiry Selection window.

### **Fields**

#### **No.**

This field displays the shifts in sequence number.

#### **Start Time**

This field displays the shift start times.

#### **Finish Time**

This field displays the shift end times.

#### **Effective from Date**

This field displays the date on which this shift comes into effect.

#### **Effective to Date**

This field displays the date after which this shift is no longer used.

#### **Comment**

This field displays any comment text.

#### **Territory Profile**

This field displays any associated territory profile.

Select **Exit (F3)** to leave the [task](#).

### Introduction

Before you can start recording [contract](#) information or entering service operations, you have to enter your customers' details, their site [locations](#) and all the equipment installed on each [site](#).

Your customers must be set up in System21 Accounts Receivable before you can set up additional details within Service Management.

#### **Price Lists**

Service Management uses two types of price list: labour price lists and parts price lists.

Labour price lists define the hourly labour rates to be charged to customers for contract, non-contract and workshop work, and include an hourly travel rate. Each list has an effectivity date. You can enter a labour price list against every customer and [model](#). The model code of the equipment being serviced or repaired determines the labour rates to be charged.

Parts price lists and discount lists hold the prices and discounts you want to apply when charging for spare parts fitted or used by an engineer. The options to set up and maintain these lists are the same as the ones in Sales Order Processing, but SOP is not a prerequisite for Service Management, so the options are made available even if you do not use SOP.

You then specify the appropriate price list against the customer location in the Customer Additional Details [task](#) in Service Management. This means that the customer site at which the work is done determines the prices charged for spare parts.

### Customer Additional Details [1/SSE]

You must set up your customers in Accounts Receivable before you can set their additional details up in Service Management using this [task](#). You must set up the customer's additional service details before you can record equipment installed at their [sites](#).

Accounts Receivable, Sales Order Processing and Service Management all affect your customer's details.

Accounts Receivable controls credit limits and payment [terms](#), Sales Order Processing controls stock allocation, pricing of sold items and Sales Analysis codes, and Service Management controls pricing of Service Management [jobs](#) and [invoice consolidation levels](#).

Although some of the data held on the Accounts Receivable customer account is not used by Service Management, the following is significant:

- The customer's name and address
- The customer's geocode or postcode

Service Management uses this to automatically assign a team or an engineer to jobs at the customer site. It can match the geocode or postcode to the engineer's territory.

- The tax code

The software uses this when generating invoices or credit notes, to establish which tax rate to charge.

- The credit stop indicator

Job maintenance in Service Management checks whether a customer is on credit stop.

You can set up your customer to match the structure of the customer's organisation. One customer may be a simple single account; another may have a statement account with many invoicing addresses, each with many different delivery or [installation](#) accounts.

The statement account is set up in Accounts Receivable. The data includes credit details, Accounts Receivable parameters and statistical codes.

You can send invoices to a different address from the statement address.

Each customer may have many delivery or [installation addresses](#). You set these up in Sales Order Processing or Service Management.

## Additional Details Maintenance Customer Selection Window

To display this window, select the Customer Additional Details [task](#).

### **Fields**

#### **Account Number**

Enter your customer's account. You must have already set this customer up in Accounts Receivable, using the Names and Addresses task.

Press Enter to display the Additional Details Maintenance Address window.

## Additional Details Maintenance Customer Confirmation Window

To display this window, select a customer and then press Enter on the Additional Details Maintenance Customer Selection window.

This window displays the customer's 000 address (also called the statement address).

### **Fields**

**Please Enter Account Number**

To change the customer, enter the new customer in this field and then press Enter.

Press Enter to display the Additional Details Maintenance [Location](#) Selection window.

## Additional Details Maintenance Location Selection Window

To display this window, press Enter on the Additional Details Maintenance Customer Confirmation window.

At first, this window displays only the details at the top of the window and the Enter Location Code field, but you can press Enter to display a list of all existing addresses for the customer.

**Fields****Enter Location Code**

Enter a new address code or enter an existing one from the list.

**Locn Code**

This field displays a list of existing address codes for the account, or a message that there are none.

**Name**

This field displays the name of the account for each [installation address](#).

**Address Line 1**

This field displays the first line of the address.

**Note:** For any account, there can be a number of locations with different addresses.

Select a customer and then press Enter to display the Additional Details Maintenance Customer Defaults window.

## Additional Details Maintenance Customer Defaults Window

To display this window, select a customer and address and then press Enter on the Additional Details Maintenance [Location](#) Selection window.

**Fields****Account Phone Extension**

Enter the [site](#) address contact's telephone extension number.

**Note:** You can enter the service contact's telephone number and extension number on the next window.

### **Invoice Destination Address A/c**

Enter the account to which to send the invoices raised on behalf of this [installation address](#).

### **and Sequence**

Enter the address to which to send the invoices raised on behalf of this installation address.

### **Contact**

This is a memo field to hold the installation address contact's name; this could be the service contact for the site.

**Note:** There is also an equipment contact field for each piece of equipment at the site, when you set up the installation.

### **Cash Customer**

Enter one of the following:

0 - If this customer was not set up at call logging

1 - If this customer was added at call logging

This is a memo field only. Enter **1** if the [job](#) was logged to a new [installation](#) in Service Call Logging, using the **New Customer (F18)** function.

### **Region**

Enter the Service Management region to which the installation [site](#) belongs. This is for analysis purposes only. It is not used on standard reports, but you can use it for your own memo purposes.

You set this code up in the Codes/Parameter File [task](#) under type REGN.

### **Admin Branch**

Enter an existing [branch](#). This defaults to the branch to which you are currently linked.

The administration branch may be different from the branch that owns the equipment at the installation address. However, when equipment is moved, it is this branch on the new site's record that determines the branch to which the equipment is moved and its new owning branch.

### **Invoice Consolidation Level**

Enter one of the following:

1 - Account level

2 - Location level

3 (default) - [Job/contract](#) level



This field is only maintainable for the 000 (that is, the statement address) [site](#) for this customer. The [location](#) code 000 sets the [invoice consolidation level](#) for all sites. Any change you make at 000 level is automatically made to all account site records.

Consolidation at levels 1 and 2 are subject to special rules in [multi-currency](#) and [World Trade](#): there will be break points at change of currency and at change of tax/GST regimes.

### Customer Ref for Job

Enter one of the following:

- 0 - If no customer reference is required when a [call](#) is logged
- 1 - If a customer reference (for example, a purchase order number) must be entered when a call is logged

### Parts Price List

This field is only displayed if the SOP Active? field is set to 1 in the [Company Profile File task](#).

If displayed, it is a mandatory field and any parts list entered must exist in Sales Order Processing. The list is used to price Service Management parts fitted at the [installation](#) site and logged in the call's [technical report](#).

### Customer Ref for Contracts

Enter one of the following:

- 0 - If you do not have to enter a customer reference when a [contract](#) is set up
- 1 - If you have to enter a customer reference when a contract is set up

### Parts Discount List

The field is only displayed if the SOP Active? field is set to 1 in the Company Profile File task.

Any discount list entered must exist in Sales Order Processing. The list is used to calculate any discounts due on service parts fitted at the installation site and logged in the call's technical report.

### Currency Customer

Enter one of the following:

- 0 - If this customer is not a currency customer within Service Management.
- 1 - If this customer is a currency customer within Service Management.

**Note:** This field may be set differently from the Currency Customer Flag setting on the Delivery Name and Address Maintenance window in the Customers Maintenance task in Sales Order Processing.

### Currency Rate Code

This currency rate code must be set up in the General Ledger. This value defaults from the Service Management [company](#) profile.

This currency rate is used during [contract](#) and [job](#) invoicing to convert the customer's prime currency into the company's base currency.

### **Currency Code**

If the Currency Customer field is set to **0**, this field defaults to the base currency of the Accounts Receivable company and you cannot change it.

If the Currency Customer field is set to **1**, this field defaults to the currency set up for the customer in the Names and Addresses [task](#) in Accounts Receivable.

The currency code must be set up in the General Ledger.

### **Labour Price List**

You can enter a Service Management labour price list here. This will override any labour price list entered against the [model](#).

The labour price list must exist in this customer's currency.

### **Tax Code**

You set up the three-character tax code in the General Ledger.

This code defaults in from the Customer master file.

## **Functions**

### **F5=Trade Details**

This is only available if [World Trade](#) is attached. Use this to display the Maintain Customer Trade Details pop-up. Refer to the World Trade Product Guide for more details.

Press Enter to display the Additional Details Maintenance Details window.

## **Additional Details Maintenance Details Window**

To display this window, press Enter on the Additional Details Maintenance Customer Defaults window.

### **Fields**

#### **Customer Priority**

Enter this customer's priority.

Your entry depends on how the Maximum Customer Importance field is set up on the System Parameters Maintenance General window. If you entered **1** there, that is the only setting you can use here. If you entered **4** there, you have settings **1-4** here to indicate the customer's importance.

The customer priority is used in the 3-D matrix (with volume segment and machine up/down) to apply any percentage reductions to [call](#) response time. So, if you specify that this customer has a high priority, this customer may be entitled to a shorter response time, depending on how you have set up the 3-D matrix.

### Customer Calendar Code

A customer can arrange cover for hours and days that are outside your [company's](#) normal working hours and days. If they want extra cover for all their [sites](#) and machines, set up a calendar that indicates the extra days' cover and type the calendar code here.

If a customer wants extra cover for a particular [contract](#), site or machine, type the calendar code at those levels.

### Geographic Code (2 Fields)

Enter here the geographic code (geocode) that will tell the software where this customer site is located. You could use the customer's postcode for this.

You will then assign this geocode to engineers' territories, and the software will use the information when allocating the customer's [jobs](#).

If you are setting up a new customer, this value defaults in from the Post Code field on the Customer Maintenance window 1 in Accounts Receivable. If you have not formatted the postcode correctly when you entered it in Accounts Receivable then it will not be formatted correctly here, and you will have to amend it.

### Service Telephone Number

Enter the phone number for the service contact at the customer. This can be a different number to the [installation address](#) phone number.

### Service Telephone Extension

Enter the service contact's telephone extension number.

### Service Fax Number

Enter the fax number for the service contact at this address.

### Charge Standard Distance Value

This field defaults to the value from the Company Profile Maintenance Charges window.

Enter one of the following:

- 0 - If no standard distance value is to be charged
- 1 - If a standard distance value is to be charged

Enter a value in the next field to cover the charge for a return trip to the [site](#). The Charge Actual Distance Driven and Charge Zones fields must be **0**.

### Standard Mile/Km Value

If the Charge Standard Distance Value field is **0**, leave this field as **.00**.

If the Charge Standard Distance Value field is **1**, enter the charge to be made for a return trip to the [site](#). The field holds 11 digits plus two decimal places.

### Charge Actual Distance Driven

This field defaults to the value from the [Company](#) Profile Maintenance Charges window.

Enter one of the following:

0 - If you do not want to charge according to the actual distance driven

1 - If you want to charge the actual distance driven

The engineer enters the actual distance driven on the [technical report](#). This is multiplied by the Charge Per Mile/Km, set up in the next field. The Charge Standard Distance Value and Charge Zones fields must be **0**.

### Charge Per Mile/Km

If the Charge Actual Distance Driven field is **0**, leave this field as **.00**.

If the Charge Actual Distance Driven field is **1**, enter the charge to be made per mile/km. The field accepts 11 digits plus two decimal places.

### Charge Zones

This field defaults to the value from the Company Profile Maintenance Charges window.

Enter one of the following:

0 - If you do not want to charge for travel according to zone

1 - If you want to charge for travel according to zone

You must enter in the next field the appropriate zone code which holds the flat rate, [branch](#) charge for a [call](#) to a customer [site](#) in that zone. The Charge Standard Distance Value and Charge Actual Distance Driven fields must be **0**.

### Zone Code to Charge

If the Charge Zones field is **0**, leave this field **blank**.

If the Charge Zones field is **1**, enter an existing zone code. This holds the flat rate, branch charge for [visiting](#) a customer site in the zone.

You set up zone codes in the Codes/Parameter File [task](#), under type ZONE.

### Time Zone ID

You can operate the software across different time zones. The zones are specified as a number of hours' difference (called the offset time) from the system time. You can specify zones at branch level and at customer additional details level.

Once you have specified the offset time, when service [calls](#) are received the customer's date and time are recorded with them, and are used to calculate target times.

This function is best used where your [company](#) branches are in different time zones. It is more problematic when used for your customer [locations](#), and if you do not use it carefully it can lead to impractical work allocation. For example, a customer in a particular time zone may prefer a [branch](#) that, though in a different time zone, is in fact nearby.

The time zone offset times are set up in the Inventory Descriptions file under major type TIMZ.

Enter the correct time zone in this field, if the time zone is different from that of the system.

Press Enter to display the Additional Details Maintenance Customer Hours window.

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## Additional Details Maintenance Customer Hours Window

To display this window, press Enter on the Additional Details Maintenance Customer Details window.

### **Fields**

#### **From/To**

Enter 24-hour clock times, to show when the [site](#) is open or will accept service [calls](#).

Select **Update (F8)** to update the data.

## Model File [2/SSE]

You use this [task](#) to set up and maintain the details of all your models and peripherals. Every type of machine you deal with must be set up as a [model](#) or a peripheral in this task.

When you specify a model to a customer [site](#), this is an [installation](#). To do this you enter the model code itself, and either a [serial number](#) or a quantity, so that each individual machine is identified. A model defined as a machine is the unit that you can record service [jobs](#) against.

A model defined as a peripheral (that is, a sub-unit or accessory) can be attached to a machine, but you cannot record service jobs for it.

You can also define any number of peripherals for each model and serial number combination. A peripheral can either be assigned a serial number, or entered as a quantity. It can be identified with a configuration code, which is displayed at [call](#) logging, when a call is entered for its parent machine.

You can enter a number of Inventory codes against each model. These are used by the software when SOP updates Service Management after the sale of a machine.

### **Implications**

You have to use this task to set up models before you can enter them against sites as installations. You cannot perform any [contract](#) or transaction processing until you have established this equipment database.

Once you have set up your model you can:

- Link the model to its correct contract rates and, possibly, its scheduled visit profile by means of the model group and model sub-group
- Price the labour element of service jobs by using the hourly labour rates held on the price list specified for the model
- Generate a schedule of planned maintenance visits for contracts covering the model by using the scheduled visit profile

Note that a profile specified on a contract header will override profiles associated with the models covered by the contract.

You can assign a [model](#) to a particular model group and sub-group.

You can then assign different [contract](#) rates for contracts held at model group, model sub-group or model level. You can specify that individual engineers can only perform work on specific model groups, model sub-groups or models.

It is also the model that determines which labour rate is charged for service work, since each model holds a pointer to its appropriate labour price list.

## Model Maintenance Selection Window

To display this window, select the Model File task.

### **Fields**

#### **Model**

Enter the model you want to set up or update. If it is an existing model, details are displayed for update. If it is a new model, you have to enter the details.

Select the model and then press Enter to display the Model Maintenance Hierarchy window.

## Model Maintenance Hierarchy Window

To display this window, select a [model](#) and then press Enter on the Model Maintenance Selection window.

### **Fields**

#### **Description**

Enter the description of the model.

#### **Division**

Enter the [division](#) for this model. You set up divisions using the Division Code [task](#).

You can organise your machines into hierarchies. The division is the highest level, and this is subdivided into [model](#) groups. Model groups in turn are subdivided into model sub-groups, and below this level are the models themselves.

You then use the groupings when assigning skill levels to engineers, so one engineer might be skilled to work on division A, model group 100, and model XX, while another engineer is only qualified to work on model XY.

You can also use the groupings for any number of control and reporting purposes.

#### **Model Group**

Enter the model group as required.

You can organise your machines into hierarchies. The division is the highest level, and this is subdivided into model groups. Model groups in turn are subdivided into model sub-groups, and below this level are the models themselves.

You then use the groupings when assigning skill levels to engineers, so one engineer might be skilled to work on division A, model group 100, and model XX, while another engineer is only qualified to work on model XY.

You can also use the groupings for any number of control and reporting purposes.

### **Model Sub-Group**

Enter the required model sub-group.

You can organise your machines into hierarchies. The division is the highest level, and this is subdivided into model groups. Model groups in turn are subdivided into model sub-groups, and below this level are the models themselves.

You then use the groupings when assigning skill levels to engineers, so one engineer might be skilled to work on division A, model group 100, and model XX, while another engineer is only qualified to work on model XY.

You can also use the groupings for any number of control and reporting purposes.

### **Machine/Peripheral**

Enter one of the following:

0 - If this model is a machine, not a peripheral

Service [calls](#) can be logged against it, and you will maintain its full details in the [Installation Details task](#). Installation details will be set up automatically if this machine is sold to a customer through Sales Order Processing, although you must enter a valid Inventory item code, or codes, on the model to enable this.

1 - If this model is a peripheral

You do not want to log service calls against it, and you will maintain it as a peripheral to a machine in the Installation Details task. Do not include an Inventory item code on a peripheral. You can sell peripherals through SOP, but you must attach them manually to the appropriate machine records.

### **Labour Price List**

Enter an existing labour price list. This is used to calculate the hourly rates for chargeable work performed on the [model](#).

This field is optional for peripherals.

### **Visit Profile Code**

Leave this field blank, or enter an existing schedule [visit](#) profile (SVP).

The SVP tells the software how many visits to generate for a piece of equipment on a [contract](#). The software looks for the relevant SVP according to the following hierarchy:

It looks for the SVP on the contract header.

If there is none, it uses the model file SVP.

If there is none, it uses the model group file SVP.

If there is none, it uses the [company](#) profile SVP.

If there is none, no visits will be generated.

**Note:** As long as it finds a [scheduled visit profile](#), the software generates visits for the equipment line on the contract when you enter 8 (Generate Visits) on the Contract Equipment Maintenance Detail window.

### Points

Enter a number in the range 0 to 999, to define the service index of the [model](#). The software can use this value in automatic engineer assignment, to select the engineer if all other workload factors are equal. The higher the number of points a machine has, the more work it is likely to entail.

### Inventory Item Codes

If you sell a machine to a customer through SOP, you might want the customer's details to be transferred from SOP to Service Management. Then, if the customer makes a [call](#), their details already exist.

This will happen automatically if you enter in this field the Inventory code that corresponds to this machine. There may be more than one Inventory code; for example, you may have a single machine code for a machine whether it is white or black, but have two Inventory items, one for the white machine, and one for the black.

Do not include Inventory item codes on a peripheral. You can sell peripherals through SOP, but you must attach them manually to machines.

Press Enter to display the Model Maintenance Details window.

## Model Maintenance Details Window

To display this window, press Enter on the Model Maintenance Hierarchy window.

### Fields

#### **Van Kit Number to Fix**

This field is for future development.

#### **Av. Hours per Breakdown**

Enter hours and minutes in the range 00:01 to 99:59. This value is the default [job](#) duration for a breakdown [call](#) on the [model](#). The software adds this value to the travel time in order to calculate a job's duration.

You must enter this unless the model is a peripheral.

#### **Av. Hours per PM Visit**

Enter hours and minutes in the range 00:01 to 99:59. This value is the default job duration for planned maintenance calls on the model.

You must do this unless the model is a peripheral.



**Workshop Preparation**

This field is for future development only, but you must enter either **0** (No) or **1** (Yes).

**Engineer Required for Installation**

This field is relevant only for machines, not for peripherals.

Enter one of the following:

**0** - If no action is taken

**1** - If the software automatically creates an [installation](#) job after a machine is sold through Sales Order Processing

This is done as soon as you have run the SOP Transfer to Service [task](#). The default job category for an installation job must already be set up.

**Manufacturers ID**

You can optionally enter a manufacturer's name as set up in the Inventory Descriptions file under major type MFID.

**Warranty Months**

You must enter the number of months for which the warranty is to cover this [model](#).

**Volume Segment ID**

Enter the number of days, or copies, used to calculate a repeat [call](#) for this model in call logging.

This value must be in the range zero to 99, or you can use the prompt facility to display the Code Selection pop-up.

The value entered must have been set up in Volume Segment Maintenance.

This field is mandatory unless the [model](#) is a peripheral.

**Automatic Call Assignment**

Enter one of the following:

**0** - If you do not want [calls](#) for this model to be included in automatic call assignment

**1** - if calls for this model will be included in automatic call assignment (ACA)

You can also control the workings of ACA by settings in the System Parameters File task, [Job](#) Category [task](#) and Engineer Master File task.

**Configuration Code**

This field classifies your peripherals. Leave it blank for machines.

You set up the codes in the Codes/Parameter File task, under type CONF.

The first 5 configuration codes of peripherals attached to any one machine are displayed at call logging, on the [Job Line](#) Details window.

### **Statistical Family Fields 1 to 3**

This is a memo field. You must set up these codes in the Codes/Parameter File task, under type STA1.

#### **Number of Meters**

Enter the number of meters for the model, in the range 0 to 2.

You must enter **1** or **2** if you are using meter readings in [contracts](#) or [technical reporting](#).

#### **Digits Meter 1**

Enter the total number of digits on the first meter. This value is used by the software to check for meter roll over when it has reached its maximum reading.

#### **Digits Meter 2**

Enter the total number of digits on the second meter. This value is used by the software to check for meter roll over when it has reached its maximum reading.

#### **Warranty Units**

This field is a memo field that you can use to hold an agreed number of units covered by the warranty. This is a default field for equipment warranty units. The value must be a positive whole number.

If you enter a value here, it will be displayed on the Equipment Detail Maintenance window when you set up this model as part of an [installation](#).

#### **Copies = 1 Fill Toner**

Enter the estimated number of copies you expect from each fill of toner.

#### **Copies = 1 Fill Developer**

Enter the estimated number of copies you expect from each fill of developer.

#### **Volume Band Starting Seq**

Enter a number in the range 1 to 9.

#### **Target Mean Repair Time**

This is a memo field where you can enter the expected repair time for the [model](#) in hours and minutes.

#### **Target Copies between Visits**

Enter the number of copies that you expect the model to produce between service [visits](#).

#### **Target Days between Visits**

Enter a value, in the range 1 to 999, to indicate the number of days you expect the model to work without service intervention.

#### **Target Cost per Copy**

You can optionally enter a monetary value, in the range 0.00001 to 9999.99999, which is the target maximum copy cost.

## **Functions**

### **Warranty Parts (F14)**

Use this to maintain any parts that have a different warranty from the parent.

Select **Update (F8)** to update the model.

## Warranty Parts Maintenance Pop-up

To display this pop-up select **Warranty Parts (F14)** on the Model Maintenance Details window.

Use this pop-up to set warranty months for up to five parts associated with this [model](#). This is necessary only for parts whose warranty months differ from those set for the model itself.

## **Fields**

### **Part Number**

Enter an existing Inventory item.

### **Mths**

Enter the warranty months for the part. This should be different from the warranty entered for the model. If it is the same, there is no need to enter the item separately here.

Select **Update (F8)** to update the item warranties and all other model changes and return to the Model Maintenance Selection window.

## Installation Details [3/SSE]

An [installation](#) is a customer address at which equipment is installed.

Use this [task](#) to specify what equipment is held at a customer [site](#). You can enter both [models](#) and peripherals, and give them all [serial numbers](#) as required.

You should set up all your installations in the software, irrespective of whether they are covered by [service contracts](#).

To enter a new installation, the account code and address will normally exist in Service Management already. However, you can enter a new cash customer if necessary.

A customer account address may itself be an [installation address](#), and there may be several additional installation addresses for that customer's account. When you set up a customer account, its address code is 000. You then create more installation addresses using this task by assigning address codes of 001, 002, and so on (these numeric codes are only a suggestion - you can use other numbering systems, or characters, as you prefer).

You specify the model number and, ideally, serial number of each piece of equipment at the installation. If you do not know the serial number, leave it blank and enter a model quantity of one or more instead. You can enter individual serial numbers later.

The data held for each piece of equipment at an installation includes details of age, dates of delivery and installation, warranty period, [location](#), department and product [division](#).

**Note:** *New serial numbers are not applied immediately; they are stored for update when you run the Day End Routines task.*

**Note:** *For [World Trade](#), [multi-currency](#) tax can be applied at machine level.*

The information you set up here:

- Means you can locate any piece of equipment
- Calculates the warranty expiry date for a piece of equipment by adding warranty months to installation date

This expiry date is displayed in the [Call Logging task](#).

- Enables you to assign a specific engineer to all service jobs for a piece of equipment (overriding the automatic engineer assignment), if an engineer is entered against the piece of installed equipment

Note that the Assign Calls Only to Preferred Engineer for Machine field on the System Parameters Maintenance Calls window must also be set to 1.

## Installation Maintenance Selection Window

To display this window, select the [Installation Details task](#).

### Fields

#### **Model**

Enter an existing [model](#).

**Note:** *Do not select a peripheral; you add peripheral details to a machine using a function.*

If you have not yet entered equipment, you must also enter an account number.

#### **Serial Number**

Enter an existing [serial number](#).

If you enter a serial number and no model, press Enter, and either the model will be displayed, or a pop-up will be displayed, on which you can select the correct model for a non-unique serial number.

**Account Number**

Enter an existing customer. This must not only exist in Accounts Receivable, but must also have had additional details set up in Service Management.

**Account Address**

Enter the address code as well as the customer account.

Enter the account number and account address and then press Enter to display the [Installation Equipment Maintenance](#) window.

Enter the account number and account address and then select Address (F15) to display the Installation Name/Address Detail window.

Enter just the model and then press Enter to display the Equipment by Model window.

Enter the model and serial number and then press Enter to display the Equipment Detail Maintenance window.

Enter the model and serial number and then select Serial Maint (F9) to display the Serial Number Maintenance window.

**Account Number Prompt**

Enter ? in the Account Number field and then select **Prompt (F4)** to display the search fields, which function as follows:

**Account Name**

Search for a customer by name.

**User-defined**

Search for a customer by a second user-defined search parameter.

**User-defined**

Search for a customer by a third user-defined search parameter.

**Note:** You can use one or more lines to search for a customer. The customer records that match the entered search words are displayed.

**Note:** Not all displayed customers are defined as Service Management customers.

**Functions****Serial Number Maintenance (F9)**

Enter the [model](#) and [serial number](#) and then use this to display the Serial Number Maintenance pop-up.

**Address (F15)**

Enter the account and address and then use this to display the [Installation](#) Name and Address Detail window.

### **Machine (F16)**

Use this to display the Equipment Detail Maintenance window.

## Installation Name and Address Detail Window

To display this window, enter the account and address details and then select **Address (F15)** on the Installation Maintenance Selection window.

Alternatively, select **Site Addr (F15)** on the Equipment Detail Maintenance window.

Alternatively, select **Owner Address (F17)** on the Equipment Detail Maintenance window, if a separate [owner](#) is set up for this customer.

### **Fields**

#### **Main Account Name**

This field displays the account name for the 000 address (that is, the statement address) for this account.

#### **Account Name**

This field defaults to the [installation](#), or [site](#), name for the selected address.

#### **Currency Customer**

You cannot maintain this field here. You can only change the statement account in Accounts Receivable.

#### **Account Address**

This field defaults to the installation, or site, address for the selected address.

#### **Currency Code**

This field displays the currency from the customer's additional service details. You can amend this here.

#### **Currency Rate Code**

This field displays the currency rate code from the customer's additional service details. You can amend this here.

#### **Tax Code**

This field displays the tax code from the customer's additional service details. You can amend this here.

#### **Postcode**

This field displays the customer's postcode as set up on Customer Maintenance window 1 in the Names and Addresses [task](#) in Accounts Receivable. If you do not enter it correctly on that window, it will not be correctly formatted here.

This is not the code that the software uses to allocate engineers or teams. That is the geocode, displayed in the Geographic Code field on this window.

### **Geographic Code**

This field displays the customer's geographic code (also known as a geocode) for the selected address. Note that it is displayed in two fields.

The value in this field defaults in from the code in the Geographic Code fields on the Additional Details Maintenance Customer Details window, so the formatting must be correct there if it is to be correct here.

You can amend it, either to correct it, or to change it.

The software will use this geocode to locate the [installation](#) and to allocate teams and engineers.

### **Telephone Number**

This field displays the telephone number from the customer's details.

#### **Ext No.**

Enter the [installation address](#) contact's phone extension number.

You can maintain the Service Management telephone number and extension on the Additional Details Maintenance Customer Details window.

### **Inv Cons Lev**

This field displays the [invoice consolidation level](#).

Enter one of the following:

- 1 - Account level
- 2 - [Location](#) level
- 3 - [Job/contract](#) level

### **Admin Branch Code**

Although one [branch](#) can own a piece of equipment, you can set up another branch to administer it. This is called the admin branch.

The default value for this field comes from the Customer Additional Details [task](#).

### **Job Ref**

Enter one of the following:

- 0 - If the software will not force you to enter a customer reference when you are entering a [job](#)
- 1 - If the software will force you to enter a customer reference when you are entering a job

### **Account Contact**

Enter the service contact for this [site](#). The default value is the [installation address](#) contact's name.

There is also an equipment contact field for each piece of equipment on the site.

## **Region**

This designates the service region to which the [installation](#) site belongs. The value defaults from the Customer Additional Details task.

The code must exist in under type REGN in the Codes/Parameter file.

You can use this field to report on your service or [contract](#) revenue by service region.

## **Contract Ref**

Enter one of the following:

0 - If the software does not force you to enter a customer reference when you are entering a contract

1 - If the software forces you to enter a customer reference when you are entering a contract

## **Customer Priority**

Customer priority is used in the 3-D matrix (with volume segment and the machine up/down indicator) to apply a percentage reduction or increase to [call](#) response times.

This field defaults to the value in the Customer Additional Details [task](#), but you can change this to any value from 0 to 4. You cannot leave this field blank.

The Maximum Customer Importance field is set up on the System Parameters Maintenance General window. This tells you whether 0 or 4 is the highest priority.

## **Statement Code**

Enter the customer account statement code for the [site](#). This defaults from the Additional Details Maintenance Customer Confirmation window.

## **Invoice Address**

Enter the account and [location](#) to be used for invoicing this account. This defaults from the Customer Additional Details task.

## **Untitled**

This untitled field is the address code to work in conjunction with the Invoice Address field above. This defaults from the Customer Additional Details [task](#).

## **Parts Price List**

The parts price list defaults from the Customer Additional Details task. This parts price list must exist in Sales Order Processing.

## **Parts Discount List**

The parts discount list defaults from the Customer Additional Details task. Any parts discount list must exist in the Sales Order Processing.

## **Function**

### **Machine (F16)**

Use this to display the Equipment Detail Maintenance window.



**Text (F21)**

Use this to display a full window of text lines for entering free format text.

Select **Update (F8)** to update the data.

## Installation Equipment Maintenance Window

To display this window, enter the account number and the account address and then press Enter on the Installation Maintenance Selection window.

Use this window to add machines to an [installation](#). Any existing machines are listed.

**Note:** You can simply specify the list of machines and leave the [task](#). This does not fully install the machine. To do this, you must enter 1 against it and complete the Equipment Detail Maintenance window.

**Fields****Model**

To add a piece of equipment, enter an existing [model](#) in this field.

**Serial**

To add a piece of equipment, enter the [serial number](#) in this field, using up to 15 alphanumeric characters. The number must have an associated model, and the model and serial number combination must be unique.

**Quantity**

If you are not using [serial numbers](#), or you have not yet got a serial number for the machine you are installing, you can instead simply enter the [model](#) with its quantity, in the range 1 to 9999999.

If you enter a serial number, you do not have to enter the quantity.

**Select (Untitled)**

Enter one of the following:

1 - To display the Equipment Detail Maintenance window to set up or maintain the details for this piece of equipment

You should do this for any piece of equipment you have just added to the [installation](#). You cannot add peripherals to a machine until you have set these details up.

4 - To delete this piece of equipment from this installation, so long as the equipment:

- Is not on a pending or active contract
- Has no invoice pending records
- Has no job-line records awaiting invoicing
- Has no job-lines outstanding

5 - To display the Equipment Configuration window, where you enter any peripherals associated with this piece of equipment

### **Functions**

#### **Fold/Truncate (F13)**

Use this to toggle between displaying the model descriptions and just displaying the codes.

#### **Address (F15)**

Use this to display the Installation Name and Address Detail window.

#### **Text (F21)**

Use this to display a full window of text lines for entering free format text.

## Equipment Detail Maintenance Window

To display this window:

Enter the [model](#) and [serial number](#) on the [Installation](#) Maintenance Selection window.

Enter 1 against a machine listed on the Installation Equipment Maintenance window.

Select **Machine (F16)** on the Installation Name and Address Detail window.

Select **Machine (F16)** on the Installation Maintenance Selection window.

### **Fields**

#### **Owner**

Enter the customer who owns the piece of equipment at this [location](#). If the [owner](#) is the same as the [site](#) customer already specified, leave this field blank.

#### **Untitled**

Enter the address of the customer who owns the piece of equipment at this location. If the owner is the same as the site customer already specified, leave this field blank.

#### **Quantity**

This field shows the quantity of the [model](#) installed. If you have already specified a [serial number](#), this field will be 1.

#### **Equipment Status**

Enter a status for the equipment. You set up status codes under type STAT in the Codes/Parameter File [task](#). The software has the following codes already set up when you install it:

L - Leased

R - Rented

S - Sold

### **Last Serviced**

This field displays the last date on which the equipment was serviced. The software updates the field when a [call](#) to the equipment is completed.

### **Tax Calc Basis 1/2/3**

This indicates the customer's tax status for invoicing; the default for a new customer is **3**.

Enter one of the following:

1 - If the customer is tax exempt

This is for export customers outside the EEC.

2 - To use the tax code entered in the tax code field

3 - To use the tax code set up for each Inventory item

### **Tax Code**

The three-character code is mandatory.

In add mode, the code is defaulted from the Customer Additional Details [task](#).

### **Warranty Units**

This field is a memo field that you can use to hold an agreed number of units covered by the warranty. This field is only displayed if you entered a value in the Warranty Units field on the [Model](#) Maintenance Details window. The value must be a positive whole number.

### **Model Year**

Enter the year of manufacture of the equipment.

### **Warranty Mths**

This field defaults from the warranty months set up for the [model](#). You must enter detail in this field if you have entered warranty units.

### **Installation Date**

Enter the date on which this equipment was installed (DDMMYY). The [installation](#) date plus the warranty months gives the date on which the warranty expires. The software displays this during [job line](#) details entry.

### **Delivery Date**

Enter the date on which the equipment was delivered (DDMMYY).

### **Department**

Enter a department code or name to help locate the particular piece of equipment when the engineer makes a [call](#).

### **Warranty Expiry**

The software calculates this date as being the installation date plus the warranty months, unless there is a delivery date entered, in which case the expiry date is the delivery date plus the warranty months.

The expiry date is on the call details window. If the call date is less than the expiry date, a warranty call type may default from the [job](#) category.

### **Location**

Enter the [location](#) of the equipment, using up to 35 alphanumeric characters.

This location is then displayed in the Call Logging and Engineer Work Allocation [tasks](#).

### **Warranty Units**

***Note:** This field is only displayed if the model has a meter defined to it.*

This field will default from the [model](#) and is a memo value only.

### **Equipment Contact**

Enter the name of the person responsible for the equipment.

### **Division Code and Description**

This information comes from the model details for this piece of equipment.

[Division](#) is at the top of the product hierarchy, over model group, model sub-group, model and [serial number](#). The software uses this hierarchy to set skill levels for engineers and [field service groups](#).

### **Contract Number**

The software maintains this field. It is blank when you are adding new equipment.

### **Contract Type**

The software maintains this field. It is blank when you are adding new equipment.

### **Contract Start Date**

The software maintains this field. It is blank when you are adding new equipment.

### **Inclusion Date**

The software maintains this field. It is blank when you are adding new equipment.

### **Engineer**

Enter an existing engineer.

If you enter an engineer in this field, and the Assign Calls Only to Preferred Engineer for the Machine field is set to **1** on the System Parameters Maintenance Calls window, the software will only allocate this engineer to [calls](#) for this equipment during automatic call assignment.

**Points**

No validation takes place. You can enter a number of work points for this [installation](#), which is a guide to the amount of work it would usually take to fix. You can use work points to assign work more or less equally among your engineers.

**Serviced by Ourselves**

Enter one of the following to indicate who services the equipment.

0 - If the equipment is serviced by a third party

1 - If the equipment is serviced by you

**Order Type**

This field is for future development.

**Under Product Superv**

Enter one of the following to indicate whether the customer needs to provide supervision for this equipment during service calls:

0 - If supervision is not required on service calls

1 - If supervision is required on service calls

**Order No/Line**

If you sold this machine through Sales Order Processing, the SOP order number and line number are displayed here.

**Calendar Code**

A customer can arrange cover for hours and days that are outside your [company's](#) normal working hours and days. If they want extra cover for this machine, set up a calendar that indicates the extra days' cover and enter the calendar code in this field.

**Functions****Warranty Parts (F10)**

Use this to save any changes made to the Equipment Detail Maintenance window and display the Equipment/Warranty Part window.

**Site Addr (F15)**

Use this to display the [Installation](#) Name/Address Detail window, with the [site](#) customer's details.

**Owner Addr (F17)**

Use this to display the Installation Name/Address Detail window, with the [owner's](#) details.

**Peripherals (F20)**

Use this to display the Equipment Configuration window, for entering any peripherals attached to this machine.

**Text (F21)**

Use this to display a full window of text lines for entering free format text.

### **F22=Add Msg (F22)**

Use this to display the Send a Machine Message window.

### **Rec Msg (F23)**

Use this to receive messages for the machine.

### **More Keys (F24)**

Use this to display any functions that are not currently on display.

Select **Update (F8)** to save any details you have entered.

## Equipment/Warranty Part Pop-up

To display this pop-up, select **Warranty Parts (F10)** on the Equipment Detail Maintenance window.

Use this pop-up to enter a warranty for individual spare parts used on this piece of equipment.

### **Part Number**

Enter an existing Inventory Management item. Items already entered in [Model](#) File Maintenance are listed here, but you can change or remove them.

### **Mths**

Enter the warranty months for the part.

### **Exp Date**

The expiry date is the [installation](#) date plus warranty months, unless a delivery date was specified, in which case the expiry date is the delivery date plus warranty months.

When all the parts are entered, select **Update (F8)** to update the data.

## Send a Machine Message Window

To display this window, select **Add Msg (F22)** on the Equipment Detail Maintenance window.

### **Fields**

#### **Message From**

Enter up to 10 alphanumeric characters to identify the sender by name, by [job](#) title or by user-defined code.

#### **Expiry Date**

The default (99/99/99) is for a machine message that will not expire, nor be subject to expiry by the default number of days for message expiry set on the System Parameters Maintenance Assignment window.

If the machine message is to expire, enter a valid expiry date (DDMMYY).

**Message**

Enter up to three 65-character lines of free format text.

**Model**

The [model](#) defaults from the Installation Maintenance Selection window, but you can change it.

**Serial**

The [serial number](#) defaults from the Installation Maintenance Selection window, but you can change it.

**Note:** If the message is for a machine with no serial number, just enter the model and leave the serial number blank before selecting **Send Message (F8)**.

**To**

If you wish to send the message to a range of serial numbers, enter the To number here.

**Division**

If the machine message is for a product [division](#), enter a valid division.

The Model and Serial fields must be blank.

**Model Group**

If the machine message is for a product [division](#) and [model](#) group, enter a valid division and model group.

The Model and Serial fields must be blank.

**Sub-Group**

If the machine message is for a product division, model group and model sub-group, enter a valid division, model group and model sub-group.

The Model and Serial fields must be blank.

Select **Send Message (F8)** to send the message.

## Machine Messages Pop-up

To display this pop-up, select **Rec Msg (F23)** on the Equipment Detail Maintenance window.

**Fields****Message**

This field displays the text of the message sent to the machine.

Press Enter to continue.

## Equipment Configuration Window

To display this window, select **Peripherals (F20)** on the Equipment Detail Maintenance window.

Use this window to specify any peripheral attachments for a machine.

### Fields

#### **Model**

Enter a valid peripheral [model](#) to add a peripheral.

#### **Serial No**

When you add a peripheral, it must have either a [serial number](#) or a quantity defined to it. You can enter a serial number in this field. The combination of model and serial number must be unique.

#### **Ins Date**

Enter the [installation](#) date (format DDMMYY), if required.

#### **Qty**

If you have not entered a [serial number](#), enter a quantity in the range 1 to 9999999. If you have entered a serial number, the quantity field is set to **1** automatically.

#### **Equip Stat**

The default equipment status is **S**, but you can change this.

You set up these codes under type STAT in the Codes/Parameter File [task](#).

#### **Option (Untitled)**

Enter one of the following:

- 1 - To select the peripheral for maintenance  
Only the date, quantity and status can be updated.
- 4 - To delete the peripheral

### Functions

#### **Fold/Truncate (F13)**

Use this to toggle between displaying part descriptions and displaying only the codes.

#### **Text (F21)**

Use this to display a full window of text lines for entering free format text.

Select **Update (F8)** to save any changes.



## Serial Number Maintenance Window

To display this window, enter the [model](#) and [serial number](#) and then select **Serial Maint (F9)** on the [Installation](#) Maintenance Selection window.

Use this window to correct a serial number for an existing piece of equipment, or to insert one where none previously existed.

### Fields

#### **Serial**

Enter a [serial number](#) that does not already exist.

You can enter individual serial numbers in line with the quantity of equipment shown, up to a maximum quantity of 99. You do not have to allocate serial numbers for the entire quantity displayed; you can enter a minimum of just one.

**Note:** *The change of serial number only comes into effect once you have run the Day End Routines task.*

#### **History**

Enter one of the following:

0 - If the [job](#) history will not be held against this [serial number](#)

1 - If all existing job history will be held against this serial number from now on

Where there is more than one serial number, at least one must have **1** entered against it.

Press Enter to display **Update (F8)**. Select **Update (F8)** to update the data.

## Division Code [4/SSE]

Use this [task](#) to define and maintain the [divisions](#) for a [model](#) family.

Divisions, model groups and model sub-groups mean that you can organise your models into a structured hierarchy within product. The software can hold [contract](#) rates, and possibly [scheduled visit profile](#) codes, at each level, and engineers' skill levels are defined by the divisions, model groups, model sub-groups and models that they can service.

You must define your divisions, model groups and model sub-groups before creating the models within them.

## Division Selection Window

To display this window, select the Division Code task.

## **Fields**

### **Division Code**

Enter a new or existing [division](#).

Press Enter to display the Division Maintenance window.

## Division Maintenance Window

To display this window, enter a new or existing code and then press Enter on the Division Selection window.

## **Fields**

### **Description**

Enter a description for the [division](#), using up to 36 alphanumeric characters. If you are amending an existing division, the existing description is displayed here.

Select **Update (F8)** to update the data.

## Model Group [5/SSE]

Use this [task](#) to define and maintain the [model](#) groups for a model family.

[Divisions](#), model groups and model sub-groups mean that you can organise your models into a structured hierarchy within product. The software can hold [contract](#) rates, and possibly [scheduled visit profile](#) codes, at each level, and engineers' skill levels are defined by the divisions, model groups, model sub-groups and models that they can service.

You must define your divisions, model groups and model sub-groups before creating the models within them.

## Model Group Selection Window

To display this window, select the Model Group task.

## **Fields**

### **Division Code**

Enter an existing [division](#).

### **Model Group**

Enter a new or existing [model](#) group.

Press Enter to display the Model Group Maintenance window.

## Model Group Maintenance Window

To display this window, press Enter on the Model Group Selection window.

### **Fields**

#### **Description**

Enter a description for the [model](#) group, using up to 36 alphanumeric characters. If you are amending an existing model group, the existing description is displayed here.

**Note:** *You can link a schedule visit profile to a model group.*

Select **Update (F8)** to update the data.

## Model Sub-group [6/SSE]

Use this [task](#) to define and maintain the [model](#) sub-groups for a model family.

[Divisions](#), model groups and model sub-groups mean that you can organise your models into a structured hierarchy within product. The software can hold [contract](#) rates, and possibly [scheduled visit profile](#) codes, at each level, and engineers' skill levels are defined by the divisions, model groups, model sub-groups and models that they can service.

You must define your divisions, model groups and model sub-groups before creating the models within them.

## Model Sub-Group Selection Window

To display this window, select the Model Sub-group task.

### **Fields**

#### **Division Code**

Enter an existing division.

### **Model Group**

Enter an existing model group.

### **Model Sub-Group**

Enter a new or existing model sub-group.

Press Enter to display the Model Sub-Group Maintenance window.

## Model Sub-Group Maintenance Window

To display this window, press Enter on the Model Sub-Group Selection window.

### **Fields**

#### **Model Sub-Group Description**

Enter a description for the [model](#) sub-group, using up to 20 alphanumeric characters. If you are amending an existing model sub-group, the existing description is displayed here.

Select **Update (F8)** to update the data.

## Equipment Movement [7/SSE]

Use this [task](#) to transfer one piece of equipment, or more than one, from one [installation address](#) to another, to the same or a different account and to the same or a different [branch](#).

You can also change the [ownership](#) of a piece of equipment from one customer to another.

The transfer is performed immediately. The branch to which the equipment is to be moved is the administrative branch on the additional service details of the [site](#) receiving the equipment.

### **Implications**

Equipment cannot be transferred if any of the following applies:

- It is currently active on a service contract.
- It has any incomplete jobs on it.
- It has any invoices pending generation.
- The owner is not the customer account (that is, an override has been specified). If you are transferring more than one piece of equipment, and an override owner has been specified on any of that equipment, the transfer of all the equipment is suspended.

**Note:** A completed [job](#) is flagged for pricing and invoicing even if it has no chargeable elements, as these routines also perform the costing, calculate response time and transfer the job to the history file.

## Equipment Movement Maintenance Initial Window

To display this window, select the Equipment Movement [task](#).

### **Fields**

#### **Model**

Enter a valid [model](#) and then press Enter to display a list of equipment for that model.

If there is no equipment, enter an account. This switches the search from listing models and [serial numbers](#) to customers and [sites](#).

#### **Serial Number**

Enter the serial number of the equipment you want to transfer. You must also enter the model.

#### **Account Number**

Enter the customer whose equipment you want to transfer.

#### **Account Address**

If you enter an account number, you must also enter the account address.

**Note:** The [branch](#) that you are currently signed on to must be the same as the one on the additional details of the account and address you have entered.

Make your selection and then press Enter to display the Equipment Selection window.

## Equipment Selection Window

To display this window, make your selection and then press Enter on the Equipment Movement Maintenance Initial window.

If you entered a [model](#) on the Equipment Movement Maintenance Initial window, this window lists all the equipment for that model.

If you entered the account details on the Equipment Movement Maintenance Initial window, this window lists all the equipment for that [location](#).

### **Fields**

#### **Select (Untitled)**

Enter **1** to select the required equipment.

#### **Serial Number**

All the [serial numbers](#) that exist for the account and address codes entered on the previous window are listed here.

If a quantity is listed (Qty), it means that there are one or more pieces of equipment for that model without specific serial numbers.

## **Functions**

### **Transfer All (F7)**

If you entered a customer account on the Equipment Movement Maintenance Initial window, use this to transfer every piece of equipment listed to another [site](#) using the Move All Equipment window.

Select the required equipment and then press Enter to display the Move Single Piece of Equipment window.

## **Move All Equipment Window**

To display this window, select **Transfer All (F7)** on the Equipment Selection window.

Use this window to move all the equipment for the customer to an account you specify here. None of the equipment can be on a [service contract](#), and none can be owned by an override [owner](#).

## **Fields**

### **New Account Number**

Enter the customer account to which the equipment will be moved.

### **Account Address**

Enter the address to which the equipment will be moved.

The administration [branch](#) on the new [site's](#) additional service details record determines the branch to which the equipment is moved.

### **New Account Name**

When you press Enter, the software displays the account's name.

When you have specified the account to which the equipment is to be moved, select Update (F8) to update the data.

## **Move Single Piece of Equipment Window**

To display this window, select a single item of equipment to transfer on the Equipment Selection window.

## **Fields**

### **Owner**

Enter the [owner](#) of the equipment, where relevant. If you have already specified the owner, it is displayed in this field.

### **Untitled**

Enter the owner's address. If you have already specified an owner and address, it is displayed in this field.

### **Account Name**

This field displays the existing [site](#) name for the account.

### **Model**

This field displays the selected [model](#).

### **Serial Number**

This field displays the selected [serial number](#). If this is blank, the software displays a quantity of 1, for which the software holds a system-generated reference, or serial number.

### **Quantity**

This is always 1, whether there is a value in the Serial Number field or not.

### **Equipment Status**

This field displays the equipment status from the [installation](#) details for the machine.

You set up status codes under type STAT in the Codes/Parameter File [task](#).

### **Model Year**

This field displays the model year from the installation details for the machine. This is the year in which the equipment was manufactured.

### **Warranty Months**

This field displays the warranty months from the installation details for the machine.

The installation date plus the warranty months gives the date on which the warranty expires. When you take a [call](#), the [Job Line](#) Details window tells you whether the equipment is still under warranty or not.

### **Installation Date**

This field displays the installation date from the installation details for the machine.

The date on which equipment was installed, plus the warranty months, gives the date on which the warranty expires.

### **Delivery Date**

This field displays the delivery date from the installation details for the machine.

This is for future development.

### **Department**

This field displays the department from the installation details for the machine. You can change this to any department code or name, to help locate the particular piece of equipment when the engineer makes a call.

### **Last Serviced**

This field displays the date on which the machine was last serviced.

The software updates the field when a [call](#) to the machine is completed.

### **Location**

Enter the machine's [location](#) within the [installation](#), if it will help the engineer find the machine. This is displayed on the [Job Line](#) Details window in Call Logging.

### **Equipment Contact**

This field displays the name of the person responsible for the equipment from the installation details for the machine.

### **Division**

This field displays the [division](#) from the [model](#) details for this piece of equipment.

### **Points**

This field displays the points from the installation details for the machine.

A machine's work points can be used by the software when allocating calls, to spread the workload evenly among engineers.

### **Escalation Hours**

This field is for future development.

### **Works Order Number**

This field is for future development.

### **Loan**

This field is for future development.

### **New Account Number**

Enter a valid account to which the equipment will be moved.

### **New Account Address**

Enter a valid [location](#) (address) for the new [site](#) to which the equipment will be moved.

The administrative [branch](#) in the new site's additional details determines the branch to which the equipment is moved.

When you have specified the account that the equipment is to be moved to, select **Update (F8)** to update the data.



## Volume Segment [8/SSE]

Use this [task](#) to specify the volume of usage for a piece of equipment at [model](#) level.

Equipment usage volume can influence both the response time for [calls](#) and the calculation of whether a call is a repeat call or not.

The 2-digit volume segment codes are user-defined, within the range 01 (low) to 99 (high). Volume usage is one of the factors in the 3-D matrix for calculating response times (the other factors are customer priority and whether the machine is working or not).

A repeat call may depend on volume usage or the number of days between [visits](#), factors that are also user-defined. Whether a call is a repeat or not will affect the default [job](#) category displayed on the [Job Line](#) Details window in Call Logging.

You must set up at least one volume segment code in the software. The code is a mandatory field on [models](#).

## Volume Segment Maintenance Selection Window

To display this window, select the Volume Segment task.

### Fields

#### **Volume Segment**

Enter a new or existing numeric code to add or amend the volume segment.

Enter a code and then press Enter to display the Volume Segment Maintenance Detail window.

## Volume Segment Maintenance Detail Window

To display this window, enter a code and then press Enter on the Volume Segment Maintenance Selection window.

### Fields

#### **Description**

Enter a description for the volume segment.

#### **Minimum Copy Volume per Month**

Enter the minimum copy volume per month. Do not enter decimals.

#### **Maximum Copy Volume per Month**

Enter the maximum copy volume per month. Do not enter decimals.

### **Average Copy Volume per Month**

Enter the average copy volume per month. Do not enter decimals. This value is used in [contract](#) invoicing, if actual volume data is not available, to calculate the daily average for copy estimates.

### **Volume Band Width**

Enter the volume bandwidth. This field is for future development, so enter any whole number.

### **Volume between Calls**

This field displays the volume field that can be used in calculating a repeat [call](#). Enter up to nine numeric characters. Do not enter decimals.

Leave this field at **0** if time is the sole criterion for the repeat call calculation.

### **No of Days between Calls**

This field displays the time field that can be used in calculating a repeat call. Enter the number of days, in the range 0 to 999.

Leave this field at **0** if volume is the sole criterion for the repeat call calculation.

### **Both Tim/Vol Used in Repeat Calc**

Enter one of the following:

0 - If either time or volume is used in the repeat call calculation, not both

1 - If both time and volume are used in the repeat call calculation

In this case, both the Volume Between Calls and the No of Days Between Calls fields must have values greater than **0**. As long as a call fulfils either one of the criteria, it will be designated a repeat call.

Select **Update (F8)** to save any changes you have made.

## **Zone Charges [9/SSE]**

If you want to charge travel distance by mileage zones (see the Company Profile Maintenance Charges Window section), you must set up a zone charge that holds the zone description, the charge and an effectivity date.

You only need to set up zone charges if you want to charge distance travelled by zone, by [company](#) or [branch](#) default, or selectively for specific [sites](#).

You specify whether you use a zone charge to charge travel distance, and if so which zone charge applies in the customer's additional details.

You can group customer sites in these user-defined zones, so that you can impose a travel charge for each [call](#) made to a customer's site wherever it is within that zone.

You set up the zone charge description in the Codes/Parameter File [task](#), under type ZONE.

The actual zone charge is [branch](#)-specific. This means that branches can set their own charge for a particular zone description (for example, the inner city zone may be charged 5.00 at one branch, but 7.50 at another).

## Zone Charges Maintenance Initial Window

To display this window, select the Zone Charges task.

### **Fields**

#### **Zone**

Enter a new or existing zone code.

#### **Currency Code**

Enter the currency in which this zone is charged.

Press Enter to display the Zone Charges Maintenance Detail window.

## Zone Charges Maintenance Detail Window

To display this window, press Enter on the Zone Charges Maintenance Initial window.

### **Fields**

#### **Description**

Enter the zone charge code description.

The [company](#)-specific description is held in parameter type ZONE in the Codes/Parameter File [task](#).

#### **Zone Charge**

Enter the [branch](#)-specific zone charge.

You cannot amend the current zone charge; instead you must create a new charge with a different effective date.

#### **Effective Date**

Enter the date on which each zone charge is to become effective, in the format DDMMYY.

If the effective date of an existing charge is earlier than or the same as the system date, you cannot change it, because it is the current charge. Instead you must create a new charge with a different effective date.

#### **Select (Untitled)**

Enter one of the following:

- 1 - To select a charge for updating

#### 4 - To delete a charge

This only available if the charge's effective date is later than the system date.

**Note:** The zone charge will be applied by [job](#) pricing to a customer's [call](#), if the customer's additional details has the Charge Zones field set on, and mileage is chargeable on the [cover type](#)/job category for the call.

Select **Update (F8)** to update the file.

## Enquire on Customer Account [31/SSE]

Use this [task](#) to enquire on the details of customer accounts.

### Customer Account Enquiry Initial Window

To display this window, select the Enquire on Customer Account task.

#### **Fields**

##### **Customer Number**

Enter an existing customer.

Enter a customer and then press Enter to display the Customer Account Enquiry Detail window.

### Customer Account Enquiry Detail Window

To display this window, enter a valid customer account number and then press Enter on the Customer Account Enquiry Initial window.

#### **Fields**

##### **Name**

This field displays the customer name that will appear on windows and reports.

##### **AI Seq**

These eight characters are used for the alpha sequencing of the customer in selected reports. For example, the alpha sequence for W.H. SMITH would be entered as SMITH WH. This is only used in Accounts Receivable.

##### **Address**

This field displays the customer's account address.

**Postcode**

This field displays the customer's postcode.

**Contact**

This field displays the name of the person with whom you would normally make contact at this customer.

**Phone No**

This field displays the telephone number for the customer account address.

**Pay Terms (Three Fields)**

These three fields define the payment [terms](#) for the customer.

The first field is a single character code that defines the type of terms:

D - Number of days from invoice date

M - Net monthly account number of months and payment due date

P - Periodic range

If you use the code **P**, you must enter a 4-digit data range, for example 1211, in the second field. 12 is for 12th of the current month and is the start of the range, and 11 is 11th of the next month and the end of the range.

For the **D** and **M** codes, leave the second field blank.

For code **D**, you must enter the number of days in the third field in the format DDD. For example, for a payment of 30 days from the receipt of invoice, enter 030.

For codes **P** and **M**, the third field contains the month and the day within that month (MDD).

Examples:

A code of M \_\_\_\_ 210 will generate a payment date of the 10th of the 2nd month following the date of invoice. In this example, an invoice date of 22/4/01 would generate a payment date of 10/6/01.

A code of P 2019 106 would generate for all invoices with a document date between the 20th of this month and the 19th of the next month a payment date of the 6th of next month.

**Ledger Type**

This is a single-character code representing the type of account.

Enter one of the following:

Blank - Open item account

B - Balance brought forward account

**Currency**

If this field is blank, the software uses base currency. An actual entry displays the code for the currency used by the account.

### **Tax Code**

This field displays the default tax code used for the customer account.

### **Tax Indic**

Enter one of the following:

- 1 - If this customer is exempt from tax and is not in the EEC
- 2 - If a special tax code applies (to use the code in the tax Code field)
- 3 (default) - To use the tax code in the Item Master file

### **Cr Limit**

Enter up to 13 numeric characters and two decimals to specify the credit limit in the customer's currency.

### **Credit Status Code**

Enter an alphanumeric code to indicate the customer's credit status.

### **Stop Indicator**

Enter an alphanumeric code to indicate a stopped customer. This does not inhibit any action in Accounts Receivable, but is included on enquiry and transaction windows. [Calls](#) can still be logged for a customer on credit stop, but you cannot assign or despatch an engineer until the situation changes.

### **Insured**

Enter up to 13 numeric characters and two decimals to specify the insured limit in the customer's currency.

### **Cr Resp**

Enter the code or name for credit responsibility to be used for sequencing selected Accounts Receivable reports.

For example:

- Accounts A to J reports - G Brown
- Accounts K to R reports - F Santer
- Accounts S to Z reports - K Elvin

### **St Addr Code**

If the statement for this customer is to be sent to a different address, this is the code of the required name and address.

### **In Addr**

If the invoice for this customer is to be sent to a different address, this is the code of that address.

### **St Copies**

This field displays the number of statement copies to be printed.

Enter one of the following:

Blank - If this defaults to one copy

0 - If no statements will be printed

1 to 9 - If this number of copies is printed

### **Code/Message**

The code part of this display is a statement print code. On a statement print run you can print all customers or those with a selected entry in this field. For example, a statement print code of **W** could indicate weekly statements for this customer.

The message part of the display shows the statement message that will be retrieved and printed on the customer's statements.

### **Consolidate to Accounts Receivable Account (Consol)**

Enter one of the following:

0 - If transactions are not consolidated to Accounts Receivable

1 - If all transactions are consolidated to Accounts Receivable, to the account indicated by the statement address code

### **Control A/c**

This field displays the control account for the customer in the General Ledger, if it is different from that set up in the [company](#) profile.

### **Bank A/c**

This is only displayed if the General Ledger is attached. It is the General Ledger bank account for the customer, if it is different from that set up in the [company](#) profile.

### **Group 1 to 4**

These groups are for user-defined coding of customers. They can be used in Sales Analysis or in sequencing Accounts Receivable reports.

### **Remarks**

This holds up to 50 alphanumeric characters, for any remarks to be held against this customer.

### **Salesman**

This field displays the salesman, representative or territory for this account. You can use this field for sequencing Accounts Receivable reports.

### **Sales Region**

This field displays the region code for the customer. You can use this field for sequencing Accounts Receivable reports.

### **Activity**

This field displays one of the following:

Blank - Normal live details

S - Suspends a record

D - Requests deletion

These values are used in Sales Order Processing, not in Service Management or in Accounts Receivable.

**Note:** You will find full details of these enquiry windows in the Enquire on Customer Additional Details section.

Press Enter to display the Service Additional Details Enquiry Customer Defaults window.

## Enquire on Installation Addresses [32/SSE]

Use this [task](#) to enquire on customer [site](#) addresses.

### Installation Address Enquiry Initial Window

To display this window, select the Enquire on [Installation Addresses](#) task.

#### **Fields**

##### **Account Number**

Enter the code of the customer on which you want to enquire.

If you leave the address blank, a list of existing addresses for this customer is displayed.

##### **Account Address**

Enter an address and then press Enter to display the details for the customer and address selected.

Leave the address blank and then press Enter to display a list of the existing addresses for this customer.

Enter a customer and an address, and then press Enter to display the Installation Address Enquiry Detail window.

### Installation Address Enquiry Detail Window

To display this window, enter a customer and an address codes and then press Enter on the [Installation Address](#) Enquiry Initial window.

#### **Fields**



All fields are for display only.

You will find full details of these enquiry windows in the Enquire on Customer Additional Details section.

Press Enter to display the Service Additional Details Enquiry Customer Defaults window.

## Enquire on Customer Additional Details [33/SSE]

Use this [task](#) to enquire on Service Management settings for a customer [site](#) address.

The windows that make up this task are also accessible from within the Enquire on Customer Account and the Enquire on [Installation Addresses](#) tasks.

### Service Additional Details Enquiry Customer Selection Window

To display this window, select the Enquire on Customer Additional Details task.

#### **Fields**

##### **Please Enter Account Number**

Enter the code of the customer on which you want to enquire.

Press Enter to display the Service Additional Details Enquiry [Location](#) Selection window.

### Service Additional Details Enquiry Location Selection Window

To display this window, enter a customer and then press Enter on the Service Additional Details Enquiry Customer Selection window.

At first, no addresses are listed. If you want to display the list of addresses, press Enter.

#### **Fields**

##### **Enter Location Code**

Enter a valid [site](#) address code for the selected customer.

Leave this field blank and then press Enter to display a list of all the available addresses for the customer.

Press Enter to display the Service Additional Details Enquiry Customer Defaults window.

## Service Additional Details Enquiry Customer Defaults Window

To display this window, press Enter on the Service Additional Details Enquiry Location Selection window.

### **Fields**

#### **Phone Extension**

This field displays the extension number for the contact at the [site](#) address.

#### **Invoice Destination Address A/c**

This field displays the account to which to send the invoices raised on behalf of this [installation address](#).

#### **And Sequence**

This field displays the address to which to send the invoices raised on behalf of this installation address.

#### **Job Contact**

This field displays the site contact's name, which could be the service contact for the site. It may be different from the contact for the main account.

**Note:** *There is also an Equipment Contact field for each piece of equipment relevant to the site.*

#### **Cash Customer**

One of the following is displayed:

0 - If this customer was set up via the usual route, that is, in Accounts Receivable and then in Customer Additional Details.

1 - If this customer was added via [Call Logging](#).

There is no functionality associated with this field even if it is set to **1**, as it is for future development.

#### **Region**

This field designates the service region to which the site belongs. You set up the codes under type REGN in the Codes/Parameter File [task](#).

You can then report on service and [contract](#) revenue by service region.

#### **Admin Branch**

The administrative [branch](#) can be different from the branch that owns the equipment at the [installation site](#) address. It is the branch on the new [site's](#) record that determines the branch to which the equipment is moved and its new owning branch.

If you want to move equipment at a customer's site, you must be signed on to the administrative branch for that site.

---

### Invoice Consolidation Level

One of the following is displayed:

- 1 - For consolidation at account level
- 2 - For consolidation at [location](#) level
- 3 - For consolidation at [job](#) or [contract](#) level

Consolidation at levels 1 and 2 will be subject to the specific rules in [multi-currency](#) and [World Trade](#). This means that there will be break points at change of currency and at change of tax/GST regimes.

### Customer Ref for Job

One of the following is displayed:

- 0 - If you do not have to enter a customer reference when you log a [call](#)
- 1 - If you have to enter a customer reference when a call is logged

### Parts Price List

The parts price list prices any service parts fitted at the installation site.

The field is only displayed if Sales Order Processing is active.

### Customer Ref for Contracts

One of the following is displayed:

- 0 - If you do not have to enter a customer reference when you set up a contract
- 1 - If you have to enter a customer reference when you set up a contract

### Parts Discount List

The parts discount list calculates discounts on service parts fitted at the installation site.

The field is only displayed if Sales Order Processing is active.

### Currency Customer

One of the following is displayed:

- 0 - If this customer does not use a currency other than base currency
- 1 - If this customer uses a currency other than base currency

### Currency Rate Code

The currency rate code identifies the currency rate used during [contract](#) and [job](#) invoicing to convert the customer's prime currency into the [company's](#) base currency.

### Currency Code

This field displays the General Ledger prime currency that this customer uses.

### Labour Price List

This field displays the default labour price list for the customer.

### **Tax Code**

This field displays the customer's tax code, set up in the General Ledger.

### **Functions**

#### **Trade Details (F5)**

This is only available if you have the [World Trade](#) module attached. Use this to go into World Trade and access World Trade enquiries. Refer to the World Trade product guide for more details.

Press Enter to display the Service Additional Details Enquiry Customer Details window.

## Service Additional Details Enquiry Customer Details Window

To display this window, press Enter on the Service Additional Details Enquiry Customer Defaults window.

### **Fields**

#### **Customer Priority Code**

This customer's priority is displayed as a number from 0 to 4. Either 0 or 4 can mean high priority, depending on how the Maximum Customer Importance field is set on in the System Parameters Maintenance General window.

The customer priority is used in the 3-D matrix (with volume segment and machine up/down) to apply any percentage reductions to [call](#) response time.

#### **Customer Calendar Code**

The field is for memo use only, to hold working days' data for the customer. It is not used by the current software.

#### **Geographic Code**

Postcodes and geocodes are used to define territories that are allocated to teams and engineers. At call logging, the detail is used to suggest who could do the [job](#), that is, has the right skills and is available to meet the job target time.

#### **Service Telephone Number**

This field displays the phone number for the service contact at the [installation address](#). It can be a different number to the installation address phone number.

#### **Service Telephone Extension**

This field displays the service contact's phone extension number.

#### **Service Fax Number**

This field displays the fax number for the service contact at the installation address.

**Charge Standard Distance Value**

This field defaults to the value from the [Company](#) Profile Maintenance Charges window.

One of the following is displayed:

0 - If a standard distance value is not charged

1 - If a standard distance value is charged

**Standard Mile/Km Value**

If the Charge Standard Distance Value field is **1**, this field holds the charge to be made for a return trip to the [site](#).

**Charge Actual Distance Driven**

This field defaults to the value from the Company Profile Maintenance Charges window.

One of the following is displayed:

0 - If you do not want to charge according to the actual distance driven

1 - If you want to charge the actual distance driven

The engineer enters the actual distance driven on the [technical report](#). This is multiplied by the Charge Per Mile/Km, set up in the next field.

**Charge per Mile/Km**

If the Charge Actual Distance Driven field is **1**, this field holds the charge to be made per mile/km.

**Charge Zones**

This field defaults to the value from the Company Profile Maintenance Charges window.

It is set to **1** if you want to charge for travel according to zone.

**Zone Code to Charge**

If you have specified that you charge for travel by zone, an existing zone code is displayed. This holds the flat rate, [branch](#) charge for [visiting](#) a customer [site](#) in the zone.

**Zone Code**

If you have specified that you charge for travel by zone, a zone code is displayed. The code indexes the record holding the amount of the zone charge.

**Time Zone ID**

If the customer [location](#) is in a different time zone from the system, the appropriate zone code will be displayed in this field.

Press Enter to display the Service Additional Details Enquiry Customer Hours window.

## Service Additional Details Enquiry Customer Hours Window

To display this window, press Enter on the Service Additional Details Enquiry Customer Details window.

### **Fields**

#### **Customer Opening Hours**

The customer's opening hours are displayed in 24-hour clock times. This is the time range within which the customer will accept service [calls](#).

Select **Exit (F3)** to leave the [task](#).

## Enquire on Model File [34/SSE]

Use this [task](#) to enquire on [models](#).

## Model Enquiry Selection Window

To display this window, select the Enquire on Model File task.

### **Fields**

#### **Model**

Enter an existing model.

Press Enter to display the Model Enquiry Hierarchy window.

## Model Enquiry Hierarchy Window

To display this window, enter a model and then press Enter on the Model Enquiry Selection window.

### **Fields**

#### **Division**

This field displays the model's division. The [division](#) is the top level in the product hierarchy of division, [model](#) group, model sub-group, model.

#### **Model Group**

This field displays the model's model group.

#### **Model Sub-Group**

This field displays the model's model sub-group.

**Machine/Peripheral**

One of the following is displayed:

- 0 - If this model is a machine, and service [calls](#) can be logged against it
- 1 - If this model is a peripheral, and service calls cannot be logged against it

**Labour Price List**

This price list will be used to calculate the hourly rates for chargeable work performed on the model.

**Visit Profile Code**

The [scheduled visit profile](#) (SVP) is used in generating the [visits](#) to each piece of equipment on a contract. The code to apply depends on the following hierarchy:

Use the SVP on the [contract](#) header.

If there is none, use the [model](#) file SVP.

If there is none, use the model group file SVP.

If there is none, use the [company](#) profile SVP.

If there is none, no visits will be generated.

As long as a profile is found, the software generates visits for the equipment line on the contract when you enter **8** on the Contract Equipment Maintenance Detail window.

**Points**

This field defines the service index of the model. The value is used in automatic engineer assignment, to select the engineer if all other workload factors are equal.

**Inventory Item Codes**

[Installation](#) details will be set up automatically for a machine when it is sold to a customer through the Sales Order Processing module; the Inventory item code, or codes, enables this.

No Inventory item codes are included on a peripheral record. Peripherals can be sold through SOP, but must be attached manually to machine records.

Press Enter to display the Model Enquiry Details window.

## Model Enquiry Details Window

To display this window, press Enter on the Model Enquiry Hierarchy window.

**Fields****Av. Hours per Breakdown**

This value is used as the default [job](#) duration for a breakdown [call](#) on the [model](#).

### **Av. Hours per PM Visit**

This value is used as the default job duration for planned maintenance calls on the model.

### **Workshop Preparation**

This field is for future development.

### **Engineer Required for Installation**

One of the following codes will be displayed:

0 - If no action is taken

1 - If the software will automatically create an [installation](#) job after a machine is sold through Sales Order Processing

This is done as soon as you run the SOP Transfer to Service [task](#). The default job category for an installation job must already be set up.

On a peripheral, either setting is for memo purposes only.

### **Manufacturers ID**

This must be set up under major type MFID in the Inventory Descriptions file.

### **Warranty Months**

This field displays the number of months the warranty covers.

### **Volume Segment ID**

The volume segment holds the number of days, or copies, used to calculate a repeat [call](#) for the [model](#) in Call Logging.

### **Automatic Call Assignment**

1 is displayed if calls for this model will be included in automatic call assignment (ACA), if ACA is activated.

ACA operation may also be limited by settings in the System Parameters File, Job Category and Engineer Master File tasks.

### **Configuration Code**

This is a single alphanumeric code to classify peripherals; the value entered is validated against parameter type CONF set up in the Codes/Parameter File [task](#).

The first five configuration codes relating to the peripherals attached to a machine are displayed during [call](#) logging, on the [Job Line](#) Detail window.

### **Statistical Family Fields 1 to 3**

These are for memo/reporting purposes and are validated against parameter type STA1 in the Codes/Parameter File task.

### **Number of Meters**

This field displays the number of meters for the [model](#), up to a maximum of 2.

A value of 1 or 2 means meter readings are to be used in [contracts](#) or [technical reporting](#).



**Digits Meter 1**

This field displays the total number of digits for the meter. The software uses this value to check for meter roll over when it has reached its maximum reading.

**Digits Meter 2**

This field displays the total number of digits for the meter. The software uses this value to check for meter roll over when it has reached its maximum reading.

**Warranty Units**

This field displays the number of units covered by the warranty. It is a default field for equipment warranty units. The value must be a positive whole number.

**Copies = 1 Fill Toner**

This field displays the estimated number of copies expected from each fill of toner.

**Copies = 1 Fill Developer**

This field displays the estimated number of copies expected from each fill of developer.

**Volume Band Starting Seq**

This is a number in the range 1 to 9.

**Target MTTR**

This field displays the expected repair time for the [model](#). This field is used for memo purposes only.

**Target MCBV**

This field displays the number of copies that you expect this model to produce between service [visits](#).

**Target MTBV**

This field displays the number of days during which the model is expected to work without service intervention.

**Target Cost per Copy**

This field displays a monetary value, in the range 0.00001 to 9999.99999; that is, the target maximum copy cost.

**Function****Warranty Parts (F14)**

Use this to enquire on any parts that have a different warranty from the parent.

Select **Warranty Parts (F14)** to display the Warranty Parts Enquiry pop-up.

## Warranty Parts Enquiry Pop-up

To display this pop-up select **Warranty Parts (F14)** on the Model Enquiry Details window.

Use this pop-up to view the warranty months for up to 5 parts associated with this [model](#). This is necessary only for parts whose warranty months differ from that set for the model itself.

### Fields

#### **Part Number**

This field displays the relevant Inventory item.

#### **Mths**

This field displays the warranty months for the part.

Select **Previous (F12)** to return to the Model Enquiry Details window.

## Enquire on Installation Details [35/SSE]

Use this [task](#) to enquire on the equipment held on customer [sites](#).

## Installation Details Enquiry Selection Window

To display this window, select the Enquire on [Installation](#) Details task.

### Fields

#### **Model**

Enter the [model](#) on which you wish to enquire.

**Note:** Do not select a peripheral here, as peripherals are held against a machine and can be enquired on from the Equipment Detail Enquiry window.

#### **Serial Number**

If only a [model](#) number is entered, a list of all [serial numbers](#) for this model with the associated account/[locations](#) will be displayed.

#### **Site Account Number**

Enter an existing customer. You cannot select both [site](#) and [owner](#) accounts.

#### **Site Account Address**

Enter an address along with the customer. You cannot select both site and owner accounts.

**Owner Account Number**

Enter the existing customer, defined as the owner of a piece of equipment. You cannot select both site and owner accounts.

**Owner Account Address**

Enter an address along with the customer. You cannot select both site and owner accounts.

**All Branches**

Enter one of the following:

0 - To show details for the current [branch](#) only.

1 - To show details for all branches.

You can only use this field if you have selected an owner account; it cannot be used with site accounts.

**Functions****Address (F15)**

Enter a site name and address and use this to display the [Installation](#) Details Enquiry. Enter the [owner](#) name and address to display the Ownership Address Enquiry.

**Machine (F16)**

Enter a site name and address and use this to display the Installation Equipment Enquiry. Enter the owner name and address to display the Installation Equipment by Owner.

Enter the site account number and account address and then select **Address (F15)** to display the Installation Details Enquiry window.

Enter the site account number and account address and then select **Machine (F16)** to display the Installation Equipment Enquiry window.

Enter the owner account number and account address and then press Enter to display the Installation Equipment by Owner window.

Enter the [owner](#) account number and account address and then select **Address (F15)** to display the Ownership Address Enquiry window. This is the equivalent of the [site's](#) Installation Details Enquiry.

Enter the owner account number and account address and then select **Machine (F16)** to display the [Installation](#) Equipment by Owner window. This is the equivalent of the site's Installation Equipment Enquiry window.

Enter the [model](#) and [serial number](#) and then press Enter to display the Equipment Detail Enquiry window.

## Installation Address Enquiry Window/Ownership Address Enquiry Window

To display this window, select **Address (F15)** on the Installation Details Enquiry window or the Equipment Detail Enquiry window.

Alternatively, select **Owner Address (F17)** on the Installation Details Enquiry window.

The [Installation Address](#) Enquiry window and the Ownership Address Enquiry window are the same in layout and information.

### **Fields**

All fields are for information only and cannot be maintained. For more details on individual fields see the [Installation](#) Details section of this product guide.

### **Functions**

#### **Header (F16)**

Use this to display the Equipment Detail Enquiry window.

#### **Text (F21)**

Use this to display [site](#) address text.

Select a function or select **Exit (F3)** to leave the [task](#).

## Equipment Detail Enquiry Window

To display this window, enter a [model](#) and [serial number](#) and then press Enter on the [Installation](#) Details Enquiry window.

### **Fields**

All fields are for display only and cannot be maintained. For more details on individual fields, see Installation Details section.

### **Functions**

#### **Warranty Parts (F10)**

Use this to display the Equipment/Warranty Part Enquiry pop-up.

#### **Address (F15)**

Use this to display the [Installation Address](#) Enquiry window.

#### **Peripherals (F20)**

Use this to display the Equipment Configuration Enquiry window.

#### **Text (F21)**

Use this to display any existing text.

### **Messages (F23)**

Use this to display the Machine Messages pop-up.

Select a function or select **Exit (F3)** to leave the [task](#).

## Equipment/Warranty Part Enquiry Pop-up

To display this pop-up select **Warranty Parts (F10)** on the Equipment Detail Enquiry window.

### **Fields**

All fields are for display only and cannot be maintained. For more details on individual fields, see the [Installation](#) Details section.

Select **Previous (F12)** to return to the Equipment Detail Enquiry window.

## Equipment Configuration Enquiry Window

To display this window, select **Peripherals (F20)** on the Equipment Detail Enquiry window.

### Fields

All fields are for display only and cannot be maintained. For more details on individual fields, see the [Installation](#) Details section.

### **Functions**

#### **Fold/Truncate (F13)**

Use this to toggle between displaying the [model](#) description and displaying only the codes.

#### **Text (F21)**

Use this to display any existing text.

Select **Previous (F12)** to return to the Equipment Detail Enquiry window.

## Machine Messages Pop-up

To display this pop-up, select **Messages (F23)** on the Equipment Detail Enquiry window.

### **Fields**

All fields are for display only and cannot be maintained. For more details on individual fields, see the [Installation](#) Details section.

Select **Previous (F12)** to return to the Equipment Detail Enquiry window.

## Enquire on Division Code [36/SSE]

Use this [task](#) to enquire on the [divisions](#) for a [model](#) family.

### Division Enquiry Selection Window

To display this window, select the Enquire on Division Code task.

#### **Fields**

##### **Division Code**

Enter the division on which you want to enquire.

Enter an existing division and then press Enter to display the Division Enquiry window.

### Division Enquiry Window

To display this window, enter an existing division and then press Enter on the Division Enquiry Selection window.

#### **Fields**

##### **Division Code**

This field displays the selected [division](#).

##### **Description**

This field displays the division's description.

Select **Exit (F3)** to leave the [task](#).

## Enquire on Model Group [37/SSE]

Use this [task](#) is used to enquire on the [model](#) groups for a model family.

### Model Group Enquiry Selection Window

To display this window, select the Enquire on Model Group task.

#### **Fields**

**Division Code**

Enter the [division](#) on which you want to enquire.

**Model Group**

Enter the model group on which you want to enquire.

Enter an existing division and model group and then press Enter to display the Model Group Enquiry window.

## Model Group Enquiry Window

To display this window, enter a [division](#) and [model](#) group on the Model Group Enquiry Selection

**Fields****Description**

This field displays the model group's description.

Select **Exit (F3)** to leave the [task](#).

## Enquire on Model Sub-group [38/SSE]

Use this [task](#) to enquire on the [model](#) sub-groups for a model family.

## Model Sub-Group Enquiry Selection Window

To display this window, select the Model Sub-Group Enquiry task.

**Fields****Division Code**

Enter the [division](#) on which you want to enquire.

**Model Group**

Enter the model group on which you want to enquire.

**Model Sub-Group**

Enter the model sub-group on which you want to enquire.

Enter an existing division, model group and model sub-group and then press Enter to display the Model Sub-Group Enquiry window.

## Model Sub-Group Enquiry Window

To display this window, enter a valid division, model group and model sub-group code and then press Enter on the Model Sub-Group Enquiry Selection window.

### **Fields**

The selected codes are displayed along with their descriptions.

Select **Exit (F3)** to leave the [task](#).

## Enquire on Volume Segment [40/SSE]

Use this [task](#) to enquire on the usage volume and the basis for repeat [call](#) calculations, for equipment at [model](#) level.

Equipment usage volume influences both the response time for calls and the calculation whether a subsequent call is a repeat call or not.

## Volume Segment Enquiry Window

To display this window, select the Volume Segment Enquiry task and enter an existing code on the Volume Segment Enquiry Selection window.

### **Fields**

All fields are for display only and cannot be amended. For full details of the fields please refer to the Volume Segment section of this product guide.

Select **Exit (F3)** to leave the task.

## Enquire on Zone Charges [41/SSE]

This [task](#) is used to enquire on the details of zone charges on an ad hoc basis.

Where travel distance is charged by zone (see the [Company](#) Profile Maintenance Charges window), the zone charge record confirms the zone description, the charge and its effectivity date.

## Zone Charges Enquiry Selection Window

To display this window, select the Enquire on Zone Charges task.



### **Fields**

#### **Zone Charge**

Enter the zone charge on which you want to enquire.

#### **Currency Code**

Enter the currency code for the zone charge on which you want to enquire.

Press Enter to see the Zone Charges Enquiry Detail window.

## Zone Charges Enquiry Detail Window

To display this window, press Enter on the Zone Charges Enquiry Selection window.

### **Fields**

All fields are for display only. The [company](#)-specific description is set up in parameter type ZONE in the Codes/Parameter File [task](#). The [branch](#)-specific zone charge and effective date are held in the Zone Charges file.

Select **Exit (F3)** to leave the task.

## SOP Transfer to Service [50/SSE]

Use this [task](#) to store details of equipment sold through SOP and delivered to customers as Service Management-installed equipment. Machines sold can be held in and issued from a standard Inventory stockroom, or a warehouse.

You can also generate an [installation](#) job, with the default installation [job](#) category, if an engineer is required for the machine's installation. This is indicated on the [model](#).

### **Description**

This is a batch job that you can run on demand. It selects equipment that has been despatched in SOP, if the sales order item number matches a Service Management model record containing that item number. The job writes details of the model, [serial number](#), delivery date and so on to the Service Management installed equipment file for the [delivery address](#) on the SOP order.

If the customer additional service details for the [site](#) do not exist, a record is written from the SOP order data and the site's additional sales details record, which now includes a field to define the relevant service [branch](#).

**Note:** You will find full details of the SOP processing involved in the sale of the equipment before its transfer to service in the SOP product guide.

### **Implications**

The configuration of peripheral devices to the prime machine is not covered in the transfer process.

You need to add the linking of peripherals to the prime machine manually, after the engineer has completed the [installation](#).

Ensure that the Codes/Parameter File [task](#), parameter type STAT, has a record X SOP Sale: SS Record Required. The equipment installation record, created by the SOP sale, will display X in the Equipment Status field. You can leave this value unchanged, or amend it when the installation is completed after the SOP transfer.

A [job](#) category record for the default installation job is included in the test data. You must set this up correctly for live running, to ensure the job category and fault codes are included in the installation job (that is, INS, Installation, 4, 2, 1, 1, \*blank). In the Codes/Parameter File task, for parameter type FLTC, the following record should be set up: INS, Installation: SOP machine.

Select **Submit (F8)** to submit the job.

## Process Customer Returns [51/SSE]

You can only use this [task](#) if you are using System21 Customer Returns.

This is a batch [job](#). When you run it, the software reviews the items that have been returned by customers and received into goods inwards, inspection or stock. It compares them with service [model](#) and [serial number](#) combinations.

If the software finds a match, this means a customer's machine has been returned.

The software checks whether the item (or model, in Service Management vocabulary) has any outstanding service jobs booked against it, and whether it is on an active [contract](#).

If the software finds that the item has no outstanding job or contract task, it flags the item to ensure that it will be deleted and included in the audit report.

If the item has service jobs still outstanding, those jobs are also flagged for deletion.

If the item is on an active contract, its details are included on the audit report; and the item is not deleted.

**Note:** You can find full details of the Customer Returns processing, which precedes the selection routine in Service Management, in the Customer Returns product information.

**Note:** If you want to scrap the machine, return it to stores first and then scrap it. This ensures that the software makes all the necessary Service adjustments. While the machine is in goods inwards, or inspection, do not use the Returns Scrap/Adjust task as this will by-pass the Service adjustments.

### **Implications**

Use the Customer Returns Audit report to find the required corrective action.

Where returned equipment is on an active [contract](#), its detail appears on the audit report for subsequent manual removal: invoicing or crediting may be involved.

Select **Submit (F8)** to submit the [job](#).



## Contracts [1/SSC]

Use this [task](#) to set up and maintain the details of all your [service contracts](#) and [quotations](#) for [contracts](#).

You would use this task on a regular basis to add, amend or delete contracts and quotations.

### **Contracts**

A contract describes the [terms](#) of maintenance for one or more pieces of equipment installed at one or more of a customer's [sites](#).

A contract has a start date, and normally an end date, although it can be a never-ending contract. Each piece of equipment covered by a contract has an inclusion date (which can be later than the contract start date), and may have a removal date (if it is removed from the contract before the contract end date).

A contract is uniquely identified by the combination of the contract number, [contract type](#), and start date.

A contract consists of a number of components:

- Contract header

This specifies the terms for the contract.

- Contract equipment

This lists the pieces of equipment covered.

- Maintenance visit schedule

This is the schedule, by service period, of planned maintenance visits.

A [special price](#) can be defined for any piece of equipment on a [contract](#), this price overriding the standard price calculated by the software.

New contracts have a status of pending start date. This status is changed to Active when you run either the Day End Routine or the Contract Updating [tasks](#), provided that the contract's start date has been reached.

Contract quotations are created in exactly the same way as true contracts, but are given quotation status by means of **Quotation Only/Accept Contract (F22)**. The same function is used to convert the quotation into a true contract when the customer accepts the quotation.

## Contract Maintenance Initial Window

To display this window, select the Contracts Maintenance task.

You can do two things from this window.

- You can select the contract you want to maintain.
- You can enter a customer and site, and either set up a new contract for that site, or maintain an existing one.

### Fields

#### **Contract Number**

If you enter a [contract](#) number and no account code or address code, the contract must already exist in the software.

If you enter a contract number by itself and then press Enter, the software displays a list of all contracts with this contract number, in [contract type](#) and start date sequence.

#### **Contract Type**

Enter an existing contract type. You must also enter a contract number. If you do not enter an account and address then the contract and type combination must already exist.

If you enter only a contract number and a type, press Enter and the software displays all relevant contracts in start date sequence.

#### **Account Number**

Enter an existing customer. If you press Enter, the software displays a list of all the address codes for this customer.

If you then select an address code, you will see a list of all contracts for this customer and address code, in contract type and start date sequence.

#### **Account Address**

Enter an address in conjunction with a customer. This combination must already exist.

If you only enter a customer and address code and then press Enter, the software displays all contracts in contract type and start date sequence.

Press Enter.

If you are setting up a new contract and you have completed all four input fields, the Contract Header Maintenance window will be displayed.

Otherwise, the Contract Selection window is displayed.

## Contract Selection Window

To display this window, press Enter on the Contract Maintenance Initial window.

On this window you can either select an existing [contract](#) for maintenance, or enter a [contract type](#) and start date to set up a new contract.

### **Fields**

#### **Select (n)**

Enter **1** against a contract to select it for maintenance.

#### **Contract No.**

To maintain an existing contract, enter the number of the contract.

To set up a new contract, leave the Contract No. field blank and enter the contract type and date, and the software will generate a new contract number.

If you entered a specific contract number on the Contract Maintenance Initial window, that value defaults into this field.

#### **Type**

Enter the contract type of the contract to be maintained or set up.

If you entered a specific contract and type on the Contract Maintenance Initial window, the contract type defaults into this field.

#### **Contract Dt**

Enter the contract start date of the contract to be maintained or set up.

Press Enter.

If you selected an existing contract, the Contract Equipment Maintenance Detail window will be displayed.

If you entered a new contract, the Contract Header Maintenance window will be displayed.

## **Contract Header Maintenance Window**

To display this window, if you are adding a new [contract](#), enter the [contract type](#) and start date on the Contract Selection window.

Alternatively, if you are adding a new contract, enter the contract number, type, account and [location](#) and then press Enter on the Contract Maintenance Initial window.

If you are maintaining an existing contract, select **Previous (F12)** on the Contract Equipment Maintenance Detail window (which follows on from the Contract Selection window).

### **Fields**

#### **Alt Cont No**

Enter up to seven alphanumeric characters for an alternative [contract](#) number.

#### **Version**

Enter up to five alphanumeric characters for a version number.

**Contract Type**

Enter an existing [contract type](#). You can only amend this when the [contract](#) has a status of pending start.

This is a key field in controlling your contracts. If you are not familiar with the concept of contract types, see the Contract Type section of this product guide.

**Status**

This field displays the contract's status. The software maintains this field. It retrieves the status descriptions from the Codes/Parameter file, type CHST.

The status can be:

P - Pending start

Q - [Quotation](#)

A - Active

E - Expired

D - To be deleted

**Contract Start Date**

Enter the start date for the contract. You can only change this when the contract status is Pending Start. The contract will be made active by the Day End Routines [task](#) when the start date is reached.

You can backdate a contract.

**End Date**

Enter the date on which the contract is to end. If you leave this field blank, the software will calculate it as the start date plus the contract duration.

If the contract duration is zero, the software will make this a rolling contract with an end date of 99/99/99.

If you overwrite the original end date with an earlier date, the software assumes the contract is ending early.

The Contract Updating and Contract Credit Selection tasks use this date as the basis for calculating any credits that may be due.

**Invoice Start**

This field displays the date on which the first invoice for the contract was raised.

**Calendar Code**

If you want to associate this contract with a calendar, enter that calendar in this field.

If you want to associate individual machines with calendars, you can do that within this [task](#), on the Contract Equipment Maintenance Detail window.



### Tot Contract Value

This field displays the total value of the fixed service charges that you entered on the Contract Equipment Maintenance [Contract Conditions](#) pop-up for each piece of equipment. It is the annualised, or [term's](#), nominal value of the service elements of a [contract](#).

This value will be zero before the contract start date, or the effective date(s) for the equipment prices.

The total does not necessarily reflect the invoice value of the contract if equipment is added or deleted during the course of the [billing term](#).

This field is not used for pricing or invoicing the contract if header pricing applies.

**Note: Re-value (F5) updates this field's value.**

### Header Price

This field displays the header, or block, price for the contract, as entered on the Contract Header Maintenance Contract Conditions pop-up (**Conditions Maintenance (18)**). This is the price that will be invoiced for the contract term.

The field is only displayed if the Header Level Pricing field on this window is set to 1.

### Duration

Enter the [contract](#) duration, in months, up to a maximum of 120.

The initial value defaults from the [contract type](#). You can only change this field if the contract status is Pending Start.

If the duration is zero, the software assumes it is a rolling, or never-ending, contract, with an end date of 99/99/99.

### Mantle Code

Enter an existing mantle code of up to five alphanumeric characters.

You set up mantle codes under type MANT in the Inventory Descriptions file.

The mantle code is used in the Global Price Update [task](#), to identify a group of contracts for a percentage price change.

### Customer Order Ref 1

This field, and the Order Ref Date field, are mandatory if the Customer Ref for Contracts field in the Customer Additional Details task is set to 1.

Enter up to 20 alphanumeric characters as the customer's order reference.

### Order Ref Date

This field, and the Customer Order Ref 1 field, are mandatory if the Customer Ref. for Contracts field in the Customer Additional Details task is set to 1.

Enter a valid date (format DDMMYY) for the customer's order.

### Customer Contact

Enter the name of the contact to whom enquiries relating to this [contract](#) should be addressed. The contact entered in the Contact field in the Customer Additional Details [task](#) is the default for this field.

### Telephone No

Enter the telephone number to which enquiries relating to this contract should be directed. The telephone number entered in the Service Telephone Number field in the Customer Additional Details task is the default for this field.

### Renew Contract

Enter one of the following:

- 0 - If the contract will never be renewed
- 1 - If the contract will be renewed with effect from the end date on the contract header

**Note:** This indicator has no effect if the contract end date is set to 99/99/99: a rolling or never-ending contract.

### Region

The customer's region is displayed. You set this up in the Region field in the Customer Additional Details [task](#).

### Non-posting Invoices

Enter one of the following:

- 0 - If invoices produced for the [contract](#) will be posted to Accounts Receivable and the General Ledger
- 1 - If the contract will function as normal, but invoices produced will stay within Service Management and will not post to Accounts Receivable or the General Ledger

### Header Level Pricing

Enter one of the following:

- 0 - If you want to be able to price pieces of equipment individually

If you do not select **Conditions Maint (F18)** to enter a price into the Contract Header Maintenance [Contract Conditions](#) pop-up, the software takes the contract price from the contract rates file for each piece of equipment.

If you do select **Conditions Maint (F18)** and you enter a price into the Contract Header Maintenance Contract Conditions pop-up, that price defaults to each Contract Equipment Maintenance Contract Conditions pop-up for each piece of equipment, but you can change this for each individual piece of equipment.

- 1 - If you want to define your pricing at header level rather than for each individual piece of equipment

You must select **Conditions Maint (F18)** and complete the Contract Header Maintenance [Contract Conditions](#) pop-up before you can update the [contract](#) header. Enter only a fixed service charge. The software will price the contract based on that price. The software will ignore any prices you enter into the Contract Conditions pop-up for individual pieces of equipment. These prices will be used only for comparison purposes: their total is displayed on the Tot Contract Value field.

### Estimates Allowed

The default comes from the System Parameters File [task](#).

Enter one of the following:

- 0 - If you are not using estimated meter readings
- 1 - If you want to produce invoices based on estimated meter readings

### No of Estimates Allowed

Enter the number of consecutive estimates that are allowed for billing. Valid entries are from 1 to 999.

### Pool Contract

This is only valid for contracts which have meterage billing parameters defined on the contract type. Pooling meterage prices means that you can spread minimum volumes or charges across equipment, allowing the excess units on one machine to be offset against the under-usage on another machine.

Enter one of the following:

- 0 - Non-pooled

Non-pooled contracts are assessed for invoicing on the basis of the individual machine. If the number of copies or vends is less than the minimum, the minimum is charged for. If the number exceeds the minimum, the additional copies or vends are charged for.

- 1 - Pooled

Pooled contracts are assessed for invoicing on the basis of the aggregated minima of all the machines on the contract. That is, machines which have an excess of copies or vends can offset the total excess against those machines which have actual usage which is less than the minimum.

### Tile Contract

This is only valid for contracts which have meterage billing parameters defined on the contract type.

Enter one of the following:

- 0 - Non-tiled

- 1 - Tiled

Tiled [contracts](#) are a special form of pooled contract. You can only use tiling if you are using pooling. Unlike pooled contracts, which have a defined [termination](#) date, tiled contracts allow the termination date to be extended for each new item of equipment added to the contract.

The new [termination](#) date is calculated by adding the contract [term](#) to the inclusion date of the machine which has been added.

### **Copy-kit**

Enter one of the following:

0 - If this [contract](#) is not a copy-kit contract

1 - If you want to be able to provide service and materials for either a pre-defined period of time, or a pre-defined number of copies, whichever runs out first. This is called a copy-kit contract.

This field is only displayed if you selected one of the copy fields on the [contract type](#).

### **Salesman Code**

Enter an existing salesman.

You can set up these sales codes under type SN in the Inventory Descriptions file.

The salesman is used for memo purposes only.

### **Invoice Summ/Det Form**

This field is for future development.

### **Invoice Destination**

Enter the customer's account. This has a default value, but can be changed to any existing account.

### **Address Code (Untitled)**

Enter a valid address code for the corresponding customer.

This is the address that will be printed on all invoices and credit notes for the contract.

### **Direct Debit**

This field is for future development.

### **Contract Inv Bill To**

If you wish contract invoices to go to a different customer, enter the customer in this field and the relevant address in the next field.

### **Untitled**

This field is for the contract invoice bill address. If you wish contract invoices to go to a different customer or address, enter the customer in the previous field and the relevant address in this field.

### **Header Currency**

Enter one of the following:

0 - If you want to invoice the equipment on the [contract](#) in the currency of the [site](#) where the equipment is installed

1 - If you want to invoice all equipment on the [contract](#) in the currency of the account on the contract header

**Note:** *Some of the fields on the header window are only displayed if the function they relate to has been selected for that contract type.*

### **Job Invoice Bill To**

If you want [job](#) invoices to go to a different customer, enter the customer in this field and the relevant address in the next field.

### **Untitled**

This field is for the job invoice bill address. If you want job invoices to go to a different customer or address, enter the customer in the previous field and the relevant address in this field.

## **Functions**

### **Re-value (F5)**

Use this to total the nominal value of the fixed service charges for all the contract lines and displays the new value in the Tot. Contract Value field on the contract header.

### **Update (F8)**

Use this to update the contract details. This is only displayed when you have completed the Billing Parameters pop-up and, if you are pricing at header level, the Contract Header Maintenance [Contract Conditions](#) pop-up.

### **Service (F14)**

Use this to display the Service Parameters pop-up, where you can set up various response time and [visit](#) defaults.

### **Billing Maint (F16)**

Use this to display the Billing Parameters pop-up.

### **Conditions Maint (F18)**

Use this to display the Contract Header Maintenance Contract Conditions pop-up.

### **Text (F21)**

Use this to update or add text for the contract.

### **Quotation Only/Accept Contract (F22)**

Use this as a toggle to change a [contract](#) to a [quotation](#), or to change a quotation into a contract.

If you are currently maintaining a contract, select this to change the contract to a quotation. You can only change a contract to a quotation if the contract's status is Pending. When you select this, the contract's status will change to Quotation Only, and the function's description will change from Quotation Only to Accept Contract.

If you are currently maintaining a [quotation](#), select this to change it to a [contract](#). The quotation's status will change to Pending Start Date, and the function's description will change from Accept Contract to Quotation Only.

### **Invoice Enquiry (F23)**

Use this to display the Invoice Enquiry window.

Select a valid function to display the next window.

## Service Parameters Pop-up

To display this pop-up, select **Service (F14)** on the Contract Header Maintenance window.

Use this pop-up to set up the service maintenance agreement for the [contract](#).

### **Fields**

#### **Response Hours**

The value defaults from the [contract type](#), but may be overwritten. Enter up to five numeric characters (hhh:mm) to set the response time for the contract. The response will apply to all contract lines, unless a line is given its own special response time.

#### **Scheduled Visit Profile**

Leave this field blank if you do not want to use a [scheduled visit profile](#). If you do, enter a valid scheduled visit profile (SVP) code of up to three alphanumeric characters.

The profile generates the [visits](#) to each piece of equipment on a contract. The software selects the profile according to the following hierarchy:

Use the scheduled visit profile on the contract header.

If there is none, use the scheduled visit profile for the [model](#).

If there is none, use the scheduled visit profile for the model group.

If there is none, use the scheduled visit profile from the [company](#) profile.

If there is none, do not generate visits.

As long as a scheduled visit profile is found, the software generates visits for the equipment line on the contract, using the first scheduled visit profile found, when you select option **8** on the Contract Equipment Maintenance window.

When a scheduled visit profile is entered on the Service Parameters pop-up, **Schedule Override (F14)** is displayed, to enable you to edit the scheduled visit profile details.

#### **Use Scheduled Visit Override at Renewal**

Enter one of the following:

0 - If at contract renewal, the scheduled visit profile field will be blank

You can enter a valid [scheduled visit profile](#), but if you leave it blank, the scheduled visit profile hierarchy will determine the equipment [visits](#) to be generated on the renewed [contract](#).

1 - If the software will use the \*OV amendments to the scheduled visit profile when renewing the contract and generating equipment visits

### **Allow Service Cover When Contract Pending**

This field defaults from the System Parameters Maintenance Response window, but you can change it.

Enter one of the following:

0 - If contract cover will only be effective on and after the contract start date

1 - If all [calls](#) that are logged before the contract start date (while the contract has a status of pending) will be treated as though the contract cover was effective

This is reflected on the [Job Line](#) Details window.

### **Use Start Date Rates**

This field defaults from the [contract type](#) but you can change it.

Enter one of the following:

0 - If the price lists used for chargeable work will be those effective on the date the work is carried out

1 - If the price lists and labour rates used for chargeable work will be those effective on the [contract](#) start date

### **Or, Until**

If the Use Start Date Rates field is **1**, this field must be **0/00/00**.

If the Use Start Date Rates field is **0**, enter a valid date (format DDMMYY). The labour and parts price lists used for chargeable work, effective at the contract start date, will only be used until the date entered. After this date, the price lists used will be those effective on the date the work was carried out.

### **Global Price Code**

Enter an existing global price. The code is used in the Global Price Update [task](#), to select contracts for inclusion in the price revision then being applied.

You can set up these codes under type GLPR in the Codes/Parameter File task.

## **Functions**

### **Schedule Override (F14)**

Use this to change the [scheduled visit profile](#) for the [contract](#). The Scheduled Visit Profile Maintenance Detail window is displayed.

If you update the scheduled visit profile, select **Update (F8)**. Then regenerate equipment [visits](#) using the revised scheduled visit profile, by selecting option 8 for each record on the Contract Equipment Maintenance Detail window. The scheduled visit profile for a contract where the scheduled visit

profile has been edited will now be displayed as \*OV: to indicate that a standard [scheduled visit profile](#) has been overridden.

## Billing Parameters Pop-up

To display this pop-up, select **Billing Maintenance (F16)** on the Contract Header Maintenance window.

**Note:** Only those billing parameters that you selected for this [contract type](#) are displayed.

Use this pop-up to specify the billing frequency and other billing details for the [contract](#).

### **Fields**

#### **Set All Next Pricing Cycle to Dates To**

The software automatically uses the end date of the contract's first [term](#) for the first pricing cycle.

Only enter a date (format DDMMYY) in this field if you want the first term of the contract is to be shorter than subsequent, standard terms.

This might happen if you want a contract's term to coincide with the start of a financial year, for example. You would shorten the first term to end on 5<sup>th</sup> April, but subsequent terms would be a whole year.

You define the subsequent, standard term length in the Term (Mths) field below.

#### **Set All Next Pricing Cycle from Start Days To**

The pricing cycle start day is the day on which the software first produces invoices for a contract.

This day defaults either to the day on which the contract starts, or to the first of the following month, depending on what you defined in the Default Invoice Start Date to First of the Month field on the System Parameters Maintenance Meterage window.

If you enter a start day in this field, this changes the invoice day to any day following the contract start day, for up to one month. If the day you enter is less than the contract start day, the software assumes it to be the following month.

#### **Line 1 Fixed Service Charge - Term (Mths)**

Enter the number of months within the contract's duration for which the contract price is protected from change, and the number of periods covered by the fixed service charge.

You express this term in months. It defaults to 12; but you can enter any value from one to 120 (10 years).

This term is the normal term for the contract. The first term can differ. If there is a date in the Set All Next Pricing Cycle to Dates To field, the first term is shorter than the standard term you enter in this field.



**Line 1 Fixed Service Charge - Freq (Mths)**

Enter the frequency of invoicing expressed in months. You can enter any value from 0 to the maximum number of months in the [term](#), and the value you enter must be divisible into the term. For example:

- 1 - Monthly
- 3 - Quarterly
- 12 - Annual invoicing in a 12-month term

Enter **0** in this field if you have set the Adv/Visit/Arr field to **1**.

**Line 1 Fixed Service Charge - Adv/Visit/Arr**

This is advance, [visit](#) or arrears billing. This field defaults to the value in the Invoice Schedule field on the [contract type](#).

Enter one of the following:

- 0 - To invoice in advance

The release date is the start of the [invoice period](#), and the invoice for each [invoice term](#) is issued before the term starts.

- 1 - To invoice each scheduled planned maintenance visit

This is a [job](#) invoice, raised as the result of the engineer's [technical report](#) for the visit. You must set the Freq field to **0**.

- 2 - To invoice in arrears

Here, the release date is the end of the invoice period. The invoice for each invoice term is issued after the term finishes, but you should price it before the [contract](#) start date.

**Line 1 Fixed Service Charge - Next Pricing Cycle From**

This field displays the date of the next pricing cycle. This is the date on which the next contract invoice term to be processed will start. The software maintains this field.

**Line 1 Fixed Service Charge - Next Pricing Cycle To**

The date on which the next [contract invoice term](#) to be processed will end. This field defaults to the Next Pricing Cycle From date, plus the [billing term](#). You can override this when you first enter the contract.

The To date is the end of the contract term and can therefore cover one or more invoices, depending on the [invoice frequency](#) within the term.

Contract price increases during the [term](#) will not take effect until after the Next Pricing Cycle To date has been passed.

**Line 2 Rental Charge - Term (Mths)**

This term is the number of months within the contract duration that the rental price is protected from change, and the number of periods covered by the rental charge.

You express this [term](#) in months. It defaults to 12; but you can enter any value from one to 120 (10 years).

This term is the normal term for the [contract](#). The first term can differ. If there is a date in the Set All Next Pricing Cycle to Dates To field, the first term is shorter than the standard term you enter in this field.

### **Line 2 Rental Charge - Freq (Mths)**

This field displays the frequency of invoicing expressed in months. You can enter any value from 0 to the maximum number in the term, as long as it is equally divisible into the term.

For example:

1 - Monthly

3 - Quarterly

12 - Annual invoicing in a 12-month term

### **Line 2 Rental Charge - Adv/Visit/Arr**

This is advance, [visit](#) or arrears billing. It defaults to the value in the Invoice Schedule field on the [contract type](#).

Enter one of the following:

0 - To invoice in advance

The release date is the start of the [invoice period](#). The invoice for each [invoice term](#) is issued before the [term](#) starts.

2 - To invoice in arrears

The release date is the end of the invoice period. The invoice for each invoice term is issued after the term finishes.

### **Line 2 Rental Charge - Next Pricing Cycle From**

This field displays the date of the next pricing cycle. This is the date on which the next contract invoice term to be processed will start. The software maintains this field.

### **Line 2 Rental Charge - Next Pricing Cycle To**

This field displays the date on which the next [contract invoice term](#) to be processed will end. This date defaults to the Next Pricing Cycle From date plus the [billing term](#). You can override this when you first enter the contract.

The To date is the end of the contract term and can therefore cover one or more invoices, depending on the [invoice frequency](#) within the term.

Contract price increases during the term will not take effect until after the Next Pricing Cycle To date has been passed.

### **Line 3 Pre-billing Charge - Freq (Mths)**

This field displays the frequency of invoicing expressed in months. You can enter any value from 0 to the maximum number in the term, as long as it is divisible into the term.

For example:

- 1 - Monthly
- 3 - Quarterly
- 12 - Annual invoicing in a 12-month [term](#)

### **Line 3 Pre-billing Charge - Adv/Visit/Arr**

This is advance, [visit](#) or arrears billing. The initial value defaults to that set up on the [contract type](#).

Enter one of the following:

- 0 - If the invoice release date is the start of the [invoice period](#)
- 2 - If the invoice release date is the end of the invoice period

### **Line 3 Pre-Billing Charge - Next Pricing Cycle From**

This field displays the date of the next pricing cycle. This is the date on which the next contract invoice term to be processed will start. The software maintains this field.

### **Line 3 Pre-Billing Charge - Next Pricing Cycle To**

This field displays the date on which the next [contract invoice term](#) to be processed will end. This date defaults to the Next Pricing Cycle From date, plus the [billing term](#). You can change this when you first enter the [contract](#).

The To date is the end of the contract term and can therefore cover one or more invoices, depending on the [invoice frequency](#) within the term.

Contract price increases during the term will not take effect until after the Next Pricing Cycle To date has been passed.

### **Line 4 Interim Charge - Freq (Mths)**

Use interim pricing if you want to charge according to a meter estimate or actual reading returned by the user.

This field is the frequency of invoicing expressed in months. You can enter any value from 0 to the maximum number in the term, as long as it is divisible into the term.

For example:

- 1 - Monthly
- 3 - Quarterly
- 12 - Annual invoicing in a 12-month term

### **Line 4 Interim Charge - Next Pricing Cycle From**

This field displays the date of the next pricing cycle. This is the date on which the next contract invoice term to be processed will start. The software maintains this field.

**Line 4 Interim Charge - Next Pricing Cycle To**

This field displays the date on which the next [contract invoice term](#) to be processed will end. This date defaults to the Next Pricing Cycle From date, plus the [billing term](#). You can change this when you first enter the [contract](#).

The To date is the end of the contract [term](#) and can therefore cover one or more invoices, depending on the [invoice frequency](#) within the term.

Contract price increases during the term will not take effect until after the Next Pricing Cycle To date has been passed.

**Line 5 Reconciliation Charge - Term (Mths)**

You express this term in months. It defaults to 12; but you can enter any value from one to 120 (10 years).

Use reconciliation pricing if you want to charge according to an actual meter reading. You can apply additional meterage charges, or give credits for overcharges. The reconciliation term must be a multiple of the interim period.

The reconciliation term is the number of months after which the software will compare the number of machine cycles (for example, copies or vends) with the number of cycles which have already been billed. This billing could be invoicing in advance; or invoicing at an interim stage as a result of an estimated or customer advised meter reading.

This term is the normal term for the contract. The first term can differ. If there is a date in the Set All Next Pricing Cycle to Dates To field, the first term is shorter than the standard term you enter in this field.

**Line 5 Reconciliation Charge - Next Pricing Cycle From**

This field displays the date of the next pricing cycle. This is the date on which the next contract invoice term to be processed will start. The software maintains this field.

**Line 5 Reconciliation Charge - Next Pricing Cycle To**

This field displays the date on which the next contract invoice term to be processed will end. This date defaults to the Next Pricing Cycle From date, plus the billing term. You can change this when you first enter the contract.

The To date is the end of the contract term and can therefore cover one or more invoices, depending on the invoice frequency within the term.

Contract price increases during the term will not take effect until after the Next Pricing Cycle To date has been passed.

Press Enter or select **Update (F8)** to validate your entries.

If any of the Next Pricing Cycle To dates do not equal the start date of the next term plus the [normal invoice term](#), you will receive a warning message, which you can choose to ignore.

Select **Update (F8)** to update.

## Contract Header Maintenance Contract Conditions Pop-up

To display this pop-up, select **Conditions Maintenance (F18)** on the Contract Header Maintenance window.

If this is a header priced contract (that is, the Header Level Pricing field on the Contract Header Maintenance window is set to **1**), only the Cover Type, Eff Date, untitled currency and Fixed Service Charge fields are displayed.

If this is not a header priced contract (that is, the Header Level Pricing field on the Contract Header Maintenance window is set to **0**), use this pop-up to set up the defaults for the Contract Conditions pop-up for each individual piece of equipment you add to this contract.

### Fields

#### **Cover Type**

Enter a header level [cover type](#) as required.

#### **Eff Date**

This effectivity date defaults to the [contract](#) start date, but you can overwrite it with a later date (format DDMMYY).

#### **Fixed Service Charge**

Enter the value to be charged. The software will apply this charge either for the [term](#) of the contract, or for a month, depending on the setting of the Processing by Month or Term field on the System Parameters Maintenance Response window. Once you have decided on either month or term processing, you cannot change it.

Any charges you enter at header level will apply to all the equipment on the contract, unless you set up conditions at equipment level. If you ever amend the header details, you should also check the conditions for each machine, and amend them if necessary.

#### **Minimum Volume**

Enter the agreed minimum number of copies or vends which you will invoice each month.

You can only use this field if the Processing by Month or Term field on the System Parameters Maintenance Response window is set to Month.

The software will apply the minimum you entered at header level to all machine lines, unless you change the [contract conditions](#) for a particular line.

#### **Fixed Visit Charge**

Enter the value to be charged, for each [visit](#) made.

Any charges you enter at header level will apply to all the equipment on the contract, unless you set up conditions at equipment level. If you ever amend the header details, you should also check the conditions for each machine, and amend them if necessary.

#### **Copies in Rental**

Enter the number of copies per month that you want to include in the rental charge.

**Fixed Rental Charge**

Enter the value to be charged. The software will apply this charge either for the [term](#) of the [contract](#), or for a month, depending on the setting of the Processing by Month or Term field on the System Parameters Maintenance Response window. Once you have decided on either month or term processing, you cannot change it.

Any charges you enter at header level will apply to all the equipment on the contract, unless you set up conditions at equipment level. If you ever amend the header details, you should also check the conditions for each machine, and amend them if necessary.

**Free Copies**

Enter the number of free copies allowed on each monthly billing.

**Pre-billing Value/Volume**

The [contract type](#) determines whether this entry is for a monetary value or for a number of copies or vends.

Enter the value or quantity which has been agreed as the pre-determined monthly value or quantity for copies or vends.

You can only use this field if the Processing by Month or Term field on the System Parameters Maintenance Response window is set to Month. Once you have decided on either month or term processing, you cannot change it.

**Meter 1 - Band Volume To**

Enter a numeric value for the maximum number of copies to which the price for the band applies.

The volume for band 1 must not be less than the minimum volume.

**Meter 1 - Band Price per Copy**

Enter the price per copy to be charged up to the band maximum.

This per copy value is probably much smaller than the smallest unit of your currency. To save your input staff typing several zeroes after the decimal point, they can enter a much larger number there, and you can convert it to your currency using the Copy Price Conversion Factor (Pence to Pound) field on the System Parameters Maintenance Meterage window in the System Parameters File [task](#).

For example, if you enter a factor of 100, the software moves the decimal point two points to the left. Your input staff can type the notional value of 0.25 per copy, and this becomes 0.0025 in the real currency.

We recommend that you test the factor before using it in a [multi-currency](#) environment.

**Meter 2 - Band Volume To**

Enter the maximum number of copies to which the price for the band applies.

**Meter 2 - Band Price per Copy**

Enter the price per copy to be charged up to the band maximum.

This per copy value is probably much smaller than the smallest unit of your currency. To save your input staff typing several zeroes after the decimal point, they can enter a much larger number there, and you can convert it to your currency using the Copy Price Conversion Factor (Pence to Pound) field on the System Parameters Maintenance Meterage window in the System Parameters File [task](#).

For example, if you enter a factor of 100, the software moves the decimal point two points to the left. Your input staff can type the notional value of 0.25 per copy, and this becomes 0.0025 in the real currency.

We recommend that you test the factor before using it in a [multi-currency](#) environment.

## **Functions**

### **Add (F10)**

The charges you enter for this [contract](#) are effective from the date shown in the Eff Date field. If you select **Add (F10)**, the date in this field changes to the current system date and the charges fields are all blanked out. You can now enter new charges, which will be effective from the new date.

You can change the effectivity date from the current date to the date you require, as long as the date is within the life of the contract.

**Note:** Only the [contract conditions](#) that you have selected for this [contract type](#) will be displayed.

Use Page Up and Page Down to display more windows of differently dated contract conditions.

## Contract Billing History Window

To display this window, select **Invoice Enquiry (F23)** on the Contract Header Maintenance window.

This window displays the [contract](#) header details and lists the invoices sent.

## **Fields**

The fields display the total revenue for the contract, with invoice details.

## **Functions**

### **Base Currency/Prime Currency (F14)**

Use this to toggle between displaying values in base currency and prime currency.

Select **Previous (F12)** to return to the previous window.

## Contract Equipment Maintenance Detail Window

To display this window, select **Update (F8)** on the Contract Header Maintenance window, once that window is completed.

Alternatively, select an existing [contract](#) and then press Enter on the Contract Selection window.

**Note:** *If you displayed this window by selecting an existing contract on the selection window, if you select **Previous (F12)** you are not taken back to the selection window, but to the Contract Header Maintenance window.*

Use this window to specify the machines you want covered by this contract. The top half of the window displays the machines already selected. You use the lower half to make your selection.

You list machines for selection by entering the relevant customer and site and pressing Enter. All the machines for that site are then listed, and you can select as many as you want. Any machines in the list that are highlighted are already included in a pending or active contract.

### Fields

#### **Position to Serial Number**

Enter a valid [serial number](#) of up to 15 alphanumeric characters.

If there are more machines on the [contract](#) than can be displayed on the window, entry of a known serial number for the contract will enable the cursor to be positioned quickly on that machine for selection.

#### **Select (Untitled)**

This window is divided into two; the upper half lists machines selected to be on the contract, and the lower half lists those machines available for selection. Both halves have Selection fields.

The Selection field in the lower half of the window only accepts **1**, and selects a machine to be added to the upper half of the window.

The Selection field in the upper half of the window accepts the following options:

0 - Calendar Code

This displays a pop-up in which you enter the calendar you want to attach to this machine.

2 - Conditions

This displays the [Contract Conditions](#) pop-up so you can enter the charges you want to apply to the machine. If you are not using header level pricing, these charges will override the contract header conditions. If you are using header level pricing, the software will ignore anything you enter in this field.

3 - Peripherals

This displays the Contract Equipment Peripherals window. This shows the peripherals attached to the machine, and allows you to enter additional charges for the peripheral.

4 - To invoice History



This displays the invoice history on the Contract Line Billing History window.

#### 5 - Meter History

This displays all previous meter readings from all sources for the machine, on the Meter Reading History window.

#### 6 - Statistics

This displays the Meter Statistics window, which shows the average number of copies or vends, and the total usage, where meterage is used.

#### 7 - Visits

This displays the service [visits](#) scheduled for the machine on the Scheduled Visits Maintenance window. You can make amendments if you need to. You can also add visits, but beware if the [contract](#) has already been priced or invoiced. If you have already run the Load Planned Maintenance [Jobs task](#) for the other visits on the contract, run it again to convert these added visits.

#### 8 - Generate Visits

You use this to generate visits for the machine if the Automatically Generate Service Visits field is set to **0** on the [Contract Type](#) Maintenance window. The Service Visit Profile Selection pop-up is displayed, where you select the service visit profile you want to use for this machine.

This option generates a schedule of planned visits by period for the machine. The software does this by applying the [scheduled visit profile](#) (SVP) hierarchy to generate visits using the first scheduled visit profile found:

- 1 Use the scheduled visit profile on the contract header.
- 2 If there is none, use the model's scheduled visit profile.
- 3 If there is none, use the model group's scheduled visit profile.
- 4 If there is none, use the company profile's scheduled visit profile.
- 5 If there is none, no visits will be generated.

**Note:** Make sure the Daily Calendar file is set up far enough ahead to handle the visits to be generated; otherwise, the last field will continue to display Vst - 0.

#### 9 - To delete

This displays the Delete Record pop-up, where you enter a date and a cancellation reason code to remove the equipment line from the [contract](#). You set up cancellation reason codes under type CCRC in the Codes/Parameter File [task](#).

#### Loc

This field displays the [site](#) address for the selected machine.

#### Model

This field displays the [model](#) of the selected machine.

**Serial**

This field displays the [serial number](#) for the selected machine.

**Stat**

This field displays the status of the selected machine line.

**Inc Dt**

This field displays the inclusion date and defaults to the contract start date, but you can change this.

The machine line will remain with a status of pending until the inclusion date is reached and you update the contract, either by running the Contract Updating [task](#) or the Day End Routines task.

**Remov Dt**

Enter the date on which the machine is to be removed from the contract. The software will delete outstanding [visits](#).

The expiry of the machine from the contract will occur when you update the contract, either by running the Contract Updating task or the Day End Routines task. This will cancel all outstanding visits.

**Rsp Hrs**

Enter hours and minutes (format hhh:mm), to define the response time for this machine on the [contract](#).

The machine's response time overrides the contract header response time, and the software uses it at [call](#) logging to calculate the target time for the call.

**Vst**

This field is system-maintained.

One of the following is displayed:

- 0 - If no visits have been generated for this machine.
- 1 - Scheduled visits exist for this machine.

**Select by Account No?**

Enter a customer account, and a corresponding address in the Addr field, and then press Enter to display all equipment at that [site](#).

Equipment already on a [contract](#) is displayed with the [model](#) and [serial number](#) highlighted. If you add this equipment to another contract, it will appear on an error report when you run the Contract Updating [task](#), and its status on the new or active contract will remain pending. You must resolve such duplication issues, because a machine can only be active on one contract at any one time.

**Addr**

Enter a customer account in the Select by Account No? field and a corresponding address in this field and then press Enter to display all equipment at the [site](#).

Equipment already on a [contract](#) is displayed with the [model](#) and [serial number](#) highlighted. If you add this equipment to another contract, it will appear on an error report when you run the Contract Updating [task](#), and its status on the new or active contract will remain pending. You must resolve such duplication issues, because a machine can only be active on one contract at any one time.

### **Model**

To display a list of all equipment for a model for a particular site within the customer account, customer and site, and enter a valid model in this field.

### **Select (Untitled)**

This window is divided into two, the upper half lists machines selected to be on the contract, and the lower half lists those machines available for selection. Both halves have Selection fields.

Enter **1** in the lower Selection field against a machine to add it to the contract. Machines which are already on a contract (this is indicated by highlighting) can be added to a new contract, but can only be Active on one contract at a time. They will be Pending on any other contracts.

When you add a machine, the software will automatically display the Service [Visit](#) Profile Selection pop-up, where you select the [scheduled visit profile](#) for the piece of equipment.

If you have not already completed it, the [Contract Conditions](#) pop-up is then displayed for acceptance or amendment and update. If header level pricing applies to the contract, the header price is attached to the first machine added to the contract; the machine is always displayed first on the list of equipment. For this reason, a dummy machine may be added for use with header pricing.

## **Functions**

### **Previous (F12)**

If you selected an existing contract on the selection window(s), the Contract Equipment Maintenance Detail window is displayed immediately. If you select **Previous (F12)** you are not taken back to the selection window, but to the Contract Header Maintenance window.

### **Text (F21)**

Use this to update existing text, or enter new text.

### **More Options (F23)**

Not all of the functions available can be listed at once. Use this to display more functions.

Once you have added the equipment and it is displayed on the top half of the window, you can enter a number from 2 to 9 against it in the Selection field on lines 8-13.

## **Contract Conditions Pop-up**

To display this pop-up, enter 2 against a piece of equipment on the Contract Equipment Maintenance Detail window. This equipment must already have been added to the [contract](#).

The software displays this pop-up automatically when you add a piece of equipment to a non-meterage [contract](#).

This pop-up will default to display the conditions you set up using **Conditions Maintenance (F18)** at header level, if you did select that function.

**Caution:** Any subsequent changes you make to the Conditions Maintenance (F18) default details will not be carried through to the existing equipment conditions. This means that if you make changes there, you should also select option 2 to check the conditions for each machine, and amend them if necessary.

## **Fields**

### **Cover Type**

Enter the relevant [cover type](#).

### **Eff Date**

This field defaults to the [contract](#) start date, but you can overwrite this with a later date (format DDMMYY).

### **Untitled**

This field displays the customer's currency.

### **Fixed Service Charge**

Enter the value to be charged for fixed service for this piece of equipment.

The software will apply this charge either for the [term](#) of the contract, or for a month, depending on the setting of the Processing by Month or Term field on the System Parameters Maintenance Response window. You cannot change this setting once you start processing on your software.

If you set up a header charge in the Billing Parameters pop-up, it is displayed for change or acceptance.

If you enter **0**, the equipment will be priced at zero.

If you leave this value **blank** and then press Enter, the appropriate charge for the [division](#), model group, model sub-group and [model](#) for the contract type and term is retrieved from the contract rate for the specified currency.

If header level pricing applies to the contract, any fixed service charge you enter in this field is ignored. Entries would be for memo purposes only, and the sum of them all is shown in the Total Contract Value field on the header window.

### **Minimum Volume**

Enter the agreed minimum number of copies or vends which will be invoiced each month.

You can only use this field if you have set the Processing by Month or Term field to Month on the System Parameters Maintenance Response window. You cannot change this setting once you start processing on your software.

Minima entered at machine level will override those defaulted from the [contract](#) header conditions.

### **Fixed Visit Charge**

Enter the value you want to charge for each service [visit](#) to the machine.

The software will apply this charge, per visit, for the [term](#) of the contract, or for a month, depending on the setting of the Processing by Month or Term on the System Parameters Maintenance Response window. You cannot change this setting once you start processing on your software.

For contracts billed in advance or in arrears, the software multiplies the fixed visit charge by the number of visits in the term.

For visit type contracts, which are invoiced after each visit, the [job](#) invoice includes the fixed visit charge. This happens once the engineer has completed a [technical report](#) for the planned service [call](#).

If you set up a visit charge in the Contract Header Conditions pop-up, it is displayed for change or acceptance.

If you enter a value of **0**, the visit will be priced at zero.

If you leave the value **blank** and then press Enter, the software will retrieve the appropriate charge for the [division](#), model group, [model](#) sub-group and model for the [contract type](#) and term from the contract rates file for the specified currency.

### **Copies in Rental**

Enter a numeric value for the number of copies per month which are to be included in the rental charge.

### **Fixed Rental Charge**

Enter the value to be charged for rental.

This value will be applied for the term of the contract, or for a month, depending on the setting of the Processing by Month or Term on the System Parameters Maintenance Response window. You cannot change this setting once you start processing on your software.

If you set up a charge in the Contract Header Conditions pop-up, it is displayed for change or acceptance.

If you enter a value of **0**, the visit will be priced at zero.

If you leave the value **blank** and then press Enter, the software will retrieve the appropriate charge for the division, model group, model sub-group and model for the contract type and term from the contract rates file for the specified currency.

### **Free Copies**

Enter the number of free copies or vends allowed on each monthly billing.

### **Pre-billing Value/Volume**

The [contract type](#) determines whether this entry is for a monetary value or for a number of copies or vends.

Enter the value or quantity which has been agreed as the pre-determined monthly value or quantity for copies or vends.

You can only use this field if the Processing by Month or Term field on the System Parameters Maintenance Response window is set to Month. Once you have decided on either month or [term](#) processing, you cannot change it.

**Meter 1 - Band Volume To**

Enter the maximum number of copies to which the price for the band applies.

The volume for band 1 must not be less than the minimum volume.

Copy bands you enter for the machine line override the values that default in from the [contract](#) header conditions.

**Band Price per Copy**

Enter the price per copy you want to charge up to the band maximum.

For pooled contracts, you can only define copy charges on the contract header conditions. All machines must use the same copy price.

For pooled contracts, you can only define copy charges on the contract header conditions. All machines must use the same copy price.

This per copy value is probably much smaller than the smallest unit of your currency. To save your input staff typing several zeroes after the decimal point, they can enter a much larger number there, and you can convert it to your currency using the Copy Price Conversion Factor (Pence to Pound) field on the System Parameters Maintenance Meterage window in the System Parameters File [task](#).

For example, if you enter a factor of 100, the software moves the decimal point two points to the left. Your input staff can enter the notional value of 0.25 per copy, and this becomes 0.0025 in the real currency.

We recommend that you test the factor before using it in a [multi-currency](#) environment.

**Meter 2 - Band Volume To**

Enter the maximum number of copies to which the price for the band applies.

Copy bands you enter for the machine line override the values that default in from the contract header conditions.

**Meter 2 - Band Price per Copy**

Enter the price per copy to be charged up to the band maximum.

For pooled contracts, you can only define copy charges on the contract header conditions. All machines must use the same copy price.

For pooled contracts, you can only define copy charges on the [contract](#) header conditions. All machines must use the same copy price.

This Per Copy value is probably much smaller than the smallest unit of your currency. To save your input staff typing several zeroes after the decimal point, they can enter a much larger number there, and you can convert it to your currency using the Copy Price Conversion Factor (Pence to Pound) field on the System Parameters Maintenance Meterage window in the System Parameters File [task](#).

For example, if you enter a factor of 100, the software moves the decimal point two points to the left. Your input staff can enter the notional value of 0.25 per copy, and this becomes 0.0025 in the real currency.

We recommend that you test the factor before using it in a [multi-currency](#) environment.

## **Functions**

### **Add (F10)**

The conditions you enter for this contract are effective from the date shown in the Eff Date field. If you select **Add (F10)**, the date in this field changes to the current system date (this will normally be today's date), and the charges fields are all blanked out. You can now enter new charges, which will be effective from the new date.

You can change the effectivity date from the current date to the date you require, as long as the date is within the life of the contract.

Use Page Up and Page Down to display further windows of differently dated [contract conditions](#).

**Note:** *Only those contract conditions that you selected for this contract type will be displayed.*

Select **Update (F8)** to update. If this [contract type](#) was set up with the Automatically Generate Service Schedule field set to 1, you will be able to select a [scheduled visit profile](#) for the new piece of equipment before the update takes place.

## Service Visit Profile Selection Pop-up

This pop-up is displayed when you add a new machine to a non-meterage [contract](#), and the contract type has the Automatically Generate Service Schedule field set on the Contract Type Maintenance window. It is displayed after the [Contract Conditions](#) pop-up is completed.

This pop-up is also displayed if the [contract type](#) has the Automatically Generate Service Schedule field set off on the Contract Type Maintenance window, and you enter 8 against the machine on the Contract Equipment Maintenance Detail window.

Use this pop-up to specify the [scheduled visit profile](#) you want for the machine on this contract.

## **Fields**

### **Service Visit Profile**

Enter the [scheduled visit profile](#) you want to apply to the machine. You can change the default, which the software finds by going through the hierarchy of scheduled visit profiles.

Select **Update (F8)** to update and return to the Contract Equipment Maintenance Detail window.

## Contract Equipment Peripherals Window

To display this window, enter 3 against a piece of equipment on the Contract Equipment Maintenance Detail window.

This window lists all the peripherals attached to the piece of equipment you selected.

### Fields

#### **Select (Sel)**

If you want to enter additional charges to be applied to the peripheral, enter 1 to see the Peripheral Conditions pop-up.

#### **Date Removed**

Enter the date you want to remove the peripheral from the [contract](#).

The equipment will be removed from the contract during contract updating, which is run as part of the Day End Routines [task](#) on the removal date.

Select a particular peripheral to see the Peripheral Conditions pop-up.

## Peripheral Conditions Pop-up

To display this pop-up, enter 1 against a peripheral on the Contract Equipment Peripherals window.

### Fields

#### **Effective Date**

This effectivity date for the price list, for the additional peripheral charges, defaults to the [contract](#) start date. You can change this date (format DDMMYY).

#### **Service Charge**

Enter the additional service charge for the peripheral. This charge will be added to the charge for the main machine according to the pricing rules applied to that machine when you invoice the contract.

#### **Rental Charge**

Enter the additional rental charge for the peripheral. This charge will be added to the charge for the main machine according to the pricing rules applied to that machine when you invoice the contract.

#### **Additional Min**

The additional volume you enter in this field for the peripheral is added to the minimum for the main machine when calculating copy or vending charges.

This field is only displayed if the main machine is a meterage machine.



### **Addit Copy Cost**

The additional price per copy that you enter in this field is added to the price per copy of the main machine, to calculate the total copy price to be invoiced.

This field is only displayed if the main machine is a meterage machine.

**Note:** Only those peripheral conditions selected for this [contract type](#) will be displayed.

### **Functions**

#### **Add (F10)**

The peripheral conditions you enter for this [contract](#) are effective from the date shown in the Eff Date field. If you select **Add (F10)**, the date in this field changes to the current system date and the charges fields are all blanked out. You can now enter new charges, which will be effective from the new date.

You can change the effectivity date from the current date to the date you require, as long as the date is within the life of the contract.

Select **Update (F8)** to update and leave the pop-up.

## Contract Line Billing History Window

To display this window, enter 4 against a piece of equipment on the Contract Equipment Maintenance Detail window.

This window displays the invoice history of the [contract](#) and machine.

### **Fields**

The window displays the details of the equipment line you selected.

### **Functions**

#### **Prime/Base Currency (F14)**

Use this to toggle between prime and base currency details.

Select **Previous (F12)** to return to the Contract Equipment Maintenance Detail window.

## Meter Reading History Window

To display this window, enter 5 against a piece of equipment on the Contract Equipment Maintenance Detail window.

This window displays the history of meter readings for the [contract](#) and machine.

### **Fields**

The window displays the details of the equipment line you selected.

Select **Previous (F12)** to return to the Contract Equipment Maintenance Detail window.

## Meter Statistics Window

To display this window, enter 6 against a piece of equipment on the Contract Equipment Maintenance Detail window.

This window displays various meterage statistics for the machine.

### **Fields**

The window displays the details of the equipment line you selected.

Select **Previous (F12)** to return to the Contract Equipment Maintenance Detail window.

## Scheduled Visits Maintenance Window

To display this window, enter 7 against a piece of equipment on the Contract Equipment Maintenance Detail window.

If option 8 (Generate Visits) has already been selected, the window will display the [visits](#) set up for the particular equipment record.

Use this window to amend or delete existing visits, or to add further visits.

**Note:** *You must take care if you add new visits after pricing or invoicing the [contract](#). You will have to charge for the new visit(s) separately on a [job](#) invoice. If you have already run the Load Planned Maintenance Jobs [task](#), the new visit(s) will only be converted to jobs when you run it again.*

### **Fields**

#### **Select (n)**

Enter one of the following:

1 - To select the line for amendment

The software re-displays the line in the fields in the lower half of the window, where you can make changes.

4 - To delete the line

The software marks the line as deleted; and will remove it after you update. If you want to remove the machine from the [contract](#), you just have to enter the Equipment Maintenance window Remov Dt field. When you run the Day End Routines [task](#) on this date, the software deletes the records, including the [visit](#) records.

**Note:** *Once you have run the Load Planned Maintenance Jobs task, and have created the jobs, you cannot delete visit lines.*

To add a [visit](#), complete this and the next six fields.

If you want to amend or delete an existing visit, enter **1** or **4** against it, and that visit's details are displayed on the lower fields.

### **Service Period**

Enter the [service period](#) in which the visit is scheduled. It must be a valid period entered in YYPP format and must fall between the [contract](#) start and end dates.

### **Number of Visits**

Enter the number of scheduled visits to be made to the piece of equipment within this service period.

This must be greater than 0.

### **Job Category**

Enter the type of [job](#) to be done on this scheduled visit. This must be an existing job category.

### **Estimated Hours**

Enter the number of hours you think it will take to carry out the scheduled job. Enter up to five numeric characters, in the format hhh:mm.

### **Total Visits**

Enter the total number of scheduled [visits](#) to be made to this piece of equipment during the [contract term](#). This must be greater than zero.

### **Use These Visits on Renewal**

Enter one of the following:

0 - If, when the contract is renewed, you want visits to be generated according to the contract header [scheduled visit profile](#)

1 - If, when you create a [contract](#), the scheduled visit profile is defaulted in, and you can generate the visits

Once the visits have been generated, select the equipment line with **7** to modify or delete the visits. If you want these revised visits to be used when the contract is renewed, enter **1** in this field. There is another reason to use this setting: On a contract with several lines of equipment you can apply a different schedule to each line. You can do this in two ways, either by using [cover types](#), or by selecting each equipment line with **8** and typing the scheduled visit profile you want to apply. If you do this the second way, and you want these visits used at contract renewal, enter **1** in this field.

### **Start Next Profile Load From (YYPP)**

Enter the period from which you want the next profile load to start. This must either be a valid [service period](#) in YYPP format, or 9999.

You cannot set this field to a period less than the current period.

You can enter this manually, or you can leave it to be updated by the software, which refers to the last scheduled [visit](#) generated.

### **Functions**

#### **Text (F21)**

Use this to enter or update text.

Select **Update (F8)** to save changes you have made.

## Delete Record Pop-up

To display this pop-up, enter 9 on the Contract Equipment Maintenance Detail window once equipment has been added to a [contract](#).

If you want to delete a piece of equipment from a contract, you must first enter the date and a cancellation reason code.

### **Fields**

#### **Removal Date**

You must enter the date (format DDMMYY) on which you want the removal to take place.

#### **Cancel Reas Code**

You must enter a valid reason code for the removal.

You set the codes up under type CCRC in the Codes/Parameter File [task](#).

#### **Inclusion Date**

This field displays the date on which this piece of equipment was included on the [contract](#).

#### **Response Hours**

This field displays the number of response hours for this piece of equipment. If no response time is on the equipment line, the software will use the response time from the [contract](#) header.

Select **Delete (F11)** to perform the deletion. The machine is removed from the contract.

## Contract Type [2/SSC]

Use this task to maintain the details of your contract types.

A [contract type](#) defines a type of [contract](#). Each contract type holds the duration of the contract, any guaranteed response hours, the invoice schedule (in advance, in arrears, or on completion of each scheduled maintenance [visit](#)) and whether a [quotation](#) or contract is generated at renewal time.

It also specifies whether service charges, rental charges or various meterage conditions will apply.

Contract types define the different types of [service contract](#) you offer your customers, so you might set up gold and silver contract types for these different types of contract.

The contract type:

- Provides default data (contract duration, invoice schedule, invoice at start date flag) for the contract. These can be changed once you start to maintain the contract itself.
- Provides call escalation monitoring, using the guaranteed response time to calculate the target arrival time for the engineer.

All the contracts you set up must have a user-defined contract type. The software uses a default contract type of \*NO for work on equipment not covered by a service contract.

A contract is defined by its contract number, contract type and start date.

You must set up at least one contract type before you can create any contracts. You cannot delete a contract type once you have used it with a contract.

## Contract Type Maintenance Initial Window

To display this window, select the Contract Type task.

Use this window to select the [contract type](#) you want to maintain, or enter the code to set up a new contract type.

### **Fields**

#### **Contract Type**

Enter a new or existing contract type.

If the type exists, it will be displayed for update; otherwise a new contract type can be added.

One contract type with the code \*NO must be set up, with a fixed service charge, for [visit](#)-only contracts. These are not invoiced or priced by the contract [tasks](#), only in [job](#) pricing and invoicing.

Press Enter to display the Contract Type Maintenance window.

## Contract Type Maintenance Window

To display this window, select your [contract type](#) and then press Enter on the Contract Type Maintenance Initial window.

Use this window to specify all the parameters that make up the contract type.

### **Fields**

#### **Contract Type Description**

Enter a description of up to 20 alphanumeric characters, to identify the type of [contract](#).

### **Automatically Generate Service Schedule**

Enter one of the following:

- 0 - If you will not be able to select a [scheduled visit profile](#) when adding equipment to contracts which have this contract type
- 1 - If, when you add a piece of equipment to a contract of this contract type, a pop-up will enable you to select a scheduled visit profile

### **Quotation Required on Renewal**

Enter one of the following:

- 0 - If this type of contract will renew as a pending contract
- 1 - If this type of contract will renew as a [quotation](#)

### **Use Contract Start Date Rates**

Enter one of the following:

- 0 - If labour rates and parts prices used in [job](#) pricing, for any jobs on equipment covered by this [contract](#), will be those effective on the date of the [call](#) out, or the date of the engineer's [visit](#)
- 1 - If labour rates and parts prices used in job pricing, for any jobs on equipment covered by this contract, will be those effective at the contract start date

### **Response Hours Guarantee**

This field displays the normal response time guaranteed for equipment covered by this type of contract.

The software uses this value when calculating job escalation.

### **Contract Duration (Months)**

This field displays the standard [contract](#) duration, used to calculate contract [termination](#). Set this duration to zero (blank) to indicate a contract which runs indefinitely. The field works in calendar months, not periods.

### **Termination Notice in Days**

Enter the default number of penalty days the software will use to calculate the credit owed when a customer cancels a contract.

For example, if you wish to charge a customer for 10 days' cover when they ask to cancel a contract, enter **10**.

### **Invoice Schedule**

Enter one of the following:

- 0 - To invoice in advance
- 1 - To invoice after each scheduled [visit](#)
- 2 - To invoice in arrears

The invoice cannot be printed until after the end of any instalment period.

**Calendar Code**

If you want to attach a calendar to this [contract type](#), enter it in this field.

**Fixed Service Charge**

Enter one of the following:

0 - If you cannot apply fixed service charges to this contract type

1 - If you can apply fixed service charges to this contract type

The input fields for these charges are displayed on the [Contract Conditions](#) window.

**Interim Charges**

Enter one of the following:

0 - If you cannot apply interim charges to this contract type

1 - If you can apply interim charges to this contract type

The input fields for these charge cycles are displayed on the Contract Conditions pop-up.

Interim charges allow for actual or estimated copies in excess of the minimum to be invoiced periodically.

**Fixed Rental Charge**

Enter one of the following:

0 - If you cannot apply fixed rental charges to this contract type

1 - If you can apply fixed rental charges to this contract type

The input fields for these charges are displayed on the Contract Conditions pop-up.

**Reconciliation Charges**

Enter one of the following:

0 - If you cannot apply reconciliation charges to the [contract type](#)

1 - If you can apply reconciliation charges to the contract type

The input fields for these charge cycles will be displayed on the [Contract Conditions](#) pop-up.

Reconciliation charges mean that at the end of the period you can invoice actual copies in excess of the minimum, or credit excess estimated copies which have been invoiced.

**Fixed Visit Charge**

Enter one of the following:

0 - If you cannot apply fixed [visit](#) charges to this contract type

1 - If you can apply fixed visit charges to this contract type

The input fields for these charges will be displayed on the Contract Conditions pop-up.

### **Copies in Rental**

Enter one of the following:

- 0 - If no copies are to be included in the rental charge
- 1 - If you can enter the number of copies per month which are included in the rental charge

The input field for this allowance will be displayed on the Contract Conditions pop-up.

### **Minimum Volume**

Enter one of the following:

- 0 - If you cannot apply minimum copy volumes to this contract type
- 1 - If you can apply minimum copy volumes to this contract type

The input fields for these copies will be displayed on the Contract Conditions pop-up.

### **Copy Charges 1**

Enter one of the following:

- 0 - If you cannot apply copy charge bands to this contract type
- 1 - If you can apply copy charge bands to this contract type

The input fields for these copy bands are displayed on the Contract Conditions pop-up.

### **Pre-billing Value**

Enter one of the following:

- 0 - If you cannot apply a pre-determined value to this contract type
- 1 - If you can apply a pre-determined value to this contract type

The input fields for this value are displayed on the Contract Conditions pop-up.

### **Copy Charges 2**

Enter one of the following:

- 0 - If you cannot apply copy charge bands to this [contract type](#)
- 1 - If you can apply copy charge bands to this contract type

The input fields for these copy bands are displayed on the Contract Conditions pop-up.

### **Pre-Billing Volume**

Enter one of the following:

- 0 - If you cannot apply a pre-determined volume to this contract type
- 1 - If you can apply a pre-determined volume to this contract type

The input fields for this volume are displayed on the Contract Conditions pop-up.

### **Free Copies**

Enter one of the following:



0 - If no free copies are allowed

1 - If the number of free copies specified in the [contract conditions](#) is allowed on each monthly billing

### Free Visits

This field is for future development.

Select **Update (F8)** to save any changes.

## Scheduled Visit Profile [3/SSC]

Use this maintenance [task](#) to maintain the schedule of planned maintenance [visits](#) for each visit profile.

A [scheduled visit profile](#) defines the number, type and frequency of scheduled maintenance visits. Each visit has an associated [job](#) category, to indicate the kind of work to be done, and the period in which it is scheduled to be carried out.

Once set up, a visit profile can be linked to the [company](#), to a [cover type](#), [model](#), or to an individual [contract](#), to define the schedule of visits at that level.

Although not essential to the system, visit profiles are used to save time in the Contracts task. When you need to define the service visit schedule for each piece of equipment on a contract, you can specify a visit profile instead, and this generates the schedule automatically.

You set up the scheduled visit profile description in the Codes/Parameter file under type VSTP.

## Scheduled Visit Profile Maintenance Selection Window

To display this window, select the Scheduled Visit Profile task.

### Fields

#### Enter Profile to be Maintained

Enter a valid [scheduled visit profile](#).

A scheduled visit profile is a recommended pattern of planned maintenance [visits](#) which can be applied at [contract](#), model, [model](#) group, or [company](#) level. The profile indicates both the [service periods](#) and [job](#) categories of the intended visits.

When you add a piece of equipment to a contract, you can then run the Load Planned Maintenance Jobs task, and this automatically generates the visits for the equipment, based on the pattern of the visit profile.

Press Enter to display the Scheduled Visit Profile Maintenance Detail window.

## Scheduled Visit Profile Maintenance Detail Window

To display this window, select the profile you want to maintain and then press Enter on the Scheduled Visit Profile Maintenance Selection window.

### Fields

#### **Profile**

Enter a description of up to 30 alphanumeric characters, for the [scheduled visit profile](#).

#### **Relative Period**

Enter the number of [service periods](#), after the period in which a [contract](#) starts, in which a scheduled service [visit](#) will be generated.

0 is valid, if you want the first visit to be made in the contract's start period.

The relative period used in this context is the service period relative to the period in which the contract's start date falls.

For example, let us suppose you are using a profile for three visits per annum, you have set up Service Management to use monthly service periods and you define the relative periods as 02, 06 and 10. For a contract which starts in period 07/08 (July 2008), the software would generate a schedule of three visits, in periods 09/08, 01/09 and 05/09.

#### **Job Category**

Enter an existing [job](#) category. This indicates the type of job that the engineer will perform during the planned maintenance visit.

If the contract covers several years and you wish to generate the same pattern of visits year after year, you do not have to enter these repeated visits.

Instead, enter all the visits for one year and enter the special job category of \*RP at the end (you do not have to enter any estimated hours for this, but it must have a relative period). This tells the software to generate visits as far ahead as the contract end date, or as the number of [service periods](#) to be loaded (as specified on the [company](#) profile), whichever is the sooner. So, even if you only enter one year's visits in this field, they will be generated for subsequent years automatically. This repeat cycle of visits will be generated using the existing visit profile, starting from the relative period entered against the \*RP code.

The Load Planned Maintenance Jobs [task](#) will, in fact, load any job category found here, not just a job category code set up as PM.

#### **Est Hours**

Enter up to five numeric characters (hhh:mm) for the estimated job duration.

This is a memo field, for future development.

### Functions

#### **Resequence (F7)**

Use this to re-sequence the relative periods numerically.

Select **Update (F8)** to save details.

## Enquire on Scheduled Visit Profile [13/SSC]

Use the [task](#) to enquire on existing profiles.

### Scheduled Visit Profile Enquiry Initial Window

To display this window, select the Enquire on Scheduled Visit Profile task.

#### **Fields**

##### **Enter Profile to Enquire On**

Enter a [scheduled visit profile](#).

A [visit](#) profile is a recommended pattern of planned maintenance visits which can be applied at [contract](#), model, [model](#) group, or [company](#) level. The profile indicates both the [service periods](#) and [job](#) categories of the intended visits.

Select a profile and then press Enter to display the Scheduled Visit Profile Enquiry Detail window.

### Scheduled Visit Profile Enquiry Detail Window

To display this window, select a profile and then press Enter on the Scheduled Visit Profile Enquiry Initial window.

#### **Fields**

##### **Relative Period**

This field displays the number of [service periods](#), after the period in which a [contract](#) starts, in which a scheduled service [visit](#) will be generated. The relative period 0 would indicate a visit in the period in which the contract started.

##### **Job Category**

The [job](#) category indicates the type of job which the engineer is going to do on the scheduled visit.

**Note:** If \*RP is displayed in the Job Category field, the software will generate a repeat cycle of visits, using the scheduled visit profile, starting from the relative period shown to the left of \*RP.

##### **Est Hours**

This is an estimate of how long this type of job normally takes.

Select **Exit (F3)** to leave the [task](#).

## Recommended Service Visits [4/SSC]

Use this [task](#) to maintain the [scheduled visit profile](#) which applies to each [model](#) group, by effectivity date.

This task defines the number, type and frequency of scheduled maintenance [visits](#) normally associated with a model group, by linking the model group with a scheduled visit profile. Additionally, there is an effective date which enables the same model group to be linked to different profiles for different time windows. The concept of scheduled visit profiles is explained in the Scheduled Visit Profile section.

The software uses the group's scheduled visit profile where there is no scheduled visit profile defined for the [contract](#) or the model. If the model group has no profile, the software uses the one defined in the [company](#) profile. If this is absent, the software does not generate visits.

## Recommended Visits Maintenance Initial Window

To display this window, select the Recommended Service Visits task.

### **Fields**

#### **Division Code**

Enter a valid [division](#). You set up divisions in the Division Code [task](#).

#### **Model Group Code**

Enter a valid [model](#) group. You set up model groups in the Model Group task.

Select a valid division and model group and then press Enter to display the Recommended Visits Maintenance Detail window.

## Recommended Visits Maintenance Detail Window

To display this window, select a valid [division](#) and [model](#) group and then press Enter on the Recommended Visits Maintenance Initial window.

### **Fields**

### Effective Date

Enter the date (format DDMMYY) on which the [scheduled visit profile](#) is to come into effect. You can use the effectivity dates to link one model group to different profiles for different time windows.

### Scheduled Visit Profile Code

Enter a valid scheduled visit profile.

The software will use the effective scheduled visit profile to generate scheduled service visits for each piece of this model group's equipment on the [contract](#). The software uses the following hierarchy to find the correct profile:

Use the scheduled visit profile on the contract header.

If there is none, use the model's scheduled visit profile.

If there is none, use the model group's scheduled visit profile.

If there is none, use the company profile's scheduled visit profile.

If there is none, no visits will be generated.

### Select (Untitled)

Enter **4** to delete the [scheduled visit profile](#).

Press Enter to update the data.

## Cover Type [5/SSC]

Use the maintenance [task](#) to set up and maintain [cover types](#).

A cover type works with the [job](#) category to specify whether a job is chargeable or not. Each job has both a cover type and a job category, and the software searches the cover type/job category matrix for the right combination of cover type and job category, which specifies whether a job is chargeable.

Each piece of equipment covered by a [contract](#) must be assigned a cover type. Different equipment on the same contract may have different cover types. The cover type controls both contract and job pricing, in different ways.

- If you are working with a job, when the system prices the job, it looks at the cover type and job category matrix to determine which job elements - labour, materials and so on - for which to charge. For non-contract equipment, a special cover type of \*NO is assumed, and used to access the same matrix.
- If you are working with a contract, the elements to charge for are already defined by the contract type, at contract level. However, the cover type is used, only when equipment is added to the contract, to retrieve default prices from a set of standard contract rates.

If you are working with either jobs or contracts, the system prevents you from creating a job for an invalid combination of cover type and job category; that is, one for which there are no details in the matrix.

You can attach a [scheduled visit profile](#) to a [cover type](#).

**Note:** You must set up a minimum of one cover type on the software and that is \*NO, meaning no contract.

## Cover Type Maintenance Selection Window

To display this window, select the Cover Type task.

### **Fields**

#### **Cover Type**

Enter a new or existing [cover type](#).

Press Enter to display the Cover Type Maintenance window.

## Cover Type Maintenance Window

To display this window, press Enter on the Cover Type Maintenance Selection window.

### **Fields**

#### **Untitled**

Enter the description of a new [cover type](#).

#### **Service Visit Profile**

Enter a [scheduled visit profile](#) for the cover type, if required.

Select **Update (F8)** to save the cover type and details.

## Enquire on Cover Type [15/SSC]

Use this [task](#) to enquire on existing [cover types](#).

## Cover Type Enquiry Selection window

To display this window, select the Enquire on Cover Type task.

### **Fields**

#### **Cover Type**

Enter a [cover type](#).

Press Enter to display the Cover Type Enquiry window.

## Cover Type Enquiry Window

To display this window, press Enter on the Cover Type Enquiry Selection window.

### **Fields**

#### **Untitled**

This field displays the description for the selected [cover type](#).

#### **Service Visit Profile**

This field displays the [scheduled visit profile](#) attached to the cover type.

Select **Exit (F3)** to leave the [task](#).

## Contract Rates [6/SSC]

Use this [task](#) to maintain the [term](#) contract rates for each combination of [model](#) group, sub-group, model and [contract type](#), by effectivity date and currency.

You can only use [contract](#) rates if you are using term processing. You cannot use them for monthly processing. You set this up in the Processing By Month Or Term field on the System Parameters Maintenance Response window.

The software uses contract rates to calculate the price for each piece of equipment on a contract. For each contract type and contract term, you can define the rates for each model group or sub-group or model.

Contract rates specify the charge per scheduled maintenance [visit](#) and/or a fixed charge for each piece of equipment covered by the contract type. Contract rates are held by effectivity dates; this means you can use different rates during different time windows. Contract rates are held for different currencies.

Contract rates are of three types:

- A visit charge, which is the price to be charged for each scheduled maintenance visit to a piece of equipment.
- A rental charge, which is the price to be charged for the equipment rental for the term.
- A service charge, which is the price to be charged for the piece of equipment's fixed service for the term.

You can set any of these rates to zero, and you can use one or more of these rates for the [contract](#) charge for a piece of equipment.

Once you have set up the rates, when you are maintaining a contract, setting up the conditions for the contract equipment, the software finds the contract rates data. If there is no contract rates data, you will have to enter a [special price](#), or zero, in the [Contract Conditions](#) pop-up.

**Note:** *If you are using monthly rather than [term](#) pricing, you must set the rate per month within the contract.*

## Contract Rates Maintenance Initial Window

To display this window, select the Contract Rates task.

### **Fields**

#### **Division**

Enter an existing [division](#). You set up divisions using the Division Code [task](#).

#### **Model Group**

Enter an existing [model](#) group. You set up model groups using the Model Group task.

Each model group can have [contract](#) rates attached, with effective dates.

The software will use the current rate when pricing contracts, to price a piece of equipment belonging to a particular model group.

#### **Term**

Enter the [billing term](#). Valid mandatory entries are from one to 120 calendar months; the default value is 12.

[Term](#) defines the price protection period for the contract, and the number of periods for which contract pricing will generate pending invoice and actual invoice records.

The contract rate selected for the contract header will be for the same term as that entered in the contract billing parameters.

#### **Currency Code**

Enter a valid currency.

#### **Based on Fields**

If you want to create a contract rate based on an existing one, enter the existing rate details in this field.

The software will set up the structure of the new rate based on the existing one, but you cannot amend the actual detail lines. If you need to change them you have to delete them and enter new ones.

This means that the based on facility is of limited use.

Press Enter to view the Contract Rates Maintenance window.



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## Contract Rates Maintenance Window

To display this window, select a valid [division](#) and [model](#) group and then press Enter on the Contract Rates Maintenance Initial window.

### **Fields**

#### **Model Sub-Group**

Enter a valid model sub-group or leave this field blank.

If you enter this, the [contract](#) rates will apply to all models belonging to this model sub-group, within the model group and division.

#### **Model**

Enter a valid model, or leave this field blank.

A model code is linked to model sub-group, model group and division. If you set up a contract rate at model level, at contract pricing, this rate will override any rates you set up at model sub-group or model group levels.

#### **Effective Date**

Enter the date (format DDMMYY) on which the contract rate becomes active. You cannot update the charges you enter if this field does not hold a valid date.

All existing contract rates for the new combination of model group, model sub-group and model that have earlier effective dates will be superseded.

#### **Cover Type**

Enter a valid [cover type](#).

The software will apply the specified service, rental or [visit](#) charge(s) to this cover type for the product combination selected at contract pricing.

#### **Currency Code**

This field displays the currency you selected on the previous window.

#### **Visit**

Enter the charge per visit made during the contract, if you selected [term](#) processing on the System Parameter Maintenance Response window.

If you have set up any charges in the [Contract Conditions](#) pop-up, they will override this [visit](#) charge.

The software calculates the price for a [contract](#) line by multiplying the charge per visit by the number of visits in the [term](#), and adding the rental and service charges for the term.

#### **Rental**

Enter the rental to be charged for the contract term, if term processing is set up on the System Parameter Maintenance Response window.

If you have set up any charges on the Contract Conditions pop-up, they will override this rental charge.

The software calculates the price for a contract line by multiplying the charge per visit by the number of visits in the term, and adding the rental and service charges for the term.

### **Service**

Enter the charge to be made for fixed service for the contract term, if term processing is set up on the System Parameters Maintenance Response window.

If you have set up any charges on the Contract Conditions pop-up, they will override this service charge.

The software calculates the price for a contract line by multiplying the charge per visit by the number of visits in the term, and adding the rental and service charges for the term.

### **Select (Untitled)**

Enter **4** to delete the contract rates for this combination of [model](#) group, model sub-group and model combination.

Press Enter to update.

## Enquire on Contracts [11/SSC]

Use this [task](#) to enquire on the details of [service contracts](#), and [quotations](#) for [contracts](#).

## Contract Enquiry Initial Window

To display this window, select the Enquire on Contracts task.

To select a contract for enquiry, you can use the contract number (and optionally, the [contract type](#)), or customer account (and optionally, the address code), or alpha search. Depending on the entries you make, you will see lists of customer [sites](#) or contracts matching the selection parameters, to allow further selection.

### **Fields**

#### **Contract Number**

Enter a valid contract number.

The contract number must exist already, if you do not enter the account number and address code.

If you enter only the contract number, the software displays a list of all contracts with this number in [contract type](#) and start date sequence.

#### **Contract Type Code**

If you know it, enter the contract type of the contract number you have entered.

If you only enter a contract number and contract type, the software displays a list of all contracts with this number and type, in start date sequence.

**Account Number**

Enter a valid customer.

If you enter the customer without an address code, the software displays a list of all address codes for this account.

If you do enter an address code, the software displays a list of all contracts with this account number and address code.

**Account Address Code**

If you know it, enter the address code of the customer you have entered.

If you only enter the account number and address code, the software displays a list of all of the contracts at that address, in contract number, contract type and start date sequence.

Select a valid contract to display the Contract Header Enquiry Detail window.

## Contract Header Enquiry Detail Window

To display this window, select a valid [contract](#) on the Contract Enquiry Initial window.

**Fields****Alt Cont No**

This field displays up to seven alphanumeric characters for an alternative contract number.

**Version**

This field displays up to five alphanumeric characters for the version number.

**Contract Type**

This field displays the [contract type](#).

**Status**

This field displays the contract header status. These codes are set up in the Codes/Parameter File [task](#), under type CHST.

The status may be:

P - Pending

Q - [Quotation](#)

A - Active

E - Expired

D - To deleted

### **Contract Start Date**

The contract will be made active by the Day End Routines task when this start date is reached.

### **Contract End Date**

The software calculates this date by adding the contract duration to the contract start date.

The contract will be expired by the Day End Routines task when its contract end date is reached.

If the contract duration is **0**, the software assumes that the contract is rolling, with an end date displayed as 99/99/99.

### **Invoice Start Date**

The software maintains this field, which displays the date on which the first invoice for the contract was raised.

### **Calendar Code**

If this [contract](#) is associated with a calendar, that calendar is displayed in this field.

### **Total Contract Value**

This field displays the total value of the fixed service charges, entered in the [Contract Conditions](#) pop-up of each contract equipment line. It is the annualised, or [term's](#), nominal value of the service elements of a contract, but is not used for invoicing.

No value can be displayed in advance of the contract start date; or of the effective date(s) for the equipment prices.

The total does not necessarily reflect the invoice value of the contract, if equipment is added or deleted during the course of the [billing term](#).

### **Header Price**

This field displays the header price to be invoiced for the contract, as entered on the Contract Header Maintenance Contract Conditions pop-up. This can be compared to the total contract value, the nominal price displayed from the total of the contract lines.

The field literals are only displayed if the Header Level Pricing field is set to **1** (Yes) on this window. The literals are not displayed if Header Level Pricing is set to **0** (No).

### **Contract Duration**

This field displays the contract duration in months up to a maximum of 120.

If the contract duration is **0**, the software assumes the contract is never-ending, or rolling, and gives it an end date of 99/99/99.

### **Mantle Code**

This field displays a user-defined mantle code of up to five alphanumeric characters, set up under type MANT in the Inventory Descriptions file.

The mantle code is used in the Global Price Update [task](#), to identify a group of contracts for a percentage price change.

**Customer Order Ref 1**

This field, and the Order Ref Date, are mandatory if the Customer Ref for Contracts field in the customer's additional service details is set to 1.

**Order Ref Date**

This field is mandatory if the Customer Ref for Contracts field in the customer's additional service details is set to 1.

**Customer Contact**

This field displays the name of the contact to whom enquiries relating to this contract should be addressed.

**Telephone No**

This field displays the telephone number of the contact to whom enquiries relating to this [contract](#) should be addressed.

**Renew Contract**

One of the following is displayed:

- 0 - If the software will not renew this contract
- 1 - If the software will renew this contract from the end date on the contract header

**Note:** This indicator has no effect if you set the contract end date to 99/99/99, because it is then a never-ending contract.

**Region**

This field displays the service region from the additional service details file for the [site](#).

**Non-Posting Invoices**

One of the following is displayed:

- 0 - If invoices are posted to Accounts Receivable and the General Ledger
- 1 - If the contract functions as normal, but invoices produced stay within Service Management and are not posted to Accounts Receivable and the General Ledger

**Header Level Pricing**

One of the following is displayed:

- 0 - If you did not enter a price on the Contract Header Maintenance Contract Conditions pop-up, the software uses the contract rate to price each of the contract equipment lines
- 0 - If you did enter a price in the Contract Header Maintenance Contract Conditions pop-up, the software defaults that price into the [Contract Conditions](#) pop-up for each piece of equipment added to the contract
- 1 - If the Contract Header Maintenance Contract Conditions pop-up requires a fixed service charge before you can update the contract header

The [contract](#) is priced based on the value in the Contract Header Maintenance Contract Conditions pop-up.

**Note:** *If this is set to 1 (Yes), any prices you enter into contract equipment conditions pop-ups will be ignored by the software. They can only be used for comparison purposes, as their total is displayed on the Total Contract Value field.*

### **Estimates Allowed**

One of the following is displayed:

- 0 - If you do not want to produce invoices based on estimated meter readings
- 1 - If you want to produce invoices based on estimated meter readings

### **Pool Contracts**

This is only valid for [contracts](#) which have meterage billing parameters defined on their [contract type](#).

One of the following is displayed:

- 0 - If non-pooled contracts are assessed for invoicing on the basis of the individual machine  
If the number of copies or vends is less than minimum, minimum is charged; if the number of copies exceed the minimum, the additional copies or vends are charged.
- 1 - If pooled contracts are assessed for invoicing on the basis of the aggregated minima of all the machines on the contract  
Machines which have an excess of copies or vends can offset the total excess against those machines which have actual usage which is less than the minimum.

### **Salesman Code**

This field displays the salesman from the customer account. You set up salesman codes under parameter type SN in the Inventory Descriptions file.

The field is used for memo purposes only.

### **Invoice Summ/Det Form**

This field is for future use.

### **Invoice Destination**

This field displays the customer and address.

The narrative address is retrieved for printing on all invoices and credit notes for the [contract](#).

### **Direct Debit**

This field is for future development.

### **Contract Inv Bill To**

Contract invoices are sent to this customer.

**Untitled (Contract Invoice Bill Address)**

Contract invoices are sent to this address.

**Header Currency**

One of the following is displayed:

0 - If you invoice the equipment on the contract in the currency of the [site](#) where the equipment is installed

1 - If you invoice all equipment on the contract in the currency of the account header

**Note:** Some of the fields on the header window are only displayed if you have selected that particular function on the [contract type](#).

**Job Invoice Bill To**

The software will send [job](#) invoices to this customer.

**Untitled (Job Invoice Bill Address)**

The software will send job invoices to this address.

**Functions****Detail (F8)**

Use this to display the detail of the contract's equipment lines on the Contract Equipment Enquiry Detail window.

**Service (F14)**

Use this to display the Service Parameters pop-up, in enquiry format (you cannot update the information).

**Billing Enquiry (F16)**

Use this to display the Billing Parameters pop-up, in enquiry format (you cannot update the information).

**Conditions Enq (F18)**

Use this to display the [Contract Conditions](#) pop-up, in enquiry format (you cannot update the information).

**Text (F21)**

Use this to display any text associated with this [contract](#).

**Invoice Enquiry (F23)**

Use this to display the Contract Billing History window in enquiry format (you cannot update the information).

Select **Detail (F8)** to display the Contract Equipment Enquiry Detail window.

## Service Parameters Pop-up

To display this pop-up, select **Service (F14)** on the Contract Header Enquiry Detail window.

### **Fields**

#### **Response Hours**

This field displays the response time for the [contract](#); it applies to all contract lines, unless a line is given its own special response time.

#### **Schedule Visit Profile**

The [scheduled visit profile](#) generates the [visits](#) to each piece of equipment on a contract. The software selects the scheduled visit profile according to the following hierarchy:

- 1 Use the scheduled visit profile on the contract header.
- 2 If there is none, use the model's scheduled visit profile.
- 3 If there is none, use the model group's scheduled visit profile.
- 4 If there is none, use the company profile's scheduled visit profile.
- 5 If there is none, no visits will be generated.

If you have edited a scheduled visit profile on a contract, the software displays the profile code as \*OV. This indicates that a standard profile has been overridden.

#### **Use Scheduled Visit Override at Renewal**

One of the following is displayed:

0 - If at contract renewal the scheduled visit profile hierarchy will determine the equipment visits to be generated on the renewed contract

1 - If at contract renewal the software will use the \*OV amendments to the scheduled visit profile, and equipment visits will be generated using that edited profile

#### **Allow Service Cover When Contract Pending**

This field's value defaults from the System Parameters Maintenance Response window.

One of the following is displayed:

0 - If [contract](#) cover is effective from the contract start date.

1 - If all [calls](#) that are logged before the contract start date (while the contract has a status of pending) will be treated as though the contract cover was effective

This is reflected on the [Job Line](#) Details window.

#### **Use Start Date Rates**

One of the following is displayed:



0 - If labour rates and parts prices will be those effective on either the date the call was placed or the date of the engineer's [visit](#)

1 - If labour rates and parts prices will be those effective at the contract start date

### **Or, Until (Date)**

If Use Start Date Rates is **1**, this field is displayed as 0/00/00.

If Use Start Date Rates is **0**, a valid date (DDMMYY) is displayed. The labour and parts price lists used for chargeable work, effective at the [contract](#) start date, will only be used until this date.

After this date, the price lists used will be those effective on the date the work was carried out.

### **Global Price Update Code**

This field displays the global price. The code is used in the Global Price Update [task](#), to select contracts for inclusion in the price revision then being applied.

You can set up these codes under type GLPR, in the Codes/Parameter File task.

Select **Previous (F12)** to return to the Contract Header Enquiry Detail window.

## Billing Parameters Pop-up

To display this pop-up, select **Billing Enquiry (F16)** on the Contract Header Enquiry Detail window.

### **Fields**

#### **Fixed Service Chrg: Term**

This field is for display only.

The [term](#) is expressed in months; it defaults to a value of 12, but may be set to one to 120 months (that is, a 10-year maximum).

The term is the number of months within the contract's duration for which the [contract](#) price is protected from change and the number of periods covered by the fixed service charge.

#### **Fixed Service Chrg: Freq**

This field is for display only.

It is the frequency of invoicing expressed in months: 1 is monthly, 3 is quarterly, 12 is annual invoicing in a 12-month term.

Entries will be between 0 and the maximum number in the term, and equally divisible into the term.

#### **Fixed Service Chrg: Adv/Visit/Arr**

This field is for display only. It defaults to the value in the invoice schedule field on the [contract type](#).

One of the following is displayed:

0 - If you invoice in advance

The release date is the start of the [invoice period](#), and the invoice for each [invoice term](#) is issued before the term starts.

1 - If you invoice each scheduled planned maintenance [visit](#)

This is a [job](#) invoice, raised as the result of the engineer's [technical report](#) for the visit. The Freq field must be **0**.

2 - If you invoice in arrears

Here, the release date is the end of the invoice period. The invoice for each invoice term is issued after the [term](#) finishes, but you should price it before the [contract](#) start date.

**Fixed Service Chrg: Next Pricing Cycle From**

This field is for display only.

It is the anniversary date of the first invoice; it will be the date on which the next pricing cycle will start.

**Fixed Service Chrg: Next Pricing Cycle To**

This field is for display only.

It is the end date of the next contract [term](#).

**Rental Charge: Term**

This field is for display only.

The term is expressed in months; it defaults to a value of 12, but may be set to one to 120 months (that is, a 10-year maximum).

The term is the number of months within the contract's duration for which the rental price is protected from change and the number of periods covered by the rental charge.

**Rental Charge: Freq**

This field is for display only.

It is the frequency of invoicing expressed in months: 1 is monthly, 3 is quarterly, 12 is annual invoicing in a 12-month term.

Entries will be between 0 and the maximum number in the term, and equally divisible into the term.

**Rental Charge: Adv/Visit/Arr**

This field is for display only.

It defaults to the value in the Invoice Schedule field in the [Contract Type](#) file.

One of the following is displayed:

0 - If you invoice in advance

The release date is the start of the [invoice period](#), and the invoice for each [invoice term](#) is issued before the term starts.

1 - If you invoice each scheduled planned maintenance visit

This is a [job](#) invoice, raised as the result of the engineer's [technical report](#) for the [visit](#). You must set the Freq field to 0.

2 - If you invoice in arrears

Here, the release date is the end of the invoice period. The invoice for each invoice term is issued after the term finishes, but you should price it before the [contract](#) start date.

#### **Rental Charge: Next Pricing Cycle From**

This field is for display only.

It is the anniversary date of the first invoice: the date on which the next pricing cycle will start.

#### **Rental Charge: Next Pricing Cycle To**

This field is for display only.

It is the end date of the next contract term.

#### **Pre-billing Charge: Term**

This field is not applicable and is always blank.

#### **Pre-billing Charge: Invoice Frequency**

This field is for display only.

It is the frequency of invoicing expressed in months: 1 is monthly, 3 is quarterly, 12 is annual invoicing in a 12-month term.

Entries will be between 0 and the maximum number in the term, and equally divisible into the term.

#### **Pre-billing Charge: Adv/Arr**

This field is for display only.

It defaults to the value in the invoice schedule field on the [contract type](#) file:

One of the following is displayed:

0 - If you invoice in advance

The release date is the start of the [invoice period](#), and the invoice for each [invoice term](#) is issued before the [term](#) starts.

2 - If you invoice in arrears

Here, the release date is the end of the invoice period. The invoice for each invoice term is issued after the term finishes, but you should price it before the [contract](#) start date.

#### **Pre-billing Chrg: Next Pricing Cycle From**

This field is for display only.

It is the anniversary date of the first invoice: the date on which the next pricing cycle will start.

**Pre-billing Chrg: Next Pricing Cycle To**

This field is for display only.

It is the end date of the next contract term.

**Interim Charge: Term**

This field is for future development.

**Interim Charge: Freq**

This field is for display only.

It is the frequency of invoicing expressed in months: 1 is monthly, 3 is quarterly, 12 is annual invoicing in a 12-month term.

Entries will be between 0 and the maximum number in the term, and equally divisible into the term.

**Interim Charge: Arr**

This field is for display only.

It defaults to the value in the Invoice Schedule field on the Contract Type file.

If the value is **2** (Invoice in Arrears) the release date is the end of the invoice period. The invoice for each invoice term is issued after the term finishes, but you should price it before the contract start date.

**Interim Charge: Next Pricing Cycle From**

This field is for display only.

It is the anniversary date of the first invoice; it will be the date on which the next pricing cycle will start.

**Interim Charge: Next Pricing Cycle To**

This field is for display only.

It is the end date of the next arrears invoicing period, which is set by the interim charge [invoice frequency](#); it may only be for a three-month period, for example.

**Reconciliation Charge: Term**

This field is for display only.

The [term](#) is expressed in months; it defaults to a value of 12, but may be set to one to 120 months (that is, a 10-year maximum).

The term is the number of months within the contract's duration, for which the [contract](#) price is protected from change.

**Reconciliation Charge: Freq**

This field is for display only.

It is the frequency of invoicing expressed in months: 1 is monthly, 3 is quarterly, 12 is annual invoicing in a 12-month term.

Entries will be between 0 and the maximum number in the term, and equally divisible into the term.

**Reconciliation Charge: Arr**

This field is for display only.

It defaults to the value in the Invoice Schedule field in the [Contract Type](#) file:

If the value is **2** (Invoice in Arrears) the release date is the end of the [invoice period](#). The invoice for each [invoice term](#) is issued after the term finishes, but you should price it before the contract start date.

**Reconciliation Chrg: Next Pricing Cycle From**

This field is for display only.

It is the anniversary date of the first invoice; it will be the date on which the next pricing cycle will start.

**Reconciliation Chrg: Next Pricing Cycle To**

This field is for display only.

It is the end date of the next arrears invoicing period, which is set by the reconciliation charge [invoice frequency](#); it may only be for a three-month period, for example.

**Note:** *The software will only display those billing parameters that you have selected for this [contract type](#).*

Select **Previous (F12)** to return to the Contract Header Enquiry Detail window.

## Contract Conditions Pop-up

To display this pop-up, select **Conditions Enq (F18)** on the Contract Header Enquiry Detail window.

**Fields****Cover Type**

The [cover type](#) for the header is displayed.

**Effe. Date**

This field defaults to the [contract](#) start date, but may have been overwritten with a later, valid date (format DDMMYY).

**Currency Code**

This field defaults from the customer additional service details for the [site](#), or the account on the contract header.

**Fixed Service Charge**

This field displays the value you want to charge.

The software will charge this value either for the [term](#) of the contract or for a month, depending on how you have set the Processing by Month or Term field on the System Parameters Maintenance Response window. Once you have decided on either month or term processing, you cannot change it.

Charges entered at header level will be applied to all machine lines, unless a special machine line condition is set up.

### **Fixed Visit Charge**

This field displays the value to be charged for each [visit](#) made.

The charge entered at header level will be applied to all machine lines, unless a special machine line condition is set up.

### **Fixed Rental Charge**

This field displays the rental you want to charge.

The software will charge this value for the term of the contract, or for a month, depending on how you set up the Processing by Month or Term field on the System Parameters Maintenance Response window. Once you have decided on either month or term processing, you cannot change it.

The charge entered at header level will be applied to all machine lines, unless a special machine line condition is set up.

### **Pre-Billing Value/Volume**

The [contract type](#) determines whether this is a monetary value or a number of copies or vends.

This field displays the monthly minimum value for copies or vends.

You can only use this field if the Processing by Month or Term field on the System Parameters Maintenance Response window is set to Month. Once you have decided on either month or [term](#) processing, you cannot change it.

The header level charge is applied to all machines on the [contract](#) and could not be changed on the conditions for individual machine lines.

### **Minimum Volume**

This field displays the agreed minimum number of copies or vends which will be invoiced each month.

You can only use this field if the Processing by Month or Term field on the System Parameters Maintenance Response window is set to Month. Once you have decided on either month or term processing, you cannot change it.

The minimum, entered at header level, is applied to all machine lines unless you change it in the [Contract Conditions](#) pop-up on a machine line.

### **Copies in Rental**

This field displays the number of copies per month which are to be included in the rental charge.

**Free Copies**

This field displays the number of free copies allowed on each monthly billing.

**Meter 1 - Band Volume To**

This field displays the maximum number of copies to which the price for the band applies.

The volume for band 1 must not be less than the minimum volume.

**Meter 1 - Band Price per Copy**

This field displays the price per copy to be charged up to the band maximum.

You can express the copy price in pence (or cents) by setting the Copy Price Conversion Factor field on the System Parameters Maintenance Meterage window.

**Meter 2 - Band Volume To**

This field displays the maximum number of copies to which the price for the band applies.

**Meter 2 - Band Price per Copy**

This field displays the price per copy to be charged up to the band maximum.

You can express the copy price in pence (or cents) by setting the Copy Price Conversion Factor field on the System Parameters Maintenance Meterage window.

If meterage is specified, at least one price band must be entered for meter 2 even if not used in the [contract](#).

Use Page Up or Page Down to display further windows of differently dated [contract conditions](#).

**Note:** Only the contract conditions selected for the [contract type](#) will be displayed.

Select **Previous (F12)** to see the Contract Header Enquiry Detail window.

## Contract Billing History Window

To display this window, select **Invoice Enquiry (F23)** on the Contract Header Enquiry Detail window.

**Fields**

This window displays the total revenue for the [contract](#), and lists all invoices.

**Functions****Base Currency/Prime Currency (F14)**

This toggles between displaying values in base and prime currency.

Select **Previous (F12)** to see the Contract Header Enquiry Detail window.

## Contract Equipment Enquiry Detail Window

To display this window, select **Detail (F8)** on the Contract Header Enquiry Detail window.

### **Fields**

#### **Select (Untitled)**

Enter one of the following:

- 2 - To see the [Contract Conditions](#) pop-up
- 3 - To see the Peripherals window; (from which you can access the Peripheral Conditions window)
- 4 - To see the invoice history
- 5 - To see any meter history
- 6 - To see meter reading statistics
- 7 - To see the scheduled [visits](#)

#### **Loc**

This field displays the [site](#), or [installation address](#), of the equipment. This need not be the same address as on the contract header.

#### **Model**

This field displays the [model](#) code for the equipment.

#### **Serial**

This field displays the [serial number](#) of the piece of equipment.

#### **Stat**

This field displays the status of the equipment on the [contract](#).

One of the following is displayed:

- Pen - Pending
- Act - Active
- Exp - Expired
- Del - To be deleted

#### **Inc Dt**

This field displays the date on which the equipment was/will be included on the contract.

This date must lie between the contract start date and end date.

#### **Rem Dt**

This field displays the date on which the equipment was/will be removed from the contract.



**Resp Hrs**

This field displays the contracted response time for the piece of equipment.

If a time is displayed, it will override the response time on the contract header.

**Vst**

One of the following is displayed:

0 - If no [visits](#) have been generated

1 - If scheduled visits exist

**Functions****Fold/Truncate (F13)**

Use this to toggles between displaying more details or summary details only for each equipment line.

**Text (F21)**

Use this to displays any text associated with the equipment.

Select **Previous (F12)** to return to the previous window.

## Enquire on Contract Type [12/SSC]

Use this [task](#) to enquire on the details of [service contract types](#).

### Contract Type Enquiry Initial Window

To display this window, select the Contract Type Enquiry [task](#).

**Fields****Contract Type**

Enter a valid [contract type](#).

Select a contract type and then press Enter to display the Contract Type Enquiry Detail window.

### Contract Type Enquiry Detail Window

To display this window, select a [contract type](#) and then press Enter on the Contract Type Enquiry Initial window.

**Fields**

### **Automatically Generate Service Schedule**

This field is for future development.

### **Quotation Required on Renewal**

One of the following is displayed:

- 0 - If this type of [contract](#) is renewed as a pending contract
- 1 - If this type of contract is renewed as a [quotation](#)

### **Use Contract Start Date Rates**

One of the following is displayed:

- 0 - If the labour rates and parts prices used in [job](#) pricing, for any jobs on equipment covered by this contract, are those effective on the date of [call](#) out, or the date of the engineer's [visit](#)
- 1 - If the labour rates and parts prices used in job pricing, for any jobs on equipment covered by this contract, are those effective at the contract start date

### **Response Hours Guarantee**

This field displays the normal response time guaranteed for equipment covered by this type of contract.

The software uses this in job escalation [tasks](#).

### **Contract Duration**

This field displays the standard contract duration, used to calculate [contract termination](#).

If the duration is **0**, it indicates a contract which runs indefinitely.

### **Termination Notice in Days**

The number of days specified in this field is used by the contract credit program as the default number of penalty days for contract cancellation.

For example, if this field is set to **10**, if a customer wants to cancel a contract they have to give 10 days notice. This means that the software, when calculating how much to credit the customer for unused contract cover (assuming the customer has paid in advance), will deduct 10 days' credit.

### **Invoice Schedule**

One of the following is displayed:

- 0 - If contracts of this type are invoiced in advance
- 1 - If contracts are invoiced after each scheduled [visit](#)
- 2 - If contracts are invoiced in arrears

In this case, the invoice cannot be printed until after the end of any instalment period.

### **Calendar Code**

If this [contract type](#) is attached to a calendar, that calendar is displayed in this field.

**Fixed Service Charge**

One of the following is displayed:

- 0 - If you cannot apply fixed service charges to this contract type
- 1 - If you can apply fixed service charges to this contract type

The input fields for these charges will be displayed on the [Contract Conditions](#) pop-up.

**Interim Charges**

One of the following is displayed:

- 0 - If you cannot apply interim charges to this contract type
- 1 - If you can apply interim charges to this contract type, and the input fields for these charge cycles will be displayed on the Contract Billing pop-up

Interim charges allow for actual or estimated copies, in excess of the minimum, to be invoiced periodically.

**Fixed Rental Charge**

One of the following is displayed:

- 0 - If you cannot apply fixed rental charges to this contract type
- 1 - If you can apply fixed rental charges to this contract type

The input fields for these charges will be displayed on the Contract Conditions pop-up.

**Reconciliation Charges**

One of the following is displayed:

- 0 - If you cannot apply reconciliation charges to the [contract type](#)
- 1 - If you can apply reconciliation charges to the contract type

The input fields for these charge cycles will be displayed on the [Contract Conditions](#) pop-up.

Reconciliation charges allow for actual copies in excess of the minimum to be invoiced, or excess estimated copies which have been invoiced, to be credited at the end of the month.

**Fixed Visit Charge**

One of the following is displayed:

- 0 - If you cannot apply fixed charge [visits](#) to this contract type
- 1 - If you can apply fixed charge visits to this contract type

The input fields for these charge cycles will be displayed on the Contract Conditions pop-up.

**Copies in Rental**

One of the following is displayed:

- 0 - If you cannot enter the number of copies per month
- 1 - If you can enter the number of copies per month that are included in the rental charge

The input fields for these charge cycles will be displayed on the Contract Conditions pop-up.

### **Minimum Volume**

One of the following is displayed:

0 - If you cannot apply minimum copy volumes to this contract type

1 - If you can apply minimum copy volumes to this contract type

The input fields for these charge cycles will be displayed on the Contract Conditions pop-up.

### **Copy Charges 1**

One of the following is displayed:

0 - If you cannot apply copy charge bands to this contract type

1 - If you can apply copy charge bands to this contract type

The input fields for these charge cycles will be displayed on the Contract Conditions pop-up.

### **Pre-billing Value**

One of the following is displayed:

0 - If you cannot apply a pre-determined value to this contract type

1 - If you can apply a pre-determined value to this contract type

The input fields for these charge cycles will be displayed on the Contract Conditions pop-up.

### **Copy Charges 2**

One of the following is displayed:

0 - If you cannot apply copy charge bands to this [contract type](#)

1 - If you can apply copy charge bands to this contract type

The input fields for these charge cycles will be displayed on the [Contract Conditions](#) pop-up.

### **Pre-Billing Volume**

One of the following is displayed:

0 - If you cannot apply a pre-determined volume to this contract type

1 - If you can apply a pre-determined volume to this contract type.

The input fields for these charge cycles will be displayed on the Contract Conditions pop-up.

### **Free Copies**

One of the following is displayed:

0 - If the number of free copies specified on the Contract Conditions pop-up will not be allowed on each monthly billing

1 - If the number of free copies specified on the Contract Conditions pop-up will be allowed on each monthly billing

**Free Visits**

This field is for future development.

Select **Exit (F3)** to leave the [task](#).

## Enquire on Recommended Service Visits [14/SSC]

Use this [task](#) to enquire on the details of recommended [visits](#) per [model](#) group.

### Recommended Visits Enquiry Initial Window

To display this window, select the Recommended Service Visits Enquiry task.

**Fields****Division**

Enter a valid [division](#).

**Model Group**

Enter an existing [model](#) group for the selected division.

Each model group can have a [scheduled visit profile](#) attached, with an effective date. The software will use this to generate scheduled service [visits](#), if there is no visit profile specified at [contract](#) or model level.

Enter a [division](#) and model group and then press Enter to display the Recommended Service Visits Enquiry Detail window.

### Recommended Visits Enquiry Detail Window

To display this window, enter a [division](#) and [model](#) group and then press Enter on the Recommended Visits Enquiry Initial window.

**Fields****Date**

This field displays the date on which a model group and a [scheduled visit profile](#) association become active.

**Visit Profile Code**

The software will use the scheduled visit profile with the correct effective date to generate scheduled service [visits](#), if there is no scheduled visit profile specified at [contract](#) or model level.

Select **Exit (F3)** to leave the [task](#).

## Enquire on Contract Rates [16/SSC]

Use this [task](#) to enquire on the details of [contract](#) rates for a [model](#) group and [term](#), by currency.

### Contract Rates Enquiry Initial Window

To display this window, select the Contract Rates Enquiry task.

#### **Fields**

##### **Division**

Enter a valid [division](#).

##### **Model Group**

Enter a valid [model](#) group.

Each model group can have [contract](#) rates attached, with effective dates. The software will use the current rate when pricing the contract, to price a piece of equipment belonging to a particular model group.

##### **Billing Term**

Enter a term from 1 to 120 calendar months; the default value is 12.

The [term](#) defines the price protection period for the contract and the number of periods for which contract pricing will generate pending invoice and actual invoice records.

The contract rate selected for the contract header will be for the same term as that entered in the contract billing parameters.

##### **Currency Code**

Enter a valid currency.

Press Enter to display the Contract Rates Enquiry Detail window.

### Contract Rates Enquiry Detail Window

To display this window, press Enter on the Contract Rates Enquiry Initial window.

#### **Fields**

##### **MG**

The [contract](#) rate displayed in this field will apply to this [model](#) group within the product [division](#).

**MSG**

If there is a value in this field, the contract rate will only apply to models which belong to this model sub-group within the model group.

Any contract rates for the model group will be overridden by the rates for the model sub-group.

**Model**

If a model number is displayed in this field, these rates will override those for the model group or model sub-group in contract pricing.

**Typ**

This field displays the [contract type](#). This indicates the contract rate to be used in contract pricing depending on the contract type of the contract being priced.

**Eff Date**

This field displays the date on which the contract rates become active. All contract rates with earlier dates will be obsolete.

**Visit**

This field displays the charge per [visit](#), which is used in contract pricing. It is applied per visit.

**Rental**

This field displays the annual rental, which is used in [contract](#) pricing. It is applied per contract [term](#).

**Service**

This field displays the annual service charge. This value, also known as the fixed service charge, is used in contract pricing and is applied per contract term.

Select **Exit (F3)** to leave the [task](#).

## Contract Quotation Print [20/SSC]

Use this [task](#) to print [quotations](#) for all [contracts](#) which have a status of Quotation Only.

When you select this task, a batch [job](#) is submitted. The job will generate a printer file of quotations on the output queue.

The account address printed at the top of the report will be the contract invoice bill to account, if one exists.

After a quotation has been printed, it is flagged so that it will not be printed next time you select this task.

## Contract Renewal [21/SSC]

Use this [task](#) to renew all [contracts](#) which are due to expire, and which are flagged as being renewable. You should run this task on a regular basis (for example, monthly).

**Note:** *This procedure requires exclusive use of the [company](#).*

Contracts will only be renewed if:

- They have the Renew Contract field set to On in the contract header.
- They are active. They must not be pending or expired.
- Their contract termination date is before or the same as the date selected on the Contract Renewal Selection window.

The new contract will have a start date one day after the [termination](#) date of the original, and an end date of the start date plus the contract duration for the contract type.

The contract type will remain the same.

The [contract](#) number will depend on the setting of the [company](#) profile field New Contract No at Renewal. If this is set to No, the same number is retained, if it is set to Yes, a new number is generated by the software, from the sequence in the company profile.

The status of the new contract is Pending Start Date, unless the [contract type](#) indicates that a [quotation](#) is required on renewal, in which case the status is set to Quotation Only. In the latter case, this will cause a quotation to be printed in the next run of the Print Contract Quotations task, and the quotation can subsequently be changed to a true contract through the Contracts maintenance [task](#).

In order to renew a contract, the equipment on the contract must still be eligible for the contract type; that is, the contract charge rates must be in effect.

The renewal procedure will also renew the service schedule for each piece of equipment on the contract. This will depend on the following:

- If the existing schedule has the Use These Visits on Renewal field set to On, the new schedule will mirror the existing one.
- If the existing contract header has a non-standard visit profile held against it, and is flagged to say Use the Non-standard Profile on Renewal, the new schedule will be generated using the non-standard profile (and this profile will be attached to the new contract).
- If the existing contract header has a standard visit profile held against it, this will be used to generate the new schedule.
- If the model number for the piece of equipment has a standard visit profile, this will be used to generate the new schedule.
- If the model group for this piece of equipment has a standard visit profile, this will be used to generate the new schedule.
- If the company profile has a standard visit profile, this will be used to generate the new schedule. If not, this procedure will not be able to generate a new schedule.

### **What Should be Done after Renewal?**



You can, if necessary, amend the new contract, using the usual contract maintenance procedures, before you generate any quotations or invoices.

After contracts are renewed, check the equipment Contract Conditions pop-up (option **2** on the Contract Equipment Maintenance Detail window in the Contracts maintenance task). It is these conditions which will be applied when the contract is priced, not the conditions at header level.

## Contract Renewal Selection Window

To display this window, select the Contract Renewal task.

This is the only window for the [task](#), and you enter the appropriate date.

### **Fields**

#### **Renew Those Which Will Expire on or before DDMMYY**

Enter the expiry date limit of [contracts](#) for renewal.

The software reads through all active contracts and determines which ones to renew, by comparing the contract end date with the date you have entered in this field. If the contract end date is earlier than or equal to the entered date, it is renewed.

Select **Submit Job (F8)** to submit the job for processing.

## Contract Updating [22/SSC]

Use this [task](#) to perform various housekeeping procedures on the [contracts](#) for a [branch](#).

Note that the procedures included in this task are also included in the Day End Routines task, when they apply to the whole [company](#).

**Note:** *This procedure requires exclusive use of the company.*

When you select this task, a batch [job](#) performs the following processing on contracts owned by the requesting service branch:

- The software sets the status of any Active contracts that have reached their termination date to Expired. This also updates the installation, so it shows that the equipment is no longer covered.
- The software sets the status of any Pending Start Date contracts that have reached their start date to Active. The installation is also updated, so it shows that the equipment is now covered.
- The software produces an error report of all pieces of equipment that are supposed to become active on a contract but are already covered by a different active contract.
- The software selects for credit processing all contracts that have had a termination date entered before the end of their current term. The contracts will appear on the report of contracts selected for credit.

**Note:** Because this processing is always performed as part of the Day End Routines task, this task would normally only be run if there was an urgent requirement to update a contract status during the day.

Select **Confirm Submit (F8)** to submit the job for processing.

## Request Quotes from Contract [23/SSC]

Use this [task](#) to create contract [quotations](#) from existing [service contracts](#).

Use this task if your customer already has a [contract](#), and wants a quotation for a different type of contract to cover the same equipment.

You can either generate the new quotation immediately, or you can store the request and generate the new quotation later, by running the Generate Deferred Request Quotes from Contracts [task](#).

You create quotations the same way as contracts, but they have a special status of Quotation Only. You can only create them for contracts with service and [visit](#) charges. The software will not generate quotations for rental and meterage contracts.

You can print contract quotations on pre-printed stationery, to show account and [site](#) details, contract number, type, start date, duration, customer order number, equipment covered, number of scheduled maintenance visits and price. The software calculates the quotation price in the same way as the contract invoice price.

You convert a quotation to a contract by using the Contracts maintenance task to change the status from Quotation Only to Pending Start Date.

## Request Quotes from Contract Detail Window

To display this window, select the Request Quotes from Contract task.

Use this window to specify the [quotation](#) you want to create, and the [contract](#) on which you want to base it.

### **Fields**

#### **New Contract**

Enter a new contract number for the quotation, using up to seven alphanumeric characters.

#### **Contract Type (Untitled)**

Enter a valid contract type. The new quotation must have the same [contract type](#) as the contract or quotation you are basing it on.

**Date (Untitled)**

Enter the date (format DDMMYY) on which the new quotation will start.

**Based-On Contract**

Enter the existing contract or quotation that is to form the source of the new quotation.

**Contract Type (Untitled)**

Enter the contract type of the existing contract or quotation in this field. This must be the same as the contract type of the new quotation.

**Date (Untitled)**

Enter the actual start date (format DDMMYY) of the based-on contract or quotation in this field.

**Service Visits**

Enter one of the following:

1 - If only the existing, or outstanding, [visits](#) for each piece of equipment on the old [contract](#) or [quotation](#) will be copied to the new one

In this case, leave the Service Visit Profile Code field blank.

2 - If new visits will be generated for each piece of equipment on the new quotation, for the quotation's duration

This may be a more extensive series of visits than that set up by **1** (Copy). You have to enter the Service Visit Profile Code field.

3 - If no visits will be set up

In this case, leave the Service Visit Profile Code blank.

**Service Visit Profile**

Leave this field blank if you entered **1** or **3** in the Service Visits field.

If you entered **2** in the Service Visits field, enter a valid [scheduled visit profile](#). The software will use this to generate scheduled service visits for each piece of equipment on the new quotation.

**Functions****Process Later (F13)**

Use this to generate the new quotation at a later time by running the batch [job](#) Generate Deferred Request Quotes from Contract.

**Process Now (F22)**

Use this to generate the new quotation now.

Select **Process Later (F3)** or **Process Now (F22)** to submit the job for processing.

## Generate Deferred Request Quotes from Contracts [24/SSC]

Use this [task](#) to generate [quotations](#) from existing [service contracts](#), using stored requests.

This task is a batch [job](#), which you submit to perform the processing. It takes outstanding requests for quotations from contracts (made through the Request Quotes from Contracts task) and generates [contract](#) quotations. It copies the contract header and contract equipment from the based-on contract to the new quotation, and either copies or generates the service schedule records for the new quotation.

Select **Confirm Submit (F8)** to submit the job for processing.

## Global Price Update [25/SSC]

Use this [task](#) to apply percentage price increases, or decreases, to selected groups of product families, customers or [contracts](#).

You can select the contracts you want to update by price code or by mantle code, or both.

You can run the task in a test mode initially, once you have checked the results in the report it produces (showing the current and new prices), you can run the task in update mode.

Contracts are price protected by their [term](#). This task does not override that. If you apply a global price change may generate a new dated price list for a contract, but it will not become effective until the end of the term even if the price list has an effective date prior to the end of the term.

**Note:** *There is no provision for updating contract [visit](#) charges. Only service, rental and copy charges can be updated.*

## Global Price Update Detail Window

To display this window, select the Global Price Update [task](#).

Use this window to specify the price update you want to perform and the [models](#) it is to affect.

You must complete at least one of the seven selection fields (three [contract](#) selections and four price change selections).

### **Fields**

#### **Effective From Date**

Enter the date (format DDMMYY) on which the update is to come into force.

**Mantle Code**

Enter a valid mantle code. The software compares the code you enter in this field with the mantle code set up in the contract header. If they match, that contract is selected for the price update.

You set up these codes under type MANT in the Inventory Descriptions file.

**Price Code**

Enter a valid price code. The code you enter is matched against the global price code set up on the Service Parameters pop-up. If they match, that contract is selected for the price update.

Code 00 is a system code, not for general use.

You set up price codes under type GLPR in the Codes/Parameter File task.

**Contract Type**

Enter a valid [contract type](#). If you enter a contract type, the price update selection is limited to contracts of that type.

**Currency Code**

Enter a currency. If you enter a currency, the price update selection is limited to [contracts](#) with that currency.

**Division**

Enter a valid [division](#).

If you enter a division, the price update selection is limited to that division. If you leave this field blank, all divisions within the other selection criteria will be included.

**Model Group**

Enter a valid [model](#) group.

If you enter a model group, the price update selection is limited to that model group. If you leave this field blank, all model groups within the other selection criteria will be included.

**Model Sub-Grp**

Enter a valid model sub-group.

If you enter a model sub-group, the price update selection is limited to that model sub-group. If you leave this field blank, all model sub-groups within the other selection criteria will be included.

**Model**

Enter a valid model.

If you enter a model, the price update selection is limited to that model. If you leave this field blank, all models within the other selection criteria will be included.

**Service Charge**

Enter a percentage in the range 0.01 to 999.99, positive or negative.

You can leave this field blank, but one of the three percentage fields must hold a value other than .00.

### **Rental Charge**

Enter a percentage in the range 0.01 to 999.99, positive or negative.

You can leave this field blank, but one of the three percentage fields must hold a value other than .00.

### **Price per Copy**

Enter a percentage in the range 0.01 to 999.99, positive or negative.

You can leave this field blank, but one of the three percentage fields must hold a value other than .00.

### **Update Contract Conditions**

Enter one of the following:

0 (default) - Not to perform an update on live files

The results of the changes are written to a work file, and a report is produced listing current prices alongside your proposed changes.

1 - To perform the update on live files

The software updates the service, rental and price per copy charges on the [Contract Conditions](#) pop-up to take account of the percentage changes you specified above.

Select **Submit Job (F8)** to submit the [job](#) for processing.

## **Copy Kit Batch Job [26/SSC]**

Use this [task](#) to produce a report listing [contracts](#) based on copy volume that will expire when an agreed volume of copies has been used. You can use the report to decide whether to cancel or renew the contract.

Copy kit contracts provide service and materials (for example, paper, toner and so on) for either a pre-defined period of time, or a pre-defined number of copies, whichever runs out first.

You can only use this task if you are using copy kits. To do this, the [contract type](#) must be a meterage contract type (that is, one or more of the meterage/copy parameters has been selected). If it is, you will see the Copy-kit field on the contract header.

If you set this Copy-kit field on, the number you entered as the minimum copies in the [Contract Conditions](#) pop-up for the contract becomes the number of copies for the [termination](#) of the contract.

The contract end date is the normal termination date for the contract. Contracts reaching this date are handled by the standard contract updating program, and no report is produced.

Select **Submit Job (F8)** to submit the [job](#) for processing.

## Contract Credit Selection [27/SSC]

Use this [task](#) to identify any [contracts](#) which have been [terminated](#) before their contracted expiry date, and which may therefore require a credit. It will also select expired contracts that need a retrospective credit.

To terminate a contract, change the contract's End Date field on the Contract Header Maintenance window.

To terminate a piece of equipment before its expiry date, if the contract is not header priced, reset the Remov Dt (removal date) field on the Contract Equipment Maintenance Detail window for any selected machine.

You have to run this Contract Credit Selection task before you can use the Maintain Contract Credits task. The Maintain Contract Credits task is described in the Invoicing chapter of this product guide.

Contract Credit Selection does the following:

- It checks both pending and actual invoices. Pending invoice records will not produce a credit, but the software will recalculate the value to ensure the correct value is used when the invoice is produced.

**Note:** *If there are pending invoice records on SSP44, but no invoice re-calculation is involved, remove the equipment via the Contracts task. Generate and Print (Contract) Invoices will clear the records from SSP44 on the removal date specified.*

**Note:** *Do not attempt to use contract credit functionality, as no invoice amount will need to be credited.*

- It puts the selected invoices in a work file, together with the expected credit and re-invoice values; these are based on the termination date plus the number of days defaulted from the Termination Notice in Days field on the Contract Type Maintenance window.
- It produces a report of all the records in the work file that need editing or acceptance. The Maintain Contract Credits task provides details of the processing you need to perform after you have produced the Contracts Awaiting Edit and Acceptance of Credits/Re-invoices reports.

### **Contract Credits**

You can produce credits at any time, to refund part, or all, of a contract invoice, and to cancel any pending invoice records.

You select the contract, or the invoice, or the pending [invoice period](#) from/to. You can amend the selected record(s) to affect the operative date and value(s) involved. You can discard the record, give a full or partial credit, or credit the original charge and re-invoice a different amount.

The resultant invoices and credit notes are produced when you next run the Generate and Print Invoices task. Any cancelled pending invoice records are removed from the work file at the same time.

## Selection of Contracts for Credit Window

To display this window, select the Contract Credit Selection task.

Use this window to specify the contracts you want to check for issuing credits.

### **Fields**

#### **Branch**

The [branch](#) will default to the current branch. You can change it to any branch you are authorised to, or to all branches (\*A) if you have blanket branch authority.

If you only enter the branch and the [termination](#) date, all contracts terminating on or before this date will be selected.

#### **Contract Number**

Enter a [contract](#) number to select a specific contract for credit, or leave blank to select all contracts. This includes pending, active, deleted and expired contracts which have been priced or invoiced or both.

If you enter a contract number, you also need to enter a [contract type](#) and date.

#### **Contract Type**

Enter a contract type.

#### **Contract Date**

Enter the start date of the contract.

If you are selecting an expired or deleted contract for credit, you only need to enter the number, type and date.

#### **Invoice Number**

Enter the invoice number, in the format Innnnnn, to select a contract that has been invoiced and requires credit. Leave this field blank to select all invoices for the contract you have entered above.

#### **Contracts Terminating on or Before**

This field defaults to the current date, on or before which credits for [terminating](#) contracts are to be processed. You can substitute a later, but not an earlier, date.

Select **Submit Job (F8)** to submit a job for processing. This is only available after the window has been validated. The batch job produces reports entitled Contracts Awaiting Edit and Acceptance of Credits/Re-invoices.



### Engineer Master File [1/SSM]

Use this [task](#) to set up your engineers.

The software uses the engineer details:

- To calculate the cost of an engineer's time on each service job
- To link an engineer with a stock location
- This means that when an engineer reports the use of certain spare parts, the software can generate the necessary Inventory movements automatically.
- To record an engineer's absence
- You can use this to prevent new jobs being assigned to that engineer.
- To determine whether an engineer has the correct skills for the job they have been assigned to, and to display a warning message if they are not skilled
- To link an engineer with a region for reporting purposes
- To distinguish between field and workshop engineers, who may be charged out at different hourly rates

### Engineer Maintenance Initial Window

To display this window, select the Engineer Master File [task](#).

#### **Fields**

##### **Engineer**

Enter a new or existing engineer.

Press Enter to display the Engineer Maintenance window.

### Engineer Maintenance Window

To display this window, enter the engineer and then press Enter on the Engineer Maintenance Initial window.

## **Fields**

### **Name**

Enter the full name of the engineer.

### **Address Lines 1 to 5**

Enter the engineer's address.

### **Geo Code (2 Fields)**

Identify the first and second part of the engineer's home [location](#) code using up to five alphanumeric characters for each part of the code.

**Note:** *The engineer's geocode is for information only. The engineer's team, with its link to a territory, is used in engineer allocation, not the geocode.*

### **Post Code (2 Fields)**

Enter the first and second parts of the engineer's postcode, if required. The format should comply with Post Office regulations, but the software does not validate this field.

### **Telephone**

Enter the engineer's contact telephone number.

### **Ext**

Enter a telephone extension number for the engineer, if one exists.

### **Radio Page Code**

If the [remote communications](#) link is active, this field must hold the engineer's designated [terminal](#) code.

### **Supply Stockroom**

**Note:** *This field is only displayed if the DRP libraries have been included in the Service Management library list.*

Enter an existing supply stockroom which has been set up in Inventory Management (in the [company](#) profile) with item and stockroom details.

This stockroom is the source of spare parts for replenishing the engineer's stock [location](#). The software uses this as the default supply stockroom for the engineer in DRP parts orders originated during [technical reporting](#).

### **Stock Location**

Enter a stockroom that exists in Inventory Management. This stockroom could be the engineer's van or car, or a common store or depot from which spare parts are drawn.

The software will automatically update this stockroom's stock when the [engineer reports](#) that parts have been used.

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If you are using DRP orders, set up an Accounts Receivable customer account with a [delivery address](#) of 001. In DRP, attach the account to the stock [location](#) as the sole customer for all Distribution orders to the location.

### Team Code

Enter the engineer's team, if you have organised your engineers into teams.

Teams are used in engineer allocation if you set on the Assign by Territory or Alternative Engineer field on the [Company](#) Profile Maintenance General window.

### Vehicle Reg No

Enter the registration number of the engineer's vehicle.

### Absent Code

If this field holds anything other than **blank, 0** or **1**, automatic allocation will ignore this engineer for [calls](#).

There are two uses for this field:

- When you create a non-job activity in the engineer's diary, you can give it an absent code. That code will appear in this field, and ensure that the engineer is not allocated work.

The field needs to be re-set manually; the software will not remove the absent code.

You set up absent codes under type ABSC in the Codes/Parameter File task.

- If you are using remote communications, this field remains blank until the engineer logs on. Once the engineer is logged on, the software enters **1** in this field, and the Radio Page field holds the engineer's reference.

### Manager's Code

Enter the manager's code, if required (this could be, for example, the manager's initials).

### Grading Code

Identify the grade of the engineer, if required. You set up these codes under type EGRD in the Codes/Parameter File [task](#).

### Cost per Hour

Enter the hourly rate you are charging to the [job](#) cost database, for work done and travel time expended by the engineer. The value is in base currency.

### Region

Identify the service region in which the engineer works. You set up these codes under type REGN in the Codes/Parameter File task.

### Workshop Engineer

Enter one of the following:

- 0 - If either the contract or non-contract rate from the price list will be used, depending on the job

1 - If the workshop rate from the labour rate price list will be used when charging for an engineer's time

### **Include Engineer in Auto Call Assignment**

Enter one of the following:

0 - If this engineer will be excluded from automatic [call](#) assignment (ACA)

1 - If the engineer will be included in automatic call assignment, as long as the absent code is blank

You can also limit the operation of ACA using settings in the System Parameters File [task](#), on the [model](#) and on the [job](#) category.

### **Engineer Account**

Enter the account number for the engineer. You must have already set it up in Accounts Receivable.

The software uses this account number as the customer for non-job activities, set up for the engineer using the diary function.

### **Untitled**

Enter the address code, with the account number for the engineer. You must have already set them up in Accounts Receivable.

The software uses the account and address codes as the customer for non-job activities. You set these up for the engineer using the diary function.

## **Functions**

### **Additional Details (F10)**

Use this to display the Additional Details pop-up.

### **Skills Matrix (F14)**

Use this to maintain the engineer skills matrix.

### **Alternate Engineer Maintenance (F16)**

Use this to maintain alternative engineers (if the Assign by Territory or Alternative Engineer field on the [Company](#) Profile Maintenance General window is set to **0**).

Select **Update (F8)** to save any changes you have made.

## **Additional Details Pop-up**

To display this pop-up, select **Additional Details (F10)** on the Engineer Maintenance window.

### **Fields**

#### **Mservice Client Mqe Queue Manager**

Enter the name for the client queue manager.

**Mservice Server Mqe Queue Manager**

Enter the name for the server queue manager.

**Host for Mqe Server Queue Manager**

Enter the host name for the server queue manager.

**Client/Server Wait Time**

Enter a maximum time to wait for response.

**Secure Panels Password**

Enter the password.

**RAS Tel. No.**

Enter the RAS telephone number.

**RAS User**

Enter the user name.

**RAS Password**

Enter the password.

**RAS Domain**

Enter the domain name.

**Date Last Update**

This field displays the date of the last update.

**Time Last Update**

This field displays the time of the last update.

**Version installed**

This field displays the version.

**GPRS Network**

Enter one of the following:

- 0 - If this is not a GPRS network
- 1 - If this is a GPRS network

**Confirmation Required**

Enter one of the following:

- 0 - If no confirmation is required
- 1 - If confirmation is required

**Application**

Enter one of the following:

M -

S -

Select **Update (F8)** to save any changes you have made.

## Engineer Maintenance Skills Matrix

To display this window, select **Skills Matrix (F14)** on the Engineer Maintenance window.

### Fields

#### **Model**

Enter the [models](#) on which the engineer has been trained. If the engineer has been trained on all the models in the model sub-group, leave this field blank and enter the sub-group.

#### **Division**

Enter the [division](#) for the engineer. This means the engineer is trained on all products within the division if you do not enter any further qualification (that is, for model group, model sub-group, model or [job](#) category).

#### **Model Group**

Enter the model group for the engineer. This means the engineer is trained on all products within the model group if you do not enter any further qualification (that is, for model sub-group, model or job category).

#### **Model Sub-Group**

Enter the model sub-group for the engineer. This means the engineer is trained on all products within the model sub-group if you do not enter any further qualification (that is, for model or job category).

#### **Job Cat**

Enter the job category for which the engineer has been trained. This will restrict the selection of the engineer to the jobs within the division, model group, model sub-group or models which are defined with the job category.

Leave this field blank if the engineer is skilled to do all.

### Functions

#### **Fold/Truncate (F13)**

Use this to toggle between displaying more and fewer details for each line of information.

Select **Update (F8)** to save any changes you have made.

---

## Alternative Engineer Maintenance Window

To display this window, select **Alternate Engineer Maintenance (F16)** on the Engineer Maintenance window.

**Note:** You can only use this window if you set the *Assign by Territory or Alternative Engineer* field on the [Company Profile Maintenance General](#) window to 0.

Use this window to enter all the engineers you can use as alternatives to the selected engineer.

### Fields

#### **Option (Opt)**

Enter **4** against an engineer to delete this alternative to the selected engineer. This does not delete the engineer's details from the system.

#### **Engineer**

Enter the engineer you want to set up as an alternative and then press Enter to see the engineer appear in the list towards the top of the window.

### Functions

#### **Next (F9)**

Use this to return to the Engineer Maintenance Selection window.

After entering the details for all the alternative engineers, select **Previous (F12)** to return to the Engineer Maintenance window.

## Job Category [4/SSM]

Use this [task](#) to define and maintain all your [job](#) categories.

A job category code defines the type of [call](#) (for example, a service [visit](#), or a return call to fit a part), or the type of activity carried out in the process of repairing or maintaining equipment.

Together with the [contract type](#), it is used as the basis for deciding if the [task](#) is chargeable. The details of whether to charge, and if so how much, or not to charge, are set up in the [cover type/job](#) category charge matrix.

[Job](#) categories are used to log jobs and to create planned maintenance schedules for [contracts](#). They are also required for the entry of engineer [technical reports](#).

Job categories are used:

- To determine the default values for nine frequently used job categories that are used at call logging
- In conjunction with cover types, to make up the charge matrix that determines whether cost elements in a call are chargeable or not.

This concerns labour hours, mileage charges, travel hours, miscellaneous costs and parts used by four user-defined types (for example, major, minor, consumables and supply items).

Job categories describe the different types of service work. You can define a number of categories as system defaults for breakdowns, warranty and repeat [calls](#) and so on, to save time at call logging.

Additionally, you must define a table of valid job categories for each cover type. This specifies whether the customer should be charged for travel and labour hours (both fixed and hourly charges), for up to four parts groups and for miscellaneous charges, when work of a certain job category is carried out on equipment covered by the specific cover type.

## Job Category Maintenance Selection Window

To display this window, select the Job Category Maintenance task.

### **Fields**

#### **Job Category**

Enter the [job](#) category you wish to set up or maintain.

Press Enter to display the Job Category Maintenance window.

## Job Category Maintenance Window

To display this window, enter a new or existing job category and then press Enter on the Job Category Maintenance Selection window.

### **Fields**

#### **Description**

Enter the description for the job category.

#### **Category Type**

Enter one of the following to indicate the kind of category you are setting up:

- 1 - If the [job](#) category involves fixing a machine that is down
- 2 - If the job category is a planned maintenance job
- 3 - If the job category covers a non-job activity
- 4 - If the job category is not one of the above three types

#### **Default Category**

There are nine types of job, listed on the window, which must each have a default job category. When a [call](#) is logged, the software finds out which one of the nine types of job it is, and displays the relevant default on the [Job Line](#) Details window.



Enter a single numeric, in the range 1 to 9, if this job category is the default for its particular type. If it is not, enter 0.

Enter one of the following:

- 0 - If this job category is not a default
- 1 - If this job category is the default for breakdown jobs
- 2 - If this job category is the default for [installations](#)
- 3 - If this job category is the default for withdrawals
- 4 - If this job category is the default for return jobs
- 5 - If this job category is the default for repeat calls
- 6 - If this job category is the default for specialist calls
- 7 - If this job category is the default for return for knowledge [visits](#)
- 8 - If this job category is the default for return for other reason visits
- 9 - If this job category is the default for warranty calls

#### **Include Category in Repeat Call Calculation**

Enter one of the following:

- 0 - If this job category is to be excluded from the repeat call calculation
- 1 - If this job category is to be included in the repeat call calculation

Repeat calls are checked at call logging. They depend on the number of days, and/or the number of copies or vends produced since the last technically reported service call to the equipment.

You define these days and copies between calls on the volume segment, which is linked directly to a specific [model](#).

#### **Include Category in Automatic Call Assignment**

Enter one of the following:

- 0 - To exclude [calls](#) of this [job](#) category from the automatic call assignment (ACA) of engineers
- 1 - To include calls of this job category in the automatic call assignment (ACA) of engineers.

You can also limit ACA operation by settings in the System Parameters File Maintenance [task](#), and by settings for the [model](#) and engineer.

#### **Average Hours Factor**

This field is for future development.

Press Enter and then select **Update (F8)** to update.

## Cover Type/Job Category [5/SSM]

It is important to understand the difference between the [contract type](#) and the [cover type](#):

- The contract type defines the billing charges and meterage pricing and control to be applied to the contract.
- The cover type defines the equipment price to be charged for an item of equipment in contract pricing and the charge matrix to be used in job pricing.

Use this [task](#) to define and maintain a charge matrix for all [job](#) categories. The cover type/job category matrix defines the invoicing rules relating to that combination of job category and cover type. It determines which elements are chargeable, whether overrides apply and which elements are not chargeable.

You must set up a list of all the job categories that are valid for each cover type (including \*NO - no contract). The list prevents you from booking invalid types of work against a [contract](#) and tells the software whether the labour, travel and/or parts and/or miscellaneous costs are to be charged to the customer.

You have to define the matrix of cover types and job categories before you can despatch an engineer to a call, or log a [technical report](#). You can only enter labour and travel hours, parts used and miscellaneous costs against job categories that are set up in a matrix with the cover type covering the piece of equipment on the technical report.

**Note:** You must set up a set of job categories against the special cover type code \*NO, to allow technical report entries for non-contract work.

The matrix is also important for the job invoicing tasks. As the software processes each completed job line, it reads the indicators held for the appropriate cover type and job category combination, to decide whether labour hours, miscellaneous costs and parts used are to be charged to the customer.

**Note:** If a valid cover type and job category charge matrix does not exist when you log a job, the Job Line Details window displays a warning. You can still log the call, but you should correct the error before attempting to enter a technical report.

## Cover Type/Job Category Maintenance Initial Window

To display this window, select the [Cover Type/Job](#) Category [task](#).

### Fields

#### **Contract Type**

Enter a new or existing [contract type](#).

### Currency Code

Enter an existing currency using three characters.

### Based on Contract Type

To base a new matrix on an existing one, enter the existing contract type.

### Based on Currency Code

To base a new matrix on an existing one, enter the existing currency code.

You will need to revise all fixed charge overrides for labour and travel if a different currency is involved.

Press Enter to display the Cover Type/Job Category Maintenance Detail window.

## Cover Type/Job Category Maintenance Detail Window

To display this window, press Enter on the Cover Type/Job Category Initial window.

This lists all [job](#) categories linked to the [cover type](#). The line of input fields (the invoice fields) above the list of job categories is where the actual set up or maintenance takes place.

**Note:** Where invoice field values are highlighted, that means there is a fixed charge attached.

### Fields

#### Job Category

To add a new charge matrix for a cover type/job category combination, enter a valid job category.

**Caution:** Do not enter a valid job category in this field and immediately select an existing job category by entering 1 in an option field. This will result in the unnecessary record locking of the first job category.

#### Labour

Enter one of the following:

0 - If this job category will not invoice for labour hours

In this case, no fixed charge will apply.

1 - If this [job](#) category will invoice for labour hours

In this case, you can set up fixed charge overrides by selecting **Pos Cur Charging Overrides (F14)** or **Charging Overrides (F16)**. Be sure to page through the Charge pop-ups, as the latest price is on the last page.

If you have made a copy based on another currency, you must convert the override charges to the appropriate value for the different currency.

#### Mileage

Enter one of the following:

0 - If this job category will not invoice for mileage

1 - If this job category will invoice for miles or kilometres

There are no fixed charge overrides on distance travelled.

The software will display the appropriate value on the [Call](#) Reporting window, where you can change it.

### Travel

Enter one of the following:

0 - If this job category will not invoice for travel hours

In this case, no fixed charge will apply.

1 - If this job category will invoice for travel hours

You can set up fixed charge overrides using **Pos Cur Charging Overrides (F14)** or **Charging Overrides (F16)**. Be sure to page through the Charge pop-ups, as the latest price is on the last page.

The Call Reporting window displays the appropriate value, and you can change it.

If you have made a copy based on another currency, you must convert the override charges to the appropriate value for the different currency.

### Misc

Enter one of the following:

0 - If this job category will not invoice for miscellaneous charges

1 - If this job category will invoice for miscellaneous charges

There are no fixed charge overrides on miscellaneous charges.

The Call Reporting window displays the appropriate value, and you can change it.

### Major

Enter one of the following:

0 - If this job category will not invoice for parts used, unless you enter an override charge percentage in [technical reporting](#) - parts used

1 - If this [job](#) category will invoice for major parts

If you want to specify which parts are to be charged, use **Pos Cur Charging Overrides (F14)** or **Charging Overrides (F16)**.

You specify which of the four types you want to charge for, and in what order. You can specify this information for each individual piece of equipment on each individual [contract](#).

These types are selected from the Item Types to be Invoiced details you specified on System Parameters Maintenance Meterage window.

You can set up item types in the Inventory Descriptions file.

## Minor

Enter one of the following:

0 - If this [job](#) category will not invoice for parts used, unless you enter an override charge percentage in [technical reporting](#) - parts used

1 - If this job category will invoice for major parts

If you want to specify which parts are to be charged, use **Pos Cur Charging Overrides (F14)** or **Charging Overrides (F16)**.

You specify which of the four types that you want to charge for, and in what order. You can specify this information for each individual piece of equipment on each individual contract.

These types are selected from the Item Types to be Invoiced details you specified on System Parameters Maintenance Meterage window.

You can set up item types in the Inventory Descriptions file.

## Consume

Enter one of the following:

0 - If this job category will not invoice for parts used, unless you enter an override charge percentage in technical reporting - parts used

1 - If this job category will invoice for consumable parts

If you want to specify which parts are to be charged, use **Pos Cur Charging Overrides (F14)** or **Charging Overrides (F16)**.

You specify which of the four types that you want to charge for, and in what order. You can specify this information for each individual piece of equipment on each individual [contract](#).

These types are selected from the Item Types to be Invoiced details you specified on System Parameters Maintenance Meterage window.

You can set up item types in the Inventory Descriptions.

## Supplies

Enter one of the following:

0 - If this job category will not invoice for parts used, unless you enter an override charge percentage in technical reporting - parts used

1 - If this [job](#) category will invoice for supply parts

If you want to specify which parts are to be charged, use **Pos Cur Charging Overrides (F14)** or **Charging Overrides (F16)**.

You specify which of the four types that you want to charge for, and in what order. You can specify this information for each individual piece of equipment on each individual [contract](#).

These types are selected from the Item Types to be Invoiced details you specified on System Parameters Maintenance Meterage window.

You can set up item types in The Inventory Descriptions file.

### **Option (Untitled)**

Enter one of the following:

1 - To select a job category for maintenance

There is no need to press Enter, as the job category charge details are displayed for amendment automatically.

4 - To select a category for deletion from this matrix

### **Functions**

#### **Pos Cur Charging Overrides (F14)**

Use this to display a special override entry pop-up for the item on which the cursor has been positioned.

#### **Charging Overrides (F16)**

This displays the same pop-ups as **Pos Cur Charging Overrides (F14)**, but it displays each in turn, so you can enter overrides for labour, travel, major, minor, consume and supplies.

## Charging Overrides Pop-up

To display this pop-up, select **Pos Cur Charging Overrides (F14)** or **Charging Overrides (F16)** for either Labour or Travel.

### **Fields**

#### **The First n Hours**

Enter the number of hours this charge is to apply for.

#### **For a Min Charge**

Enter the value to be charged.

#### **Eff Date**

Enter the date from which this charge is to be made.

Press Enter to add each line of detail to the list in the pop-up. When you have added all lines, select **Accept (F7)** to update.

## Parts Selection Pop-up

To display this pop-up, select **Pos Cur Charging Overrides (F14)** or **Charging Overrides (F16)** for one of the four Item Types to be Invoiced (set up on the System Parameters Maintenance Meterage window). These might be major, minor, consume and supplies.

**Select Parts to Include**

Enter one of the following:

0 - If you do not want to bring up a list of parts and select those to be overridden

1 - If you want to display a list of parts and select those to be overridden

The Include/Exclude pop-up will be displayed.

**Select Parts to Exclude**

Enter one of the following:

0 - If you do not want to bring up a list of parts and select those to be excluded from the override

1 - If you want to display a list of parts and select those to be excluded from the override

The Include/Exclude pop-up will be displayed.

**Select All Parts**

Enter one of the following:

0 - If you do not want to select any parts for the override

1 - If you want to select all parts for the override

Press Enter to continue. You will be returned to the [Cover Type/Job](#) Category Maintenance Detail window, unless you need the Include/Exclude pop-up to specify items.

## Include/Exclude Pop-up

Enter 1 in either the Select Parts to Include or the Select Parts to Exclude fields on the Parts Selection pop-up to see this pop-up.

**Fields****Position To**

Position the list of items to start at the item you specify in this field.

**Select (1)**

Type **1** against the items you are specifying.

If the pop-up has the word Include in the bottom-right corner, you are selecting items to be included in the charge override.

If the pop-up has the word Exclude in the bottom-right corner, you are selecting items to be excluded from the charge override.

When you have specified all relevant items, select **Accept (F7)** to update.

## Tax Codes [6/SSM]

You can allocate different tax or sales tax codes to all the elements (excluding parts) in the charge matrix, and for the various countries involved.

You can set specific tax or sales tax codes for four of the elements in the [cover type/job](#) category charge matrix. These override the customer account and [site](#) settings of the tax indicator and the tax code fields, which would otherwise apply.

You can set up different tax codes for different countries.

To set up the tax codes, specify a [contract type](#) and country. You can set up default values for the tax codes to apply to travel labour, chargeable travel, labour hours and miscellaneous charges.

The software applies these settings to all job category records for the cover type and country. Individual codes can be changed, if necessary. Alternatively, all the tax codes can be set up individually for a country.

## Tax Code Maintenance Initial Window

To display this window, select the Tax Codes Maintenance task.

### **Fields**

#### **Cover Type**

Enter an existing cover type.

#### **Country Code**

Enter an existing country code.

#### **Default Tax Codes**

Select the typical tax code for each element. The software will automatically apply this to the various matrices. The few exceptions can then be edited manually.

These values do not override any existing ones on the next window. You would only use these if you are setting up new codes.

#### **Travel**

Enter a travel code using a three-character code. These codes are held on the General Ledger tax codes file, to be applied to travel labour.

#### **Miles/Kilometres**

Enter a three-character code. These codes are General Ledger tax codes to be applied to miles/kilometres.



**Labour**

Enter a three-character code. These codes are General Ledger tax codes to be applied to labour.

**Miscellaneous**

Enter a three-character code. These codes are tax codes to be applied to any miscellaneous charges.

Press Enter to display the Tax Code Maintenance Detail window.

## Tax Code Maintenance Detail Window

To display this window, press Enter on the Tax Code Maintenance Initial window.

**Fields****Job Category**

Enter a [job](#) category code of up to three alphanumeric characters.

**Trv**

Enter a tax/sales tax code of up to three alphanumeric characters for travel.

The software will enter the default you specified on the Tax Code Maintenance Initial window in this field , but you can change this.

**MI/Km**

Enter a tax/sales tax code of up to three alphanumeric characters for mileage or kilometres.

The software will enter the default you specified on the Tax Code Maintenance Initial window in this field, but you can change this.

**Lbr**

Enter a tax/sales tax code of up to three alphanumeric characters for labour.

The software will enter the default you specified on the Tax Code Maintenance Initial window in this field, but you can change this.

**Msc**

Enter a tax/sales tax code of up to three alphanumeric characters for miscellaneous charges.

The software will enter the default you specified on the Tax Code Maintenance Initial window in this field, but you can change this.

**Select (1)**

Enter one of the following:

- 1 - To update an existing code
- 4 - To delete an existing code

Select **Update (F8)** to save any changes made.

## District File [7/SSM]

Use this [task](#) to authorise groups of teams to a user for the purpose of work control.

Most users can log a [call](#), but only users who are authorised to control specific teams can progress calls through Engineer Work Allocation.

## District File Maintenance Initial Window

To display this window, select the District File [task](#).

### Fields

#### **District Number**

Enter a new or existing district of up to two alphanumeric characters.

Press Enter to display the District File Maintenance Detail window.

## District File Maintenance Detail Window

To display this window, press Enter on the District File Maintenance Initial window.

### Fields

#### **Description (Untitled)**

Enter a district description of up to 36 alphanumeric characters.

#### **User ID**

Enter a user ID of up to 10 alphanumeric characters.

#### **Team Number**

Enter the team to which this user will be authorised.

A user can log [calls](#) for any team, whether authorised or not, but a user can only progress [calls](#) for teams to which that user is authorised.

#### **Select (X)**

Enter **4** to delete the line.

Press Enter to add the new team and user to the list and then select **Update (F8)** to update.

---

## FSG/Territory/Team [8/SSM]

Use this [task](#) to set up and maintain the relationship between [field service groups](#), geocodes, territories, teams, engineers and alternative engineers.

The relationships you define here are used by Service Management for selecting a team or engineer when scheduling work in [call](#) logging.

If your territories are small, you can set up a team with several engineers for each territory. The software will schedule the member of the team with the lightest workload. This is no problem where the distances to be travelled are not significant.

However, if your territories tend to be large, more than 50 miles across, this set-up is unlikely to suit you. The software could select the engineer within the team who is located the furthest from the [job](#).

You can avoid this problem by setting up a single engineer for a territory, and then specifying that engineer as the prime engineer for the territory. You would then specify a first, second, and perhaps a third alternative engineer to cover if the prime engineer is unavailable. These alternatives would be the engineers that are geographically the closest to the prime engineer's territory.

You can define any geocode to more than one territory. This is useful if you have service areas that overlap for different products.

You must set up your field service groups using the Field Service Group Maintenance task before using this task.

## FSG/Territory/Team Maintenance Selection Window

To display this window, select the FSG/Territory/Team task.

### **Fields**

#### **Branch**

Enter the [branch](#) in which you want to set up your definition, or blank out the field to create a definition for all branches.

This field defaults to your current branch.

#### **Territory Profile Code**

The territory profile is a means of linking teams and engineers to a shift profile.

Use this if you want the software to schedule [jobs](#) to a different set of engineers and teams depending on the shift that each job falls into. Enter the territory profile in this field, and enter it also against the relevant shift in Shift Profile Maintenance.

Leave this field blank if you are not using the shift profiles function, or if you are using it but you do not want to schedule different teams and engineers depending on the shift of a job. In this case, Service Management will use the shift definition to calculate the target response time, but will not schedule jobs unless they fall into the core shift hours.

You set territory profiles up under code TRPC in the Inventory Descriptions file.

Press Enter to display the FSG/Territory/Team Maintenance List window.

## FSG/Territory/Team Maintenance List Window

To display this window, press Enter on the FSG/Territory/Team Maintenance Selection window.

When you first enter this window, it has no data on it, and you must select **Add or Copy Based On (F10)** and display the FSG/Territory/Team Maintenance Copy window to add definitions.

Once you have set up definitions, this window lists all the [field service groups](#) that you have set up for the specified [branch](#) and territory profile.

### **Fields**

#### **Select (Sel)**

Enter **1** against a field service group to maintain it. Press Enter to display the FSG/Territory/Team Maintenance Details window.

### **Functions**

#### **Add or Copy Based On (F10)**

Use this to display the FSG/Territory/Team Maintenance Copy window, where you can add definitions.

Select **Add or Copy Based On (F10)** to display the FSG/Territory/Team Maintenance Copy window.

Enter 1 in the Selection field and then press Enter to see the FSG/Territory/Team Maintenance Details window.

## FSG/Territory/Team Maintenance Copy Window

To display this window, select **Add or Copy Based On (F10)** on the FSG/Territory/Team Maintenance List window.

You can use this window in two ways:

You can simply specify the branch, field service group and optionally the job category and territory profile that you want to define teams or engineers for. You use only the first four input fields on the window.

You can do the above, and also use the lower fields on the window to specify the branch, field service group, job category and territory profile that you want to copy from. This will take all the teams and engineers specified there and add them to this definition. You can then make changes.

### **Fields**

**Branch**

Enter the [branch](#) to which this definition is to apply.

**Field Service Group**

Enter the [field service group](#) to which this definition is to apply.

**Job Category**

If you want this definition to apply only to a particular [job](#) category, you can optionally enter that category in this field.

**Territory Profile Code**

If you want to attach this definition to a particular territory profile, enter it in this field.

This is only useful if you want to be able to link the profile to a shift profile. If you do not need to do this, leave this field blank.

**Copy Based on Branch**

If you want to copy an existing definition, enter the relevant branch in this field.

**Copy Based on Field Service Group**

If you want to copy an existing definition, enter the relevant [field service group](#) in this field.

**Copy Based on Job Category**

If you want to copy an existing definition, enter the relevant [job](#) category in this field.

**Copy Based on Territory Profile Code**

If you want to copy an existing definition, enter the relevant territory profile code in this field.

**Functions****Copy Based On (F10)**

Use this to perform the copy. The definitions from your copy fields will be copied to the new definition, and will be displayed on the FSG/Territory/Team Maintenance Details window.

If you completed any of the copy fields, select **Copy Based On (F10)** to perform the copy. All the data in the based on definition will be copied, and will be displayed on the FSG/Territory/Team Maintenance Details window.

If you only entered the top four fields, press Enter. The FSG/Territory/Team Maintenance Details window will be displayed, with your choices will be listed at the top of the window.

## FSG/Territory/Team Maintenance Details Window

To display this window:

Press Enter on the FSG/Territory/Team Maintenance Copy window.

Select **Copy Based On (F10)** on the FSG/Territory/Team Maintenance Copy window.

Select a [field service group](#) and then press Enter on the FSG/Territory/Team Maintenance List window.

This is the main maintenance window for your field service group/territory/team definitions.

The [branch](#), field service group, and, where relevant, the [job](#) category and territory profile are displayed at the top of the window.

Any existing definitions are listed beneath the field headings.

You can enter new definitions in two ways:

You can enter them in the input fields at the bottom of this window.

You can copy existing definitions using the FSG/Territory/Team Maintenance Copy window.

## **Fields**

### **Select (Sel)**

Enter **1** against a definition to maintain it. It will then appear in the input fields at the bottom of the window, ready to be maintained.

**Note:** *You cannot change geocodes in this way. If you do need to change a geocode, you must delete the line and re-enter it with the correct geocode.*

### **Tty**

This field displays the territory within which the defined geocodes, teams and engineers operate.

If this is the input field, you can enter or amend the territory to which the definition applies. You can only enter existing territories.

**Note:** *Although it is mandatory, this field is a memorandum field. It is not used elsewhere in the system. It is intended as a useful reference.*

If you need to set up new territories, select the Codes/Parameter File [task](#) and set up new territories as parameter IDs under type PTCH.

If you cannot find the parameter type PTCH, set it up as a new parameter type in the Codes/Parameter File task. The parameter IDs should be three characters long. See the relevant section of the product guide for instructions on how to do this.

### **Geo 1**

This field displays the first part of the geocode. This may correspond to the first part of a postcode, for example. If this is the input field, this is where you enter the first part of the geocode to which the definition applies. You can enter the same geocode in more than one territory.

You cannot use the input field to amend geocodes. To change a geocode you must delete the line and then re-enter it.

**Geo 2**

This field displays the second part of the geocode. This may correspond to the second part of a postcode, for example. If this is the input field, this is where you enter the second part of the geocode to which the definition applies. You can enter the same geocode in more than one territory.

You cannot use the input field to amend geocodes. To change a geocode you must delete the line and then re-enter it.

**Prime Eng**

This field displays the prime engineer. This is the engineer that the software will select to service any machine that is part of the specified [field service group](#) and also covers the specified geocode.

If this is the input field, this is where you enter or amend the prime engineer.

If you enter a prime engineer, you cannot enter a prime team.

**Prime Team**

This field displays the prime team. This is the team that the software will select to service any machine that is part of the specified field service group and also covers the specified territory and geocode.

If this is the input field, this is where you enter or amend the prime team.

If you enter a prime team, you cannot enter a prime engineer.

**First Eng**

This field displays the first alternative engineer. This is the engineer that the software will select if the prime engineer or team is not available.

If this is the input field, this is where you enter or amend the first alternative engineer.

If you enter a first alternative engineer, you cannot enter a first alternative team.

**First Team**

This field displays the first alternative team. This is the team that the software will select if the prime engineer or team is not available.

If this is the input field, this is where you enter or amend the first alternative team.

If you enter a first alternative team, you cannot enter a first alternative engineer.

**Second Eng**

This field displays the second alternative engineer. This is the engineer that the software will select if the prime and first engineers or teams are not available.

If this is the input field, this is where you enter or amend the second alternative engineer.

If you enter a second alternative engineer, you cannot enter a second alternative team.

### **Second Team**

This field displays the second alternative team. This is the team that the software will select if the prime and first engineers or teams are not available.

If this is the input field, this is where you enter or amend the second alternative team.

If you enter a second alternative team, you cannot enter a second alternative engineer.

### **Third Eng**

This field displays the third alternative engineer. This is the engineer that the software will select if the prime, first and second engineers or teams are not available.

If this is the input field, this is where you enter or amend the third alternative engineer.

If you enter a third alternative engineer, you cannot enter a third alternative team.

**Note:** You could specify a catchall in this field: perhaps a supervisor who would then be assigned any job that the software could not assign to a specified engineer or team.

### **Third Team**

This field displays the third alternative team. This is the team that the software will select if the prime, first and second engineers or teams are not available.

If this is the input field, this is where you enter or amend the third alternative team.

If you enter a third alternative team, you cannot enter a third alternative engineer.

**Note:** You could specify a catchall in this field: perhaps a supervisor who would then be assigned any job that the software could not assign to a specified engineer or team.

### **Position by Geocode 1**

The list of definitions may be extensive, so if you want to re-position the display to another part of the list, enter the relevant geocode and then press Enter.

If you have entered a new definition, or amended an existing one, in the input fields at the bottom of the window, press Enter and your definition will be added to the list displayed.

Select **Update (F8)** to update your definition.

## **Field Service Group [9/SSM]**

A [field service group](#) groups together those [divisions](#), groups, sub-groups and [models](#) that will need similar skills when being serviced. You set them up with this [task](#).

You will then use the FSG/Territory/Team task to define certain engineers or teams to service the field service group. The software uses these engineer team and territory definitions to assign an engineer from a team to a service [job](#) automatically.



The customer's geocode establishes the territory (or territories, as you can define a geocode to more than one territory) in which the [installation](#) falls; and the software then selects the prime engineer or team covering this territory and field service group.

## Field Service Group Maintenance Initial Window

To display this window, select the Field Service Group task.

### **Fields**

#### **Field Service Group**

Enter a new or existing [field service group](#).

Press Enter to see the Field Service Group Maintenance Detail window.

## Field Service Group Maintenance Detail Window

To display this window, press Enter on the Field Service Group Maintenance Initial window.

### **Fields**

#### **Description (Untitled)**

Enter the [field service group](#) description, using up to 36 alphanumeric characters.

#### **Model**

Enter the specific [models](#) to which the skills of the field service group are restricted.

You do not need to enter a model if the field service group is competent to service all the models in the model sub-group.

If you enter a model you must enter a [division](#), but you do not need to enter the model group or model sub-group.

#### **Division**

Enter the product division(s) covered by the field service group. This means that the field service group is competent to service all products within the division if no further qualification is entered (that is, for model group, model sub-group or model).

#### **Model Group**

Enter the specific model group or groups, within a division, that are covered by the field service group. Leave this field blank if all model groups in the division are covered.

This means that the field service group is competent to service all products within the model group if you do not enter any further qualification (that is, for model sub-group or model).

### **Model Sub-Group**

Enter the specific model sub-group or groups within a model group that are covered by the field service group. Leave this field blank if all model sub-groups in the model group are covered.

This means that the field service group is competent to service all products within the model sub-group if you do not enter any further qualification at model level.

### **Functions**

#### **Fold/Truncate (F13)**

Use this to toggle between displaying more and less detail for each line.

Select **Update (F8)** to update.

## **3-D Matrix [10/SSM]**

You might find it useful to be able to reduce the response time for a [call](#) if it is for a very important customer, or if a high-usage machine is down. The 3-D matrix lets you do this.

The matrix holds values for the following three elements:

- The importance of the customer placing the call
- The volume segment (that is, usage) of the model
- The seriousness of the problem

This is simply whether the machine is up and working, or is down and completely out of action.

When the software has to calculate the response time for a call, it first finds the relevant response time in the response time hierarchy:

The special [serial numbers](#) file. If it finds a response time here it does not apply the 3-D matrix reduction.

It then looks at the [contract](#) line.

It then looks at the contract header.

It then looks at the [contract type](#) (incl \*NO).

It then looks at the default [branch](#) response time, set on the escalation control file.

The software takes the first of these five that it finds. As long as this is not from the special serial numbers file (the 3-D matrix is never applied in that case) it checks the following:

Whether the Machine Up field on the Job Line Details window is set on or off

What the volume segment is for this model

What the customer priority is for the call

It uses this information to find the relevant box in the 3-D matrix (see the 3-D Matrix Maintenance Detail window). It takes the value in the box, and reduces the response time by that percentage.

## 3-D Matrix Maintenance Detail Window

To display this window, select the 3-D Matrix [task](#).

### **Fields**

All the input fields on this window can hold percentage reduction values. You can input a value in each field, or leave some or all fields blank. The valid entries are 0 to 100, with no decimals.

This window shows one input field for every possible combination of the three elements that compose the 3-D matrix:

#### Volume segment

All existing volume segments are listed down the left-hand side of the window.

#### Customer priority

The four customer priorities are listed across the top of the window. You can choose whether you want to use all four or fewer priorities when you set the Maximum Customer Importance field on the System Parameters Maintenance General window.

#### Machine up or down

For each customer priority there are two fields, one for the machine up scenario and one for the machine down.

Select **Update (F8)** to save any changes.

## Special Serial Numbers [11/SSM]

Use this [task](#) to set up an actual response time in hours and minutes for a specified item of equipment. This will normally be used as an exception, to provide a short-[term](#), special service to an item of equipment.

**Note:** *The response time you enter here is at the top of the response times hierarchy, and so will override any [model](#), [contract](#) or other response times set up elsewhere. The 3-D matrix will not affect this response time.*

## Special Serial Number Selection Window

To display this window, select the Special Serial Numbers task.

### **Fields**

### **Serial Number**

Enter the [serial number](#) of the machine for which you want to set up a special response time.

If you do not know the serial number, prompt on the Model field. When you select the [model](#), you will then see a list of all the serial numbers for that model, and you can select one.

### **Model**

Enter the model that relates to the serial number you have entered.

If you prompt on this field, you will see a list of the models for this [branch](#). When you select one, you will then see a list of all the serial numbers for that model, and you can select one.

## **Functions**

### **List of Serial Numbers (F6)**

Use this to display a list of the special [serial numbers](#) already set up. You can select one to amend.

Enter a valid serial number and [model](#) combination and then press Enter to display the Special Serial Number Detail window.

## **Special Serial Number Detail Window**

To display this window, enter a valid [serial number](#) and [model](#) combination on the Special Serial Number Selection window and then press Enter.

**SS05S99**

### **Fields**

#### **Response Time**

Enter the response time in hours and minutes (format hhh:mm) to be applied to the model and serial number. This must be greater than zero.

This response time will take priority when calculating the target time for a [call](#) to this machine.

The response time hierarchy:

- 1 Looks for the response hours in the special serial numbers file. If it finds a response time here it does not apply the 3-D matrix reduction.
- 2 It then looks at the [contract](#) line.
- 3 It then looks at the contract header.
- 4 It then looks at the [contract type](#) (incl \*NO).
- 5 It then looks at the default [branch](#) response time, set on the escalation control file.

The software goes through each in turn, and takes the first that it finds. The 3-D matrix reduction is applied to all but the special serial number response time to establish the call response.

Select **Update (F8)** to update.

## Enquire on Engineer Master File [21/SSM]

Use this [task](#) to enquire on the details of engineers.

### Engineer Enquiry Initial Window

To display this window, select the Enquire on Engineer Master File [task](#).

#### Fields

##### **Engineer**

Enter an existing engineer.

Press Enter to display the Engineer Enquiry Detail window.

### Engineer Enquiry Detail Window

To display this window, press Enter on the Engineer Enquiry Initial window.

#### Fields

##### **Engineer Code**

This field displays the engineer you specified on the previous window.

##### **Engineer Name**

This field displays the engineer's full name.

##### **Address Lines: 1 to 5**

This field displays the engineer's address.

##### **Geocode 1 and 2**

The geocode is not used in automatic [call](#) allocation.

##### **Postcode 1 and 2**

The postcode is not used in automatic call allocation.

##### **Telephone No.**

This field displays the engineer's telephone number.

**Telephone Extension No.**

Enter the engineer's telephone extension number, if applicable.

**Radio Page Code**

This field displays the engineer's [terminal](#) code if the [remote communications](#) link is active.

**Supply Stockroom**

This is only displayed if the DRP libraries have been included in the Service Management library list. It is the source of spare parts, to replenish the engineer's spare parts [location](#) via DRP, ordered at [technical reporting](#).

**Stock Location**

If the interface to Inventory Management is active, each engineer must be linked to a stock location set up in Inventory Management.

**Team Code/Description**

This field displays the engineer's team. Teams are used in automatic [call](#) allocation, if Assign by Territory is set to **1** on the [Company](#) Profile Maintenance General window.

**Vehicle Registration No.**

This field displays the engineer's vehicle registration number if applicable.

**Absent Code**

This field displays the reason for the engineer being unavailable. If the field has a value other than **blank**, **0** or **1**, automatic call allocation will ignore the engineer for calls.

**Manager's Code**

This field displays the engineer's manager's code.

**Grading Code**

This field displays the grade of the engineer from the codes set up under type EGRD in the Codes/Parameter File [task](#).

**Cost Per Hour**

This field displays the hourly rate, in base currency, to be charged to the [job](#) cost database, for work done and travel time expended by the engineer.

**Service Region Code**

This field displays the service region in which the engineer works.

**Service Region Description**

This field displays the description of the service region.

**Workshop Engineer**

One of the following is displayed:

- 0 - If, when the software calculates the charge for an engineer's time, it uses the contract or non-contract rate from the price list, depending upon the job

1 - If, when the software calculates the charge for an engineer's time, it uses the workshop rate from the labour rate price list

### **Include Engineer in Automatic Call Assignment**

One of the following is displayed:

- 1 - If the engineer will be included in the automatic [call](#) assignment program
- 2 - If the engineer will be excluded from the automatic call assignment program

### **Engineer Account/Locn Codes**

This field displays the account you set up for the engineer in Accounts Receivable.

This account is used as the customer for any non-[job](#) activities you set up in the diary function.

## **Functions**

### **Skills Matrix (F14)**

Use this to display the skills of the selected engineer on the Skills Matrix window.

### **Alternate Engineer Enquiry (F16)**

Use this to display any alternative engineer. This is only available if the Assign by Territory or Alternative Engineer field on [Company](#) Profile Maintenance General window is set to **0**.

## Skills Matrix Window

To display this window, select **Skills Matrix (F14)** on the Engineer Enquiry Detail window.

## **Fields**

### **Engineer Code**

This field displays the engineer you selected.

### **Model**

This field lists the [models](#) that this engineer is skilled to service.

If the engineer has been trained on all the models in the model sub-group, this field will be blank.

### **Division**

This field lists the [divisions](#) that this engineer is skilled to service.

This means the engineer is trained on all products within the division, if you do not enter any further qualification for model group, model sub-group, model or [job](#) category.

### **Model Group**

This field lists the model groups that this engineer is skilled to service.

This means the engineer is trained on all products within the model group, if you do not enter any further qualification for model, model sub-group or job category.

### **Model Sub-Group**

This field lists the model sub-groups that this engineer is skilled to service.

This means the engineer is trained on all products within the [model](#) sub-group, if you do not enter any further qualification for model or [job](#) category.

### **Job Category**

This field lists all the job categories in which this engineer is skilled, for the particular products you have listed here.

The software will only assign the engineer to jobs of this category within the [division](#), model group, model sub-group or model already specified.

A blank in the job category field indicates the engineer is trained to carry out all job categories for the products specified.

### **Functions**

#### **Fold/Truncate (F13)**

This toggles between displaying more and less detail for each line.

Select **Previous (F12)** to return to the Engineer Enquiry Detail window.

## Alternative Engineer Enquiry Window

To display this window, select **Alternate Engineer Enquiry (F16)** on the Engineer Enquiry Detail window.

### **Fields**

#### **Number**

This field displays the system number of the alternative engineer.

#### **Name**

This field displays the name of the alternative engineer.

### **Functions**

#### **Next (F7)**

Use this to return to the Engineer Enquiry Initial window.

Select **Previous (F12)** to return to the Engineer Enquiry Detail window.

## Enquire on Job Category [24/SSM]

Use this [task](#) to enquire on [job](#) categories.



## Job Category Enquiry Initial Window

To display this window, select the Enquire on Job Category task.

### **Fields**

#### **Job Category**

Enter an existing [job](#) category.

Press Enter to display the Job Category Enquiry Detail window.

## Job Category Enquiry Detail Window

To display this window, enter a [job](#) category and then press Enter on the Job Category Enquiry Initial window.

### **Fields**

#### **Job Category**

This field displays the category you entered on the Job Category Enquiry Initial window.

#### **Category Type**

This field displays the job category type (that is, breakdown, planned, non-job or other).

#### **Default Category**

If this is the default job category for a particular type of [call](#), the type of call is indicated as follows:

- 0 - Not a default
- 1 - Breakdown
- 2 - [Installation](#)
- 3 - Withdrawal
- 4 - Return job
- 5 - Repeat call
- 6 - Specialist call
- 7 - Return call, for knowledge
- 8 - Return call, other reasons
- 9 - Warranty

#### **Include Category in Repeat Call Calculation**

This field indicates whether the category will be included in the repeat [call](#) calculation:

- 1 - Yes

0 - No

### **Include Category in Automatic Call Assignment**

This field indicates whether the category will be included in automatic call assignment:

1 - Yes

0 - No

### **Average Hours Factor**

This field displays the average number of hours which a [job](#) for this job category will take to complete. The value is used in the calculation of engineer work points. The field is for future development.

Select **Previous (F12)** to return to the previous window.

## Enquire on Cover Type/Job Category [25/SSM]

Use this [task](#) to enquire on the list of [job](#) categories which are valid for a [cover type](#) within a currency, and the invoicing rules relating to each combination.

### Cover Type/Job Category Enquiry Initial Window

To display this window, select the Enquire on Cover Type/Job Category task.

#### **Fields**

##### **Cover Type**

Enter a [cover type](#).

##### **Currency Code**

Enter a currency.

Press Enter to display the Cover Type/Job Category Enquiry Detail window.

### Cover Type/Job Category Enquiry Detail Window

To display this window, enter a [cover type](#) and currency and then press Enter on the Cover Type/Job Category Enquiry Initial window.

#### **Fields**

##### **Job Category**

This field displays the [job](#) category you select from the table lower down the window.

**Invoice Labour**

One of the following is displayed:

- 0 - If labour hours are not chargeable for this cover type/job category combination
- 1 - If labour hours are chargeable for this cover type/job category combination

**Invoice Mileage**

One of the following is displayed:

- 0 - If mileage is not chargeable for this cover type/job category combination
- 1 - If mileage is chargeable for this cover type/job category combination

**Invoice Travel**

One of the following is displayed:

- 0 - If travel hours are not chargeable for this cover type/job category combination
- 1 - If travel hours are chargeable for this cover type/job category combination

**Invoice Misc. Charges**

One of the following is displayed:

- 0 - If miscellaneous charges are not chargeable for this cover type/job category combination.
- 1 - If miscellaneous charges are chargeable for this cover type/job category combination.

**Invoice Parts: 4 Types**

One of the following will be displayed:

- 0 - If parts fitted are not chargeable for this cover type/job category combination
- 1 - If parts fitted (up to four user-defined groups) are chargeable for this cover type/job category combination

If any values are highlighted, special conditions apply, which can be displayed using **Pos Cur Charging Overrides (F14)** or **Charging Overrides (F16)**. These show whether all parts have been included for charging, or whether some of the parts in the group have been included in, or excluded from, invoice charging.

**Note:** The software uses the [cover type](#) and [job](#) category combination to price completed jobs, to determine whether hours, parts and/or miscellaneous charges are to be invoiced.

**Functions****Pos Cur Charging Overrides (F14)**

Use this to display any overrides set up for the item on which you have positioned the cursor.

This is only available when you have selected a [job](#) category by entering 1 against it.

### **Charging Overrides (F16)**

Use this to step through those items which may have special overrides applied to them, displaying each item's options in turn.

This is only available when you have selected a job category by entering **1** against it.

Select **Previous (F12)** to return to the previous window.

## **Charging Overrides Enquiry Pop-up**

To display one of the Overrides pop-ups, select a job category with 1, and then select either **Pos Cur Charging Overrides (F14)** or **Charging Overrides (F16)** on the [Cover Type/Job Category Enquiry Detail](#) window.

These Override pop-ups vary depending on the charge on which you are enquiring, so you will see a selection of the fields listed below.

### **Fields**

#### **Position To**

Enter the code of the item you wish to view. The software displays the list of items starting at that code.

#### **The First n Hours**

Enter the number of hours this charge is to apply.

#### **For a Min Charge**

Enter the value to be charged.

#### **Eff Date**

Enter the date from which this charge is to be made.

#### **Select Parts to Include**

One of the following is displayed:

0 - If you do not want to bring up a list of parts and select those to be overridden

1 - If you want to display a list of parts and select those to be overridden

#### **Select Parts to Exclude**

One of the following is displayed:

0 - If you do not want to bring up a list of parts and select those to be excluded from the override

1 - If you want to display a list of parts and select those to be excluded from the override

#### **Select All Parts**

One of the following is displayed:

0 - If you do not want to select all parts for the override

1 - If you want to select all parts for the override

After each pop-up is displayed, select **Previous (F12)** to either see the next pop-up in sequence, or, if you have seen all the pop-ups you selected, to return to the [Cover Type/Job](#) Category Enquiry Detail window.

## Enquire on Tax Codes [26/SSM]

Use this [task](#) to enquire upon the tax codes which have been set up for a [cover type/job](#) category charge matrix within a specified country.

### Tax Codes Enquiry Initial Window

To display this window, select the Enquire on Tax Codes task.

#### **Fields**

##### **Cover Type**

Enter an existing [cover type](#).

##### **Country Code**

Enter an existing country code.

Press Enter to display the Tax Codes Enquiry Detail window.

### Tax Codes Enquiry Detail Window

To display this window, press Enter on the Tax Codes Enquiry Initial window.

This window displays a list of [job](#) categories and associated (travel, miles, labour and miscellaneous) tax codes for a selected [cover type](#) and country.

#### **Fields**

##### **All Fields**

These are the tax codes which apply to the job category charge matrix elements, set up for the selected cover type and country. They are used in job pricing and invoicing. They overwrite the account or [site's](#) tax indicator and tax code settings.

Select **Previous (F12)** to return to the previous window.

## Enquire on District File [27/SSM]

Use this [task](#) to enquire as to which user IDs are authorised to which teams.

A user cannot progress any [jobs](#) unless they are authorised.

## District Enquiry Detail Window

To display this window, enter a district code on the District Enquiry Initial window.

This window displays users who have the authority to access teams in Engineer Work Allocation.

### **Fields**

This displays, for each district, the teams and team descriptions defined to the user IDs.

Select **Exit (F3)** to leave the enquiry.

## Enquire on FSG/Territory/Team [28/SSM]

Use this [task](#) to review the relationship between [field service groups](#), geocodes, territories, teams, engineers and alternative engineers.

The relationships you define here are the basis for selecting a team or engineer when scheduling work in [call](#) logging.

You can define any geocode to more than one territory. This is useful if you have service areas that overlap for different products.

## FSG/Territory/Team Enquiry Selection Window

To display this window, select the Enquire on FSG/Territory/Team [task](#).

### **Fields**

#### **Branch**

Enter the [branch](#) on which you want to enquire. This field defaults to your current branch.

#### **Territory Profile Code**

Enter an existing territory.

You set these up under type TRPC in the Inventory Descriptions file.

Press Enter to display the FSG/Territory/Team Enquiry List window.

## FSG/Territory/Team Enquiry List Window

To display this window, press Enter on the FSG/Territory/Team Enquiry Selection window.

### **Fields**

#### **Select (Sel)**

Enter 1 against a line to see more details.

Enter 1 against a line and then press Enter to see the FSG/Territory/Team Enquiry Details window.

## FSG/Territory/Team Enquiry Details Window

To display this window, enter 1 against a line on the FSG/Territory/Team Enquiry List window.

### **Fields**

#### **Tty**

If a code is displayed, this is the territory to which the defined geocodes, teams and engineers apply.

#### **Geo 1**

If a code is displayed, this is the first part of the geocode. This may correspond to the first part of a postcode, for example.

#### **Geo 2**

If a code is displayed, this is the second part of the geocode. This may correspond to the second part of a postcode, for example.

#### **Prime Eng**

If a code is displayed, this is the prime engineer. This is the engineer that the software will select to service any machine that is part of the specified [field service group](#) and also lies in the specified territory and geocode.

#### **Prime Team**

If a code is displayed, this is the prime team. This is the team that the software will select to service any machine that is part of the specified field service group and also lies in the specified territory and geocode.

#### **First Eng**

If a code is displayed, this is the first alternative engineer. This is the engineer that the software will select if the prime engineer or team is not available.

#### **First Team**

If a code is displayed, this is the first alternative team. This is the team that the software will select if the prime engineer or team is not available.

### **Second Eng**

If a code is displayed, this is the second alternative engineer. This is the engineer that the software will select if the prime and first engineers or teams are not available.

### **Second Team**

If a code is displayed, this is the second alternative team. This is the team that the software will select if the prime and first engineers or teams are not available.

### **Third Eng**

If a code is displayed, this is the third alternative engineer. This is the engineer that the software will select if the prime, first and second engineers or teams are not available.

**Note:** *This may be a catchall here: perhaps a supervisor who would then be assigned any job that the software could not assign to a specified engineer or team.*

### **Third Team**

If a code is displayed, this is the third alternative team. This is the team that the software will select if the prime, first and second engineers or teams are not available.

**Note:** *This may be a catchall here: perhaps a supervisor who would then be assigned any job that the software could not assign to a specified engineer or team.*

Select **Exit (F3)** to leave the enquiry.

## Enquire on Field Service Group [29/SSM]

Use this [task](#) to display [field service group](#) details, which link [divisions](#) and [model](#) families within a group.

You set up a team of engineers by allocating certain combinations of field service group, territory and [job](#) category characteristics.

## Field Service Group Enquiry Detail Window

To display this window, enter a field service group on the Field Service Group Enquiry Initial window.

### **Fields**

These display a list of divisions, model groups, model sub-groups and models which are defined to the selected field service group.

### **Functions**



**Fold/Truncate (F13)**

Use this to toggle between displaying more and less details of the detail lines.

Select **Exit (F3)** to leave the enquiry.

## Enquire on 3-D Matrix [30/SSM]

Use this [task](#) to display the percentage reduction to be applied to the [call](#) response time depending on the customer priority, the volume usage of the [model](#) and whether or not the machine is working or completely out of action.

### 3-D Matrix Enquiry Detail Window

To display this window, select the Enquire on 3-D Matrix task.

**Fields**

The window shows the percentage reduction to be applied to the call response time for all volume segments, up to four customer priorities; and whether the machine is up (that is, working), or down (that is, not working).

Select **Exit (F3)** to leave the enquiry.

## Enquire on Special Serial Numbers [31/SSM]

Use this [task](#) to display the response times for specific [model](#) and [serial number](#) combinations, with account or address codes or both, and [installation site](#) names.

### Serial Number Enquiry Initial Window

To display this window, select the Enquire on Special Serial Numbers task.

**Fields**

Enter a [serial number](#) to display the [models](#) for selection (if more than one exists for the serial number).

**Functions**

### **List of Serial Numbers (F6)**

This displays a list of the serial numbers that have had their response times defined. This is therefore a complete list of valid entries for this enquiry.

Press Enter to display the Serial Number Enquiry Detail window.

## Serial Number Enquiry Detail Window

To display this window, enter the [serial number](#) and [model](#) combination and then press Enter on the Serial Number Enquiry Initial window.

### **Fields**

These display details of the customer account or address codes and [installation site](#) name, with the response time defined for the machine for your selected serial number and model combination.

Select **Exit (F3)** to leave the enquiry.

### Service Call Logging [1/SSS]

Use this [task](#) to enter the details of a new service [call](#) from a customer, and to update an existing call.

If you are using [remote communications](#), you can use the remote communications link to transmit call details to your field engineers.

A service [job](#) is a defined set of work at a single customer [site](#), identified by a unique job number that is generated by the software. A job can consist of one or more [job lines](#), that is, pieces of equipment. Each job line is treated as a separate unit of work within the job, with its own job category, fault code, customer contact name, target response date and time, status and engineer.

This task is extremely flexible with regard to the information you can use to get to the job you want to set up or maintain. You can enter just the [serial number](#), or the [model](#), the customer or customer and account, and so on.

Whichever fields you complete on the Job Maintenance Selection window, when you press Enter, the software automatically displays lists of missing information so that you can make a selection. So, if you enter just the account number, when you press Enter you see a list of addresses for that customer, and have to select one. You then select the machine, and so on.

These selection windows are not all included in this documentation, as there are several of them. They list the addresses, [contract types](#), machines, models, [locations](#), or whatever the software requires, and you make your selection.

When the software has enough information to identify the job you are setting up or maintaining, the Job Line Customer window is displayed.

If the customer is on credit stop (that is, the Account Stop field is set On on Customer Maintenance window 2 in the Accounts Receivable Names and Addresses task), the software displays a warning and sets the call status to credit hold. However, you can still log the job.

If the customer has a number of items of equipment on site and cannot identify which of them requires the service, you can log the job against any available machine line. The engineer enters the true model and serial number when completing the job and reporting on it.

As long as the call is in addition mode, you can change the date and time the call is logged. This allows for calls taken out of hours (for example, by an overnight answering service).

## **Assigning and Scheduling**

Service Management will attempt to assign the [job](#) to the prime engineer or team as set up in the FSG/Territory/Team [task](#). If it successfully assigns an engineer, you can schedule the job within the Service Call Logging task.

The process used to assign the engineer or team is as follows:

Service Management takes the date and time of the logged [call](#).

It finds the appropriate calendar. This could be a particular one for the machine, [contract](#) or customer, or it could be the standard calendar set up in the Daily Calendar File task.

It looks up the call date in that calendar, and finds the day type associated with that day in the calendar.

It looks at how the day type is set up in the Codes/Parameter File task.

It finds the shift profile associated with that day type. If it is blank, the software uses the core shift as set up in the Service Window fields on the Company Profile Maintenance Hours window. If there is a shift profile, the software looks up the details of that shift.

Using the calendar and shift details, the software calculates the target response time for the job and attempts to assign the job to the prime engineer or team.

If the software returns an individual engineer then you can schedule the job from the [Job Line](#) Details window within this task.

## **Specific Test Data**

**Note:** To allocate a new job to a team, check that certain default information is set up covering the default team for the [company](#), where Z1 is the demonstration company.

Division maintenance: Z1 \*D default [division](#): Z1 team allocation.

Field service group maintenance: Z1 \*D all [field service groups](#) for team \*DF \*D (division field).

Geocode/territory maintenance: Z1 CT \*DF all territories for team \*DF \*DF \*DF.

Team maintenance: Z1 CT \*DF default [branch](#) team \*D \*DF \*blank.

District maintenance: authorise users to the \*DF team. You will need to change branch to the one which originally created the default district. A query on the district file (SSP68) will show you which branch this was.

The geocode/territory and team entries will work successfully for all branches in the demonstration company.

## **Job Maintenance Selection Window**

To display this window, select the Service Call Logging task.

You can choose the field in which the cursor is placed when the window comes up by specifying it in the Position Cursor During Call Logging field on the System Parameters Maintenance Assignment window.

## **Fields**

### **Serial Number**

To log a new [job](#), the quickest access is by entry of the [serial number](#) of the machine requiring service.

If the software finds more than one [job line](#) for that machine, it will display them all.

### **Model**

Enter an existing [model](#). If this is all you enter, you will then see a list of all machines of this model at all [installation sites](#). This list can be lengthy, and this method is not recommended when taking a new [call](#).

### **Account Number**

Enter the customer account.

If a customer who does not have an account phones in, you can still take the call by setting them up as a cash customer. To do this, you must still enter an existing account; it is a good idea to set up a special dummy account for this purpose. You can enter a new address code and then select **New Customer (F18)**. You then enter the name and address of the new installation, followed by the pieces of equipment installed at the site. You can then log the job details.

If you want the cursor to be positioned on the Account Number field when the window is first displayed, set the Position Cursor During Call Logging field to **1** on the System Parameters Maintenance Assignment window.

### **Account Address**

If you enter an account number, you can enter the address if you know it. If you do not, you will have to select one from a list displayed when you press Enter.

### **Contract Number**

If you enter a [contract](#) number, and optionally a [contract type](#), a list of existing [jobs](#) relating to the contract is displayed. If there are no existing jobs for the contract, the software will allocate a new job number. For a new job, if only one piece of equipment is covered by the contract, the [Job Line](#) Customer window will be displayed immediately. If multiple pieces of equipment are covered, the software lists them.

If you want the cursor to be positioned on the Contract Number field when the window is first displayed, set the Position Cursor During Call Logging field to **2** on the System Parameters Maintenance Assignment window.

### **Contract Type**

If you enter a contract number you can also enter the type. This will save you selecting the type from a list displayed when you press Enter.

### **Customer Order No**

Enter the customer order number. It must be valid on at least one [job](#).

The customer order number can be used to access an existing job. The software will display a list of jobs relating to the entered customer order number.

If you want the cursor to be positioned on the Customer Order No field when the window is first displayed, set the Position Cursor During Call Logging field to **3** on the System Parameters Maintenance Assignment window.

### **Job Number**

If you enter a job, it must be an existing job which has not yet been completed through [technical reporting](#). When you press Enter you see a list of equipment on this job.

### **Breakdown**

The breakdown indicator is normally **1**. This sets the Job Cat field on the [Job Line Details](#) window to the default breakdown job category; the latter is defined in the Job Category Maintenance.

## **Functions**

### **New Customer (F18)**

If a customer who does not have an account phones in, you can still take the call by setting them up as a cash customer. To do this, you must still enter an existing account; it is a good idea to set up a special dummy account for this purpose. You can enter a new address code and then select **New Customer (F18)**. You then enter the name and address of the new installation, followed by the pieces of equipment installed at the site. You can then log the job details.

Press Enter. Depending on the information you have entered, you may see any one, or more than one, of a number of selection windows, where you have to make a selection so the software can identify the [call](#) you want to enter.

The Job Header/Line Selection window is included as an example of such a selection window.

Once you have made enough selections, pressing Enter on each one, you will see the Job Line Customer window.

## **Job Header/Line Selection Window**

For a new [job](#), if only one piece of equipment is installed at the [site](#) you select, the [Job Line Customer](#) window is shown.

If more than one piece of equipment is installed, the Job Header/Line Selection window is shown so you can select those items to be included on the new job.

Use this window to enter the customer order reference and contact, and select the pieces of equipment to be included on the current job number. You can add new pieces of equipment, not yet recorded on the [installation](#) database, for the installation site. For each piece of equipment selected, the software displays the Job Line Customer window.

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## **Fields**

### **Customer Order No**

Enter the customer order number, if required.

This field is mandatory if you have set the Customer Ref for Job field to **1** on the Additional Details Maintenance Customer Defaults window for this customer.

### **Job Contact**

Enter the name of the person placing the [call](#), or the person to be contacted on [site](#) by the engineer. The [job](#) contact defaults through to the Job Line Customer window.

The job contact may cover a number of [job lines](#), if the More Than One Machine Allowed on a Breakdown Call field is set to **1** on the System Parameters Maintenance Assignment window.

### **Model**

You can add a [model](#) to the list by entering its number in this field. This will actually update the [installation](#), adding this new model.

### **Serial**

If you add a model to the list, you should also enter the [serial number](#), if you know it. The installation record is updated with this model and serial number.

If you do not enter a serial number, the software assumes a quantity of 1.

### **Select (Untitled)**

Enter one of the following:

- 1 - To select the item for inclusion in the new job
- 4 - To cancel the job line for that item of equipment and delete it from the job

## **Functions**

### **Job Story (F7)**

Use this to display the Free Format Text window, where you can enter text for the [job](#). If this is not displayed when you first enter the window, you can display it by first selecting a machine (by entering **1** against it), pressing Enter and then immediately selecting **Previous (F12)**.

### **Fold/Truncate (F13)**

Use this to toggle between displaying more and less detail for each [model](#) listed.

### **Text (F21)**

Use this to display the Free Format Text window, where you can enter text for the machine. If this is not displayed when you first enter the window, you can display it by first selecting a machine (by entering **1** against it), pressing Enter, and then immediately selecting **Previous (F12)**.

## Job Line Customer Window

For a new [job](#), if only one piece of equipment is installed at the [site](#) you select, the [Job Line Customer](#) window is displayed.

If multiple pieces of equipment are installed, the Job Header/Line Selection window is displayed and you select those items you want to include on the new job.

Use this window to amend the customer details for this [call](#) only. This does not update the customer address in Accounts Receivable.

### **Fields**

#### **Customer Name**

Change the customer name as required. This will not update the customer in Accounts Receivable.

#### **Customer Address**

Change the address as required. This will not update the customer in Accounts Receivable.

#### **Currency Customer**

Enter one of the following:

0 - If this is not a currency customer

1 - If this is a currency customer

#### **Currency Code**

This field defaults from the customer's additional service details, but you can change it.

#### **Curr Rate Code**

This field defaults from the customer's additional service details, but you can change it.

#### **Tax Code**

This field defaults from the customer's additional service details, but you can change it.

**Note:** Tax codes on the charge matrix will override this value.

#### **Machine Location**

This field displays the exact [location](#) of the item selected for service.

#### **Contact Person**

This field defaults from the contact set up for the selected machine. If you change the name in this field, the machine's details will be updated when you select **Update (F8)**, but only this machine's details will be updated. If there is more than one machine on the [job](#), the details for the second and subsequent machines will not be updated.

If you did not enter a [job](#) contact on the Job Header/Line Selection window, any name you enter in this field will default through to the [Job Line Customer](#) window for each machine included in the job.



### Geo Code

This field displays the geocode from the customer's Additional Details Maintenance Customer Details window. You can change it.

The geocode/territory link determines the engineer or team to be allocated to the [call](#).

### Telephone Number

This field displays the telephone number from the customer's additional service details. You can amend or set up the number and update the service details.

**Note:** *If you change the name and address for this job only and you also enter a different phone number, be aware that the override address only holds 15 figures. Do not overtype a 20-figure telephone number because the last five characters will simply be lost.*

### Fax Number

This field displays the facsimile number from the customer's additional service details. You can amend it here.

### Opening Hours

These are the opening or closing hours from the customer's additional service details. You can amend them here.

Select **Update (F8)**.

If you are adding a new [job](#) and the default job category is a repeat [call](#) or a specialist call, the Call History pop-up will be displayed.

Otherwise, **Update (F8)** displays the [Job Line](#) Details window.

## Call History Pop-up

This pop-up will be displayed if you are adding a new [job](#) on [Job Line](#) Customer window and the default job category is a repeat [call](#) or a specialist call.

Alternatively, you can select the **Hist Enq (F13)** function on the Job Line Details window.

The Call History pop-up displays details of the last five calls.

### Fields

#### Select (Untitled)

Enter **1** to review a previous call.

#### Call Reception Date

This field displays the date on which the [call](#) was logged.

#### Call Reception Time

This field displays the time at which the call was logged.

### **CH**

Enter one of the following:

- 0 - If the call has never been on credit hold
- 1 - If the call is currently, or has been, on credit hold

### **AP**

Enter one of the following:

- 0 - If there was no appointment date and time for the call
- 1 - If there was an appointment date and time for the call

### **Resp Time**

This field displays the actual response time, established at the [technical report](#) stage.

### **Engr Code**

This field displays the code for the engineer who completed the call.

### **JC**

This field displays the [job](#) category first included in the technical report for the [job line](#).

### **FC**

This field displays the fault code for the job line.

### **MS**

This field displays the machine section repaired. You set up machine sections under type SECT in the Codes/Parameter File [task](#).

### **SS**

This field displays the machine sub-section repaired. You set up machine sub-sections under type SSCT in the Codes/Parameter File task.

### **CA**

This field displays the corrective action taken by the engineer. You set up corrective action codes under type CORA in the Codes/Parameter File task.

### **VT**

Enter one of the following:

- 0 - For a [contract](#) maintenance [visit](#) type
- 1 - For a service visit type

### **RC**

This field displays the return [call](#) reason code. The RVTY codes, 0 to 7, are hard-coded in a table and are not user maintainable. You can display them in the Return Visits pop-up when you leave call reporting, if the Return Visit field on the [Job Line](#) Details window is set to 1.

The RVTY codes are:

- 0 - Return [visit](#) not required
- 1 - Return visit on parts required
- 2 - Return visit on knowledge required
- 3 - Return visit required at end of day - customer
- 4 - Return visit required at end of day - engineer
- 5 - Return visit required for personal reasons
- 6 - Engineer could not gain access to machine
- 7 - Call stopped by despatching

### **Labour Hours**

This field displays the time taken by the engineer to complete the call.

### **Meter 1 Only**

This field displays the last 6 digits of the meter reading entered on the Call Reporting window of the [technical report](#).

### **P F**

Enter one of the following:

- 0 - If no parts were fitted
- 1 - If at least one part was fitted

### **E C**

Enter one of the following:

- 0 - If this [job](#) was not set up as an emergency
- 1 - If the Emergency field on the [Job Line](#) Details window was set on for this job and the [call](#) target time was set to the call reception date and time.

Having reviewed any of the calls in the Call History pop-up, press Enter to return to the Job Line Customer window.

## Job Line Details Window

To display this window, select **Update (F8)** on the [Job Line](#) Customer window.

This window displays a warning message if the customer is on credit stop. You can still log the call, but it is created with a status of Credit Hold.

### **Fields**

#### **Job Number**

This is allocated automatically by the software.

A [job](#) may have one or many [job lines](#) for separate pieces of equipment, depending on the setting of the More Than One Machine Allowed On a Breakdown Call field on the System Parameters Maintenance Assignment window.

### **Serial Number**

This field displays the machine's [serial number](#).

If there is more than one job line on the [call](#), the other lines will be displayed in sequence, once the existing window is accepted at **Update (F8)**.

### **Status**

This is system-maintained. One of the following is displayed:

00 - Open

This indicates that the job is open.

01 - Assigned

This job has been assigned to a team.

02 - Scheduled

This job has been placed in a team's schedule.

03 - Despatched

The engineer has been despatched to the job.

04 - Work In Progress

The engineer has arrived on [site](#).

05 - Telephone

The engineer must telephone before the [job](#) continues.

06 - Parts

The [job](#) cannot continue until spare parts arrive.

07 - Credit Hold

The customer is on credit stop in Accounts Receivable.

08 - Complete

The [job](#) is complete.

09 - Partial Report

The engineer's [technical report](#) is partially complete.

10 - SOP Job

This status is for future development.

### **Model Number**

The machine's [model](#) number is displayed.

### **Sub Status**

This field displays the job's sub-status code, once assigned. If the software fails to assign the [job](#) automatically, the reason is displayed. This code must be set up in the Codes/Parameters File [task](#), parameter type ETAR, which holds engineer assignment error codes.

If [remote communications](#) is active, the value can be updated from the field. You can also qualify the job status by entering a user-defined sub-status code.

**Note:** *If this field has any entry other than blank, this job will be excluded from automatic call assignment.*

### **Configuration**

This field displays the configuration code(s) attached to this machine. The software displays the first five configuration codes of peripherals attached to a machine.

You enter configuration codes against the model, but you set them up in the Codes/Parameter File task, under type CONF.

### **Contract Type**

The [contract type](#) is displayed. \*NO means that there is no [contract](#).

### **Cover Type**

The [cover type](#) is displayed.

### **Customer**

This field displays the customer's name.

### **Account/Loc**

This field displays the customer account and address codes.

### **Call Received**

The software enters the date and time of call receipt automatically, but you can change this if the window is in addition mode. This means you can change the time for calls taken out of hours and so on. Once you have updated the call, you can make no further changes to these fields.

### **Warranty Equip**

For non-metered equipment, enter **1** if this equipment is still under warranty.

For metered equipment, enter **1** if this equipment is still under warranty, and has not yet used up the warranty copies specified.

### **Parts**

Enter one of the following:

0 - If there is no special parts warranty still in force for this equipment

1 - If there is at least one special parts warranty in force for this equipment

The presence of parts with extended warranty has no effect on the [job](#) category of the equipment on the [call](#).

### **Response Time**

The software calculates a response time (format hhh:mm) to find the target time for work to be started on the call.

The software looks through the response time hierarchy to find the response time.

Once found, it applies any percentage reduction you may have set up in the 3-D matrix (with the exception of a response time set up as a special [serial number](#). This is never changed).

***Note:** If you change the value of the Machine Up field, blank out the Response Time field and then press Enter. The software re-calculates the response time to reflect the change and, depending on how you have set up the 3-D matrix, you may see the response time change.*

### **Bad Credit Status**

If the customer exceeds their credit limit (set up in Accounts Receivable), the software displays a warning message. You can still log the [call](#), but cannot progress it.

### **Target Date**

The target date and time displayed here are calculated as the time the call was received plus the response time.

### **Charge Matrix**

This field displays the charge elements involved, if you have set up charges for the call's [cover type](#)/job category combination.

The software displays a warning if you have not set up any charges on the cover type/job category.

### **Job Cat**

The software displays the default [job](#) category for this kind of job: breakdown, warranty, repeat and so on. You set up these defaults in the Job Category maintenance task.

If you are in update mode, you can only amend this job category if the job is at, or is changed to, status **00** (Open).

### **Contact**

The name defaults from the [Job](#) Header/Line Selection window, or from the [Job Line](#) Customer window, which extracts it from the installed equipment file for the first machine on the job.

The name may be changed. The change will only apply to the particular Job Line Details record.

### **Machine Locn**

This field displays the machine's [location](#) within the customer's [site](#), to help the engineer locate it.

**Fault**

Enter a fault code. This field can be made mandatory in the Codes/Parameter File [task](#), using type VLDN.

**Fault Description (Untitled)**

If a fault code has been entered, its associated description will be displayed once you press Enter.

**Re-transmit**

Enter one of the following:

0 (default) - For no re-transmission

Keep this setting if you are not using [remote communications](#).

1 - For use with the remote communications link

Use this setting if you want to re-transmit an amended record to the engineer's [terminal](#).

**Fault Description (Untitled)**

You can enter a more detailed description of the fault.

**Team**

The software uses the information you set up in the FSG/Territory/Team maintenance task to select the team or engineer for this [job](#). If you have set up that task with a prime engineer or team, plus the three alternatives, you can ensure that a match is likely to be found.

If no match is found, the software allocates the job to the default team, \*DF, and you must amend the field to a valid team.

**Machine Up**

Enter one of the following:

0 - If the machine is down and out of action

1 (default) - If the machine is still operational, but in need of service attention

Whenever the value is changed, blank out the response time value and then press Enter. The software re-calculates the response time, and you might find the response time changes, depending on how you have set up your 3-D matrix.

**Eng No**

The software uses the information you set up in the FSG/Territory/Team maintenance [task](#) to select the team or engineer for this [job](#). If you have set up that task with a prime engineer or team, plus the three alternatives, you can ensure that a match is likely to be found.

The [call](#) can be automatically allocated to an engineer, if an engineer is set up for the machine on the [job line](#).

The engineer field can be made mandatory in the Codes/Parameter File task, using type VLDN.

### **Maintenance**

This field indicates if a service has been carried out with the repair.

### **Appoint Date**

If a valid date and time are entered, they become the call's target date and time.

If a valid date, time and engineer are entered, they will also be booked in the engineer's diary as an appointment.

An appointment call must be made to use the assisting engineer function. The **Assist Eng (F20)** function is displayed once the call status is **01** (Assigned).

### **Job Duration**

A time can be entered in hours and minutes for the estimated job duration. The value displayed as a default is retrieved from the [model](#) details.

### **Order No**

Enter the customer order number. This may authorise the work to be done.

If the Customer Ref for Job field is set to **1** in the customer's additional service details, and there are any chargeable elements involved in the [job](#), this field is mandatory.

### **Estim Arrival**

The date and time are updated by the software once the job status is **02** (Scheduled).

### **Emergency**

Enter **1** to change the target date and time to the current system date and time.

The number of consecutive times the emergency flag can be set is limited by the Minimum Number of Calls Between Emergency Calls field on the System Parameters Maintenance Response window.

### **Despatched**

This date and time are updated by the software once the job status is **03** (Despatched).

## **Functions**

### **Assign Engineer (F2)**

Use this to display a list of engineers from the selected team and select the one required.

### **Equip Maint (F5)**

Use this to display the standard Equipment Detail Maintenance window.

**Note:** *If you grant additional warranty via this window, the software will not update the job category for you. You will have to change the job category yourself.*



**Contract (F6)**

Use this to display the Contract Detail Selection pop-up, where you select the [contract](#) on which you want to enquire. When you have made your selection, the [Cover Type/Job Category Enquiry Detail](#) window will be displayed.

**Job Story (F7)**

Use this to enter text for the whole [job](#). You can use this to build up a text history of the job for all users who work on it or administer it.

This is different from **Text (F21)**, which is text for the [job line](#), that is, the specific machine on the job.

If text already exists for this job, the word Exists appears in brackets after **Job Story (F7)**.

**Assign Eng (F9)**

Use this to display a list of all the engineers in the team you entered in the Team field. When you select one, that engineer is assigned to this job and is displayed on the window below the Team field.

**Update & Schedule (F9)**

If the software has automatically assigned the job to a specific engineer, you can schedule the job immediately by selecting this. The Job Header/Line Selection window is re-displayed, showing the job's new status of **02** (Scheduled).

**Messages (F10)**

Use this to display the Send a Machine Message window, where you can write a 3-line message and send it to:

- A particular machine
- A range of particular machines
- All machines of a particular model
- All machines in a division, model group or sub-group

**Hist Enq (F13)**

Use this to display the Call History pop-up, which shows the last five [calls](#) made on the machine.

**Peripherals (F14)**

Use this to list the peripherals associated with this machine on the Equipment Configuration Enquiry window.

**Complete Call (F15)**

Use this to complete the [call](#). You have to enter the time elapsed since the call began, and enter a reason code for completing the call.

You set these codes up in the Codes/Parameter File [task](#), under type CORA. (Typical examples would be no action necessary, or advice and guidance given.)

This function is only displayed if the [job's](#) status is **00** (Open).

### **Message Retrieval (F16)**

Use this to display a pop-up showing any messages for this machine. If you select **Remove (F11)** to delete the message, the software deletes the message immediately, with no confirmation pop-up.

### **Audit (F17)**

Use this to display the Job Audit Enquiry pop-up, which lists all changes made to a [job line](#).

### **Assist Eng (F20)**

Use this if you want to nominate one or more assisting engineers to the job.

The job status must be **01** (Assigned) before you can select the function, and you have to set an appointment date and time.

### **Text (F21)**

Use this to enter free-format text for this job line, that is, for this piece of equipment on this job.

This is different from **Job Story (F7)**, which is text for the whole job.

If text already exists for this job line, the word Exists appears in brackets after **Text (F21)**.

### **Phone Call Reqd (F22)**

Use this to change the status of the job line to **05** (Telephone). This tells the engineer to telephone the customer before proceeding with the job.

### **Name + Address (F23)**

Use this to display the Verify Installation Address window, where you can alter the [installation address](#).

### **More Keys (F24)**

There are too many functions on this window to display them all at once, so you can keep selecting **More Keys (F24)** until you see the function you want. A function does not have to be visible for you to use it; it is available whether or not it is displayed, as long it appears somewhere in the list.

## **Job Line Details - Selection of Engineers in a Team Pop-up**

To display this pop-up, select **Assign Engineer (F2)** on the Job Line Details window.

This pop-up allows an engineer to be selected from the list of engineers for the selected team.

### **Fields**

#### **Select**

Enter **1** against the engineer you wish to assign. If the selected engineer does not have the correct skills, a warning message is displayed, but you can override it.

Enter **1** to assign an engineer and return to the Job Line Details window.

## Job Audit Enquiry Pop-up

To display this pop-up, select **Audit (F17)** on the Job Line Details window.

This pop-up displays all changes made to a [job line](#), with the most recent change first.

### **Fields**

The pop-up displays the date and time of the change to a job line. It also shows who actually changed the line, as well as the status and sub status of the line, the [job](#) category, response time, and engineer assigned to the job.

Select **Previous (F12)** to return to the previous window.

## Assisting Engineer Maintenance Window

To display this window, select **Assist Eng (F20)** on the Job Line Details window.

You must log a [call](#) and assign it to an engineer before you assign an assisting engineer or engineers to the [job](#).

**Note:** For this window to be displayed, the job status must be at 01 (Assigned) and the appointment date and time must be set.

### **Fields**

#### **Prime Engineer**

This field displays the engineer assigned to the [job](#).

#### **Job Number**

This field displays the job number to which the assisting engineer(s) will be assigned.

#### **Appointment Date**

This field displays the job's appointment date from the [Job Line](#) Details window.

#### **Time**

This field displays the [job's](#) appointment time from the [Job Line](#) Details window.

#### **Job Duration**

This field displays the duration (format hhh:mm) that you set on the Job Line Details window.

#### **Assisting Engineer**

If you want to add an engineer to assist the main engineer, enter the code here.

#### **Select (X)**

Enter **4** to cancel an engineer from the job.

#### **Assisting Engineer**

This field lists the assisting engineers allocated to the job.

### **Reason for Unassignment**

This field displays the reason code if automatic [call](#) assignment cannot schedule the assisting engineer.

Select **Update (F8)** to save any changes.

## Verify Installation Address Window

To display this window, select **Name + Address (F23)** on the [Job Line](#) Details window.

This window displays a combination of essential customer information from the Customer Additional Details Maintenance and the [Installation](#) Details Maintenance [tasks](#).

### **Fields**

#### **Customer Name**

This field displays the customer's name as it is set up in Accounts Receivable. You can amend it here.

#### **Currency Customer**

This field indicates whether the customer is a currency customer within Service Management. You set up this value on the Additional Details Maintenance Customer Defaults window, but you can change it here. The software will automatically update the Additional Details Maintenance Customer Defaults window.

#### **Customer Address**

These fields display the five lines of the customer's address, which you can amend. The final two fields represent the postcode.

#### **Currency Code**

This field displays the customer's currency. You set this up on the Additional Details Maintenance Customer Defaults window, but you can change it here. The software will automatically update the Additional Details Maintenance Customer Defaults window.

#### **Curr Rate Code**

This field displays the currency rate code. You specify this on the Additional Details Maintenance Customer Defaults window, but you can change it here. The software will automatically update the Additional Details Maintenance Customer Defaults window.

#### **Tax Code**

This field displays the tax code. You specify this on the Additional Details Maintenance Customer Defaults window, but you can change it here. The software will automatically update the Additional Details Maintenance Customer Defaults window.

### Machine Location

This field displays the [location](#) of the machine on [site](#). You set this up on the Equipment Detail Maintenance window when you are setting up the [installation](#), but you can change it here. The software will automatically update the Equipment Detail Maintenance window.

### Contact Person

This field displays the customer's contact on site. You set this up on the Equipment Detail Maintenance window when you are setting up the installation, but you can change it here. The software will automatically update the Equipment Detail Maintenance window.

### Geo Code

This geocode defaults from the Additional Details Maintenance Customer Details window, but you can change it here. The software will automatically update the Additional Details Maintenance Customer Details window.

### Telephone Number

This telephone number defaults in from the Additional Details Maintenance Customer Details window, but you can change it here. The software will automatically update the Additional Details Maintenance Customer Details window.

### Fax Number

This fax number defaults in from the Additional Details Maintenance Customer Details window, but you can change it here. The software will automatically update the Additional Details Maintenance Customer Details window.

### Opening Hours

You set up the daily opening hours for the customer on the Additional Details Maintenance Customer Hours window, but you can change it here. The software will automatically update the Additional Details Maintenance Customer Hours window.

Select **Update (F8)** to update any details you have changed.

## Engineer Work Allocation [2/SSS]

Use this [task](#) to:

- Review and update all your outstanding jobs and their statuses
- Allocate jobs to engineers
- Enter your technical reports

You can update the [jobs](#) individually as required, to assign, allocate or despatch the engineer, or to update the status to work in progress, awaiting parts, completed, and so on.

You can also send engineer and team messages, but note that you cannot receive engineer messages in Engineer Work Allocation.

You can either allocate work manually to your engineers, or use automatic [call](#) allocation to help you. Automatic call allocation needs the Service Management subsystem to be running.

**Note:** You must tailor your subsystem library list to take account of:

**Note:** The consolidated files libraries in place of IN, OE, SL and G files libraries.

**Note:** The version of System Manager in use, for adjusting the four IPG libraries.

**Note:** If you are running System21 on an AS/400, use the CHGJOB command and F4 to prompt, enter OSLSSP/OSLS2P3, select **Additional Parameters (F10)** and page down to the library list.

Automatic [call](#) allocation automatically schedules an engineer or a team to the [job](#) in Call Logging. It finds an available engineer, based on the current workload and skill profile, who can get to the customer [site](#) by the target date and time for the call.

If you prefer, you can schedule calls manually, in which case the software applies the same criteria and checks for engineer selection.

When an engineer completes a job, they complete a [technical report](#) which contains all the job details, including labour hours and any spare parts used. You enter the report details in this [task](#).

You can also order spare parts to complete an existing job or a return job.

You enter the miscellaneous costs incurred, analysed by job category. For each cost, you enter a cost/charge type code, the cost value and charge value. Otherwise, you can derive the charge by entering a percentage uplift.

A service job may require more than one engineer [visit](#) to complete the work, in which case, several [technical reports](#) can be entered. The prime report is given the suffix 00, with each subsequent report suffix being incremented by the software. After the final report is entered, you indicate that the job is finished and fully documented. At this point, the [job](#) becomes eligible for pricing and invoicing.

### **Using DRP**

You must set up the service stockroom, supply stockroom and central warehouse in a Distribution Requirements Planning network if you want to run DRP net change processing. If no network is set up, the net change triggers are not set.

The sequence of operations to set up a DRP network covering service, supply and central stockrooms is:

- Set up the calendar for the current year in the Calendars maintenance task in DRP.
- Set up periods for the central and supply stockrooms using the Periods maintenance task in DRP.
- Set up the central and supply stockrooms using the Stockrooms maintenance task in DRP.
- Set up customers for the central, supply and service stockrooms using the Customers maintenance task in DRP. You have to set up the internal customer in Accounts Receivable, using the Names and Addresses task.
- Create the network using the Networks maintenance task in DRP, giving the service network a code linked to the central stockroom.

- Set up the planners using the Planners maintenance task in DRP. Use the central stockroom with user-defined detail for the planner, and set up a planner linked to the supply stockroom.
- Set up items using the Distribution Item Master maintenance task in DRP.
  - For the central stockroom the source of supply should be set to **1**, the order policy should be **A** and the local stockroom should be the central stockroom.
  - For the supply stockroom the source of supply should be set to **2**, the order policy should be **A** and the local stockroom should be the supply stockroom. Use the central stockroom for the centre and the central stockroom.

The sequence of actions for a DRP order for Service Management parts is:

- Amend the delivery name and address, if necessary. Press Enter to fill in details of order lines and then select **Update (F8)** to complete the DRP order.
- Manually allocate the DRP order, using the Order Amend (Transcriptional) task in SOP.
- Print one pick note at a time, using the Picking Notes task in SOP. Ensure that the From and To order numbers are the same.
- Confirm despatch from the DRP order lines, despatch date and despatch method only, using the Allocation by Order task in SOP. No charges data is relevant.
- Confirm the shipment receipt using the Record Transfer Out task in DRP. Then revert to Service Management and technical reporting.

## Engineer Work Allocation Initial Window

To display this window, select the Engineer Work Allocation [task](#).

Use this window to select the outstanding [jobs](#) you want to display.

- You can enter a single engineer to see only those jobs assigned to this engineer.
- You can enter a team to display all the jobs for the team.
- You can see all unassigned jobs for the service branch.

Further fields mean you can select jobs of a certain status or type (for example, planned or breakdown jobs).

The list of [jobs](#) displayed will be sequenced in order of target date and time, with the most urgent jobs first.

### **Fields**

#### **Jobs for an Engineer**

Enter an engineer code.

The software will only display jobs within the status range 00 to 04, unless you change the default values.

The software will display any outstanding engineer messages (that is, to the engineer, to the team, or to all at the [branch](#)) before the job list.

### **Jobs for a Team**

Enter a team code.

The software will display the jobs for the selected team and status range.

The software will display any outstanding team messages before the job list.

### **Jobs Number**

Enter a specific job number to list that job separately on the detail window, so that it can be processed in any way required, e.g. [technical report](#), schedule, etc.

### **Jobs for the Branch (1)**

Enter one of the following:

0 (default) - To select engineer or team jobs

1 - To display all jobs for the [branch](#) and the selected status range

Messages for the branch are not displayed before the job list. You can check them using the Engineer Messages [task](#).

### **Status of Call for Serial Number**

Enter a [serial number](#) to display all outstanding [calls](#) for that serial number.

### **All Calls for Account/Location**

Enter an account number to display all outstanding [jobs](#) for the account. Enter the [location](#) to display a list of all jobs outstanding for the [installation address](#).

### **Scheduled PM or Callout**

You can choose to display only planned maintenance (PM) jobs or only logged (callout) jobs.

Enter one of the following:

1 - To display the jobs generated by running the Load Planned Maintenance Jobs task

2 (default) - To display the jobs generated by call logging

Blank - To display both planned and emergency jobs

### **Status Ranges**

A [job](#) proceeds through its life cycle in stages. The stage each job has reached is indicated by its status, which is from 00 to 09 inclusive.

You set up statuses in the Codes/Parameters File, under type JLST.

As default, the software displays all active jobs in the range 00 to 04, but you can change this.

To select an individual status code, enter it in both the From and To fields.

Status 10 (SOP job) is for future development.

## **Functions**



### **Work Control Window (F6)**

Use this to see the Scheduled/Appointment [Calls](#) window, where scheduled work is displayed graphically.

You must enter a team in the Jobs for a Team field, and you must set the Scheduled PM or Callout field as required.

The Scheduled/Appointment Calls window displays jobs regardless of any statuses you may have entered in the Status Ranges fields.

### **Message Entry (F8)**

Use this to send a message to an engineer, a team, or to all your engineers, on the Send an Engineer Message window.

### **Diary (F10)**

Use this to display the Engineer Diary window, where you can book an engineer as unavailable for work.

Select a valid function to display the next window.

## Scheduled/Appointment Calls Window

To display this window, select **Work Control (F6)** Window on the Engineer Work Allocation Initial window.

**Note:** This display uses colour to indicate the degree of urgency of the [job](#), so avoid monochrome monitors if you can.

This window displays scheduled and unscheduled jobs for all the engineers within a team, in graphical format, with different colours representing the time remaining to target.

The window can display the details for up to twenty engineers in two rows; the eleventh engineer's details appearing below those of the first, and so on.

Scheduled jobs are shown under each engineer in the upper part of the window, in the preferred order of completion. Only four jobs can be displayed for an engineer. If more than four jobs are allocated to a [job](#) queue, the subsequent jobs will no longer be unscheduled, but equally they will no longer be displayed as scheduled.

Unscheduled jobs for the team are displayed in the lower part of the window.

Place the cursor on an engineer code and then press Enter to display that engineer's work queue.

Place the cursor on a job and then press Enter to display the job line details.

Place the cursor on the unscheduled calls line and then press Enter. Then select the job category required (or leave it blank) and then press Enter, and the Engineer Work Allocation window is displayed, where you can select the required job.

You can move jobs using the cursor and a function.

The colour of each block represents the job's time from target, as follows:

**Red & Flashing \*\*\*\*** - Within 0:30 (hrs:mins) of target time

**Red** - Within 0:30 and 2:30 (hrs:mins) of target time

**Amber** - Within 2:30 and 4:30 (hrs:mins) of target time

**Green** - Within 4:30 and 6:30 (hrs:mins) of target time

**Blue** - Within 6:30 and 8:30 (hrs:mins) of target time

**White** - More than 8:30 (hrs:mins) from target time

## **Functions**

### **Move (F11)**

Place the cursor on a [job](#) block and then select **Move (F11)** to move a job to an engineer's queue and schedule it. You can insert the moved job as job 1, 2, 3 or 4 on the engineer's queue if four jobs are already scheduled.

Position the cursor on the job before which the new job is to be scheduled, and then press Enter. The software will display an error message if it cannot schedule the [call](#). You can override certain errors by selecting **F14**.

Select **Previous (F12)** to return to the previous window.

## Engineer Diary Window

To display this window, select **Diary (F10)** on the Engineer Work Allocation Initial window.

Use this window to record an engineer's appointments: events such as holidays, training courses, sickness and dental appointments. These appointments will appear both in the engineer's work queue and in the graphical display of [jobs](#).

Five days are displayed, starting with the current system date.

When you select **Diary (F10)**, you first have to specify an engineer or a team. Select an engineer to make best use of the diary. If you select a team, the completion date, completion time and absence code are not available.

The software uses the entries you make here to check availability when allocating work to engineers.

**Note:** *Once you have completed an entry, the best way to amend any detail is to delete the existing one and add another.*

## **Fields**

### **Select (Untitled)**

Enter one of the following.

- 1 - To re-display the entry pop-up for review and amendment
- 4 - To delete the activity

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6 - To display the [Job Line](#) Detail Enquiry window

### **Add Activity (F10)**

Use this to display the Non-[job](#) Activity Maintenance pop-up, where you can enter a new diary activity.

### **Move to Date (F14)**

Use this to display the Move To pop-up, where you enter the date to which you want to move the activity.

### **Next Day (F16)**

Use this to move the diary display to show the next five days. If your display ends on Wednesday 23<sup>rd</sup>, for example, when you select **Next Day (F16)**, the window will move to show Thursday 24<sup>th</sup> - Monday 28<sup>th</sup>.

### **Prev Day (F18)**

Use this to move the diary display to show the previous five days. If your display starts on Wednesday 23<sup>rd</sup>, for example, when you select **Prev Day (F18)**, the window will move to show Friday 18<sup>th</sup> - Tuesday 22<sup>nd</sup>.

Press Enter to update the data.

## Non-job Activity Maintenance Pop-up

To display this pop-up, select **Add Activity (F10)** on the Engineer Diary window.

Use this pop-up to add an activity to an engineer's diary.

### **Fields**

#### **Job Category**

All non-machine-related activities set up in the diary require a [job](#) category. You set up these codes in the Job Category maintenance [task](#).

#### **Start Date**

Enter the date on which the appointment starts, in the format DDMMYY.

#### **Time**

Enter the start time of the appointment, in the format HHMM.

#### **Duration**

If the duration will fit within the working day, enter the duration in hours and minutes. You cannot enter a decimal point or other divider, so the last two digits you enter are considered to be minutes. Therefore, if you enter **120**, the software will read it as 1 hour 20 minutes.

If the duration would go beyond the end of the working day, leave this field blank and set the completion date and time. This ensures that a job entry is made in each of the working days affected.

**Comple. Date**

Enter the date on which the appointment will finish, in the format DDMMYY.

The field is not displayed if you are adding or updating an activity for a team.

**Time**

Enter the completion time of the appointment, in the format HHMM.

The field is not displayed if you are adding or updating an activity for a team.

**Absence Code**

Enter an absence code. As soon as you select **Update (F8)**, the software will enter this code into the Absent Code field on the Engineer Maintenance window.

If you need to amend this code, delete the existing activity and add a new one.

**Note:** *If you delete the absence code, you must go into the Engineer Master File maintenance task and blank out the Absent Code field on the Engineer Maintenance window. The software will not do this for you.*

You set up absence codes in the Codes/Parameter File [task](#) under type ABSC.

This field is not displayed if you are adding an activity for a team.

Select **Update (F8)** to update the data.

## Engineer Work Allocation Window

To display this window, select a [job](#) and then press Enter on the Engineer Work Allocation Initial window.

This window lists all the jobs with the status or statuses you selected.

There are three variations of this window:

- If you selected a particular engineer on the Engineer Work Allocation Initial window, this window displays that engineer at the top. Jobs at which this engineer is an assisting engineer are displayed with \*AST\* in the Engr field, instead of the normal code.
- If you selected a team on the Engineer Work Allocation Initial window, this window displays the team name at the top. Any job that has assisting engineers will only be displayed for the assigned engineer.
- If you selected the branch on the Engineer Work Allocation Initial window, all jobs for the branch are displayed. The words All Jobs for Branch appear at the top of the window.

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**Note:** This window will only display jobs that fulfil the selection criteria of the Engineer Work Allocation Initial window. If you change a job here in such a way that it no longer fulfils those criteria, it will disappear from this window, and you will have to return to the Engineer Work Allocation Initial window and change your selection in order to see it again.

**Note:** This may often happen when you process a job so that its status changes.

## **Fields**

### **Select (n)**

You can change a job's status here by entering one of the codes listed at the bottom of the window.

For jobs, valid options are:

00 - Open [job](#)

Calls allocated to a team in [call](#) logging have this status.

01 - Assign the job to an engineer

This displays the Assign Engineer pop-up.

02 - Schedule the job

This displays the Job Schedule pop-up.

03 - Despatch the job

This displays the Job Despatch window.

04 - Work in progress

This simply changes the job's status, with no other window displayed.

05 - Telephone

The engineer should telephone the customer. This simply changes the job's status, with no other window displayed.

06 - If this [job](#) is waiting for spare parts to arrive

This simply changes the job's status, with no other window displayed.

08 - Complete the job

22 - Change job duration

This displays the Change ETA pop-up.

23 - Add to or amend the job story

24 - Enquire on the [call](#)

This displays the Service Call Enquiry window.

25 - To maintain the call

This displays the Engineer Work Allocation Call Maintenance window.

26 - Close the job

98 - Cancel the job

99 - Complete a [technical report](#)

This displays the Call Reporting window.

For non-job activities, valid options are limited to 01, 08, 23, 98 and 99.

### Sta

This field displays the job's status. This is displayed as a three-letter code, instead of the related two-digit code.

OPN - 00 - Open

This indicates that the job is open.

ASS - 01 - Assigned

This job has been assigned to a team.

SCH - 02 - Scheduled

This job has been placed in a team's schedule.

DES - 03 - Despatched

The engineer has been despatched to the job.

WIP - 04 - Work in Progress

The engineer has arrived on [site](#).

TEL - 05 - Telephone

The engineer must telephone before the [job](#) continues.

PRT - 06 - Parts

The [job](#) cannot continue until spare parts arrive.

COM - 08 - Complete

The job is complete.

### Sub Sta

This field displays the job's sub-status code, once assigned. If the software fails to assign the job automatically, this code shows the reason. You set up these codes in the Codes/Parameters File [task](#), under type ETAR, which holds engineer assignment error codes.

**Note:** *If this field has any entry other than blank, this job will be excluded from automatic call assignment.*

### Engr

If this [job](#) has been assigned to an engineer, that engineer's code is displayed. If you arrived at this window by selecting an individual engineer on the Engineer Work Allocation Initial window,

you may see the code \*AST\* in this field. This means that your selected engineer is an assistant engineer on this job.

**Pos**

This field displays the job's position in the job queue.

**Tx**

This field displays the number of [technical report](#) lines that have been completed for this job.

This is first set to 00 when you schedule a job, or, if you do not schedule it, when you complete a technical report for a job and then select **Comp Report Line (F9)**. However, if you then enter **99** against it to enter subsequent [visit](#) details, when you update again, the number in this field will be 01, and so on.

**Target Date/Time**

The target response date and time are displayed.

**ETA Date/Time**

The estimated date and time of arrival are displayed.

**EM**

If you flagged this job as an emergency in the Emergency field on the [Job Line](#) Details window, you will see a **1** in this field.

**CI**

You set up the customer importance in the customer's additional details, and it is used in the 3-D matrix when the software calculates the response time. This value can be 1, 2, 3 or 4. You decide whether 1 is high or low importance in the Maximum Customer Importance - Customer Invoice Level field on the System Parameters Maintenance General window.

**Cat**

This field displays the job's [job](#) category.

**Model**

This field displays the job's [model](#).

**Geo Code**

This field displays the customer's geocode.

**Note:** If you selected an engineer on the Engineer Work Allocation Initial window, this window displays at the top of the list any unassigned jobs for the [branch](#).

**Note:** These jobs have a target response that is earlier than the earliest response of the jobs assigned to the engineer. These are unassigned urgent jobs.

**Functions**

**Work Ctl (F6)**

Use this to display the Scheduled/Appointment Calls window, which displays scheduled [jobs](#) in graphic form.

**Diary (F10)**

Use this to display the Engineer Diary window, where you can book an engineer as unavailable for work.

This is unavailable if you selected all the jobs for a [branch](#) (that is, you set the Jobs for the Branch field to 1) on the Engineer Work Allocation Initial window.

**Fold/Truncate (F13)**

Use this to toggle between displaying more and fewer details for each line. Use this to see the following details for each [job](#), instantly:

- Any appointment made
- The machine's serial number
- The customer and location
- The engineer (if one has been allocated)
- The customer's address

**Text (F21)**

Use this to enter text for this engineer. This function is only available if you selected a particular engineer on the Engineer Work Allocation Initial window.

If you have entered text against an engineer, the word Exists appears in brackets after **Text (F21)**.

**More Keys (F24)**

Use this to display more functions when all of them cannot be displayed at once.

If the function you want is not displayed, but is available from this window, you can still select it. You do not have to display it first.

Enter an option and then press Enter.

## Assign Engineer Pop-up

To display this pop-up, enter 01 against a [job line](#) on the Engineer Work Allocation window.

**Fields****To Engineer**

Enter the engineer who is to make the [visit](#).

If you use the prompt facility, this will not only display a list of engineers but also display the job's skill requirements and list the engineers and their skills.



If you re-set the status range on the Parameter window, only [jobs](#) within the selected status range will be displayed.

Settings on the job line status parameter code determine if the status allows [technical report](#) entry and whether escalation should include jobs at this status. The detail is set up under type JLST in the Codes/Parameter File [task](#).

**Note:** *Warnings on skills, team membership and absence can be overridden by selecting **Override (F14)** or **Update (F8)**, as indicated in the various warning pop-ups which may be displayed.*

Select **Update (F8)** to assign the [call](#) to the selected engineer.

## Job Schedule Pop-up

To display this pop-up, enter 02 against a [job line](#) on the Engineer Work Allocation window.

This pop-up is similar to the Assign Engineer pop-up, but the Position in Queue field means that you can specify the job's position in the work queue. This will set the ETA (date and time) for the [job](#). The finish time of the previous job plus the standard [branch](#) travel time equals the ETA of the next job.

### Fields

#### **To Engineer**

Enter an engineer. This will display the job's skill requirements and the engineers in the team with their skills.

#### **Position in Queue**

You can use this to add a [job](#) after jobs already scheduled, or to insert a job ahead of an existing one. If this affects another job's target date and time, a warning is displayed. You can override this by selecting **Override (F14)**.

Select **Update (F8)** to update the data.

## Job Despatch Window

To display this window, enter 03 against a [job line](#) on the Engineer Work Allocation window.

**Note:** [Calls](#) can only be despatched in the order of the engineer's scheduled work queue.

To change the sequence of a [job](#), take the following steps:

- 1 Select **Previous (F12)** to return to the Engineer Work Allocation window.
- 2 Enter **02** (Schedule) against the job to be deferred and then press Enter. You will see the Job Schedule pop-up.
- 3 Enter a Position in Queue greater than the jobs to be completed before it.

- 4 Select **Update (F8)** to return to the Engineer Work Allocation window.
- 5 Enter **03** against the job to be despatched next and then press Enter. Select **Desp (F8)** to confirm.

If the job is subject to an override name and address, the override details will be displayed.

**Note:** *If there is an asterisk after **Msgs (F10)**, that indicates there is a machine message for the machine on this job.*

Select **Desp (F8)** if this is this correct line for despatching.

## Change ETA Pop-up

To display this pop-up, enter 22 against a [job line](#) and then press Enter on the Engineer Work Allocation window.

### Fields

#### **Hours**

You can enter a different estimate of the labour hours. This can impact on the start times of [jobs](#) later in the engineer's work queue.

When entering the number of hours, the final two digits indicate the number of minutes. Any preceding digits indicate the number of hours. You do not enter any separator (for example, a colon). To indicate an hour and a half, for example, type **130** or **0130**.

Select **Update (F8)** to update the data.

## Service Call Enquiry Window

To display this window, enter 24 against a [job line](#) and then press Enter on the Engineer Work Allocation window.

**Note:** *An asterisk after **Msgs (F10)** means there is a machine message for the machine on the [job](#).*

Select **Previous (F12)** to return to the previous window.

## Engineer Work Allocation Call Maintenance Window

For more information on this window, please refer to the Service Call Logging section of this product guide.

## Return Visits Pop-up

To display this pop-up, enter 26 against a [job line](#) on the Engineer Work Allocation window.

### **Fields**

#### **Which Return Visit is Required**

The RVTY codes, 0 to 7, are hard-coded in a table and are not user-maintainable.

Enter one of the following:

- 0 - Return [visit](#) required
  - 1 - Return [visit](#) for parts required
- If this code is used, and DRP is linked to Service, when you select **Update (F8)** on this pop-up, the DRP Order Entry windows will be displayed, to allow spare parts to be ordered. (For further detail see the [Call Reporting Parts Used Window](#) section).
- 2 - Return [visit](#) on knowledge required
  - 3 - Return [visit](#) required at end of day - customer
  - 4 - Return [visit](#) required at end of day - engineer
  - 5 - Return [visit](#) required for personal reasons
  - 6 - Engineer could not gain access to machine
  - 7 - [Call](#) stopped by despatching

#### **Is the Machine up Now**

Enter one of the following:

- 0 - No
- 1 - Yes

#### **Engineer for Return Visit**

This field defaults to the engineer who carried out the [job](#) just completed and reported. You can override this by entering a valid engineer code or using the prompt facility to display the Code Selection pop-up.

#### **Keep Existing Job**

This field enables you to choose whether a new job should be generated or not.

Enter one of the following:

- 0 - To create a new job
- 1 - To keep the existing job

Jobs waiting for parts through DRP are set to status 06 automatically.

#### **Parts Must be Delivered To**

If the return visit code is not **1** (Parts), leave this field as **0**.

If the return visit code is **1** (Parts) set this field to **1** (Engineer's Van) or **2** (Customer). The setting is for memo purposes only.

### **Urgency Indicator**

Leave this field blank unless the return visit code is 1 (Parts).

If the return visit code is 1 (Parts), enter a valid alphanumeric code as set up in the Inventory Descriptions file under type SPED.

You can use the prompt facility on this field to select from the Code Selection pop-up.

Select **Update (F8)** to update the data.

**Note:** When you select **Update (F8)**, the software creates the return job, assigned to the engineer selected in the pop-up. The [job line](#) status of the original job is set to 08 (Comp) on the Job Header and Job Details files. This allows the job to be taken to status 99, priced and invoiced when the return job is successfully completed.

## Cancel Job Line Reason Pop-up

To display this pop-up, enter 98 against a [job line](#) on the Engineer Work Allocation window.

### **Fields**

#### **Enter Reason Code**

Enter a code from those set up in the Codes/Parameters File [task](#) under type CREA.

Select **Update (F8)** to update.

## Engineer Technical Reporting

A [technical report](#) (sometimes known as a [service report](#) or service sheet) is a document completed by an engineer after performing a service [call](#) at a customer [site](#). The data recorded includes:

- The details of work done (labour hours, travel hours, parts used, miscellaneous costs incurred) by engineers in completing service jobs
- Orders for spares required to complete a job, provided that the DRP libraries have been included in the Service Management library list

The data in the report is then used:

- To price and invoice service jobs
- To generate stock transactions for the parts used from engineers' vans
- To keep a record of work carried out by engineers

A technical report must have a unique number, which is the [job](#) number to be reported, plus a two-digit suffix, indicating any updates or additional lines. A technical report relates to a [visit](#) on a specific

date by a specific engineer to a specific [installation address](#). It can only include one job number on it, but the job could include more than one piece of equipment.

**Note:** *Serial-controlled spares must only be purchased, stocked and issued in singles (often coded EA). Batch-controlled and lot-controlled spares may be purchased, stocked or issued in units other than singles.*

A job line can only be completed if the prime engineer and any assisting engineers have reported finishing with **Comp Report Line (F9)** or **Comp Job Line (F10)**. Until then, the call's status will be displayed as 09, indicating a partial report.

## Call Reporting Window

To display this window, enter 99 against the appropriate [job line](#) on the Engineer Work Allocation window.

Alternatively, select **Hours (F14)** on the Call Reporting Parts Used window or by select **Hours (F14)** on the Call Reporting Miscellaneous Charges window.

You enter the basic [visit](#) details here, including the hours. You record parts used and miscellaneous costs and charges on the Call Reporting Parts Used window and the Call Reporting Miscellaneous Charges window, which are accessed by functions.

You must log all entries against a [job](#) category, which, together with the type of [contract](#) covering the equipment when the job was raised, determines if the customer is to be billed. The software will use a billing indicator of 100% for chargeable and 0% for non-chargeable work, but you can change this.

If you reported a job for the wrong piece of equipment, you can change it to another existing [model](#) or [serial number](#) at the customer [site](#); or you can add a new model or serial number.

### Fields

#### **Call Category**

This field displays the current job category. You can overwrite it with another valid code, if it is now found to be incorrect for the work done.

#### **Arrival Date**

Enter the date on which the engineer arrived on site. This field defaults to the system date, but can be changed if necessary.

#### **Time**

Enter the time of the engineer's arrival on site.

#### **Customer Travel**

Enter the travel time in hours and minutes to be charged to the customer.

### **Engineer Travel**

Enter the actual time in hours and minutes that the engineer has spent travelling to the customer.

### **Labour Time - Type 1**

You set up labour hour type codes in the Codes/Parameter File task under type LHTY. The code IDs provide up to four field headings; the records hold the factors by which to increase the standard hourly labour rates. Set up just the number of labour types you require in the Codes/Parameter file; there is no need to set up the maximum of four.

Enter the engineer's basic labour time in hours and minutes for this job category.

If you want to record zero labour hours, enter **0** in this field, otherwise, the software will automatically enter the value of (system date and time: engineer's arrival date and time). This is relevant to users who need real-time [technical reporting](#) of engineers' time, but not otherwise.

**Note:** Additional hours can be entered for other job categories for the job line by selecting **Additional Job Lines (F23)**.

### **Labour Time - Type 2**

Enter the labour hours and minutes spent by the engineer at the appropriate overtime rate, as defined in the Codes file.

**Note:** Additional hours can be entered for other job categories for the job line by selecting **Additional Job Lines (F23)**.

### **Labour Time - Type 3**

Enter the labour hours and minutes spent by the engineer at the appropriate overtime rate, as defined in the Codes file.

**Note:** Additional hours can be entered for other job categories for the job line by selecting **Additional Job Lines (F23)**.

### **Labour Time - Type 4**

Enter the labour hours and minutes spent by the engineer at the appropriate overtime rate, as defined in the Codes file.

**Note:** Additional hours can be entered for other job categories for the job line by selecting **Additional Job Lines (F23)**.

### **Maintenance Done**

The field is for memo purposes only, to indicate if a planned maintenance service has been carried out with the repair.

**Fault Code**

This field displays the fault quoted by the customer at [call](#) logging. It can be changed to the fault reported by the engineer. You can use the prompt facility to display existing fault codes (set up in the Codes/Parameter File [task](#) under type FLTC).

**Machine Section**

You can optionally enter the main section of the machine which was faulty. You set up the sections in the Codes/Parameter File task under type SECT.

**Machine Sub-Sect**

Enter a valid 3-character code, or prompt for the code selection pop-up.

You can optionally enter the sub-section of the machine which was faulty. You set up the sub-sections in the Codes/Parameter File task under type SSCT.

**Activity Code**

This records the corrective action taken by the engineer to remedy the fault. You set up corrective action codes in the Codes/Parameter File task under type CORA.

**Meter Reading 1**

If this [model](#) has meters, enter the engineer's service readings in this field. The Meter Reading 1 value is displayed on the Call History pop-up when another [call](#) is logged for the machine.

If the reading you enter is outside the percentage tolerance of any estimated reading already given, you will see a warning pop-up. You can override the warning, but you must enter a reason for the override.

**Meter Reading 2**

This is as for Meter Reading 1, except that this value is not displayed on the Call Logging pop-up.

If the reading you enter is outside the percentage tolerance of any estimated reading already given, you will see a warning pop-up. You can override the warning, but you must enter a reason for the override.

**Credit Copies**

Enter any number of copies that should be credited to the customer. This may be as a result of copies used to test the machine after a repair or a service.

**Return Visit**

Enter one of the following:

0 - If no return [visit](#) is required

1 - If a return visit is required

In this case, on closure of the [job](#), a pop-up displays selection parameters to generate a new job.

If a return visit for parts is required and DRP is attached, the parts can be ordered by using the DRP Order Entry windows, which will be displayed.

**New Job Required**

This field is displayed only if the Allow New Job At [Technical Reporting](#) field is set to **1** on the System Parameters Maintenance Response window.

Enter one of the following:

0 - If no new job is required

1 - To enter a new job for an existing or new machine at the same customer's [site](#)

In this case, after the current [job](#) is technically reported and any return visit set up, a Job Header window is displayed so that a call can be logged for the new job.

**Ref. Field**

This reference field defaults to the same value as the job number, plus the report suffix. If the report is updated, subsequent entries to add new reports will increment the report suffix.

Overwrite this if you need an alternative reference for the job (for example, a pre-printed [service report](#) number).

**Miles Travelled**

Enter the distance travelled by the engineer. The maximum valid entry is 99999.

The entry is not mandatory, but if you do not enter mileage in this field, it may result in no mileage charge being invoiced.

If Actual Distance Driven is the basis for chargeable travel for the [site](#), you must enter a positive number in this field. This number will be multiplied by the site charge per mile or kilometre at [job](#) pricing.

**Charge Labour**

The default value, a percentage, is extracted from the [cover type](#)/job category charge matrix.

If chargeable, the value is set to **100**.

If non-chargeable, it is set to **0**.

You can change this to any percentage value between 0 and 100.

**Charge Mileage**

Enter one of the following:

0 - Not to charge for miles or kilometres.

1 - To apply the charge miles or kilometres type defined in the Customer Additional Service Details file, or in the [company](#) profile, to this [technical report](#) suffix number at job pricing

The default value for this field is from the call's cover type/job category charge matrix for mileage.

You can change this value as required. You can, for example, set the charge to **1** for one of the machines, but to **0** for any other machines included in the site [visit](#).

Charge miles or kilometres types are:



- **Standard Distance Value**  
This is a flat rate for the site.
- **Actual Distance Driven**  
This is a site charge per mile/km.
- **Zone Code to Charge**  
This is a code charge, by branch, set in the zone charges file.

**Cust. Ord. No**

This field displays the current customer order number. You can amend this, or enter one if none is displayed.

**Functions****Ord Parts (F5)**

Use this to display the Distribution Order Entry [Delivery Address](#) Override window in DRP, which you can use to order spare parts for the [job](#).

(This function is only displayed if DRP libraries are included in the Service Management library list. The Order Entry windows are standard parts of DRP. Refer to the DRP product guide for guidance on the processing of a DRP order.)

**Pricing (F6)**

Use this to display a pop-up showing all priced lines for the [job](#).

Use the pop-up to price the job interactively. If the price is accepted for update, it will be written to the Pending Invoice file the job will be closed. No further reports can be entered for the job line/machine.

If there are still outstanding DRP orders for this job, you will be given a warning, which you can override.

**Job Story (F7)**

Use this to add to the job story.

**Comp Report Line (F9)**

Use this to complete the [visit](#) report. This prevents any further entries against the [job line](#) on the [technical report](#), and should be used only if all job lines which have been added to the technical report are completed on this visit report.

It does not complete the job line and does not prevent its inclusion on other technical reports. The job line is not released for job pricing at this stage (subsequent visit details are recorded on another technical report number, that is, 01, 02, 03 and so on).

Parts are sent through to Inventory Management, if it is attached. The parts used are updated in the engineer's stockroom and the appropriate stock movement records generated. The parts cost is extracted from Inventory Management at this stage, and is stored on the technical report.

**Comp Job Line (F10)**

Use this to complete a job line. This will set its status to complete, preventing any further technical report entries and enabling it to be prepared for invoicing, through the Price Jobs task. This will also cause the report line to be completed. Invoicing will now be allowed for this job line for all technical reports to which it has been added.

If there are still outstanding DRP orders for this [job](#), you will be given a warning, which you can override.

Parts are sent through to Inventory Management, if it is attached. The parts used will be updated in the engineer's stockroom and the appropriate stock movement records generated. The parts cost is extracted from Inventory Management at this stage, and is stored on the technical report.

**Messages (F11)**

Use this to send or retrieve machine messages.

**New Meters (F13)**

If you install new meters, use this to see the New Meters pop-up. You enter the final reading of the old meter (or meters) and the first reading of the new one(s).

**Peripherals (14)**

Use this to go to peripherals maintenance, where you can add peripherals to the machine.

**Parts (F15)**

Use this to see the Call Reporting Parts Used window to record any parts used for this [job line](#).

**Misc Charges (F16)**

Use this to see the Call Reporting Miscellaneous Charges window to record any miscellaneous charges for this job line.

**Serial Maintenance (F17)**

Use this to display the Call Reporting Serial Number Maintenance window, if the [job](#) has been logged against an incorrect [serial number](#).

**Model Maintenance (F18)**

Use this to display the Call Reporting Model Maintenance window, if the job has been logged against an incorrect machine. You can change the machine against which the job has been logged, either to an existing machine or to a new machine.

This function is only available until the [technical report](#) on the original machine is entered. After that, no change can be made.

**Name & Address Maintenance (F19)**

Use this to maintain the customer's name and address and a number of other details. This displays the Verify [Installation Address](#) window as described in the Service Call Logging section.

**Text (F21)**

Use this to update the text for hours booked.

**Job Details (F22)**

Use this to access the job detail enquiry for the piece of equipment on this [job line](#).

**Additional Job Lines (F23)**

Use this to display the Call Reporting Additional Job Line Hours pop-up, where you can enter additional job line hours.

**More Keys (F24)**

As there are many functions available from this window, they cannot all be displayed at once. Use this to display more of the available functions. If a function is available from a window, it does not have to be visible for you to use it.

Select **Comp Report Line (F9)** or **Comp Job Line (F10)**, as appropriate, to update the data.

## Call Reporting Interactive Job Pricing Pop-up

To display this pop-up, select **Pricing (F6)** on the Call Reporting window.

Interactive job pricing achieves the same result as selecting **Comp Job Line (F10)** on the Call Reporting window and then running the Price Jobs task.

Select **Price (F8)** to price the [job](#). A Job Price Audit report is produced for the [job line](#). The job line may be invoiced without having to be included in the batch run to price jobs.

## Call Reporting Parts Used Window

To display this window, select **Parts (F15)** on the [Call](#) Reporting window or select **Parts (F15)** on the Call Reporting Miscellaneous Charges window.

**Fields****Part**

This must be a valid item in the Inventory Management Item Master file.

If you do not enter a source in the Srce field, this part must be set up as existing in the engineer's stockroom.

If you do enter a source, and that source engineer stocks this part, this part need not be set up in the engineer's stockroom. The software will create the part in the stockroom automatically.

If the part is set up for batch, lot or [serial number](#) control in the Item Master file (BATC35), a pop-up is displayed for you to enter the batch details when you select **Update (F8)**, **Comp Rep Line (F9)** or **Comp [Job Line](#) (F10)**.

**Job Category**

This must be a valid [job](#) category in the Job Category file.

**Qty Used/Rtnd**

This field displays the quantity used or returned.

If you enter a positive number in this field, it signifies parts used. This reduces the available stock in the engineer's stockroom.

If you enter a negative number in this field, it denotes parts returned. This increases the amount of frozen stock in the engineer's stock [location](#).

This field does not allow you to enter decimals.

Both of these transactions are reflected in Inventory Management stock movements.

If the item used or returned is defined in the Item Master file as lot-controlled, batch-controlled or serial-controlled, a pop-up is displayed for the entry of the appropriate lot, batch or serial number when you select **Update (F8)**, **Comp Rep Line (F9)** or **Comp Job Line (F10)**.

[Call](#) reporting, where a DRP order for parts is involved will display the Call Reporting Parts Used window automatically, regardless of the status of the DRP order. Parts are transferred into the engineer's stock [location](#) immediately after confirmation of despatch from the supply stockroom.

Once the parts are available in the engineer's stock location, the DRP order quantities are displayed on the Call Reporting Parts Used window. If usage equals or exceeds the order quantities, the stocks will be reduced. If usage is less than the DRP order, the actual amount used is taken off the stocks and the unused order amount is added to them.

**Srce**

Enter an engineer's code, if the part has been sourced from another engineer in the same country.

The part sourced will be transferred from the supplying engineer's stockroom to the fitting engineer's stockroom, before usage is updated by this [technical report](#).

If you enter a source in this field, you can enter an item which is not set up for this engineer's stockroom.

**Note:** [World Trade](#) and [multi-currency](#) will prevent sourcing from a different country.

**Charge %**

The default value (retrieved when a part number is entered) is set in the call's [cover type](#)/job category charge matrix for parts: 0% is non-chargeable, 100% is chargeable.

The value can be changed as required to any percentage between 0 and 100%. The override will be effective even if the type of part is 0 on the charge matrix.

Whatever the percentage charge on a negative value parts returned record, there will be no charge on the Pricing Audit report, or on the [job](#) invoice. The cost of the frozen stock will be increased by the normal cost held in the item/stockroom record.

**Functions**

**Ord Parts (F5)**

Use this to display the Distribution Order Entry [Delivery Address](#) Override window in DRP.

This function is not displayed if you have not installed DRP.

**Job Price (F6)**

Use this to display a pop-up showing all priced lines for the job. You can price interactively from here.

If there are still outstanding DRP orders for this job, you will be given a warning, which you can override.

**Job Stry (F7)**

Use this to update the job story.

**Comp Rep Line (F9)**

Use this to complete the [visit](#) report. This should be used only if all [job lines](#) which have been added to the [technical report](#) are completed on this [visit](#) report. No further access to the technical report suffix number will be permitted.

Job line details are not released for [job](#) pricing (subsequent visit details will be recorded on another technical report number: 01, 02, 03 and so on).

**Comp Job Line (F10)**

Use this to complete the [job line](#). No further maintenance of this job line will be allowed on any technical report. Invoicing will now be allowed for this job line for all technical reports to which it has been added.

If there are still outstanding DRP orders for this job, you will be given a warning, which you can override.

**Hours (F14)**

Use this to see the [Call](#) Reporting window to record the hours' maintenance for this job line.

**Misc Chrg (F16)**

Use this to see the Call Reporting Miscellaneous Charges window to record any miscellaneous charges for this job line.

**Text (F21)**

Use this to update the text for parts used.

Select **Comp Rep Line (F9)** or **Comp Job Line (F10)**, as appropriate, to update the data.

## Call Reporting Miscellaneous Charges Window

To display this window, select **Misc Charges (F16)** on the [Call](#) Reporting window or select F16=Misc. Chrg on the Call Reporting Parts Used window.

**Fields****Charge**

Enter the charge code for this expense. You must set up these codes in the Codes/Parameters [task](#) under code type CHGT.

**Currency Code**

Enter the relevant currency. On the first line of the window, this defaults to the customer's currency, as set up on the Additional Details Maintenance Customer Defaults window.

**Job Cat**

Enter the relevant [job](#) category.

**Cost**

Enter the cost of the item, at the rate for the currency in the previous field. The cost will be recorded on the [job](#) file for use in reporting, but will be converted to base currency value, if [multi-currency](#) is in operation.

**% Uplift**

If you enter a percentage in this field, the software uses this with the value in the Cost field to calculate the value for the Charge field.

Valid uplifts are from 100.00 to 999.99. 0 indicates no uplift. Blank is not valid.

If you do not enter a percentage in this field, when you enter a value in the Charge field the software uses that with the value in the Cost field to calculate the percentage uplift.

**Charge**

If you enter a value in this field, the software uses this with the value in the Cost field to calculate the value for the % Uplift field.

If you do not enter a value in this field, when you enter a percentage in the % Uplift field the software uses that with the value in the Cost field to calculate the charge.

**Tax**

The three-character tax code defaults from the Additional Service Details file, or from the Installed Equipment file if the machine is subject to a non-standard rate prompted by the tax indicator. The value can be overwritten but the tax code must be valid in General Ledger.

**Charge Description (Untitled)**

This field normally displays the description of the charge type code (parameter type CHGT), but you can change the text here.

If an invoice is produced, it will show the text you enter in this field, instead of the charge code description.

**Chargeable**

Enter one of the following:

0 - If this miscellaneous charge is not chargeable

1 - If this miscellaneous charge is chargeable

The default value is set by the call's [cover type](#)/job category charge matrix for Misc. You can change this as required.

## **Functions**

### **Job Pricing (F6)**

Use this to display a window showing all priced lines for the [job](#). You can price interactively from here.

If there are still outstanding DRP orders for this job, you will be given a warning, which you can override.

### **Job Story (F7)**

Use this for text ([job](#) story) entry/update.

### **Comp Report Line (F9)**

Use this to complete the [visit](#) report, that is, this [job line](#) on this [technical report](#). No further maintenance of this job line on this technical report suffix number will be allowed.

Any parts entered on the [Call](#) Reporting Parts Used window will be taken out of stock.

Job line details are not released for job pricing. Subsequent visit details will be recorded on another technical report suffix number, that is, 01, 02, 03 and so on.

### **Comp Job Line (F10)**

Use this to complete the job line. No further maintenance of this job line will be allowed on any technical report. Invoicing will now be allowed for this job line for all technical reports it has been added to.

Any parts entered on the Call Reporting Parts Used window will be taken out of stock.

If there are still outstanding DRP orders for this job, you will be given a warning, which you can override.

### **Hours (F14)**

Use this to see the Call Reporting window to record the hours' maintenance for this job line.

### **Parts (F15)**

Use this to see the Call Reporting Parts Used window to record the parts used for this job line.

### **Text (F21)**

Use this to update the text for this miscellaneous charge.

Select **Comp Report Line (F9)** or **Comp Job Line (F10)**, as appropriate, to update the data.

## **Call Reporting Serial Number Maintenance Window**

To display this window, select **Serial Maintenance (F17)** on the [Call](#) Reporting window.

Use this window to add or correct a [serial number](#) for the machine. You cannot change it to a [model](#) and serial number combination that already exists.

No change you make will come into effect until you run the Day End Routines [task](#).

### **Fields**

#### **Serial**

Enter a serial number that does not already exist for this model.

You can correct an incorrect [serial number](#), or insert one where none previously existed. You can enter serial numbers for the total quantity of equipment shown.

**Note:** *The change of serial number is only effective once the Day End Routines task has been run.*

#### **History**

This must be **1** or **blank**.

Where there is more than one serial number to be entered, at least one must have **1** entered against it here.

This means that all previous [job](#) history will be held against this particular serial number in future.

Press Enter to update the data.

## Call Reporting Model Maintenance Window

To display this window, select **Model Maintenance (F18)** on the [Call](#) Reporting window.

If a [job](#) has been logged to the incorrect machine, use this window to make the necessary changes. You can change the job to another machine, or even to a machine that has not yet been set up on the software as part of the customer's [installation](#).

This is not available once you have entered [technical report](#) details against the machine on the job.

This window lists all the machines currently installed at the customer's [site](#).

### **Fields**

#### **Select (Untitled)**

Enter **1** against the machine against which this job should be logged.

### **Functions**

#### **Amend Machine (F14)**

Use this if you want to log the job against a machine that is not yet set up on the software as part of the customer's installation.



This displays a pop-up where you specify the new machine's [model](#) and [serial number](#). When you update, the software adds these new details to the site's installed equipment records, and amends the job record.

Select **Update (F8)** to update the data.

## Call Reporting Additional Job Line Hours Pop-up

To display this window, select **Additional Job Lines (F23)** on the [Call](#) Reporting window.

Use this pop-up to enter more labour hours for the [job line](#).

### **Fields**

#### **Flt**

This field displays the fault reported by the customer. You can change this to the fault reported by the engineer.

You set up fault codes in the Codes/Parameters Maintenance [task](#) under type FLTC.

#### **Job**

Enter the [job](#) category for the additional job line hours.

#### **M/c**

You can optionally enter a valid machine section code to indicate the main section of the machine that was faulty.

You set up machine sections in the Codes/Parameters Maintenance task under type SECT.

#### **M/c**

You can optionally enter a valid machine sub-section code to indicate the section of the machine that was faulty.

You set up sub-sections in the Codes/Parameters Maintenance task under SSCT.

#### **Act**

Enter the activity code to record the corrective action taken by the engineer to remedy the fault.

You set up corrective action codes in the Codes/Parameters Maintenance [task](#) under type CORA.

#### **Labour Time - Type 1**

Enter the engineer's basic labour time in hours and minutes for this job category.

You set up labour hour type codes in the Codes/Parameter File task under type LHTY.

The code IDs provide the four field headings; the record holds the factor by which to increase the standard hourly labour rates.

**Labour Time - Types 2, 3 and 4**

Enter the labour hours and minutes spent by the engineer at the appropriate overtime rate as defined in the Codes/Parameter File task under type LHTY.

**Chg %**

If the job category for the line is chargeable, this value will default to 100%; if it is non-chargeable, it will default to 0%.

The field may be changed to any intermediate value between 0 and 100, and the variable labour will be charged accordingly.

**Note:** *This value has no effect on fixed labour charges retrieved from the cover type/job category file.*

Press Enter to update the data.

## Call Reporting Return Visits Pop-up

To display this pop-up, close a [technical report](#) by selecting **Comp Job Line (F10)** with the Return Visit field set to 1 (it is not displayed if you select **Update (F8)** or **Comp Rep Line (F9)**).

Alternatively, enter 26 against a [job line](#) on the Engineer Work Allocation window.

**Fields****Which Return Visit is Required**

The RVTY codes, 0 to 7, are hard-coded in a table and are not user-maintainable.

Enter one of the following:

- 0 - Return [visit](#) not required
- 1 - Return visit on parts required
- If this code is used, and DRP is linked to Service, when you select **Update (F8)** on this pop-up, the DRP Order Entry windows will be displayed, to allow spare parts to be ordered. (For further detail see the Call Reporting Parts Used Window section).
- 2 - Return visit on knowledge required
- 3 - Return visit required at end of day - customer
- 4 - Return visit required at end of day - engineer
- 5 - Return visit required for personal reasons
- 6 - Engineer could not gain access to machine
- 7 - [Call](#) stopped by despatching

### Is the Machine up Now

Enter one of the following:

0 - If the machine is not up

1 - If the machine is up

### Engineer for Return Visit

This field defaults to the engineer who carried out the [job](#) just completed and reported. You can override this by entering a valid engineer code.

### Keep Existing Job

Enter one of the following:

0 - To create a new job

1 - To keep the existing job

Jobs waiting for parts through DRP are set to status 06 automatically.

### Parts Must Be Delivered To

If the return [visit](#) code is not **1** (Parts), leave this field as **0**.

If the return visit code is **1** (Parts) set this field to **1** (Engineer's Van) or **2** (Customer). The setting is for memo purposes only.

### Urgency Indicator

Leave this field blank, unless the return visit code is **1** (Parts).

If the return visit code is **1** (Parts), enter a valid urgency code, set up in the Inventory Descriptions file, under type SPED.

When you select **Update (F8)**, the software creates the return job assigned to the engineer selected in the pop-up.

**Note:** If you have System21 Distribution Requirements Planning installed, the Distribution Order Entry [Delivery Address](#) Override window will be displayed. Use this to order spare parts for the job.

**Note:** (Refer to the DRP product guide for guidance on processing a DRP order.)

## Credit Call Maintenance [4/SSS]

When you log a call from a customer, Service Management checks the Account Stop field from the Names and Addresses maintenance task in Accounts Receivable. If that field is set to **1**, the customer has a credit problem.

The highlighted message "Bad Credit Status" is displayed on the Job Details window. You can still log the [call](#). The decision as to whether to advise the customer of an account problem is yours.

Calls placed by customers who have this credit problem are not allocated to an engineer's workload until the jobs are authorised.

Use this [task](#) to cancel or release calls which have been put into credit hold status (these are calls of status 07).

You can review any of the [company's](#) held [calls](#), unless you have set the Credit Control by [Branch](#) field On on the System Parameters Maintenance Assignment window. If you need to carry out credit control across the company, leave the field set Off.

The credit stop flag is only checked when the call is logged. [Jobs](#) already logged will need to be manually released, if an account is cleared of credit hold.

## Credit Call Maintenance Initial Window

To display this window, select the Credit Call Maintenance task.

**Note:** Leave all fields blank and then press Enter to see all orders on credit hold.

### **Fields**

#### **Account No**

If entered, this must be an existing customer. Entry of an account code displays account addresses for selection.

#### **Location**

If this is entered as well as the account code, the [calls](#) at status 7 (Credit Hold) will be displayed for the account [location](#).

#### **Serial Number**

Enter a [serial number](#) to display any jobs for that unit for credit maintenance.

#### **Model Number**

Enter a [model](#) number to display all models for further selection by serial number and account.

#### **Job Number**

Enter an outstanding [job](#) number to display that job for credit maintenance.

Press Enter to see the Credit Call Maintenance Detail window.

## Credit Call Maintenance Detail Window

To display this window, enter an account number and a [location](#) code on the Credit Call Maintenance Initial window.

**Note:** Select **Fold/Truncate (F13)** to expand each single line of detail by a further two lines.

## **Fields**

### **Select (X)**

Enter one of the following:

1 - To cancel the [call](#)

A pop-up is displayed for entering a reason code. You set up cancellation reason codes under type CREA in the Codes/Parameter File [task](#).

3 - To release the call from credit hold

A pop-up is displayed for entering a reason code. You set up credit release reason codes under type RRES in the Codes/Parameter File task.

5 - To enter [job line](#) text

This is also available from the Call Reporting window in Engineer Work Allocation.

7 - To access the Job Line Detail window for the [job](#)

9 - To access the standard Accounts Receivable enquiry

## **Functions**

### **Fold/Truncate (F13)**

Use this to expand the window display for each call from one line to three, to display additional information.

Select a valid option against a line and press Enter.

## **Load Planned Maintenance Jobs [10/SSS]**

Planned maintenance schedules are created within the Contracts maintenance [task](#), at equipment line level. These schedules are not converted into actual jobs until you select this task.

Use this task to convert planned maintenance schedules into actual service [jobs](#), with engineers assigned, for specified [service periods](#) in advance.

Select this task after running the Period End Routines task, when [contracts](#) have been added during a service period. All planned maintenance [visits](#) generated for the selected periods, including the new visits extended by the latest Period End Routines run, are converted to actual jobs.

**Note:** *This procedure requires exclusive use of the [company](#).*

This task is run as required. It creates a service job for each [installation](#) that has a planned maintenance visit scheduled for periods falling within a user-specified range. You can create a schedule for up to six periods in advance of the current period.

The software tries to assign an engineer or team to each service job by comparing the customer's geocode with the teams' and engineers' territory definitions in the FSG/Territory/Team maintenance [task](#). If you entered a specific engineer against the equipment on the [installation](#) record, this engineer will always be assigned (if you set the Assign [Calls](#) Only to Preferred Engineer for Machine field On on the System Parameters Maintenance Calls window).

When the process is complete, all scheduled maintenance [visits](#) for the selected periods(s) will have a [job](#) number and an assigned engineer (if possible), and will have been added to the list of outstanding open jobs.

The customer order number from the contract header will only be included in each job if the customer additional service details have the Customer Refs for Contracts field set to **1**, indicating that a customer reference must be included on the contract header.

Either single line or multi-line jobs will be generated by this task, depending on the setting of the [company](#) profile field One Machine per PM Job.

If the field is set to **1**, each piece of equipment due to receive a planned maintenance visit in a service period will be assigned its own job number.

If the field is set to **0**, one job number will be assigned to any pieces of equipment that are all on the same contract, are at the same customer site, and are due to receive a planned maintenance visit in the same service period. Each piece of equipment will form a job line within the single job.

## Load Planned Maintenance Jobs Window

To display this window, select the Load Planned Maintenance Jobs task.

### **Fields**

#### **From Period**

Enter the [service period](#), in the format YYPP, from which to begin the load of planned maintenance [jobs](#).

The significant calendar fields and current period are maintained in the Calendar File Control maintenance [task](#) and the Daily Calendar File maintenance task.

#### **Until Period**

This field displays the service period up to which the load of planned maintenance jobs is to occur. Enter four digits in the format YYPP.

This cannot be more than six periods ahead of the current period.

Select **Submit Job (F8)** to submit a job to perform the load. No report is produced, but the Engineer Work Allocation task will display the results when the batch job is complete.

---

## Reassign Calls for a Team [22/SSS]

This [task](#) re-organises the workload for a team on demand, so long as automatic [call](#) assignment is inactive.

During the normal running of the call assignment sleeper program, the software attempts to shuffle the [jobs](#) already loaded, in order to schedule new work within target times.

This task removes all jobs for the selected team, except for despatched or appointment jobs, and re-assigns them based on the current settings of the engineers' availability. This is useful when engineers become unavailable for work *after* calls have been assigned to them, and you need to refresh the team's workload completely.

Jobs that have an appointment, or have been despatched, will not be re-assigned by this procedure. You will have to reassign them manually if re-assignment becomes necessary.

**Note:** *The Service Management subsystem must be active.*

## Reassign Calls for a Team Window

To display this window, select the Reassign Calls for a Team task.

### Fields

#### **Team**

Enter a team.

All calls for this team will be re-allocated, except despatched and appointment calls.

Select **Submit (F8)** to submit the job.

## Reassign Undespatched Calls [23/SSS]

Use this [task](#) to reorganise the workload for all teams on demand, so long as automatic [call](#) assignment is inactive.

**Note:** *This is also run as part of the Day End Routines task.*

The task will remove all [jobs](#), except despatched or appointment jobs, for all teams and re-load them, based on the current settings of the engineers' availability flags.

This is useful as an end of day task (and is part of the Day End Routines task), after engineer availability has been updated for the next working day.

It will also check each engineer's diary for all activities with end dates, such as holidays. If an end date has been passed, the software re-sets the Absent field in the Engineer Master file to blank.

### **Implications**

[Jobs](#) that have an appointment, or have been despatched, will not be re-assigned by this procedure. You will have to re-assign these manually if re-assignment is required.

Automatic [call](#) assignment must be stopped while this re-assignment is running.

**Note:** *The Service Management subsystem must be active.*

## Reassign Undespatched Calls Window

To display this window, select the Reassign Undespatched Calls task.

Select **Submit (F8)** to submit the job.

## Enquire on Job History [30/SSS]

Use this [task](#) to enquire on the details of both current and completed [jobs](#) against a piece of equipment, in order to obtain its service history.

**Note:** *This enquiry can also be accessed from Service [Call](#) Logging.*

## Job History Initial Window

To display this window, select the Enquire on Job History task.

The following information is available through this enquiry:

- Job header/line selection
- Job line details
- Hours details
- Parts details
- Miscellaneous charges details
- Free-format text

The Job History Initial window provides a number of different access routes to the detailed enquiry on [job](#) details. Whatever you enter, appropriate selection lists are displayed to help you select the correct job.

### **Fields**



**Serial Number**

Enter a [serial number](#). You can only enter a serial number in conjunction with a valid [model](#) number. The model and serial number combination must exist.

Entry of both the model and serial number provides a list of [jobs](#) recorded against that machine, and one can be selected for detailed enquiry. The Job History Line Detail window is then displayed.

**Model**

Entry of both the model and serial number provides a list of jobs recorded against that machine, and one can be selected for detailed enquiry. The Job History Line Detail window is then displayed.

If you enter only the model number you see a list of all the equipment of this model at all [sites](#). This list can be lengthy and the method is therefore not recommended.

**Account Code**

Enter the customer account code to display account addresses for selection. This must exist in the Customer file.

**Account Address**

You can enter an account address code, which must exist for the entered account. You cannot enter an account address code without an account code.

**Contract Number**

You can enter a [contract](#) number, which must exist in the Contracts file. A list of jobs which exist for the selected contract number will be displayed. No records will be displayed if the contract has expired.

**Contract Type**

You can enter an existing [contract type](#). The combination of contract number and type must be an existing contract.

You cannot enter a contract type without a contract number.

**Customer Order No.**

Enter the customer order number. This must be a valid customer order number on at least one job.

You will see a list of jobs bearing the entered number, and you can select one for enquiry. The Job History Line Detail window is then displayed.

**Job Number**

This must be an existing [job](#) that has not yet been completed through [technical reporting](#).

If the job you enter has more than one [job line](#) you will see the Job History Line Selection window, which displays all the job lines (pieces of equipment included on the job number). Select one to see it displayed on the Job History Line Detail window.

If the job you enter has only one job line, you will go directly to the Job History Line Detail window.

Press Enter to display the next window.

## Job History Selection Window

To display this window, enter your selection criteria on the Job History Initial window.

### **Fields**

#### **Account Number**

This field displays the account code entered on the previous window, or the account code of the piece of equipment or [contract](#) entered on the previous window.

#### **Account Address**

This field displays the account address entered on the previous window, or the account code of the piece of equipment or contract entered on the previous window.

#### **Account Name**

This is retrieved from the Customer file using account code or address code.

#### **Select (1)**

Enter 1 against a [job](#) to display it in more detail.

#### **Job No**

This field displays the list of job numbers for the parameters entered on the Initial window.

#### **Model Number**

This field displays the [model](#) code for the equipment on the [job line](#).

#### **Serial Number**

This field displays the [serial number](#) of the equipment on the job line.

#### **Jb Cat**

This field displays the job category for the job line.

#### **Flt**

This field displays the latest fault code for the job line.

#### **Date**

This field displays the date on which the job was created.

#### **Time**

This field displays the time at which the job was created.

Enter 1 against a job to see the Job History Line Selection window. There is no need to press Enter.

---

## Job History Line Selection Window

To display this window, select a [job](#) on the Job History Selection window.

Use this window to select a particular job line to display job details. Three extra detail lines per job line record are displayed if you select **Fold/Truncate (F13)**.

### **Fields**

#### **Customer Order No**

This field displays the customer order number as previously entered.

#### **Contact Date**

This field displays the date of the first contact for the job.

#### **Job Contact**

This field displays the customer contact name for the job.

#### **Contact Time**

This field displays the time of first contact for the job and cannot be amended.

#### **Select (Untitled)**

Enter 1 against a [job line](#) to enquire on it.

#### **Jb Cat**

This field displays the job category which was assigned to each piece of equipment on the job.

#### **Model**

This field displays the list of [models](#) previously added to the job.

#### **Serial**

This field displays the list of [serial numbers](#) previously added to the job.

#### **Sts**

This field displays the status of the job line.

#### **Location of Equipment**

The [location](#) details are held on the [Installation](#) Details file, for the piece of equipment on the [job line](#).

### **Functions**

#### **Job Story (F7)**

Use this to access text for the [job](#).

#### **Fold/Truncate (F13)**

Use this to toggle between showing more and less detail for the job.

### **Text (F21)**

Use this to access text for the job header.

Enter 1 against a job and then press Enter to see the Job History Line Detail window.

## Job History Line Detail Window

To display this window, enter 1 against a [job line](#) and then press Enter on the Job History Line Selection window.

**SS0AG99**

### **Fields**

#### **All Fields**

For details of each field's functionality, please refer to the Job Line Details Window section within the Service Call Logging [task](#).

In addition, if a machine's record includes meters:

#### **Service Reading (1)**

This field displays the meter reading entered via [technical reporting](#).

#### **Service Reading (2)**

This field displays the meter reading entered via technical reporting.

### **Functions**

#### **Contract (F6)**

Use this to display the [Cover Type](#)/Job Category Enquiry Detail window, showing the [contract](#) and charges matrix.

#### **Job Story (F7)**

Use this to display the [job](#) story for the job. You cannot maintain this here.

#### **Invoice (F10)**

Use this to display the invoice enquiry. If the invoice/credit is pending the [job](#) will be at status 99 but no invoice number will be displayed. In this instance, a list of individual jobs will be displayed for selection.

Where a single job has multiple documents (invoices and credits), a list of the available documents will be shown for selection of the appropriate one.

If the invoice is a consolidated invoice, the Invoice Enquiry will allow selection of a specific job number.

#### **Peripherals (F14)**

Use this to display the Equipment Configuration Enquiry window, which shows all peripherals for this machine.

**Hours (F15)**

Use this to display the Job History Labour Hours window. This shows all the labour hours reported for this [job line](#) on the [technical report](#).

**Parts Used (F16)**

Use this to display the Job History Parts Used window. This shows all the parts reported for this job line on the technical report.

**Misc Costs (F17)**

Use this to display the Job History Miscellaneous Charges window. This shows all the miscellaneous costs reported for this job line on the technical report.

**Audit (F19)**

Use this to display the Job Audit Enquiry pop-up, which lists any changes made to the job line, with the most recent change at the top of the list.

**Assisting Engineer (F20)**

This function is only displayed if an assisting engineer has been assigned to an appointment [call](#).

**Text (F21)**

Use this to display any free format text entered for this job line. You cannot maintain this here.

**Name and Address (F23)**

Use this to display the Verify Installation Address window, showing the machine's [installation address](#) and other customer details.

Select a valid function or select **Previous (F12)** to return to the previous window.

## Job History Labour Hours Window

To display this window, select **Hours (F15)** on any Job History Enquiry window. Two extra detail lines are displayed when you select **Fold/Truncate (F13)**.

**Fields****Job Number**

This field displays the [job](#) number selected previously.

**Model**

This field displays the [model](#) for the piece of equipment on the job.

**Serial Number**

This field displays the [serial number](#) of the piece of equipment on the job.

**Account Number**

This field displays the customer code of the customer for the job.

### **Account Address**

This field displays the customer address code of the customer for the job.

### **Contract Number**

If the piece of equipment on the job was under [contract](#), the contract number is shown.

### **Contract Type**

This field displays the [contract type](#) of the contract. \*NO means there was no contract.

### **Visit Date**

This field displays the dates of all [visits](#) to this piece of equipment on this job where labour hours were entered.

### **Job Category**

This field displays the job category entered on the [technical report](#) for the visits and its description as retrieved from the Job Category file.

### **Recorded Fault**

This field displays the fault code entered on the technical report and its description as retrieved from the Codes/Parameter file, type FLTC.

### **Eng No.**

This field displays the engineer who carried out the visit to the piece of equipment on the job.

### **Hours**

This field displays the time spent on this piece of equipment on this job.

## **Functions**

### **Job Story (F7)**

Use this to display any job story text. You cannot maintain this here.

### **Fold/Truncate (F13)**

Use this to toggle between displaying more and less detail for each line.

### **Parts Used (F16)**

Use this to display the Job History Parts Used window. This shows all the parts reported for this [job line](#) on the [technical report](#).

### **Misc Costs (F17)**

Use this to display the Job History Miscellaneous Charges window. This shows all the miscellaneous costs reported for this job line on the technical report.

### **Text (F21)**

Use this to display text for the job line.

Select a valid function or select **Previous (F12)** to return to the previous window.

## Job History Parts Used Window

To display this window, select **Parts Used (F16)** on any Job History Enquiry window. Two extra detail lines are displayed when you select **Fold/Truncate (F13)**.

### **Fields**

#### **Job Number**

This field displays the [job](#) number selected previously.

#### **Model**

This field displays the [model](#) for the piece of equipment on the job.

#### **Serial Number**

This field displays the [serial number](#) of the piece of equipment on the job.

#### **Account Number**

This field displays the customer code of the customer for the job.

#### **Account Address**

This field displays the [site](#), or [installation address](#) code of the customer for the job.

#### **Contract Number**

If the piece of equipment is under a [contract](#), the contract number is displayed.

#### **Contract Type**

This field displays the [contract type](#) of the contract. \*NO means there is no contract.

#### **Visit Date**

This field displays the dates of the [visits](#) to this piece of equipment on the [job](#).

#### **Part**

This field displays the part numbers, and retrieves the descriptions of the items from the Inventory parts file, used for the job.

#### **Eng No**

This field displays the engineer who carried out the visit to the piece of equipment on the job.

#### **Qty Used**

This field displays the used quantity of the part.

No record is kept of returns.

#### **Job Category**

The job category for this particular part record is displayed with its description.

#### **Source**

This field displays the engineer's code to indicate the stockroom from which the part was issued.

If the part is sourced from another engineer in the same country, Inventory Management transfers stock from this engineer's stockroom to the stockroom of the engineer on the first line of the record and then debits the quantity used.

### **Charge Parts %**

The value, between 0 and 100, is the one entered at [technical reporting](#) to show how much of the list price has been charged for the part.

### **Report No**

The first seven digits of the report number are the [job](#) number.

The last two start at 00 and are incremented by one each time you are in the technical report and you select **Comp Report Line (F9)** for the [job line](#), or **Comp Job Line (F10)** on other job lines within the job.

## **Functions**

### **Job Story (F7)**

Use this to access job story text. You cannot maintain this here.

### **Fold/Truncate (F13)**

Use this to toggle between displaying more and less detail for the line.

### **Hours (F15)**

Use this to display the Job History Labour Hours window. This shows all the hours reported for this job line on the technical report.

### **Misc Costs (F17)**

Use this to display the Job History Miscellaneous Charges window. This shows all the miscellaneous costs reported for this [job line](#) on the [technical report](#).

### **Text (F21)**

Use this to access text for the job line.

Select a valid function or select **Previous (F12)** to return to the previous window.

## **Job History Miscellaneous Charges Window**

To display this window, select **Misc Costs (F17)** on any Job History Enquiry window. One extra detail line is displayed when you select **Fold/Truncate (F13)**.

### **Fields**

#### **Job Number**

This field displays the [job](#) number selected previously.

#### **Model**

This field displays the [model](#) for the piece of equipment on the job.



**Serial Number**

This field displays the [serial number](#) of the piece of equipment on the job.

**Account Number**

This field displays the customer code of the customer for the job.

**Account Address**

This field displays the account address code of the customer for the job.

**Contract Number**

If the piece of equipment on the job is under a [contract](#), the contract number is shown.

**Contract Type**

This field displays the [contract type](#) of the contract. \*NO means there is no contract.

**Visit Date**

This field displays the dates of all [visits](#) to this piece of equipment on this job where miscellaneous charges were incurred.

**Charge Type**

This field displays the reason for the charge. You set up these codes in the Codes/Parameter File [task](#), under type CHGT.

This also displays the code description. If you overwrote the file description in [call](#) reporting, the overwritten detail is displayed.

**Job Category**

This field displays the [job](#) category entered on the [technical report](#) and its description.

**Amount**

This field displays the value of the miscellaneous charge entered on the technical report. Whether or not this will be invoiced depends on the value in the Charge field, which you can see if you select **Fold/Truncate (F13)**.

**Tax**

This field displays the tax code applicable to this record.

**Eng**

This field displays the prime engineer's code for this record.

**Rep**

This field displays the report number. The first seven digits are the job number and the last two digits are the report number. These start at 00 and are incremented by one each time you are in the technical report and you select **Comp Report Line (F9)** for the [job line](#), or **Comp Job Line (F10)** on other job lines within the job.

### **Uplift %**

This field displays the relationship between cost and the invoiced charge for the miscellaneous record.

### **Act**

This field displays the actual cost of the miscellaneous expenditure.

### **Chg**

One of the following is displayed:

0 - Not to be charged

1 - To be charged

## **Functions**

### **Job Story (F7)**

Use this to access job story text.

### **Fold/Truncate (F13)**

Use this to toggle between displaying more and less details for the line.

### **Hours (F15)**

Use this to display the Job History Labour Hours window. This shows all the hours reported for this job line on the technical report.

### **Parts Used (F16)**

Use this to display the Job History Parts Used window. This shows all the parts reported for this [job line](#) on the [technical report](#).

### **Text (F21)**

Use this to access text for the job line.

Select a valid function or select **Previous (F12)** to return to the previous window.

## **Enquire on Escalation [31/SSS]**

If you use [job](#) escalation, Service Management alerts you to any service jobs which are approaching their designated response time and are still outstanding. Job escalation runs while the Service Management subsystem is active.

Each job has a target response date and time. Use this [task](#) to enquire on outstanding service jobs which are close to, or have exceeded, their response time guarantee.

You can monitor and take action on jobs approaching a critical status.

Jobs are removed from the escalation procedure once they reach a certain status. You define this status. For example, escalation can stop once the job is allocated to an engineer, or once the engineer has arrived and started work.

## Example of Call Escalation

Escalation Step	Reporting Times - (1 Hour Intervals)
0	16:00 Target Time
1	15:00
2	14:00
3	13:00
4	12:00 Escalation Time Fence (4 hours) starts

In the above example, the escalation time fence is set to 4 hours and the reporting interval to 1 hour.

A [job](#) with target time of 16:00 will start to escalate at 12:00.

Between 12:00 and 12:59, the escalation step is 4, and the job is within 4 hours of target.

Between 13:00 and 13:59, the escalation step is 3, and the job is within 3 hours of target.

At 16:00, or later, the escalation step will be calculated as 0, because the [job](#) has reached or passed its target time.

**Note:** An escalation step of 0 always indicates that the job has reached or is past its target response time.

## Escalation Enquiry Initial Window

To display this window, select the Enquire on Escalation [task](#).

### Fields

#### **Jobs Assigned to Engineer**

If you enter an engineer, a list of all [job lines](#) currently assigned to this engineer, irrespective of the job line [branch](#), which satisfy the other selection criteria, will be displayed.

#### **Jobs for a Team**

If you enter a team, a list of all job lines currently assigned to this team, irrespective of the job line branch, which satisfy the other selection criteria, will be displayed.

### **All Jobs for the Branch**

Enter one of the following:

0 - Not to display all the jobs for this branch

Instead, display the jobs for the engineer or team requested.

1 - To display all the [jobs](#) for this branch

You only use this if you have not entered an engineer or team number. A list of all job lines belonging to the current branch, that also satisfy the other selection criteria, will be displayed.

### **Planned Jobs (1) or Callouts (2)**

Enter one of the following:

Blank - To display all job lines, irrespective of whether they are breakdown [calls](#) or planned maintenance jobs, assuming they satisfy the other selection criteria

1 - To display only planned maintenance job lines, assuming they satisfy the other selection criteria

2 - To display only breakdown job lines, assuming they satisfy the other selection criteria

### **Contracted Responses Only**

Enter one of the following:

0 - If all jobs, irrespective of whether they are covered by [contract](#) or not, are selected

1 - If only [jobs](#) for pieces of equipment covered by [contract](#), and therefore having a contracted response time, are selected

### **Escalation Step**

The default is 00. Valid entries are between 00 and 98, or blank.

If this field is set to a specific number, only [job lines](#) with this escalation step will be displayed.

If this field is set to blank, any job line with any escalation step will be displayed, depending on the other selection criteria.

### **Status Range**

Enter a range of status codes between 00 and 09.

The status codes are:

00 - Open job lines

01 - Assigned jobs

02 - Scheduled jobs

03 - Despatched jobs

04 - Work in progress

05 - Telephone [call](#) required

06 - Awaiting parts

07 - Credit hold

08 - Completed, but not documented

09 - Partial report - assisting engineer

10 - Not supported in the current system

All job lines with status which fall within the range, assuming they satisfy the other selection criteria, will be displayed.

Press Enter to display the Job Escalation Enquiry Detail window.

## Job Escalation Enquiry Detail Window

To display this window, press Enter on the Job Escalation Enquiry Initial window.

**Note:** Select **Fold/Truncate (F13)** to expand the single line of detail by a further two lines.

### Fields

#### **Engineer**

This field displays the engineer you selected on the previous window, if you selected an engineer.

#### **Team**

This field displays the team you selected on the previous window, if you selected a team.

#### **Select (n)**

Enter **1** to view the [job line](#) in more detail.

#### **Account Name**

This is retrieved from the Customer file using the account or [location](#) codes from the [job](#).

#### **Pcde**

This field displays the first four alphanumeric characters of the customer's postcode, as retrieved from the Customer file using the account or location codes from the job.

#### **Model**

This field displays the [model](#) code of the piece of equipment on the job.

#### **Flt**

This field displays the fault code entered against this piece of equipment when the job was logged.

#### **Cat**

This field displays the job category entered against this piece of equipment when the job was logged.

### **Job**

This field displays the job number which has been allocated by the application.

### **St**

This field displays the current status of the job for example, open, allocated, scheduled, despatched, completed, and so on. It cannot be amended.

### **Target**

This field displays the calculated target time for the piece of equipment on the job.

It is calculated by adding the response hours for the [call](#) to the original time of contact. This takes into account the working hours in the day, from the service window, and the working days in a period, from the Daily Calendar file.

If an appointment date and time were entered when the job was logged, these are used instead of the above.

### **Stp**

This field displays the current escalation step for the piece of equipment on the job.

98 is the step when the [call](#) is logged. The call will stay at this until the Report Escalation Before Response Due time is reached (set up in Escalation Parameters maintenance). The call's report step is then updated to the highest step value listed on the Escalation Control Maintenance Details window. The report steps decrease as the escalation steps are reached.

A step of 00 means that the [job](#) has reached or passed its target time.

### **Untitled**

The first line of the [site](#) address is retrieved from the Customer file using the account or [location](#) codes from the job.

This field is displayed if you select **Fold/Truncate (F13)**.

### **Serial or Qty**

This field displays the [serial number](#) of the piece of equipment on the job; if there is no serial number, the quantity of the [model](#) included on the [job line](#) is displayed.

This field is displayed if you select **Fold/Truncate (F13)**.

### **Target Date**

This field displays the calculated target date for the piece of equipment on the job.

It is calculated by adding the response hours for the call to the original date and time of contact. This takes into account the working hours in the day, from the service window, and the working days in a period, from the Daily Calendar file.

If an appointment date and time were entered when the job was logged, these are used instead of the above.

This field is displayed if you select **Fold/Truncate (F13)**.

### **Fault**

The full name of the fault code displayed under field Flt is displayed here. It is retrieved from the codes file under type FLTC, or as overwritten at [call](#) logging. Beside it is displayed the first 21 alphanumeric characters of any user-defined fault description, entered on the Job Line Detail window in call logging.

This field is displayed if you select **Fold/Truncate (F13)**.

### **Service Period**

This field displays the [service period](#) in which the [job](#) was created or the [visit](#) was due.

This field is displayed if you select **Fold/Truncate (F13)**.

**Note:** *If you entered 1 in the All Jobs for the Branch field on the Escalation Enquiry Initial window, the engineer number, name, radio page no., last contact date and time and location are not shown; instead, a heading of All Jobs for Branch is displayed.*

## **Functions**

### **Fold/Truncate (F13)**

Use this to toggle between displaying more and less detail for the line.

### **Text (F21)**

Use this to access text for engineer.

Press Enter to display the Job Line Detail window.

## **Job Line Detail Window**

To display this window, select a [job line](#) and then press Enter on the [Job](#) Escalation Enquiry window.

### **Fields**

For details of each field's functionality, please refer to the [Job Line](#) Details Window section within the Service [Call](#) Logging [task](#).

### **Functions**

#### **Contract (F6)**

Use this to display the [Cover Type/Job](#) Category Enquiry Detail window, showing the [contract](#) and charges matrix.

#### **Job Story (F7)**

Use this to display the job story for the job. You cannot maintain this here.

#### **Peripherals (F14)**

Use this to display the Equipment Configuration Enquiry window, which shows all peripherals for this machine.

**Hours (F15)**

Use this to display the [Job](#) History Labour Hours window. This shows all the labour hours reported for this [job line](#) on the [technical report](#).

**Parts Used (F16)**

Use this to display the Job History Parts Used window. This shows all the parts reported for this job line on the technical report.

**Misc Costs (F17)**

Use this to display the Job History Miscellaneous Charges window. This shows all the miscellaneous costs reported for this job line on the technical report.

**Audit (F19)**

Use this to display the Job Audit Enquiry pop-up, which lists any changes made to the job line, with the most recent change at the top of the list.

**Assisting Engineer (F20)**

This function is only displayed if an assisting engineer has been assigned to an appointment [call](#).

**Text (F21)**

Use this to display any free-format text entered for this job line. You cannot maintain this here.

**Name and Address (F23)**

Use this to display the Verify Installation Address window, showing the machine's [installation address](#) and other customer details.

Select a valid function or select **Previous (F12)** to return to the previous window.

## Enquire on Branch Workload [32/SSS]

Use this [task](#) to view the projected workload for the next 16 working hours, based on the duration of jobs in the software and the available engineers' working hours.

This task displays the workload in two-hour time slots, starting from the current time. Only working hours are displayed, as derived from the service window.

The calculation is based on the total [job](#) duration of [calls](#) with a target time falling within the two-hour slot, divided by the total available engineer hours for the slot. The software multiplies the result by 100, to express the load as a percentage.

No allowance is made within the loading for travel time. Jobs are included in two-hour slots, based on their target time; no account is taken of job durations that fall outside that two-hour slot.



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## Branch Workload Enquiry Detail Window

To display this window, select the Enquire on [Branch](#) Workload [task](#).

### **Fields**

**Note:** All blocks are intended for display in colour.

This window displays the loading on a district (that is, a team, or group of teams). The two-hour periods compare available engineer time with the time already allocated to [jobs](#), with the result expressed as the colour-coded percentage load.

The colour of the block represents the percentage load as follows:

Red and flashing - >125%

Red - 110 - 125%

Pink - 100 - 109%

Yellow - 90 - 99%

Green - 75 - 89%

Blue - 50 - 74%

White - <50%

Select **Exit (F3)** to leave the enquiry.

## Enquire on Outstanding DRP Orders [33/SSS]

Use this [task](#) to enquire on outstanding DRP orders and their associated Service Management [jobs](#).

Only DRP orders which have been raised in association with a Service Management job are visible within this enquiry.

## Outstanding DRP Order Enquiry Window

To display this window, select the Enquire on Outstanding DRP Orders task.

### **Fields**

Leave all four fields blank to see a list of all outstanding DRP orders for the current [company](#) and [branch](#).

#### **DRP Order Number**

You can optionally enter the DRP order on which you wish to enquire. Leave the other three fields blank.

### **Job Number**

You can optionally enter the [job](#) which is associated with the DRP order on which you wish to enquire. Leave the other three fields blank.

### **Engineer's Stockroom**

You can optionally enter the stockroom which is associated with the DRP order on which you wish to enquire. Leave the other three fields blank.

### **Engineer Number**

You can optionally enter the engineer associated with the DRP order on which you wish to enquire. Leave the other three fields blank.

When you have entered your selection, press Enter.

If you did not specify an order or [job](#), the Outstanding Parts Orders Enquiry List window will be displayed.

If you selected an order or a job, the Outstanding Parts Orders Enquiry Details window will be displayed.

## **Outstanding Parts Orders Enquiry List Window**

To display this window, leave the order and job unspecified and then press Enter on the Outstanding DRP Order Enquiry window.

This window lists the outstanding orders for the stockroom, engineer or current [company](#) and [branch](#), depending on the selection you made on the Outstanding DRP Order Enquiry window.

### **Fields**

#### **Select (n)**

Enter one of the following:

1 - To see the [job](#) detail for this order

This displays the [Job Line](#) Detail window.

2 - To see the order detail for this order

This displays the Outstanding Parts Orders Enquiry Details window.

Press Enter when you have made your selection. If you entered 2 against an order, the Outstanding Parts Orders Enquiry Details window will be displayed.

## **Outstanding Parts Orders Enquiry Details Window**

To display this window, specify an order or [job](#) and then press Enter on the Outstanding DRP Order Enquiry window.

Alternatively, enter 2 against an order and then press Enter on the Outstanding Parts Orders Enquiry List window.

All the items for the order are listed, with the item description, quantity ordered and quantity despatched.

Select **Exit (F3)** to leave the enquiry.

## Engineer Messages [40/SSS]

Use this [task](#) to send messages, or review messages sent, between engineers and teams within a service branch. You can send messages to any engineer or team in any [branch](#). You can use the same engineer or team as both the sender and the recipient.

Enter an engineer or team to create a three-line (195-character) message. The message expiry date is calculated from the value in the Default Expiry Days for Messages field on the System Parameters Maintenance Assignment window.

These engineer and team messages are also displayed when you are in the Engineer Work Allocation task, before the [job](#) list is displayed for the selected engineer or team.

You can only review branch messages using this task.

**Note:** *The message sender needs to be defined in the software as an engineer.*

## Engineer Messages Initial Window

To display this window, select the Engineer Messages [task](#).

### **Fields**

Leave all fields blank and then press Enter to review all messages.

#### **Message Type to Maintain**

You can optionally enter one of the following:

- 1 - To review all messages for an engineer
- 2 - To review all messages for a team
- 3 - To review all messages

#### **Engineer**

You can optionally enter the engineer whose messages you want to review.

#### **Team**

You can optionally enter the team whose messages you want to review.

## **Functions**

### **Message Entry (F10)**

Leave all fields blank and use this to see the Send an Engineer Message window.

Press Enter to display the messages.

## Send an Engineer Message Window

To display this window, select **Message Entry (F10)** on the Engineer Messages Initial window.

### **Fields**

#### **Message From**

Enter the originator of a message. This must be an engineer already set up in the software.

#### **Expiry Date**

The message expiry date comes from the Default Expiry Days for Messages field, which you set up on the System Parameters Maintenance Assignment window.

You can change this date, if required.

#### **Message**

Enter the message detail, using up to three lines of 65 alphanumeric characters each.

#### **Engineer**

Enter an engineer to whom the message will be transmitted.

#### **Team**

Enter a code for the team to whom the message will be transmitted.

#### **All Engineers**

Enter 1 to transmit the message to all engineers defined to the [branch](#).

Select **Send Message (F8)** to send the message.

## Machine Messages [41/SSS]

Use this [task](#) to create messages for machines. These could be a warning to repair a generic fault, for example. You can send these messages to individual machines, or send them on a generic basis.

Users will see the messages when a [job](#) is logged or despatched.

If the [model](#) and serial fields are left blank, you can retrieve outstanding messages.

If you enter model or serial information you can create a three-line (195-character) message. The message defaults to the indefinite 99/99/99, but you can amend this to any future date as required.

## Machine Messages Initial Window

To display this window, select the Machine Messages task.

### **Fields**

Leave all fields blank and then press Enter to review all the messages for the [branch](#).

Leave all fields blank and then select **Message Entry (F10)** to create a message.

### **Message Type to Maintain**

You can optionally enter one of the following:

- 1 - To enter a message for a [model](#) with [serial number](#)
- 2 - To enter a message for a model within a serial number range
- 3 - To enter a message for a model
- 4 - To enter a message for a model sub-group

### **Model**

If you want to list all the messages for a model, enter the model in this field, enter the appropriate Message Type To Maintain and then press Enter.

### **Serial Number From**

If you enter a message for a unique model or serial number, make sure that the combination is valid: the record must exist on the [installation](#) file.

If you enter a message for a serial number range, enter the start and end of the range (inclusive numbering) to which the message is to apply.

### **Serial**

You only need to enter a serial number if a range of numbers is involved, otherwise leave this field blank.

### **To**

You only need to enter a [serial number](#) if a range of numbers is involved, otherwise leave this field blank.

### **Division**

If the machine message is for a product [division](#), enter a valid division.

In this case you must leave the Model and Serial Number From/To fields blank.

### **Model Group**

If the machine message is for a product division and [model](#) group, enter a valid division and model group. In this case you must leave the Model and Serial Number From/To fields blank.

### **Sub-Group**

If the machine message is for a product division, model group and model sub-group, enter a valid division, model group and model sub-group code. In this case you must leave the Model and Serial Number From/To fields blank.

## **Functions**

### **Message Entry (F10)**

Use this to display the Send a Machine Message window.

Press Enter to see the messages listed for amendment.

Select **Message Entry (F10)** to see the Send a Machine Message window.

## **Send a Machine Message Window**

To display this window, select **Message Entry (F10)** on the Send a Machine Message Initial window.

## **Fields**

### **Message From**

Identify the sender by name, by [job](#) title or by user ID. This field is not validated.

### **Expiry Date**

The default (99/99/99) is for a machine message which will not expire.

If you want the machine message to expire, enter a valid expiry date (format DDMMYY).

### **Message**

Enter a maximum of three 65-character lines of free-form detail.

### **Model**

The [model](#) defaults from the Machine Messages Initial window, if you entered one there.

Otherwise, enter a valid model.

### **Serial**

This field defaults from the Machine Messages Initial window, if you entered one there.

Otherwise, enter a valid [serial number](#).

**Note:** *If the message is for a machine with no serial number, enter the model number and field exit through the Serial field before selecting **Send Message (F8)**.*

**To**

This field can be left blank, but if you enter a serial number in this field it must be greater than the serial number in the Serial field.

**Division**

If the machine message is for a product [division](#), enter a valid division.

The Model and Serial/To fields must be left blank.

**Model Group**

If the machine message is for a product division and [model](#) group, enter a valid division and model group.

The Model and Serial/To fields must be left blank.

**Sub-Group**

If the machine message is for a product division, model group and model sub-group, enter a valid division, model group and model sub-group.

The Model and Serial/To fields must be left blank.

Select **Send Message (F8)** to send the message.





### Remote Communications for Service Management

You can use the [remote communications](#) link to pass [job](#) and message data to field engineers and receive details of work done back from them.

The information you enter during the [call](#) logging and [technical reporting](#) procedures is stored in outgoing and incoming monitor files, subject to strict validation and error reporting routines. Data goes to a communications gateway that is flexible enough to allow the link to be directly from a mid-range server, or from a personal computer.

A batch sleeper job extracts the data to be transmitted to active outstations and carries out all necessary file updates and status changes.

Engineers logging on to the system receive call details and messages and they pass reports of work done back to the centre. Engineers can accept, reject and otherwise change the status of jobs to reflect their current progress. They can report work that incurs charges for labour, travel time and distance, parts used and returned, plus miscellaneous costs and charges.

They can also log and report on additional jobs. New and changed equipment details update a [site's](#) installed equipment records and you can send out messages or text and receive them.

Enquiries and reports warn you of any validation errors in incoming or outgoing information. Use the provided maintenance routines to correct the errors.

The software keeps track of any engineers logging off, either at the end of the day or for any other reason. Depending on the type of log off, the jobs may be left for the same engineer to work on, or may be re-allocated to others.

#### **Description**

Call logging and technical reporting procedures are described in separate sections. They work in the same way when you are using remote communications. They interact with an extended range of job sub-status codes (parameter type ETAR in the Codes/Parameters file), remote communications error codes (parameter type ERRC), remote communications process indicators (parameter type PCDF) and transaction types (parameter type TTYP).

To operate the remote communications link on the server, follow these steps:

- Include detail in the branch record for the error message queue; the default otherwise is QSYSOPR.
- Set the Remote Communications Active field on in the System Parameters Maintenance Assignment window.

- Include any extra job sub-status codes in the Codes/Parameter File maintenance task, parameter type ETAR.
- Make sure that the Service Management subsystem is active.

### **Implications**

Follow your hand-held [terminal](#) set up instructions carefully; they are not detailed here.

You must make sure that any system required codes are set up, that the incoming and outgoing files are updated correctly and that the subsystem is active.

### **Remote Communications Links to and from Engineers**

Outgoing and incoming [job](#) processing records can be held on files interfaced to a communications gateway. The software validates records and you can correct these centrally or return them to the appropriate engineers for correction.

You can integrate a variety of carriers and mobile terminals with Service Management. You can select your preferred route for the gateway, the communications link and the remote devices.

Whether or not the [remote communications](#) link is active, normal job processing routines continue without any apparent change.

## Print Audit Report [5/SSR]

### Request Incoming Transaction Reports/Purge Window

To display this window, select the Print Audit Report [task](#).

#### **Fields**

##### **Full Audit or Exceptions**

Enter one of the following:

- 0 - To print only transactions that are partly processed, rejected, held or deleted
- 1 - To print not only those transactions that are partly processed, rejected, held or deleted, but also the fully processed records

**Note:** *Records awaiting processing are ignored.*

##### **Purge Transactions**

Enter one of the following:

- 0 - If no purging is to take place
- 1 - To purge fully processed and deleted records once the report has been printed

Select **Submit (F8)** to send a batch [job](#) to create the report.

## Incoming Transaction Maintenance [6/SSR]

### Transaction Maintenance Window

To display this window, select the Incoming Transaction Maintenance [task](#).

#### **Fields**

##### **Select (X)**

Enter one of the following:

1 - To display the [job](#) details for correction and validation

After correction, select **Update (F8)** to clear the error code, allowing the ITM to attempt to process the transaction again and re-display this window.

4 - To delete

Option **4** followed by **Refresh (F5)** will delete the transaction and re-display the remaining ones in transaction date and time sequence.

#### **Functions**

##### **Refresh (F5)**

Use this to refresh the details on the window.

## Purge Transaction Files [7/SSR]

Use this [task](#) to purge all fully processed and deleted incoming transaction records. A pop-up is displayed for confirmation.

Select **Confirm Submit (F8)** to submit the job.

# Maintain Remote Pick Lists [11/SSR]

## Pick List Maintenance Window

To display this window, select the Maintain Remote Pick Lists [task](#).

### Fields

#### **Pick List Type**

Enter a pick list type. A prompt is available on this field.

#### **Parent ID**

Enter a parent ID.

Enter the pick list type and a parent ID and then press Enter to display the Remote Pick List Maintenance Details window.

## Remote Pick Lists Maintenance Details Window

To display this window, enter the pick list type and a parent ID and then press Enter on the Remote Pick List Maintenance window.

### Fields

#### **Select (Sel)**

Enter one of the following:

- 1 - To display the line details at the bottom of the window for amendment
- 4 - To delete the line

#### **ID**

Enter a parent ID.

#### **Desc.**

Enter a description for this ID. 30 characters are available.

#### **Code**

You can optionally enter a code for this ID.

#### **Timed**

Enter one of the following to determine whether Timed Pick list entry is required:

- 0 - If Timed Pick list entry is not required
- 1 - If Timed Pick list entry is required

**Note:** *This is only allowed when a code has been entered.*

## **Functions**

### **Update (F8)**

Use this to confirm any changes made.

Select **Update (F8)** to save any changes made and return to the Remote Pick List Maintenance window. No warning is give should you leave this window without selecting **Update (F8)** and all changes will be lost.

# Maintain Tasks [12/SSR]

## PM Device Task List Maintenance Window

To display this window, select the Maintain Tasks [task](#).

### **Fields**

#### **Task Code**

Enter a task code. A prompt is available on this field.

Enter a task code and then press Enter to display the PM Device Task List Maintenance Details window.

## PM Device Task List Maintenance Details Window

To display this window, enter a [task](#) code and then press Enter on the PM Device Task List Maintenance window.

### **Fields**

#### **Task Code**

This field displays the selected task code.

#### **Task Description**

Enter a description of the task. Up to 30 characters can be used.

#### **Task Sequence**

You can optionally enter a sequence number.

### **Task Help Text**

You can optionally enter help text for this task. Eight lines of 32 characters are available.

### **Functions**

#### **Update (F8)**

Use this to confirm any addition or changes made.

#### **Delete (F11)**

Use this to delete the task. Confirmation is required.

Select **Update (F8)** to save any additions or changes made and return to the PM Device Task List Maintenance window. No warning is give should you leave this window without selecting **Update (F8)** and any changes will be lost.

## Maintain Equipment Tasks [13/SSR]

### PM Equipment Task List Reference Maintenance Window

To display this window, select the Maintain Equipment Tasks [task](#).

#### **Fields**

##### **Job Category**

Enter a [job](#) category. A prompt is available on this field.

##### **Model Sub-Group**

Enter a [model](#) sub-group.

##### **Model Number**

Enter a model number. A prompt is available on this field.

Enter a job category and model sub-group code and then press Enter to display the PM Equipment Task List Reference Maintenance Details window.

### PM Equipment Task List Reference Maintenance Details Window

To display this window, enter a [job](#) category and [model](#) sub-group code and then press Enter on the PM Equipment Task List Reference Maintenance window.

#### **Fields**

**Task Code**

This field displays the selected [task](#) code

**Model Sub-Group**

This field displays the selected model sub-group.

**Model Number**

This field displays the selected model number.

**Task Codes**

Enter the task codes you wish to associate with the selected combination.

**Functions****Update (F8)**

Use this to confirm any addition or changes made.

**Delete (F11)**

Use this to delete the tasks. Confirmation is required.

Select **Update (F8)** to save any additions or changes made and return to the PM Equipment Task List Reference Maintenance Details window. No warning is give should you leave this window without selecting **Update (F8)** and any changes will be lost.





# Contract Pricing and Invoicing

Contracts invoiced in advance or in arrears are priced and invoiced as follows:

### **Service Pricing**

A [contract](#) is priced for a defined period of time (the [term](#)) which can be the same as the contract duration itself, or can be less. You can split the charge for an [invoice term](#) into instalments for invoicing purposes. So, for example, you can invoice a one-year term in quarterly instalments. The software will charge pro-rata for equipment added to a contract part of the way through its invoice term.

If no [special price](#) exists, and you are using term processing, the Contract Rates [task](#) provides the price per maintenance [visit](#) and any supplement fee. The total number of maintenance visits scheduled for the piece of equipment in the invoice term is then multiplied by the price per visit, and the supplement fee is added. The result is the gross charge for the piece of equipment.

### **Rental Pricing**

You can charge rent for equipment on contract, if rental is defined on the [contract type](#).

### **Meterage Pricing**

If you want to make meterage charges, you have to select monthly processing. You cannot process by term.

You can define up to five copy charge bands, for each of two meters, for each piece of equipment.

### **Invoicing**

The Price Contracts task creates invoice lines in the [pending invoice lines](#) file.

The Generate and Print Invoices task generates the invoice header and line details. This is when the software consolidates invoices, if you requested this. The task posts the relevant transactions to Accounts Receivable and the General Ledger. The software calculates the tax according to the parameters set for the customer. The invoices are then printed.

Where you are invoicing in advance, the revenue value of the invoice is posted to the General Ledger's deferred income account. The software then generates additional postings that transfer the period revenue values from this deferred income account into a sales account each period.

### **Contract Invoice Term**

When a [contract](#) is priced, the price is calculated to cover a fixed period of time known as the [term](#). There can be one or many terms within the life (duration) of a contract.

The term is the period of time from the [next term starts on](#) date to the [next term ends on](#) date and defines the period of price protection for the contract.

Contracts are selected for pricing if the next term starts on date is less than or equal to the date entered on the Price Contracts window. This field is set up on the Billing Parameters pop-up in the Contracts [task](#).

### **Contracts Payable in Advance, in Arrears, per Visit**

There are three ways of paying the contract:

- Customers can pay in advance.

The contract charges for any contract invoice term, or instalment of a term, are invoiced before the term or instalment.

- Customers can pay in arrears.

The contract charges for any contract invoice term, or instalment of a term, are invoiced after the term or instalment.

- Customers can pay per visit.

The contract charges are invoiced as a result of a scheduled service visit being made and technically reported. The pricing of these visits is carried out by the Price Jobs task.

### **Pending Invoice Line**

A [pending invoice line](#) is an invoice line that has not yet been assigned an invoice number and has not been posted to the ledgers. It is waiting to be grouped with other invoice lines to form an invoice. This grouping is dependent on the [invoice consolidation level](#) set up for the customer account at the 000 [location](#).

**Note:** The location code 000 sets the invoice consolidation level for all [sites](#).

### **Pending Invoice Line Availability Date**

This field displays the date on, or after which, the pending invoice line may be included in an invoice. For advance contracts, this will be the start date of the [contract invoice term](#) or instalment period. For arrears contracts, it will be the end date of the contract invoice term or instalment period.

### **Price Contracts**

When you select the Price Contracts [task](#) you can run the [job](#) for all branches or a single [branch](#), you can specify the type of billing, and select [contracts](#) by [term](#) date.

Only contracts payable in advance or arrears are processed by this task; [visit](#) only contracts are processed by the Price Jobs task.

Pending invoice lines are generated for:

- All non-invoiced pieces of equipment added to a contract during an invoice term that have been priced previously
- All equipment on contracts where the entered cut-off date is later than, or equal to, the next term starts on date of the contract

### **Pricing Routine**

Contract pricing is governed by the conditions set up in the Contracts task.

### **Contract Rates Task**

**Note:** *Default pricing can only be used for fixed service, rental and visit charges. It will not apply to copy/vend contracts, where special [contract conditions](#) must be set up.*

When you set up a new [contract](#), the fixed service, rental and [visit](#) charges default in from the rates set up in the Contract Rates [task](#) (you can change these at contract or machine level).

You set up these rates for the combination of [division](#), [model](#) group, [term](#) and currency.

For the currency in question, the contract rates used will be those for the [contract type](#) and term, effective on the pricing date. The pricing date is derived as follows:

- If the Use Start Date Rates field on the Service Parameters pop-up in the Contracts task is set on (this defaults from the Use Contract Start Date Rates field on the Contract Type Maintenance window), or if there is a price held until date that is later than the next term starts on date, the pricing date is the contract start date.
- Otherwise, the pricing date is the date on which the next term starts.

If no contract rates can be found, the contract could be left with no charge. We recommend that you set up contract rates for as many combinations of equipment and contract types as are necessary and you can set them up separately on the contract itself if necessary.

### **Calculating the Contract Charge**

The price is calculated by multiplying the visit charge by the number of scheduled maintenance visits for this piece of equipment that occur in the [contract invoice term](#), that is, between the [next term starts on](#) and the [next term ends on](#) dates.

The fixed service charge, from the [contract](#) rates, is added; the charge is deemed to apply to the [normal invoice term](#) and is adjusted to allow for the contract invoice term. The number of days in the contract invoice term is divided by the number of days in the normal invoice term and this factor is applied to the fixed service charge.

The rental for the contract term is included, but separately from the service and visit charges.

### **Contract Conditions Prices at Header/Equipment Levels**

If you enter a price in the Contract Conditions pop-up at header or equipment level, this price is deemed to apply to the normal invoice term specified on the Billing Parameters pop-up in the Contracts task.

This normal invoice term is converted to days. This is done by adding the normal invoice term in months to the next term starts on date to get the normal invoice term ends on date. The software then works out the number of days between these two dates.

The number of days between the next term starts on date and the next term ends on date (from the contract header) is also calculated. The ratio of the latter's number of days to the former's is calculated and the same ratio is applied to the [contract conditions](#) price, to get the actual price for the contract, or for the specific piece of equipment, for the contract invoice term.

**Note:** For complete instalment periods, the invoices are calculated to be of equal value.

### **Pro-Rata Pricing**

The price for equipment added late or removed early from a [contract](#) will be calculated on a pro-rata basis, as follows:

The number of days in the [normal invoice term](#) of the contract is calculated, as described above.

For equipment added late, the [contract invoice term](#) is the number of days between the date of addition of the piece of equipment to the contract, and the next term ends on date, or the equipment removal date, whichever comes first.

For equipment removed early, the contract invoice term is the number of days between the date of addition of the piece of equipment, or the [next term starts on](#) date, whichever comes last, and the [next term ends on](#) date, or equipment removal date, whichever comes first.

The ratio of the two sets of days (that is, contract invoice term and normal invoice term) to each other is calculated. This ratio is applied to the calculated price for the normal invoice term, to get the actual price for the contract, or for the specific piece of equipment, for the number of days that it has been on the contract.

**Note:** Equipment actually removed, or scheduled for removal, within an [invoice term](#) already processed, will not have an automatic credit generated; for this, use the [Maintain Contract Credits task](#).

## Maintain Labour Price List [1/SSI]

Use this [task](#) to add, update and delete labour and travel rate price lists by currency. Job pricing uses these prices for the labour and travel charges.

Labour price lists are recorded against [models](#); this is how [job](#) pricing determines which labour price list to use.

You can enter an effective date against any price list to allow for future price changes.

## Labour Price List Maintenance Window

To display this window, select the Maintain Labour Price List task.

### **Fields**

**Price List Code**

Enter a price list code of up to three alphanumeric characters.

The price list code, and its currency and effective date, identify a set of hourly labour rates to be used in pricing.

**Currency Code**

Enter a currency code.

**Effective Date**

Enter the date using the format DDMMYY. This date, together with the price list and currency codes, identifies a set of hourly labour rates to be used in pricing.

If you do not enter an effective date, the Labour Price List Maintenance Details window lists all the entries for the selected price list code and currency.

Press Enter.

If you entered an effective date, the Labour Price List Maintenance Labour Rates window is displayed.

If you did not enter an effective date, all the records with the selected price list code and currency, but with different effective dates, are listed on the Labour Price List Maintenance Details window.

## Labour Price List Maintenance Details Window

To display this window, press Enter on the Labour Price List Maintenance window without entering an effective date.

If you did not enter an effective date, all the records with the selected price list code and currency, but with different effective dates, are listed on this window.

**Fields****Select (Untitled)**

Enter **1** against the price list you wish to select.

**Date**

This field displays the effective date; the date on which the price list comes into force.

**Contract**

This field displays the hourly labour rate.

If, on a chargeable [job](#), a field engineer carries out the work and the equipment is covered by a [contract](#), this hourly rate is used in pricing the job.

**Non-Contract**

This field displays the hourly labour rate.

If, on a chargeable job, a field engineer carries out the work and the equipment is not covered by a contract, this hourly rate is used in pricing the job.

### **Workshop**

This field displays the hourly labour rate.

If a workshop engineer carries out the work, this hourly rate is used in pricing the job, whether or not the equipment is on contract.

### **Travel Rate**

This field displays the hourly rate.

If travel is chargeable on a [job](#), this rate is multiplied by the customer travel time, from the [technical report](#), to calculate the travel charge.

Press Enter to display the Labour Price List Maintenance Labour Rates window.

## Labour Price List Maintenance Labour Rates Window

To display this window, select a price and then press Enter on the Labour Price List Maintenance Details window.

Alternatively, enter a price list code, a currency code and an effective date and then press Enter on the Labour Price List Maintenance window.

When you have selected a price list code, currency and effective date, this window is displayed.

### **Fields**

#### **Price List Code**

This field displays the code entered or selected on the previous window.

#### **Currency Code**

This field displays the three-character alphanumeric code from the previous window.

#### **Effective Date**

This field displays the date entered or selected on the previous window.

#### **Contract Rate**

Enter the hourly labour rate.

If, on a chargeable [job](#), a field engineer carries out the work on equipment covered by a [contract](#), this hourly rate is used in pricing the job.

#### **Non-Contract Rate**

Enter the hourly labour rate.

If, on a chargeable job, a field engineer carries out the work and the equipment is not covered by a contract, this hourly rate is used in pricing the job.

### **Workshop Rate**

Enter the hourly labour rate.

If a workshop engineer carries out the work, this hourly rate is used in pricing the job, whether or not the equipment is on contract.

### **Travel Rate**

Enter the hourly labour rate.

If travel is chargeable on a job, this rate is multiplied by the customer travel time, from the [technical report](#), to calculate the travel charge.

Select **Update (F8)** to save the data.

## Maintain Contract Credits [2/SSI]

Use this [task](#) to view or amend [contracts](#), invoices or pending invoices, and to accept them for the production of a part credit note, or a full credit and re-invoice. They may even be discarded altogether from the crediting task.

### **Description**

The report produced by the Contract Credit Selection task is intended to be the input document for Maintain Contract Credits.

Where deferred income is involved (that is, in pre-paid contracts of more than one month), the amount of deferred credit can be the subject of specific enquiry.

When the values calculated are acceptable, the credit can be updated. You can credit the original invoice in full and re-invoice the outstanding amount, or credit a proportion of the original invoice.

**Note:** For pending invoice records (that is, where the invoice price has been calculated, but the invoice has not been printed or posted), only the re-invoice option is allowed.

**Note:** If the invoice or pending invoice records are not to be credited, you can discard them and remove them from the report of records selected for credit. Select **Discard (F11)**.

### **Implications**

The option to give a full credit against the original invoice and re-issue a new invoice should only be used if it does not infringe local tax regulations.

The amount of deferred credit given will directly mirror the amount of deferred revenue posted from the original invoice. If you want to take the credit over a different period from the original posting periods, do this through a journal entry in the General Ledger.

Maintain Contract Credits automatically removes pending invoices if the [contract](#):

- Has been terminated early through contract maintenance so that the pending invoices are beyond the new end date
- Has had the first invoice selected for credit and actioned

**Note:** You cannot reverse a contract invoice using the Create Sundry Credit Notes task. That [task](#) can only be used to reverse a [job](#) invoice.

After Maintain Contract Credits, run Generate and Print Invoices to print re-invoices and credit notes. Do not run Print Sundry Invoices/Credit Notes for these credits/re- invoices.

## Contract/Invoice Selection Window

To display this window, select the Maintain Contract Credits task.

### Fields

#### **Contract Number**

Enter the [contract](#) number to be credited, using seven alphanumeric characters, from the contract selection report.

#### **Contract Type**

Enter the [contract type](#) for the contract number.

#### **Contract Date**

Enter the date associated with the contract number and type.

#### **Invoice Number**

Enter either the specific invoice number (in the format I + six digits) or the credit note number (in the format C + six digits), for the contract number, type and date.

Alternatively, leave this field blank and go to the [Invoice Period](#) fields.

#### **Currency Code**

This field displays the currency code.

#### **Currency Rate Code**

Enter the currency rate code as appropriate, if the customer requires a credit in a currency other than your base currency.

If you do not have a code set up, enter values in the Currency Rate and Multiply/Divide fields instead.

#### **Currency Rate**

If the customer requires a credit in a currency other than your base currency, enter the rate to be used to convert the value of the credit.

This must be used in conjunction with the Multiply/Divide field.



### **Multiply/Divide**

If the customer requires a credit in a currency other than your base currency, enter the rate to be used in the Currency Rate field, and use this field to specify whether the software is to multiply or divide the rate into the value.

Enter one of the following:

0 - Multiply

1 - Divide

### **Invoice Period From**

As an alternative to selecting an invoice number, and specifically for pending invoices, enter a From date, in the format DDMMYY.

Use the date printed on the Contract Credit Selection report.

### **Invoice Period To**

For pending invoices, enter a date in the format DDMMYY. Use the date printed on the Contract Credit Selection report.

## **Functions**

### **Override Currency Rate (F6)**

Use this to override currency details for transactions where currencies are not linked to the Euro. This displays the Override Conversion Parameters pop-up.

Press Enter to display the Contract Header Prices window.

## **Override Conversion Parameters Pop-up**

To display this pop-up, select **Override Currency Rate (F6)** on the Contract/Invoice Selection window, where one of the currencies involved is not an [IN Currency](#).

IN currencies are defined within the General Ledger, along with the Euro itself.

**Note:** *The exchange rate between currencies that are both IN currencies is fixed, so you cannot maintain it. Selecting **Currency (F19)** in this instance displays an error message.*

## **Fields**

### **Rate Code**

Select a rate code as set up in the Currency Rate Code [task](#) within Financials.

**Rate**

Alternatively, enter a rate using up to five decimal places.

**Multiply or Divide**

Enter one of the following:

M - To multiply the values held in the source currency by the exchange rate to achieve the target currency value

D - To divide the values held in the source currency by the exchange rate to achieve the target currency value

**Source to Euro**

This field specifies whether either the source or target currencies are defined as an IN Currency; that is, linked to the Euro. The detail defaults from the Euro Currencies Maintenance task within Financials and decides the Euro calculation.

Enter one of the following:

0 - If the currencies will be converted directly

This is not an option for member currencies of the Euro.

1 - To uses a triangulation currency conversion

This is the option for member currencies of the Euro.

Press Enter to apply the rate and convert the currencies.

## Contract Header Prices Window

To display this window, press Enter on the Contract/Invoice Selection window.

If you use [contract](#) header pricing as the basis for pricing and invoicing, any amendments will be made at header level.

If you use contract equipment line pricing you can select to edit each of the machines on the invoice.

**Fields****Credit Dates - Requested**

This field displays the date which was entered in the Contract End Date on the contract header; this is assumed to be the date requested for contract [termination](#).

You can change the date to affect the value of the credit. Changing the date to the invoice start date will give a full credit for the [invoice period](#).

**Credit Dates - Actual**

This field displays the requested credit date plus the penalty days. Adding the penalty days to the requested date will not result in a date that is greater than the end of the invoice period.

## Penalty

The value used is taken from the Termination Days field on the [contract type](#). You can change this to a value between one and 999.

The penalty days will be added to the Credit Dates - Requested. No penalty can be taken beyond the end of the invoice period.

## Functions

### Re-calc (F5)

Use this to re-calculate the value of the credit and re-invoice, if changes are made.

### Update-Credit (F8)

Use this to save any changes and produce a credit against the original invoice. The original invoice number is written to the credit note header.

This is not displayed if the record being edited is a pending invoice.

**Note:** Follow this up with Generate and Print (Contract) Invoices.

### Update-Re-invoice (F9)

Use this to save any changes.

- For an actual invoice, it produces a credit for the full amount of the original invoice, and a new invoice for the re-calculated amount due.
- Follow this up with Generate and Print (Contract) Invoices.
- For a pending invoice, it produces a new pending invoice record for the re-calculated amount of the invoice. The standard Generate and Print Invoices task will produce the invoice, when you run it for the release date appropriate to that invoice.

### Discard (F11)

Use this to reject the credit.

The [contract](#) and its invoice detail are returned to their status before contract credit selection.

### Base Value/Prime Value (F14)

Use this to toggle between prime and base currency displays.

### Contract Enquiry (F16)

Use this to assist in making credit decisions.

### Internal Text (F21)

Use this to access internal text.

### External Text (F22)

Use this to access external text. Up to three lines will print on the credit note.

Select a valid function to update the data as required.

## Contract Header Line Prices Window

To display this window, use line pricing rather than header pricing (that is, set the Header Level Pricing field to Off on the Contract Header Maintenance window).

This window displays the equipment for selection and further editing.

If [contract](#) header pricing has been used as the basis for pricing and invoicing, any amendments will be made at header level.

If contract equipment line pricing has been used, each of the machines on the invoice can be selected for editing.

### **Fields**

#### **Credit Dates - Requested**

This field displays the date less the penalty charge that was entered in the Contract End Date on the contract header. This is assumed to be the date requested for contract [termination](#).

The date may be altered to affect the value of the credit. Changing the date to the invoice start date will give a full credit for the [invoice period](#).

#### **Credit Dates - Actual**

This field displays the requested credit date plus the penalty days. Adding the penalty days to the requested date will not result in a date that is greater than the end of the invoice period.

#### **Penalty Days**

The value used is taken from the Termination Days field on the [contract type](#). You can change this to a value between one and 999.

The penalty days will be added to the Credit Dates - Requested. No penalty can be taken beyond the end of the invoice period.

#### **Select (1)**

Enter **1** to select the [model](#) record for detailed editing.

### **Functions**

#### **Recalc (F5)**

Use this to re-calculate the value of the credit and re-invoice, if changes are made.

#### **Update-Credit (F8)**

Use this to save any changes and produces a credit against the original invoice. The original invoice number is written to the credit note header.

This is not displayed if the record being edited is a pending invoice.

**Note:** *Follow this up with Generate and Print (Contract) Invoices.*

#### **Update-Re-invoice (F9)**

Use this to save any changes.

- For an actual invoice, it produces a credit for the full amount of the original invoice, and a new invoice for the re-calculated amount due.
- Follow this up with Generate and Print (Contract) Invoices.
- For a pending invoice, it produces a new pending invoice record for the re-calculated amount of the invoice. The standard Generate and Print Invoices task will produce the invoice, when you run it for the release date appropriate to that invoice.

**Discard (F11)**

Use this to reject the credit.

The record is removed from the edit file; the [contract](#) and its invoice detail are returned to their status prior to contract credit selection.

**Base Value/Prime Value (F14)**

Use this to toggle between prime and base currency displays.

**Contract Enquiry (F16)**

Use this to assist in making credit decisions.

**Internal Text (F21)**

Use this to access internal text.

**External Text (F22)**

Use this to access external text. Up to three lines will print on the credit note.

Select a [model](#) and then press Enter to display the Contract Detail window.

## Contract Detail Window

To display this window, select a [model](#) on the Contract Header window and then press Enter.

**Fields****Model**

This field displays the [model](#) selected on the header window.

**Serial**

This field displays the [serial number](#) for the model selected on the header window.

**Removal Dates - Included**

This field displays the date when the item of equipment was added to the [contract](#).

**Removal Dates - Requested**

This field displays the date entered on the contract line as the potential removal date for the equipment.

You can amend this date, on the contract header window, to affect the amount of credit that may be given.

**Removal Dates - Actual**

This field displays the Removal Dates - Requested plus any penalty days. The date will not be greater than the end of the [invoice period](#).

**Penalty Days**

The value used is taken from the Termination Days on the [contract type](#). You can change this to a value between 0 and 999.

The penalty days will be added to the Credit Dates - Requested. No penalty can be taken beyond the end of the invoice period.

**Service - Visits**

The line is only displayed if [visit](#) charges have been included in the contract type.

**Service - Model**

The line is only displayed if fixed service charges have been included in the contract type.

**Rental - Model**

The line is only displayed if rental charges have been included in the contract type.

**Functions****Contract Enquiry (F16)**

Use this to assist in making credit decisions.

**Deferred Revenue Enquiry (F18)**

Use this to show the impact of the credit on future years.

Select **Deferred Revenue Enquiry (F18)** to display the Deferred Revenue Enquiry window.

## Deferred Revenue Enquiry Window

To display this window, select **Deferred Revenue Enquiry (F18)** on the Contract Detail window.

**Fields****Tot Credit Value**

This field displays the total amount of deferred credit which will be posted if the credit is processed.

### Deferred Credit Summary Year

This field displays the [contract's](#) first year into which any deferred credit will be taken, if the credit is processed.

### Deferred Credit Summary Credit

This field displays the credit amount which will be posted to the year, if the credit is processed.

Select **Previous (F12)** to return to the previous window.

## Enquire on Labour Price List [11/SSI]

Use this [task](#) to enquire on labour and travel labour rates within currency.

You can select and display labour rate price list details by selected currency.

## Labour Price List Enquiry Initial Window

To display this window, select the Enquire on Labour Price List task.

### Fields

#### Price List Code

Enter a valid price list of up to three alphanumeric characters to select a particular price list and currency code combination.

#### Currency Code

Enter a valid currency of up to three alphanumeric characters to select a particular price list and currency code combination.

**Note:** A price list, currency and effective date combination identifies a set of hourly labour rates. These are used in the pricing of chargeable [contract](#), non-contract and workshop [jobs](#); the hourly travel labour rate is used to price chargeable customer travel.

Press Enter to display the Labour Price List Enquiry Rates window.

## Labour Price List Enquiry Rates Window

To display this window, press Enter on the Labour Price List Enquiry Initial window.

### Fields

### **Price List Code**

This field displays the price list previously selected.

### **Currency Code**

This field displays the currency previously selected.

### **Effective Date**

This field displays the effective date for the labour price record.

### **Contract**

This field displays the hourly labour rate.

On a chargeable [job](#), if the work is carried out by a field engineer on equipment covered by a [contract](#), this hourly rate is used in pricing the job.

### **Non-Contract**

This field displays the hourly labour rate.

On a chargeable job, if the work is carried out by a field engineer and the equipment is not covered by a contract, this hourly rate is used in pricing the job.

### **Workshop**

This field displays the hourly labour rate.

If the work is carried out by a workshop engineer, this hourly rate is used in pricing the job, whether or not the equipment is on contract.

### **Travel Rate**

This field displays the hourly labour rate.

If travel is chargeable on a job, this rate is multiplied by the customer travel time, from the [technical report](#), to calculate the travel charge.

Select **Exit (F3)** to leave the [task](#).

## Enquire on Invoice [12/SSI]

Use this [task](#) to enquire on the details of a service invoice or credit note on an ad hoc basis.

## Invoice Enquiry Initial Window

To display this window, select the Invoice Enquiry task.

### **Fields**



**Invoice Number**

Enter an existing invoice number using the letter I and six digits. If valid, the invoice details will be displayed.

**Credit Number**

Enter an existing credit note number using the letter C and six digits. If valid, the credit note details will be displayed.

**Statement Account**

Enter a valid account code using up to eight alphanumeric characters.

This will display all invoices or credit notes for the account and the locations for which this is the statement account.

**Site Account**

Enter a valid account number of up to eight alphanumeric characters. Press Enter to display a list of [location](#) codes for selection.

**Locn**

This is used in combination with the [site](#) account code, and must be a valid customer site.

Press Enter. The window you see depends on the fields you completed on this window.

If you made a valid entry in the Statement Account field on the Invoice Enquiry Initial window, when you press Enter you will see the Statement Account window.

If you made valid entries in the Site Account/Locn fields on the Invoice Enquiry Initial window, when you press Enter you will see the Site Address window.

## Statement Account Window

To display this window, enter the Statement Account code and then press Enter on the Invoice Enquiry Initial window.

**Fields****Statement Account**

The account you selected is displayed.

**Select (1)**

Enter 1 against an invoice or credit note to see it in more detail.

**Inv/Cred**

This will be an invoice or credit note number for the selected account. Invoices are prefixed by the letter I, credit notes by the letter C.

**Date**

This field displays the date the invoice or credit note was created.

### **Invoice Value**

This field displays the total value of the invoice or credit note.

### **Account/Locn**

This field displays the account and address code of the [site](#) for the invoice or credit note.

### **Cur**

This field displays the currency of the invoice or credit note.

### **Installation Name**

This field displays the customer's name.

## **Functions**

### **Base Value/Prime Value (F14)**

Use this to toggle between prime and base currency displays.

Select an invoice or credit note for a [job](#) and then press Enter to see the Job Invoice Summary window.

Select an invoice or credit note for a [contract](#) and then press Enter to see the Contract Invoice Summary window.

## **Site Address Window**

To display this window, enter a valid [site](#) in the Site Account/Locn fields and then press Enter on the Invoice Enquiry Initial window.

## **Fields**

### **Select (1)**

Enter **1** against an invoice or credit note to see it in more detail.

### **Invoice/Credit**

This will be an invoice or credit note number for the selected [site](#). Invoices are prefixed by the letter **I**, credit notes by the letter **C**.

### **Date**

This field displays the date the invoice or credit note was created.

### **Invoice Value**

This field displays the total value of the invoice or credit note.

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**Statement Account**

This field displays the statement account for the [installation](#) site. It is set up in Accounts Receivable.

**Currency Code**

This field displays a valid currency for the invoice or credit.

**Functions****Base Value/Prime Value (F14)**

Use this to toggle between displaying values in prime value and base value.

Select an invoice or credit note for a [job](#) and then press Enter to see the Job Invoice Summary window.

Select an invoice or credit note for a [contract](#) and then press Enter to see the Contract Invoice Summary window.

## Job Invoice Summary Window

To display this window, select an invoice or credit note for a [job](#) and then press Enter on either the Statement Account window or the Site Address window.

**Fields****Job Invoice Number**

This field displays the value selected on the previous window.

**Currency Code**

This field displays the three-character currency code of the invoice.

**Date**

This field displays the invoice creation date.

**Invoice Address**

These fields display the invoice destination account and address codes, indicated in the additional details for the [site](#) account and address codes.

**Invoice Name and Address**

The invoice name and address details are retrieved from the Customer file, using the invoice destination account and address codes.

**Site Address Codes**

These fields display the site account and address codes for the [job](#) invoice.

**Site Name and Address**

The site name and address details are retrieved from the Customer file, using the site account and [location](#) codes. If an override name and address is applied, the override details are displayed.

**Total Invoice Value**

This field displays the total value, excluding tax, of all invoice lines covered by the invoice.

**Total Invoice Tax Value**

This field displays the total tax value of all invoice lines covered by the invoice.

**Total Invoice Total**

This is equal to invoice value + invoice tax for all [job lines](#) on the invoice.

**Select (1)**

Enter 1 against a job line to display it in more detail.

**Job Number**

This field displays the job number from the invoice line.

**Model Description**

This is retrieved from the [model](#) file, using the model number on this job line.

**Serial/Qty**

If the piece of equipment on the job has a [serial number](#), it will be displayed: if not, the model quantity will be displayed.

**Tech Rpt**

This field displays the [technical report](#) number on which the job line was reported. There will be a separate line for each technical report number.

**Visit Date**

This field displays the [visit](#) date, as entered on the technical report.

**Functions****Base Value/Prime Value (F14)**

Use this to toggle between displaying values in prime and base currency.

Enter 1 against a job to display the Job Invoice Detail window.

## Job Invoice Detail Window

To display this window, select a [job](#) on the Job Invoice Summary window.

**Fields**

**Job Invoice Number**

This field displays the invoice you selected on the previous window.

**Currency Code**

This field displays the three-character currency code of the invoice.

**Date**

This field displays the invoice creation date.

**Job Number**

This field displays the job number from the pre-selected invoice.

**Model Description**

This is retrieved from the Model file, using the [model](#) number on this [job line](#).

**Serial Number/Quantity**

If the piece of equipment on the job has a [serial number](#), it is displayed; if not, the model quantity is displayed.

**Technical Report**

This field displays the [technical report](#) number on which the job line was reported. This consists of the job number with the two-digit report number at the end. There will be a separate line for each technical report number.

**Visit Date**

This field displays the [visit](#) date, as entered on the technical report.

**Note:** Each detail line shows a different kind of charge, and the fields on the line are appropriate to that charge. Below, each is explained in turn.

**Travel Hours****Hours Travel**

This field displays the billable travel hours recorded for this [job](#) on this [technical report](#).

**Job Cat**

This is taken from the technical report.

**Total Value**

This field displays the net value + tax value.

Select **Fold/Truncate (F13)** to display the following:

**Rate**

This field displays the hourly rate at which the travel hours were billed.

**Value**

This field displays the travel hours multiplied by the hourly rate.

**Tax Value (& Rate)**

This field displays the calculated tax value for the invoice line, with the tax rate used shown in brackets.

**Labour Hours**

**Labour Hours**

This field displays the labour hours entered through technical reporting against this [job line](#).

**Fault**

This field displays the fault code entered against the labour hours for this job in technical reporting.

**Job Cat**

This field displays the job category entered against the labour hours for this job in technical reporting.

**Total Value**

This field displays the net value + tax value.

Select **Fold/Truncate (F13)** to display the following:

**Rate**

This field displays the hourly rate at which the labour hours were billed.

**Value**

This field displays the labour hours multiplied by the hourly rate.

**Tax Value (& Rate)**

This field displays the calculated tax value for the invoice line, with the tax rate used shown in brackets.

**Labour Rate Type**

This field displays the labour rate type code entered against the labour hours for this [job](#) in [technical reporting](#).

**Miscellaneous Charges**

**Charge Type Code**

This field displays the charge type code entered against the miscellaneous cost and charge values for this job in technical reporting.

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**Charge Type Description**

This field displays the description of the charge type retrieved from the Codes file, or the override description entered by you during technical reporting.

**Job Cat**

This field displays the job category entered against the miscellaneous cost for this job in technical reporting.

**Total Value**

This field displays the net value + tax value.

Select **Fold/Truncate (F13)**, to display the following:

**Rate**

This field displays the entered charge for the miscellaneous cost.

**Value**

This field displays the entered charge for the miscellaneous cost.

**Tax Value (& Rate)**

This field displays the entered tax value for the invoice line, with the tax rate used shown in brackets.

**Parts Used****Part Number**

This field displays the part number entered on the technical report.

**Quantity**

This field displays the quantity used of the part number entered on the technical report.

**Job Cat**

This field displays the job category entered against the part used on this job in technical reporting.

**Total Value**

This field displays the net value + tax value.

Select **Fold/Truncate (F13)** to display the following:

**Rate**

This field displays the price per unit, retrieved from the SOP parts price list associated with the customer [site](#).

**Discount**

This field displays the discount retrieved from the SOP parts discount list associated with the customer site.

**Value**

This field displays the value discount.

**Tax Value (& Rate)**

This field displays the entered tax value for the invoice line, with the tax rate used shown in brackets.

**Contract Visit Charge**

**Contract Visit Fee**

This field displays the net value plus the tax value.

Select **Fold/Truncate (F13)** to display the following:

**Rate**

This field displays the gross value of the [visit](#) fee.

**Discount**

This is not supported in the current system.

**Value**

This field displays the gross value of the visit fee.

**Tax Value (& Rate)**

This field displays the calculated tax value for the invoice line, with the tax rate used shown in brackets.

**Functions**

**Fold/Truncate (F13)**

Use this to display extra details for each line.

**Base Value/Prime Value (F14)**

Use this to toggle between displaying values in base currency and prime currency.

Select **Previous (F12)** to return to the previous window.

## Contract Invoice Summary Window

To display this window, select an invoice or credit note for a [contract](#) rather than a [job](#) and then press Enter on either the Statement Account window or the Site Address window.

**Fields**

**Contract Invoice Number**

This field displays the value selected on the previous window.



**Date**

This field displays the invoice creation date.

**Currency Code**

This field displays the three-character currency code of the contract invoice.

**Invoice Address**

These fields display the invoice destination account and address, set up in the Customer Additional Details [task](#) for the [site](#) account and address.

**Invoice Name and Address**

The invoice name and address details are set up for the customer, using the invoice destination account and address codes.

**Site Address**

These fields display the site account and address for the contract invoice.

**Site Name and Address**

The site name and address details are set up for the customer, using the site account and [location](#) codes.

**Invoice Value**

This field displays the total value, excluding tax, of all invoice lines covered by the invoice.

**Invoice Tax**

This field displays the total tax value of all invoice lines covered by the invoice.

**Total Invoice Value**

This is equal to invoice value + invoice tax.

**Select (Untitled)**

Enter **1** against a [contract](#) invoice to display it in more detail.

**Contract Number**

This is retrieved from the invoice line.

**Contract Type**

This is retrieved from the invoice line.

**Contract Start Date**

This is retrieved from the invoice line.

**Functions****Base Value (F14)**

Use this to toggle between displaying values in base currency and prime currency.

Enter 1 against a [contract](#) on the Contract Invoice Summary window to display the Contract Invoice Detail window.

## Contract Invoice Detail Window

To display this window, enter 1 against a contract on the Contract Invoice Summary window.

### **Fields**

#### **Invoice Number**

This displays the value selected on the previous window.

#### **Currency Code**

This field displays the three-character currency of the [contract](#) invoice.

#### **Contract Number**

This field displays the contract number from the invoice line.

#### **Contract Type**

This field displays the [contract type](#) from the invoice line.

#### **Contract Start Date**

This field displays the contract start date from the invoice line.

#### **Model Description**

This is retrieved from the Model file, using the [model](#) from each invoice line.

#### **Serial Number**

This field displays the [serial number](#) from each invoice line; it may be blank.

#### **Quantity**

This field displays the model quantity from each invoice line.

#### **Total Value**

This field displays the sum of price plus tax, for each invoice line.

### **Functions**

#### **Fold/Truncate (F13)**

Use this to toggle between displaying summary information and displaying extra details, which consist of the calculated price of each invoice line and the calculated tax value of each invoice line, using the specified tax rate.

#### **Base Value/Prime Value (F14)**

Use this to toggle between prime and base currency displays.

Select **Previous (F12)** to return to the previous window.

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## Sundry Invoice Detail Window

To display this window, select an invoice for a sundry charge window and then press Enter on either the Statement Account window or the Site Address window.

### Fields

#### **Sundry Invoice No/Credit Note No**

This field displays the invoice or credit note you selected.

#### **Currency Code**

This field displays the currency code.

#### **Invoice/Credit Note Date**

This field displays the date on which the invoice or credit note was created.

#### **Account/Location**

This field displays the [site](#) account or address codes of the selected invoice or credit note.

#### **Account Name**

This is retrieved from the Customer file using the account or address codes.

#### **Customer Order No**

This field displays the customer order reference on the invoice or credit note.

#### **No**

This field displays the line sequence as printed on the invoice or credit note.

#### **Description**

This field displays the line text printed on the invoice credit note.

#### **Tax/Value**

This field displays the tax code used to calculate the tax value of the invoice or credit note line and beside it is the tax value of the invoice or credit note line.

### Functions

#### **Base Value (F14)**

Use this to toggle between displaying values in base and prime currency.

#### **Text (F21)**

Use this to display invoice or credit note text, if it exists.

Select **Previous (F12)** to return to the previous window.

## Credit Note Invoice Reversal Window

To display this window, select a credit note which is to reverse all or part of the charges included on a previous [job](#) invoice and then press Enter on either the Statement Account window or the Site Address window.

### **Fields**

#### **Invoice Reversal Number**

This field displays the value previously selected.

#### **Currency Code**

This field displays the three-character currency code of the credit note.

#### **Date**

This field displays the date on which the credit note for invoice reversal was created.

#### **Customer Order No**

This field displays the customer order reference for the invoice reversal.

#### **Account**

This field displays the [site](#) account of the selected credit note for invoice reversal. The site name is retrieved from the customer file using the account and [location](#) codes.

#### **Locn**

This field displays the address code of the selected credit note for invoice reversal. The site name is retrieved from the customer file using the account and location codes.

**Note:** *The detail lines on this window vary depending on the kind of charge they are describing. Each is explained in turn below.*

### **Travel Hours**

#### **Hours Travel**

This field displays the billable travel hours recorded on this invoice reversal line.

#### **Job Cat**

This is taken from the original [job](#) invoice line detail window, or as amended in the credit note preparation.

#### **Total Value**

This field displays the net value + tax value.

Select **Fold/Truncate (F13)** to display the following:

#### **Rate**

This field displays the hourly rate entered on the invoice reversal line at which the travel hours were billed.

**Value**

This field displays the travel hours multiplied by the hourly rate.

**Tax Value (& Rate)**

This field displays the calculated tax value for the invoice reversal line, with the tax rate used shown in brackets.

**Labour Hours****Labour Hours**

This field displays the labour hours recorded on this invoice reversal line.

**Fault**

This field displays the fault code entered against the labour hours on this invoice reversal line.

**Job Cat**

This field displays the [job](#) category entered against the labour hours on this invoice reversal line.

**Total Value**

This field displays the net value + tax value.

Select **Fold/Truncate (F13)**, to display the following:

**Rate**

This field displays the hourly rate at which the labour hours were billed.

**Value**

This field displays the labour hours multiplied by the hourly rate.

**Tax Value (& Rate)**

This field displays the calculated tax value for the invoice line, with the tax rate used shown in brackets.

**Labour Rate Type**

This field displays the labour rate type code entered against the labour hours on this invoice reversal line.

**Miscellaneous Charges****Charge Type Code**

This field displays the charge type code entered against the miscellaneous cost and charge values on this invoice reversal line.

**Charge Type Description**

This field displays the description of the charge type retrieved from the Codes file, or the override description entered by you during the invoice reversal creation.

**Job Cat**

This field displays the [job](#) category entered against the miscellaneous cost on this invoice reversal line.

**Total Value**

This field displays the net value + tax value.

Select **Fold/Truncate (F13)** to display the following:

**Rate**

This field displays the charge for the miscellaneous cost.

**Value**

This field displays the charge for the miscellaneous cost.

**Tax Value (& Rate)**

This field displays the tax value for the invoice line, with the tax rate used shown in brackets.

**Parts Used**

**Part Number**

This field displays the part number on the invoice reversal line.

**Quantity**

This field displays the quantity used of the part number on the invoice reversal line.

**Job Cat**

This field displays the [job](#) category against the part used on this invoice reversal line.

**Total Value**

This field displays the net value + tax value.

Select **Fold/Truncate (F13)** to display the following:

**Rate**

This field displays the price per unit on this invoice reversal line.

**Discount**

This field displays the discount on this invoice reversal line.

**Value**

This field displays the discount value.

**Tax Value (& Rate)**

This field displays the tax value for the invoice reversal line, with the tax rate used shown in brackets.

**Contract Visit Charge**

**Contract Visit Fee**

This field displays the fixed [visit](#) charge from the [contract](#) rates file, possibly overridden on the [Contract Conditions](#) window at contract header and equipment line level maintenance.

**Job Cat**

This field displays the [job](#) category against the part used on this invoice reversal line.

**Total Value**

This field displays the net value + tax value.

Select **Fold/Truncate (F13)** to display the following:

**Rate**

This field displays the rate on this invoice reversal line.

**Discount**

This is not used in the current system.

**Value**

This field displays the value on this invoice reversal line.

**Tax Value (& Rate)**

This field displays the calculated tax value for the invoice reversal line, with the tax rate used shown in brackets.

**Functions****Fold/Truncate (F13)**

Use this to display extra details for each line.

**Base Value (F14)**

Use this to toggle between displaying values in base and prime currency.

Select **Previous (F12)** to return to the previous window.

## Price Contracts [20/SSI]

Use this [task](#) to price, and generate [pending invoice lines](#) for, [contracts](#) payable in advance or in arrears that include [contract invoice terms](#) and are due for invoicing.

You can select contracts either for a specific [branch](#) or for the [company](#).

**Note:** *This procedure requires exclusive use of the company.*

If you do not run the Price Contracts task you cannot produce invoices for contracts payable in advance or arrears.

**Caution:** This task will not price a contract that is priced per visit (that is, a contract that is not invoiced in advance or in arrears). To price such a contract you must use the Price Jobs task.

This task does not print invoices. The invoice lines that this task generates are printed out using the Generate and Print Invoices task.

## Price Contracts Selection Window

To display this window, select the Price Contracts [task](#).

Use this window to specify which [contracts](#) you want to price.

### **Fields**

#### **Select Branch to Process**

Enter the [branch](#) whose contracts you want to price, or blank out the field to price contracts for the whole company.

This field defaults to the user's current branch.

#### **Type of Billing Required**

Enter one of the following:

1 - Standard

This prices all service, rental and advance copy charges. You must use this option if you are not using meterage contracts.

2 - Interim

This prices all meter-based copy charges, based on estimated or actual values, which have reached the date on which interim billing is due.

3 - Reconciliation

This prices all meter-based copy charges, based on actual readings, which have reached the date on which the reconciliation of metered copies is due.

#### **Price Contracts with Terms Starting On or Before**

Enter a valid date (format DDMMYY). This field is not displayed until you have entered values in the other two fields and pressed Enter.

This field refers to [contract invoice terms](#), not [contract](#) start dates, nor contract duration. The software will only process contracts which have pricing [terms](#), not contract start dates, due on or before the date you enter here.

**Note:** *All machines on a contract which have never been invoiced before are included in this contract pricing run, if their date of inclusion on the contract is less than or equal to the entered date.*

Select **Submit Job (F8)** to submit a batch [job](#) to price the contracts.



## Price Jobs [21/SSI]

The Price Jobs [task](#) submits a batch [job](#) to price jobs for the current [branch](#).

This task only processes job lines that have been fully technically reported. A job line is fully reported once you have selected **Comp Job Line (F10)**.

Service jobs that are not covered by a [service contract](#) need to be charged to the customer. Jobs are priced and invoiced after the [technical report](#) is complete.

The software decides which jobs, or elements of jobs, are chargeable by referring to the [cover type](#)/job category matrix. This indicates whether the customer is to be charged for labour, travel distance, travel time, miscellaneous costs and spare parts.

You must process all jobs, even non-chargeable ones, through the job pricing and invoicing functions, to collect the cost values that are calculated by these tasks.

[Pending invoice lines](#) are generated for all [job lines](#) which have been fully technically reported but not yet invoiced. The software uses the job bill-to account to generate the pending invoice. If there is no job bill-to account but there is an [ownership](#) account, it uses this instead. If there is no ownership account, it uses the [site](#) account.

Six types of charge can appear on a job invoice:

### **Labour Charge**

The software prices each labour hours entry from each technical report for the job line individually.

A labour charge is only made if the [cover type](#) (of the [contract](#) that covered the machine when the job was created) and [job](#) category (entered against the labour hours on the [technical report](#)) combination is defined as chargeable for labour, on the cover type/job category matrix.

If fixed charges exist on the cover type/job category matrix, the software applies them before any variable labour charges.

The software then applies variable charges on any time remaining after any fixed charges. The labour hours on each technical report entry are multiplied by the premium factor (you set the factors up in the Codes/Parameter File [task](#) under parameter type LHTY) for the labour hours type (this indicates basic, time and a half, double time and so on).

The software multiplies the result by an hourly labour rate from a labour rate price list for the appropriate currency, which is derived as follows:

The software looks at the customer's additional details first for the labour rate price list, and if it does not find one it looks at the [model](#). The price list contains four hourly labour rates: contract, non-contract, workshop and travel. If the engineer is a workshop engineer, the workshop rate is used. If travel time is involved, on contract or not, the travel rate is used. For any other work, depending on whether the work has been carried out under a valid contract or not, the contract or non-contract rate is used.

The software will use the price list effective at the pricing date. The pricing date is determined as follows:

If the equipment is not covered by contract:

- Pricing date = Visit date (from technical report)

If the equipment is covered by contract and the Use Start Date Rates field on the contract that covers the equipment is set to On:

- Pricing date = Contract start date

If the equipment is covered by contract, and the Use Start Date Rates field on the contract, is set to Off, and the [job](#) is a planned (scheduled) job, and the [visit](#) date is before the price held until date on the [contract](#) which covers the equipment:

- Pricing date = Contract start date

If not, or if price held until date is zero:

- Pricing date = Visit date

If the job is a [callout](#) (breakdown) job and the [call](#) logged date is before the price held until date on the contract which covers the equipment,:

- Pricing date = Contract start date

If not, or if price held until date is zero:

- Pricing date = Call logged date

The labour cost value is always calculated, whether or not the labour is chargeable. The cost value, in base currency, is the number of labour hours multiplied by the engineer cost rate (you set this up in the Engineer Master File [task](#)). No premium factor is applied to the cost rate.

### **Parts Charge**

A charge for a part is only made if the [cover type](#) and [job](#) category combination specifies that spare parts should be charged for in the Cover Type/Job Category [task](#).

The cover type is either the cover type of the [contract](#) that covers the machine, or is \*NO if there is no contract. The job category is the category entered against the part number on the [technical report](#).

When you are completing the technical report for parts used on a job, you can re-set the charge percentage from 0% to any value up to 100%.

The software retrieves the customer's parts price list, discount list and currency code set up in the Customer Additional Details task. The prices and discounts are calculated in the appropriate prime currency.

The cost value of parts used is always calculated, whether or not the parts are chargeable. Parts costs are always set up in base currency in Inventory Management, in the Stockroom Details task. The cost value is calculated in base currency, not within the Price Jobs task, but when Inventory Management is updated with the detail of the parts used. This takes place when you select **Comp Report Line (F9)** or **Comp Job Line (F10)** in technical reporting.

### **Miscellaneous Charge**

A miscellaneous charge is only made if the cover type and job category combination specifies that miscellaneous charges should be charged for in the Cover Type/Job Category task.

The cover type is either the cover type of the contract that covers the machine, or is \*NO if there is no contract. The job category is the category entered against the part number on the technical report.

The charge value is entered in the specified currency on the charge line itself, in the technical report.

The cost value of each miscellaneous charge is always calculated, whether or not the item is chargeable. The cost value is the cost value entered on the line itself in the specified currency. If the specified currency is not the base currency, the software automatically converts the prime currency value to base.

### **Travel Charge**

A fixed travel charge is applied before any variable travel charges, if a fixed charge is defined in the Cover Type/Job Category task.

Variable charges are applied on the time remaining after any fixed charges.

The prime currency travel charge is calculated as the billable customer travel time entered on the technical report, multiplied by the travel rate obtained from the labour rates price list. No premium factor is applied to this rate.

The base currency travel cost value is always calculated for engineer travel time. The cost value is the number of travel hours multiplied by the engineer cost rate as set up in the Engineer Master File task.

### **Travel Labour**

The travel time is calculated from the number of customer travel hours and minutes booked on the technical report, multiplied by the hourly travel rate from the labour price list for the [model](#).

A fixed travel labour charge may be applied, if required by the job's charge matrix as set up in Cover Type/Job Category task.

### **Contract Visit Charge**

A [contract](#) visit charge is only generated if:

- The job line being invoiced is part of a planned maintenance job.
- The contract under which the job is performed is invoiced per visit (that is, the Adv/Visit/Arr field is set to **1** on the Billing Parameters pop-up in the Contracts task).
- The calculated charge is not zero.

The number of [visits](#) covered by the [job](#) is multiplied by the visit fee. The visit fee may default from the value set up in the Contract Rates [task](#), or be specified as a contract condition at header or equipment line levels.

### **The Price Jobs Task**

Use this task to find and price all [job lines](#) for the [branch](#) that are due for invoicing. The task generates [pending invoice lines](#).

**Note:** You can price your jobs interactively using **Pricing (F6)** on the Call Reporting window in the Engineer Work Allocation task.

You must run this task before you can produce job invoices, or invoices for contracts payable by visit.

This task does not print invoices. The invoice lines that this task generates are printed out using the Generate and Print Invoices task.

This task produces a summary report. This gives the total number of jobs priced, how many of these were chargeable, and how many non-chargeable. It also tells you how many jobs, in each status, are still in the job file after pricing is complete. This report is not produced if you price your jobs interactively using **Pricing (F6)** on the Call Reporting window in the Engineer Work Allocation task.

**Note:** *The Price Jobs task removes jobs from the active job files and writes them to the job history file, together with statistical data, such as the actual response times for the calls.*

Select **Confirm Submit (F8)** to submit a job to perform the pricing.

## Generate and Print Invoices [22/SSI]

Use this [task](#) to use the pending [job](#) or [contract](#) invoice lines for your [branch](#) to produce invoices.

You can print a new batch of invoices, or re-print an existing one.

You can also print re-invoiced contract credits, when credit and re-invoice is required, and you can produce contract credit notes.

This [task](#) allocates invoice and [contract](#) credit note numbers, generates and prints invoices and contract credits, and generates postings for Accounts Receivable and the General Ledger.

If you never run this task you will never produce [job](#) or contract invoices or credit notes.

### **Invoice Generation**

This task can only generate invoices if you have generated [pending invoice lines](#) using either the Price Contracts or Price Jobs tasks.

Pending invoice lines that have an availability date that is before or the same as the entered date are removed from the pending invoice file and consolidated into invoices. You control the consolidation of pending invoice lines into invoices by the [Invoice Consolidation Level](#) field in the Customer Additional Details task for the customer. You can group invoice lines by account, [location](#), job or contract.

Invoice generation ensures that invoices are created for the contract invoice bill to account. Whenever there is a change in contract [owner](#), within the contract details, the contract invoice will print the name and first line of the address of the contract owner before printing the equipment line.

**Note:** *The invoice prints for contract and job invoices and credits will re-calculate tax at header level if required by the country-specific parameter. Additional text will be printed for lines with a zero tax rate. The additional text is taken from the Inventory Descriptions file, parameter VTXT for the tax code. If no entry is found for the tax code, no extra text will be printed.*

## **Contract Deferred Revenue Posting**

The revenue (sales value), from [contract](#) invoices for contracts billed in advance, is deferred across the [accounting periods](#) which the [invoice term](#) covers.

The total value of the invoice is posted to the deferred income General Ledger account and pairs of journal entries are created to transfer the appropriate posting values to the contract sales General Ledger account in each accounting period within the invoice term. The value of the journal postings for an invoice line is calculated as follows:

- The number of deferred revenue posting days between the invoice From and To date is calculated. (A deferred revenue posting day is indicated by the day type for the date, as defined on the Daily Calendar file, and is set up in the parameter type DAYT in the Codes/Parameters File task).
- The invoice line value is divided by the number of deferred revenue posting days, to give a posting value per day.
- The number of deferred revenue posting days in each accounting period, or part period, spanned by the invoice From and To dates is multiplied by the value per day, to give the posting amount for the period.

**Note:** *There is no back-deferral of revenue for advance contracts being invoiced for a time period which spans previous accounting periods. In this case, the posting values for the previous periods are accumulated into the current period.*

**Note:** *Also note that contracts invoiced in arrears, and all job invoices, will have their full invoice value posted to the current accounting period.*

## **Invoice and Contract Credits Print**

[Contract](#) or [job](#) invoices generated by the previous processing, and any others for which a copy invoice has been requested, are printed in invoice number sequence.

Where the contract credits procedure requires a credit note, or a credit and a re-invoice, this [task](#) must be taken to print the re-invoice and all contract credit notes.

## **Service Management and the Euro**

Each time the software calculates an invoice line value from the prime currency to the base currency, the value is converted taking the Euro into account.

In a non-Euro situation the base invoice header values are calculated by adding together the base invoice line goods, tax and grand totals. This means that the invoice header base total value is always the sum of the invoice lines.

In the Euro situation the prime grand total is converted to the base grand total using triangulation. This can mean that, due to Euro roundings, the invoice header base total values is not an exact sum of the lines.

## Generate and Print Invoices Window

To display this window, select the Generate and Print Invoices task.

### **Fields**

#### **Select Invoice Type**

Enter one of the following:

- J - To generate and print [job](#) invoices
- C - To generate and print [contract](#) invoices and credits

#### **Contract Invoices to Process**

Enter one of the following:

0 - Standard

Only standard [pending invoice lines](#), generated by contract pricing, will be included on the invoices.

1 - Reconciliation/interim

Only reconciliation and interim pending invoice lines, generated by contract pricing, will be included on the invoices.

2 - Both

All pending [contract](#) invoice lines will be available for inclusion on the invoices.

**Note:** *Actual pending invoice line selection will depend on the consolidation level set on the account's Additional Service Details file and carried through to the site's record. Consolidation is also affected by currency and tax regime breaks.*

#### **Select Run Type**

Enter one of the following:

0 - Actual Invoicing

This will generate invoices and post the invoice details to Accounts Receivable (if installed). If Accounts Receivable and General Ledger are active, invoice values are automatically posted to the ledgers in the following ways:

- Accounts Receivable postings are made directly to the Accounts Receivable open period, unless the Service Management accounting period is later than that of Accounts Receivable.
- If Basic Financial Integrator (BFI) is active, the General Ledger account codes, and the current accounting period to which the transactions are posted, are taken from the Service Management company profile. Values are posted to debtors, sales, tax and deferred revenue accounts.
- If Advanced Financial Integrator (AFI) is active, the values are posted to the account codes you specified in the journal conditions.

## 1 - Fictive Invoicing

This will generate invoices, but will not post the invoice details.

**Note:** *The actual or fictive selection is made in the contract header record.*

### Process Invoice Lines Due On or Before

Enter the date (format DDMMYY) to select which invoice pending lines are to be converted to invoices.

When [jobs](#) and [contracts](#) are priced, the resulting priced lines have an available date on them, to indicate when these lines can be posted to the ledgers, and an invoice produced.

Only lines which have not been processed before, and have an available date less than or equal to the selected date, will be included in this run.

**Note:** *You would also use this to print copy invoices (for job or contract invoices) and all contract credit notes.*

**Note:** *Jobs that have been priced have an invoice available date set to the date on which they were priced. This means they are available for invoicing immediately.*

**Note:** *Contracts priced in advance have their invoice available date set to the start date of the invoice term or instalment period.*

**Note:** *Contracts priced in arrears have their invoice available date set to the end date of the invoice term or instalment period.*

Select **Submit Job (F8)** to submit a batch job to produce the invoices and credits.

## Create Sundry Invoices [23/SSI]

Use this [task](#) to generate a free-format sundry invoice for a customer.

You can specify the [model](#), [serial number](#) and related [contract](#) details if you want to. These details are used to record the revenue from the sundry invoice against the correct equipment and contract. None of these details will appear on the invoice itself.

No automatic pricing of any sort takes place.

As the software creates the sundry invoices, it adds transactions to the Accounts Receivable and General Ledger interface files. It posts them to the current [accounting period](#).

Use the Print Sundry Invoices/Credit Notes task to print entered invoices.

## Sundry Invoice Entry Window

To display this window, select the Create Sundry Invoices [task](#).

### **Fields**

#### **Account Number**

Enter a valid customer account code of up to eight alphanumeric characters.

#### **Account Address**

Enter the customer's address.

#### **Customer Order No**

Enter the reference number of up to 20 alphanumeric characters.

This field displays the basis for the creation of the sundry invoice or credit note.

#### **Original Doc Ref.**

Enter up to 15 alphanumeric characters, representing any document to which this sundry invoice or credit note may need to refer.

#### **Model Number**

Enter a [model](#) code of up to 15 alphanumeric characters.

#### **Serial Number**

Enter a [serial number](#) of up to 15 alphanumeric characters, which is also valid with the model code you have specified.

#### **Contract No**

Enter a [contract](#) number of up to seven alphanumeric characters.

#### **Contract Type**

Enter a [contract type](#) of up to three alphanumeric characters for the contract number you have specified.

#### **Start Date**

Enter the actual start date (DDMMYY) of the contract or contract type you have specified.

#### **Currency Code**

Use this to overwrite the [site](#) default values, otherwise leave this field blank.

#### **Currency Rate Code**

Use this to overwrite the site default values, otherwise leave this field blank.

#### **Currency Rate**

Use this to overwrite the General Ledger default value.

#### **Multiply/Divide**

Only use this field if you have entered a currency rate.



Enter one of the following:

0 - To multiply the value by the rate

1 - To divide the value by the rate

### **Functions**

#### **Override Currency Rate (F6)**

Use this to override currency details for transactions where currencies are not linked to the Euro. Press Enter to display the Sundry Invoice Entry Detail window.

## Sundry Invoice Entry Detail Window

To display this window, press Enter on the Sundry Invoice Entry window.

### **Fields**

#### **No.**

The software sets this line number.

#### **Description: Lines 1 to 3**

Enter up to three lines of free-form text that will print out on the sundry invoice.

#### **Tax**

Enter a tax code of up to three alphanumeric characters set up in the General Ledger.

#### **Value/Tax Val**

Enter either a line value or tax value.

When you press Enter, the software will calculate this value and print it on the sundry invoice.

The tax value must equal value x tax rate %.

### **Functions**

#### **Text (F21)**

Use this to enter or update invoice header text.

Select **Update (F8)** to save any changes.

## Create Sundry Credit Notes [24/SSI]

Use this [task](#) to enter both types of credit note:

- A free-format credit note, similar to the free-format invoice

- A job invoice reversal credit note, where an existing job invoice is fully or partially reversed to produce a credit note

**Note:** You cannot reverse a contract invoice using the Create Sundry Credit Notes task. You can only use this task to reverse a job invoice.

You must specify a customer order reference in both cases. You must also process separate Inventory Management movements, if physical stock adjustments are required.

For a free-format credit note you specify the [model](#) and [serial number](#) and, if required, the related [contract](#) details. You use these only for service revenue reporting in order to subtract the sundry credit note value from the revenue associated with the equipment and contract.

If you enter machine or contract details, the customer has to be the appropriate bill-to customer, if one exists. You cannot raise invoices or credits for the [site](#) account if bill-to overrides exist.

For a [job](#) invoice reversal credit note you enter the invoice number to be reversed (or used as a base), and optionally a job number and [technical report](#) number from this invoice. The corresponding invoice lines are displayed. These form the basis of the credit note. You can add, change and delete lines as required, until the correct credit note lines are displayed and you can complete the credit note. Because each line on the credit note has a job category, engineer and [model/serial number](#) recorded on it, the software will subtract the credit note values from the detailed service revenue analysis figures.

The software adds transactions to the Accounts Receivable and General Ledger interface files as it creates the sundry credit notes, and posts them to the current [accounting period](#).

Print the credit notes created by this [task](#) using the Print Sundry Invoices/Credit Notes task.

## Credit Note Entry Window

To display this window, select the Create Sundry Credit Notes task.

Use this window to specify what kind of credit you want to create, or which invoice you want to reverse.

### **Fields**

#### **Account Number**

Enter an existing customer account.

If you only enter machine details on this window, this must be the [ownership](#) account, if there is one. Otherwise, the [site](#) account will be used.

If you enter [contract](#) details on this window, this must be either the contract bill to account or [job](#) bill to account, if one exists. Otherwise, the customer on the contract header will be used.

#### **Account Address**

The address code for the customer account is on the Customer file and has a record on the Service Additional Details file.

**Customer Order No**

This field displays the authorisation for the creation of the credit note.

**Original Doc Ref**

This can be any document to which this credit note may need to refer.

**Invoice Number**

This must be an existing job invoice number. You cannot enter a contract invoice number.

This field is used in conjunction with **Invoice Reversal (F15)** to enable maintenance of the invoice lines.

Once maintenance has been carried out, the credit note will be for the value of all the lines still visible on the window.

**Job Number**

This must be a valid [job](#) number. This will display invoice lines with this job number on them. Enter this in conjunction with an invoice number, which includes this job number, and select **Invoice Reversal (F15)**.

**Technical Report No**

This must be a valid [technical report](#) number. This will display invoice lines with this technical report number on the entered job. Enter in conjunction with an invoice number and job number, which includes this technical report number, and select **Invoice Reversal (F15)**.

**Model Number**

Enter an existing [model](#).

**Serial Number**

In combination with model number, this must be a piece of equipment on the [installation](#) record for the entered account and address codes.

**Contract No**

This must be a valid [contract](#) on the software for this customer and the piece of equipment.

**Contract Type**

This must be pending or active on this contract.

**Start Date**

Enter this if you have not specified a model/[serial number](#).

**Last Credit Note No**

This field displays the number assigned to the credit note which has just been created.

**Currency Code**

Use this to overwrite [site](#) default values; otherwise leave this field blank.

**Currency Rate Code**

Use this to overwrite site default values; otherwise leave this field blank.

**Currency Rate**

Use this to overwrite the General Ledger default value.

**Multiply/Divide**

Only use this field if you enter a currency rate.

Enter one of the following:

0 - To multiply the value by the rate.

1 - To divide the value by the rate.

**Functions****Override Currency Rate (F6)**

Use this to override currency details for transactions where currencies are not linked to the Euro.

**Invoice Reversal (F15)**

If you want to create a credit to reverse a [job](#) invoice, enter the appropriate details on the window and select this. The Credit Notes Invoice Reversal window is displayed.

Press Enter to see the Credit Note Entry Detail window.

## Credit Note Entry Detail Window

To display this window, press Enter on the Credit Note Entry window.

Use this window to enter the details of your sundry credit.

**Fields****No.**

This line number is software-maintained, and determines the sequence in which the lines are printed on the credit note.

**Description: Lines 1 to 3**

Enter up to three lines of free-format text per line on the credit note. This text is printed as the description on the credit note.

**Tax**

Enter a tax code of up to three alphanumeric characters maintained in General Ledger.

**Value**

This field displays the value of the credit note line, excluding tax, which will print out on the credit note.

## Tax Val

You can enter this value, or let the software calculate it when you press Enter. It uses the following calculation:

Tax code (that is, percentage rate) x Value = Tax Value

**Note:** You must process separate Inventory Management movements if you need physical stock adjustments.

## Functions

### Text (F21)

Use this to enter or update credit note header text.

Select **Update (F8)** to update the data.

## Credit Notes Invoice Reversal Window

To display this window, select **Invoice Reversal (F15)** on the Credit Note Entry window.

The initial display is in add mode. You can enter new details on lines 17 to 20. Select **Add (F10)** to set up the new record.

There are six invoice line types which can be displayed, and six credit note line types. These are all detailed below.

## Fields

### Invoice Detail Value

This field displays the total value, including tax, of the original invoice number.

### Credit Value

This field displays the total value of the invoice lines still visible on the window, including tax. It will be the value of the credit note if you select **Finish Credit (F22)**.

### Select (Untitled)

Enter one of the following:

- 1 - To select a line for update
- 4 - To delete a line

Press Enter and then select **Delete (F11)** twice. The record is deleted and the line is marked \*END.

**Note:** There are six invoice line types which can be displayed. The details are as follows:

### **Travel Hours**

#### **Hours Travel**

This field displays the billable travel time in hours and minutes.

#### **Rate**

This field displays the hourly rate charged for the travel hours.

#### **Tax Code**

This field displays the tax code used to calculate the tax value of the invoice line.

#### **Tax Value**

This field displays the calculated tax value for the invoice line.

#### **Total Value**

This field displays the net value (Hours x rate) + tax value.

### **Functions**

#### **Fold/Truncate (F13)**

Use this to toggle between displaying summary information and displaying the [model](#), [serial number](#), [job](#) category and the engineer who logged the original travel time.

### **Labour Hours**

#### **Labour Hours**

This field displays the labour hours from [technical reporting](#), for the invoice line.

#### **Rate**

This field displays the hourly rate charged for the labour hours.

#### **Tax Code**

This field displays the tax code used to calculate the tax value of the invoice line.

#### **Tax Value**

This field displays the calculated tax value for the invoice line.

#### **Total Value**

This field displays the net value (Hours x rate) + tax value.

### **Functions**

#### **Fold/Truncate (F13)**

Use this to toggle between displaying summary information and displaying the model, serial number, job category, the engineer who logged the original labour hours, and the type of labour hours used in the calculation of the invoice line, for example, basic time, time and a half, or double time.

### **Parts Used**

**Part Number**

This field displays the part number from the [technical report](#).

**Quantity**

This field displays the quantity of this part number used on the [job](#) selected from the technical report.

**Tax Code**

This field displays the tax code used to calculate the tax value of the invoice line.

**Tax Value**

This field displays the calculated tax value for the invoice line.

**Total Value**

This field displays the net value (quantity x rate, less discount) + tax value.

**Functions****Fold/Truncate (F13)**

Use this to toggle between displaying summary information and displaying the [model](#), [serial number](#), [job](#) category, the engineer who was assigned to the original job, and the calculated discount on the parts. A parts discount list code must have been set up on the [site's](#) Additional Service Details.

**Miscellaneous Costs****Charge Type**

This field displays the miscellaneous charge code from the invoice line.

**Charge Type Description**

You set up charge types in the Codes/Parameter Maintenance [task](#) under type CHGT. This description is either retrieved from there or from a text record if you overwrote the description during [technical reporting](#).

**Tax Code**

This field displays the tax code used to calculate the tax value of the invoice line.

**Tax Value**

This field displays the calculated tax value for the invoice line.

**Total Value**

This field displays the net value (charge value) + tax value.

**Functions****Fold/Truncate (F13)**

Use this to toggle between displaying summary information and displaying the model, serial number, job category and the engineer who was assigned to the original job.

### **Contract Visit**

#### **Job Category**

This field displays the job category from the Job Header/Labour Hours window in technical reporting.

#### **Total Value**

This field displays the charge value + tax value.

### **Functions**

#### **Fold/Truncate (F13)**

Use this to toggle between displaying summary information and displaying the [model](#), [serial number](#), [job](#) category, the engineer who made the original job [visit](#), and the calculated tax for the invoice line.

### **Mileage**

#### **Tax Code**

This field displays the tax code used to calculate the tax value of the invoice line.

#### **Tax Value**

This field displays the calculated tax value for the invoice line.

#### **Total Value**

This field displays the line value + tax value.

### **Functions**

#### **Fold/Truncate (F13)**

Use this to toggle between displaying summary information and displaying the model, serial number, job category, the engineer who logged the original labour hours, and the number of actual miles/kilometres driven; the field is not displayed for other distance travelled charges.

You can display six credit note line types (for job invoice reversals only). Each type, or any sub-set of that type, has a different input format.

Enter **1** against the line of the required type to maintain its detail, or select **Chg Prompt (F14)** to display the sequence of formats and select one, so that you can detail a new line and add it by selecting **Add (F10)**.

The input formats appear in the sequence Labour, Travel, Parts, Miscellaneous, Fixed Visit, Fixed Travel, Fixed Labour, Actual Distance Driven, Zones and Mileage Standard Distance Value.

**Note:** Make sure that any amendments or additions are correct. The software checks whether a record exists, but not whether it is logically correct.



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**Note:** You must process separate Inventory Management movements, if you require physical stock adjustments in addition to the invoicing and Accounts Receivable corrections covered by the credit note.

The credit note line type details are as follows:

### **Labour Hours**

#### **Model**

This field displays an existing [model](#).

#### **Serial Number**

This field displays a piece of equipment at the account and address codes to which the credit note relates.

#### **Engineer Number**

This field displays an existing engineer.

#### **Labour Time**

These are the labour hours and minutes to be credited, but are not displayed for a Fixed Labour Hours override.

#### **Rate**

This field displays the labour rate per hour, to be used in the calculation, but is not displayed for a Fixed Labour Hours override.

#### **Job Category**

This field displays an existing [job](#) category.

#### **Value**

This field displays the labour time x rate per hour, or the Fixed Labour override, if applicable.

#### **Tax Code**

This is a tax code from the General Ledger.

#### **Tax Value**

Enter the calculated tax value for the line.

Leave this field blank if you want the software to calculate it.

#### **Labour Type**

This must be a code from the parameter type LHTY. The abbreviation indicates the type of labour hours used in the calculation of the line for example, basic time, time and a half or double time.

#### **Total Value**

This field displays the value + tax value.

## **Parts Used**

### **Model**

This field displays an existing [model](#).

### **Serial Number**

This must be a valid piece of equipment at the account and address codes, to which the credit note relates.

### **Engineer Number**

This field displays an existing engineer.

### **Part Number**

This field displays the part number from the Inventory Item file.

### **Quantity**

This field displays the quantity of the part to be credited. This has no effect on physical stock levels. Separate Inventory movements must be processed to adjust physical stocks.

### **Unit Price**

This field displays the price per unit to be used in the value calculation.

### **Value**

This field displays the value of the line: unit price x quantity.

### **Discount**

This field displays the discount for this line. A parts discount list code must have been set up in the [site's](#) Additional Service Details record.

### **Tax Code**

This must be valid in General Ledger.

### **Tax Value**

Enter the calculated tax value for the line.

Leave this field blank if you want the software to calculate the tax.

### **Job Category**

This must be a valid [job](#) category in the Job Category file.

### **Total Value**

This field displays the value - discount + tax value.

**Note:** *If the discount value no longer applies, delete the line then add a new one: you cannot update a discount value.*

## **Miscellaneous Charges**

**Model**

This must be a valid [model](#).

**Serial Number**

This must be a valid piece of equipment at the account and address codes, to which the credit note relates.

**Engineer Number**

This must be a valid engineer.

**Charge Type**

This must be valid in the Codes/Parameter file using parameter type CHGT.

This indicates the type of miscellaneous charge to be credited.

**Charge Type Description**

This is retrieved from the Codes file, under parameter type CHGT, or from a text record, if the Codes file description was overwritten during [technical reporting](#).

**Job Category**

This must be a valid [job](#) category.

**Value**

This field displays the value of the charge to be credited.

**Tax Code**

This must be valid in General Ledger.

**Tax Value**

Enter the calculated tax value for the line.

Leave this field blank if you want the software to calculate the tax.

**Total Value**

This field displays the value + tax value.

**Contract Visit Fee****Model**

This must be a valid [model](#).

**Serial Number**

This must be a valid piece of equipment at the account and address codes, to which the credit note relates.

**Engineer Number**

This must be a valid engineer.

**Job Category**

This must be a valid [job](#) category.

**Value**

This field displays the value of the [visit](#) fee to be credited.

**Tax Code**

This must be valid in General Ledger.

**Tax Value**

Enter the calculated tax value for the line.

Leave this field blank if you want the software to calculate the tax.

**Total Value**

This field displays the value + tax value.

**Travel Hours**

**Model**

This must be a valid [model](#).

**Serial Number**

This must be a valid piece of equipment at the account and address codes, to which the credit note relates.

**Engineer Number**

This must be a valid engineer.

**Travel Time**

This field displays the travel time to be credited, but is not displayed for a fixed travel hours override.

**Rate**

This field displays the rate per hour to be used in the calculation, but is not displayed for a fixed travel hours override.

**Job Category**

This must be a valid [job](#) category.

**Value**

This field displays the travel time x rate per hour, or the fixed travel override, if applicable.

**Tax Code**

This must be valid in General Ledger.

**Tax Value**

Enter the calculated tax value for the line.

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Leave this field blank if you want the software to calculate the tax.

**Total Value**

This field displays the value + tax value.

**Mileage****Model**

This field displays the [model](#) code of the piece of equipment on the invoice line.

**Serial Number**

This field displays the [serial number](#) (if present) of the piece of equipment on the invoice line.

**Engineer Number**

This field displays the engineer who logged the original labour hours.

**Miles**

This field displays the number of actual miles/kilometres driven; the field is only displayed for an actual distance driven record.

**Zone Code**

This field displays the zone code, if applicable and set up in the [site's](#) Additional Service Details. This field is only displayed for a zone charge.

**Job Category**

This field displays the [job](#) category entered on the Call Reporting window in [technical reporting](#).

**Value**

This field displays the distance travelled charge: for standard distance and actual distance driven, the details are taken from the site's additional service details record; for a zone charge, it was the zone code (from the site's Additional Service Details) accessing the Zone Charge file.

**Tax Code**

This field displays the tax code, valid in General Ledger, used to calculate the tax value of the invoice line.

**Tax Value**

Enter the calculated tax value for the line.

Leave this field blank if you want the software to calculate the tax.

**Total Value**

This field displays the line value + tax value.

**Note:** When you select **Finish Credit (F22)** to complete the credit note, only the invoice lines still visible on the window, or windows, will be used to create the credit note.

**Functions**

**Add (F10)**

Use this to add a newly entered line to the credit note.

**Fold/Truncate (F13)**

Use this to toggle between displaying more or less detail.

**Chg Prompt (F14)**

Use this to change the prompt to allow entry of one of the other credit note line types.

**Job Story (F16)**

Use this to for the [job](#) story (job header text).

**Crd Text (F21)**

Use this for credit text. (This will be printed on the credit note.)

**Finish Credit (F22)**

Use this to create a credit note and post to the Accounts Receivable and General Ledger interface files.

Select **Finish Credit (F22)** to create a credit note and post to the Accounts Receivable and General Ledger interface files.

## Print Sundry Invoice/Credit Notes [25/SSI]

Use this task to print, or re-print, sundry invoices and credit notes.

**Note:** Contract credit notes are printed by the Generate and Print Invoices task.

**Note:** The invoice prints for sundry invoices and credits will re-calculate tax at header level if required by the country-specific parameter. Additional text will be printed for lines with a zero tax rate. The additional text is taken from the Inventory Descriptions parameter VTXR for the tax code. If no entry is found for the tax code, no extra text will be printed.

The [task](#) submits a batch [job](#) to print sundry invoices and credit notes which have either been entered but not yet printed, or have been requested for re-print by the Request Copy Invoice/Credit Note task.

## Request Copy Invoice/Credit Note [26/SSI]

Use this [task](#) to re-print invoices and credit notes which have been lost or damaged during printing.

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**Note:** For invoice reprints, additional text will be printed for lines with a zero tax rate. The additional text is taken from the IN description parameter VTXT for the tax code. If no entry is found for the tax code, no extra text will be printed.

## Request Copy Invoice/Credit Note Window

To display this window, select the Request Copy Invoice/Credit Note [task](#).

### Fields

#### **Enter Number of Invoice to be Re 0**

##### **printed**

Enter the invoice number you want re-printed. If you enter an invoice, you cannot enter a credit note as well.

#### **Or Enter Number of Credit Note to be Re-printed**

Enter credit note number you want re-printed. If you enter a credit note, you cannot enter an invoice as well.

Press Enter to see the details of the item you selected on the Request Copy Invoice window before you confirm the re-print.

## Request Copy Invoice Window

To display this window, select an invoice and then press Enter on the Request Copy Invoice/Credit Note window.

Select **Confirm Print (F8)** to submit a job to re-print the invoice or credit note you selected.

## Enter Meter Corrections [27/SSI]

Use this [task](#) to change the meter readings for a disputed invoice.

## Meter Corrections Entry Window

To display this window, select the Enter Meter Corrections [task](#).

### Fields

**Disputed Invoice**

Enter the invoice.

**Invoice Date**

Enter the invoice date.

Press Enter to display the Meter Corrections Entry Details window.

## Meter Corrections Entry Details Window

To display this window, enter the details and then press Enter on the Meter Corrections Entry Selection window.

Use this window to enter the corrected meter reading.

**Fields**

**Contract Number**

Enter the [contract](#) number for the selected invoice.

**Serial Number**

Enter the [serial number](#) of the machine for which you want to enter a reading correction.

**Contract Type**

Select the [contract type](#) for this invoice.

**Model**

Select the [model](#) for this reading correction.

**Contract Date**

Enter the start date of the [contract](#).

**Meter N Correct Reading**

(Where N is 1 or 2)

Enter the new meter reading.

**Functions**

**Trailer (F13)**

Use this to display the [Job](#) History Misc Charges window.

**Meter History (F14)**

Use this to display the Meter Reading History window.

Press Enter to display the Meter Corrections Entry Summary window.



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## Job History Misc Charges Window

To display this window, enter the machine information and then select **Trailer (F13)** on the Meter Corrections Entry Details window.

Use this window to amend or add corrected meter readings.

### Fields

#### **Select (Untitled)**

Enter one of the following:

- 2 - To maintain the corrected meter reading
- 4 - To delete the corrected meter reading

### Functions

#### **Add (F10)**

Use this to add new meter corrections using the Meter Entry Correction Details window.

Select **Update (F8)** to save your changes.

## Meter Correction Entry Summary Window

To display this window, enter the details on the Meter Corrections Entry Details window and then press Enter. This window displays the entered details and a message stating whether credit notes will be produced. Press Enter to clear the message.

### Functions

#### **Meter History (F14)**

Use this to display the Meter Reading History window for the selected machine.

Select **Accept (F8)** to save the details and, where relevant, produce the credit notes.

## Pending Invoice Maintenance [28/SSI]

Use this [task](#) to amend priced, [pending invoice lines](#) for [jobs](#) before printing your invoices using the Generate and Print Invoices task.

You can amend the charge, the rate and the factor if applicable.

An audit report is produced, whether or not any changes are made.

## Pending Job Invoice Selection Window

To display this window, select the Pending Invoice Maintenance task.

### **Fields**

#### **Job Number**

Enter the relevant job number.

Press Enter to see the Pending Job Invoice Maintenance List window.

## Pending Job Invoice Maintenance List Window

Press Enter on the Pending Job Invoice Selection window to see this window.

This window lists all the existing [pending invoice lines](#) for the [job](#) you selected.

### **Fields**

#### **Total Job Value**

This field displays the total charge for the job, as calculated by the Price Jobs [task](#). It excludes tax.

#### **Select (Untitled)**

Enter one of the following:

- 1 - To maintain an invoice line
- 4 - Zeroise the line value, so the invoice line is not charged

#### **Model Number**

This field displays the [model](#) for the [job line](#).

#### **Serial Number**

This field displays the [serial number](#) of the equipment on the job line.

#### **Type**

This field displays the type code allocated to the invoice line during job pricing. The codes are set up in the Codes/Parameter File [task](#), under parameter type RECT.

**Note:** *If labour hours (that is, type HR) are included in more than one report line per technical report only the first HR line per technical report can be amended.*

#### **Line Value**

This is calculated by the Price Jobs task.

#### **Tax**

This is allocated by the Price Jobs task.

**Visit Date**

This defaults from the engineer's [technical report](#).

**Curr**

This field displays the three-character alphanumeric code, defaulted from the [site](#) record, or as specified via [technical reporting](#) for miscellaneous charges.

Select a line by entering 1 against it and then press Enter to display the Pending Job Invoice Maintenance Details window.

## Pending Job Invoice Maintenance Details Window

To display this window, enter 1 against a [pending invoice line](#) and then press Enter on the Pending Job Invoice Maintenance List window.

This window displays the details of the pending invoice line you selected.

The value fields on the window vary, depending on the invoice line type selected on the previous window.

**Fields****Job Number**

This field displays the [job](#) number entered on the initial window.

**Tech Report No/Line**

The engineer's [technical report](#) number is displayed. This consists of the job number, with a suffix of the report number. The report number is incremented by the software when an engineer adds another technical report to the same job.

**Model Number**

This field displays the [model](#) for the [job line](#) from the Pending Job Invoice Maintenance List window.

**Serial Number**

This field displays the [serial number](#) for the job line from the Pending Job Invoice Maintenance List window.

**Invoice Line Type**

This field displays the code for the job line from the Pending Job Invoice Maintenance List window. The invoice line type description, set up in the Codes/Parameter file under parameter type RECT, is displayed alongside.

**Engineer Number**

This field displays the engineer who carried out the job.

### **Currency Code**

This field displays the three-character alphanumeric code defaulted from the [site](#) record, or the miscellaneous charges.

### **Engineer**

This field displays the description of the engineer code. This is extracted from the Engineer Master file.

### **Visit Date**

This field defaults from the engineer's [technical report](#).

### **Line Value**

You can amend the [job](#) pricing value, if necessary.

***Note:** If labour hours (that is, HR) are included in more than one report line per technical report, only the first HR line per technical report can be amended. The detail displayed will always be that of the first, amendable HR line.*

### **Tax Code**

You can amend this if you wish.

### **Hourly Rate/Parts Price**

You can amend the job pricing value if necessary.

The appropriate hourly rate is extracted from the Labour Price List file.

The parts price is from the (SOP) parts price list specified in the [site's](#) Additional Details file.

### **Hours/Misc Charge Type/Part Number**

You can amend the job pricing value if necessary, but not the part number. The data is taken from the engineer's technical report.

Miscellaneous charge type codes are set up in the Codes/Parameter File [task](#), under parameter type CHGT.

### **Part Number**

This is taken from the engineer's technical report - parts used.

### **Part Number (cont)/Charge Type Desc'n**

This is taken from the engineer's technical report - parts used.

The charge type description is extracted from parameter type CHGT in the Codes/Parameter File task for the previous charge type code.

### **Part Number/Charge Type Desc'n (cont)**

This is taken from the engineer's technical report - parts used.

The charge type description is extracted from parameter type CHGT in the Codes/Parameter File task for the previous charge type code.

### Hours Type Code/Parts Quantity Used

You can amend the [job](#) pricing value if required.

The details are taken from the engineer's [technical report](#).

Hours type codes are set up in the Codes/Parameter File [task](#), under parameter type LHTY. If you change the hours type code to a code that already exists on the [job](#), you must consolidate the hours/line value within one record; the second (identical) hours type record must be zeroed. Do not leave the second record; the software ignores it for invoicing.

### Parts Quantity Used (cont)

You can amend the job pricing value if necessary.

The details are taken from the engineer's technical report - parts used.

Select **Update (F8)** to save any changes.

## Generate Estimates [30/SSI]

Use this [task](#) to calculate estimated invoices for a particular [branch](#) or for all branches. This batch [job](#) looks at all metered machines on meterage type [contracts](#); that is, those with interim or reconciliation billing cycles, or both.

If the contract billing parameters have an interim or reconciliation [billing term](#) which ends before or on the date specified, and no estimates already exist, this task generates estimates for all metered machines on that contract.

No report is produced, but the details are saved. You could use these to print meter cards, by developing the function yourself.

Estimates are calculated based on historical information, if this is available. Failing that, the software uses either the minimum volume specified on the contract, or the average usage for the [model](#) from the volume segment information, to arrive at an estimate.

## Estimate Generation Request Window

To display this window, select the Generate Estimates [task](#).

### Fields

#### **Branch**

Enter the [branch](#) for which you want to generate estimates. Leave this field blank to select all branches.

### **Generate Estimates for Invoice Dates Up To**

Enter the date cut-off date for the generation of estimates. All invoices with a date either equal to or before this will be included.

### **Number of Days after Invoice Date for Return of Meter Cards**

Enter the number of days, after receiving the invoice, a customer has in which to return their actual meter reading.

Select **Submit (F8)** to submit a [job](#) to calculate the estimated invoices.

## Enter Meter Readings [31/SSI]

Although you can enter meter readings as part of an engineer's [technical report](#), that assumes that there is an outstanding job for the machine.

If a machine has no outstanding job but still requires a reading, you use this [task](#).

If a machine on a [contract](#) has no outstanding [job](#) but still requires a reading, use the Enter Service Readings task.

## Meter Reading Entry Selection Window

To display this window, select the Enter Meter Readings task.

### **Fields**

#### **Serial Number**

Enter the [serial number](#) of the [model](#) for which you wish to enter meter readings.

#### **Model**

Enter the model for which you wish to enter meter readings.

If you enter the model and leave the serial number blank and then press Enter, a list of possible serial numbers will be displayed. If you enter **1** against the one you require and then press Enter, this window will be re-displayed with all the details complete.

Press Enter to display the Meter Reading Entry Details window.

## Meter Reading Entry Details Window

To display this window, press Enter on the Meter Reading Entry Selection window.

## **Fields**

### **Estimate Reading**

This field displays the existing estimated reading for the meter. You cannot change this.

### **Actual Reading**

Enter the actual readings for the meter.

The software checks that the entry is higher than the last entry, and that it falls within the tolerance limit defined in the % Within Estimate Reading Allowed field on the System Parameters Maintenance Meterage window.

If the entries are accepted, the software is updated. If there are discrepancies the Meter Reading Override pop-up is displayed, explaining the discrepancy found.

## **Functions**

### **Meter History (F16)**

Use this to display a list of past meter readings on the Meter Reading History window.

Press Enter. If the software finds any discrepancy in the meter reading, the Meter Reading Override pop-up will be displayed.

If there is no discrepancy, the software performs the update.

## **Meter Reading Override Pop-up**

To display this pop-up, enter your readings and then press Enter on the Meter Reading Entry Details window.

This pop-up is only displayed if there are discrepancies found.

## **Fields**

### **Reason for Override**

Enter a reason code for the meter reading override. The reason description is also displayed at the bottom of the pop-up.

A common reason is when a meter rolls over from 99999 to 00000, so that the entered reading is less than the previous one. A system-defined reason code is provided for this situation, and should be used only in this case, as it triggers special processing in other parts of the software.

You define your own reason codes in the Codes/Parameter File [task](#) under type MROV, and you can specify whether these are roll over codes or not.

Select **Confirm (F8)**.

## Meter Reading History Window

To display this window, select **Meter History (F16)** on the Meter Reading Entry Details window.

### **Fields**

#### **Meter 1**

This field displays the past readings for the first meter.

#### **Meter 2**

This field displays past readings for the second meter (if there is one).

Select **Previous (F12)** to return to the previous window.

## Enter Service Readings [40/SSI]

Although you can enter meter readings as part of an engineer's [technical report](#), that assumes that there is an outstanding [job](#) for the machine.

If a machine has no outstanding job but still requires a reading, you use the Enter Meter Readings [task](#).

If a machine on a [contract](#) has no outstanding job but still requires a reading, use this task.

## Service Meter Reading Entry Selection Window

To display this window, select the Enter Service Readings task.

### **Fields**

#### **Serial Number**

Enter the [serial number](#) of the [model](#) for which you wish to enter meter readings.

#### **Model**

Enter the model for which you wish to enter meter readings.

If you enter the model and leave the serial number blank and then press Enter, a list of possible serial numbers will be displayed.

If the [contract](#) is also blank, a list of possible contracts is also displayed.

#### **Contract Number**

Enter the contract for which the meter reading is made.

#### **Type**

Enter the [contract type](#).



**Date**

Enter the [contract](#) date.

If you know only the [model](#) number, enter it and then press Enter to see the Equipment by Model window.

## Equipment by Model Window

To display this window, enter the model number and then press Enter on the Meter Reading Entry window.

**Fields****Select (1)**

Enter 1 against the [serial number](#) for which you wish to enter meter readings.

**Functions****Fold/Truncate (F13)**

Use this to toggle between summary and detail displays.

Press Enter to display the [Contract](#) Selection pop-up.

## Contract Selection Pop-up

To display this pop-up, select a [serial number](#) and then press Enter on the Equipment by [Model](#) window.

**Fields****Select (1)**

Enter 1 against the [contract](#) for which this reading is to be entered.

When you have selected your contract, the Service Meter Reading Entry Selection window will be re-displayed with the selections you made. Press Enter to see the Service Meter Reading Entry Details window.

## Service Meter Reading Entry Details Window

To display this window, press Enter on the Service Meter Reading Entry Selection window.

**Fields****Meter Reading Date**

Enter the date on which the reading or readings were taken.

### **Meter 1 Reading**

Enter the meter reading.

### **Service Job Number**

Enter the Service Management [job](#) number.

### **Meter 2 Reading**

Enter the reading for the second meter, if relevant.

### **Meter Reading Type**

Enter one of the following:

1 - If this is an initial reading

Only one initial reading can ever be entered for a machine, and it cannot be entered if any readings already exist for that machine.

2 - If this is a service reading, that is, it was taken by an engineer during servicing

9 - If this is a final reading

Its date must be later than that of the last reading and later than or equal to the machine [termination](#) date.

## **Functions**

### **Meter History (F16)**

Use this to display a list of past readings for the [model](#) and [serial number](#) on the Meter Reading History window.

Press Enter to perform the update.

## Meter Reading History Window

To display this window, select **Meter History (F16)** on the Service Meter Reading Entry Details window.

## **Fields**

### **Meter 1**

This field displays the past readings for the first meter.

### **Meter 2**

This field displays past readings for the second meter (if there is one).

Select **Previous (F12)** to return to the previous window.

## Contract Audit Report [50/SSI]

Use this report to check that all [contracts](#) eligible for billing have been billed. There is no need to enquire on each individual contract.

The report lists any unbilled contracts, with their start date, attached [models](#) and [serial numbers](#), and other details.

## Contract Audit Report Window

To display this window, select the Contract Audit Report [task](#).

### **Fields**

#### **Report All Non Invoiced Equipment on Contracts Starting On/Before**

The report will include equipment on all [contracts](#) starting on or before the date you enter in this field.

Select **Submit (F8)** to submit a [job](#) to produce the audit report.



### Day End Routines [1/SSH]

Use this [task](#) to perform daily housekeeping procedures on your database. It is important to run it at approximately the same time every day to make sure that you maintain data integrity.

**Note:** *This procedure requires exclusive use of the system.*

This task performs the following [jobs](#):

- It updates the database with any serial numbers entered during the day.
- It performs the contract updating for all contracts for the company when run as part of the day end routine. It only updates contracts owned by the requesting service branch when run as an individual task.
- It prints the name and address override audit report for all jobs where you overwrote the site address during call logging.
- It rebuilds the engineer work points values.

#### **Reports Produced**

- Contract housekeeping error report
- Contracts awaiting edit and acceptance of credits/re-invoices
- Name and address override audit

Select **Confirm Submit (F8)** to submit a job to perform the day end routines.

### Period End Routines [2/SSH]

Use this [task](#) to keep the calendar in line with the period end dates defined for the [company](#), and to extend the schedule of regular planned service [visits](#), for long-[term](#) or never-ending [contracts](#), at the appropriate time.

Run this task at the end of each [service period](#), after running the Day End Routine task.

The period-end procedures include:

- Advancing the current service period
  - If the current (system) date is equal to a period end date, the software updates the current service period to be the next period.
  - If the current (system) date is not equal to a period end date, the software updates the current service period to be the current period.
- Extending planned service visits for contract equipment to a further period

**Note:** *This procedure requires exclusive use of the system.*

**Note:** *The [accounting period](#) end is not affected by this routine. Update the accounting period by manually changing the field in the Company Profile File maintenance task.*

The [task](#) extends the schedule of planned service [visits](#) for [contract](#) equipment as follows:

- Contract equipment with a Start Next Profile Load From period less than or equal to the current service period (plus the Minimum Number of Loaded Service Periods from the company profile) is selected for processing. Equipment with a Start Next Profile Load From period set to 9999 will never be processed.
- The scheduled visit profile, used to extend the schedule for a piece of equipment, is derived from the contract header, the model, the model group, or the company profile. This task uses the profile found at the first of these levels and generates visits for the appropriate service periods. If it does not find a profile, it makes no extension to the scheduled visits.
- The task determines the start and end periods for the extension as follows:
  - Start period - This is the Start Next Profile Load From period, if this is not zero. Otherwise, the task uses the service period of the contract start date, or the equipment inclusion date, whichever is the earlier.
  - End period - This is the service period of the contract termination date, or equipment removal date, whichever is the earlier. If the contract is a never-ending one, the end period is the start period plus the number of service periods to be loaded (from the company profile).
- For each relative period on the visit profile, the actual service period is calculated as the start period plus the relative period. If this actual period is less than or equal to the end period, a scheduled visit record will be created. The processing stops at the end period.
- Each piece of contract equipment processed is listed on an audit report, which shows the number of scheduled visits created and the corresponding period range.

### **Reports Produced**

Extend Scheduled Visits Audit report

Once period end has completed successfully, you must take the [task](#) to Load Planned Maintenance Jobs, to convert the extended [visits](#) to actual [jobs](#).

Select **Confirm Submit (F8)** to submit a job to perform the period end routines.

---

## Engineer Work Points [10/SSH]

Use this [task](#) to re-calculate and update the work points total for each engineer in the [company](#).

The update is part of the Day End Routine, but if you need to maintain the work point values more accurately than this, you can update them whenever necessary using this task.

**Note:** *This procedure requires exclusive use of the system.*

The task reads through all the outstanding [job lines](#) assigned to an engineer (that is, all job lines with a status other than complete or cancelled), calculates and accumulates the work point values of the job lines, and updates the engineer details. It does this for all engineers within the company.

The task calculates the work point value of a job line by multiplying the points value associated with the piece of equipment by the average hours factor associated with the job category.

Service Management uses work point values to assign engineers to jobs. When selecting an engineer within a team, the software selects the one with the lowest number of work points, to spread the workload as evenly as possible.

Select **Confirm Submit (F8)** to submit the job.

## Message Deletion [11/SSH]

Use this [task](#) to remove engineer or machine messages, or both, from the software, up to a selected expiry date. We recommend that you run this task every six months.

You can also use this task to report on deleted messages that were never accessed or displayed.

You can remove in a controlled manner messages that have become obsolete, or which have expiry dates far into the future.

## Message Deletion Window

To display this window, select the Message Deletion task.

### Fields

#### **Delete Engineer Messages**

Enter one of the following:

0 - Not to delete any engineer messages

1 - To delete engineer messages

#### **Delete Machine Messages**

Enter one of the following:

0 - Not to delete any machine messages

1 - To delete machine messages

### **Delete Messages with Expiry Date Up To**

Messages will be deleted if they have an expiry date before or equal to the date you enter here.

### **Report Deleted Messages Never Displayed**

Enter one of the following:

0 - Not to produce a report

1 - To produce a report of any messages that have been selected for deletion but which have never been accessed on the software

Select **Submit (F8)** to submit the batch [job](#).

## Serious Error Report [12/SSH]

Use this [task](#) to print any serious errors logged since the previous printing of this report. You should take corrective action for any errors reported. This may include updating and extending main data files or correcting transaction records.

You can choose the kinds of error you wish to include in this report.

Only one serious error condition has been pre-defined in Service Management. This is when the daily calendar has not been set up far enough ahead to be able to handle the generation of [service contract visits](#).

The report is for the whole [company](#), not just for a [branch](#).

## Serious Errors Report Window

To display this window, select the Serious Error Report [task](#).

### **Fields**

#### **Print Report**

Enter one of the following:

0 - Not to print the report

1 - To print the serious errors found for this [company](#)

Once you have printed these errors you cannot then print them again, but they remain on file unless you enter **1** in the Clear Serious Error File field.



### **Clear Serious Error File**

Enter one of the following:

0 - Not to clear the serious error file

1 - To clear the serious error file

This clears the file of all records of serious error, and makes no automatic backup.

Select **Submit (F8)** to submit the batch [job](#).



### Copy Company Utility [1/SSU]

Use this [task](#) to create a new [company](#) by copying an existing company.

This task will also copy data from the existing company. You can choose how much data you want copied to the new company.

Details of the physical files that will be copied are held in SSPFS in the files library.

Once you have run this task, you can make any changes to the new company using the standard Service Management maintenance tasks. Remember to go into System Manager to authorise user profiles to the new company code.

**Note:** *This procedure requires exclusive use of the system.*

When you enter the task, you have to specify the amount of data which you want copied. Level 1 copies the minimum; level 4 copies the maximum amount.

The database files copied for each level are as follows:

**Level 1 copies:**

Company Profile (SSP00, SSP87)

Calendar Control (SSP01, SSP02)

Daily Calendar: Period End Dates (SSP03)

Daily Calendar: Day Types (SSP14)

[Branch](#) (SSP10)

Codes/Parameter (SSP12)

System Parameters (SSP04, SS04E)

User/Branch Authorities (SSP15)

[Division](#) (SSP75)

[Model](#) Group (SSP32)

Model Sub-group (SSP16)

[Contract](#) Rates (SSP17)

Recommended Service [Visits](#) (SSP19)

[Scheduled Visit Profile](#) (SSP37)

[Job](#) Category (SSP63)

[Contract Type](#) (SSP64)

Contract Type/Job Category (SSP65, SSP58, SSP59)

Escalation Control (SSP85)

Escalation Report Data (SSP86)

Tax Codes (SSP90)

**Level 2 copies all the Level 1 files, plus:**

Engineer Master (SSP24)

Assisting Engineer (SSP76)

Alternative Engineer (SSP29)

[Model](#) (SSP30 SSP27)

Volume Segment (SSP69)

Geocode/Territory (SSP61)

Team (SSP67)

District (SSP68)

[Field Service Group](#) (SSP88)

Engineer Assignment (SSP62)

Labour Rates Price List (SSP66)

Record Locking (SSP99)

Zone Charges (SSP60)

3-D Matrix (SSP77)

**Level 3 copies all the Level 1 and 2 files, plus:**

Text (SSP11)

Customer Additional Service Details (SSP21)

[Installation](#) Details: Machines and Peripherals (SSP22, SSP23)

[Contract](#) Header, including Service Parameters (SSP35)

Contract Header and Equipment: Conditions (SSP39)

Contract Header: Billing Cycle (SSP40)

Contract Equipment and Peripherals (SSP38, SSP28)

Contract Scheduled [Visits](#) (SSP36)

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Quotes Based on [Contract](#) Request Log (SSP82)

Special Serial No. Response Times (SSP78)

**Level 4 copies ALL the SSP files, that is, all the above, plus jobs, technical reports, invoices, and so on.**

**Note:** You must copy customer records (SLP05) using the Copy Company utility in Accounts Receivable.

**Note:** If Inventory Management and Sales Order Processing are interfaced with Service Management, you will need to set up the relevant data within those modules.

**Note:** Use Inventory Management to copy the engineer stockrooms and the stockroom balances and Order Entry to copy the parts price and discount lists.

## Copy Company Utility Window

To display this window select the Copy Company Utility [task](#).

### **Fields**

#### **Copy From Company**

Enter an existing [company](#). This defaults to the current company.

#### **To Company**

Enter the company you want to create. This must be a company that does not exist already.

#### **Copy Detail Level**

Enter one of the following to specify the amount of information to be copied:

1 - To copy only the basic data: company profile, calendar, [job](#) categories, price lists, [contract types](#), and so on

2 - To copy the second level data: base data plus engineers, [models](#), territories and engineer assignments

3 - To copy the third level data: level 1 and 2 data plus [installations](#), [contracts](#) and customer additional service details

4 - To copy the fourth level data: all data in the company, including transaction data such as jobs, [technical reports](#) and invoices

#### **Max. No. of Records**

This must be greater than zero. Enter the maximum number of records from each file that will be copied.

Select **Submit Job (F8)** to submit the [job](#) to perform the copy.

## Delete Company Utility [2/SSU]

Use this [task](#) to delete all the Service Management data associated with a [company](#).

**Caution:** This is a very powerful task. Do not perform it unless you understand the implications.  
Take a backup copy of the files library before you run this task.

**Note:** This procedure requires exclusive use of the system. You must end the subsystem that runs the job escalation batch update and, once you have submitted the job, you must leave the module.

## Delete Company Utility Window

To display this window select the Delete Company Utility task.

### Fields

#### **Files Library**

Enter the current files library.

#### **Company Code**

Enter the current company.

Select **Submit Job (F8)** to process the deletion.

## Recreate Customer Search Index [4/SSU]

The customer search index is a complete index of the words, or part words, in the customer name. In addition, you can select two extra fields from the customer's details to use as search arguments. The requirements for these two search fields are set up in the Inventory Descriptions file, under type OTHR.

This rebuild is called automatically when new customer details are added to the software, but if you change any of the search criteria, or the index has become corrupted, you should run this [task](#) to rebuild the index and stay up to date.

There are no selection criteria. Following selection of the task, a confirmation window is displayed.

Selecting the rebuild task will reset all of the index data to those items selected from the customer details.

**Note:** Any additional information you have entered in the index will be lost.

Select **Submit Job (F8)** to process the rebuild.

## Install AFI Control Data [5/SSU]

If you want to use AFI to post information from Service Management to the General Ledger, you must use this [task](#) to set up the Service Management details in the AFI files.

These include the module name, the logical files to be used and the database records to be accessed. The database identifies the files and the specific fields to be made available to AFI. The journal conditions and posting definitions for the main invoicing routines are also set up.

You can switch from the Advanced to the Basic Financial Integrator (BFI). In BFI mode, General Ledger postings are limited to the accounts you have entered in the Service Management [company](#) profile.

Postings to Accounts Receivable are made by a separate update [job](#) running as part of the invoicing process.

The four Service Management journals are:

- **Service job invoices** with posting rules for J-type invoices to debtors (that is, invoice total of goods plus tax), standard tax and sales.
- **Service contract invoices** with posting rules for C-type invoices to debtors (that is, invoice total of goods plus tax), standard tax and deferred revenue.
- **Sundry invoices/credit notes** with posting rules for S-type invoices and credit notes to debtors (that is, invoice total of goods plus tax), standard tax and sales.
- **Deferred revenue to sales** with posting rules for C- and D-type invoices; this automatically runs with service contract invoices to post any current GL period journals to sales.

You will need to copy these journals into your test and live companies, and apply your chart of account's account codes to each posting rule.

The Service Management AFI extract program (FI532) is in the System21 library. It takes account of Service Management invoicing through different files from those used for Sales Order Processing invoicing. If the Automatically Update field is set to **2** in the Maintain Application task, the extract runs automatically at each invoice run and produces a detailed postings report.

You must also go into a standard AFI maintenance [task](#) to set up the basic application parameters and the suspense account to be used.

Once you have installed AFI, you can use the journal conditions and posting definitions for Service-orientated invoicing that are already set up within the demonstration company. These cover [job](#) invoices, sundry invoices and credit notes, [service contract](#) invoices and deferred revenue postings arising from the latter.

**Caution:** Only one of each of the four journals should be live at any one time, otherwise duplication of the journals postings will occur.

To use AFI in a live situation, you need to re-create these journal conditions and posting definitions, incorporating your own General Ledger accounts. You may also need to set up additional account rules, data conversion codes and templates.

To extend the database, use a standard utility such as DFU to add files or fields. If you add files, amend the extract program FI532 to access the new files.

If you need to re-install the AFI control data, the following files should be selected, and all SS module records deleted using SQL or DFU:

FIP05, 06, 07, 15, 20, 25, 30, 31, 32 and 40

Select **Confirm Submit (F8)** to submit a [job](#) to install the necessary data in the AFI files.

## Change Branch [17/SSU]

Use this [task](#) to select another [branch](#) in which to work.

## Change Branch Selection Window

To display this window select the Change Branch task.

This window lists all the branches to which you are authorised.

### Fields

#### **Select (1)**

Enter **1** against the branch you want to change to.

You are now in the branch you selected.

## Contract Initial Load [11/SSU]

Use this [task](#) to load [contracts](#) that are already active in a different Service Management application into the System21 Service Management module.

**Note:** Only use this task for contracts that have been invoiced in full or in part by the old application.

Do not use this [task](#) to load up [contracts](#) that have never been invoiced before, even though they may have existed on the previous application. Use the standard Contracts maintenance task to load up such contracts.

**Note:** You cannot use the Contract Initial Load task for copy-based contracts. Such contracts will need to be entered through the normal Contracts maintenance task, to take effect from their next renewal date and to allow the software to track estimates and interim billings.



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## **Description**

The Contract Initial Load task is very similar to the standard Contracts maintenance task and reference should be made to that section in the Contracts Database chapter of this product guide for full details.

There are two major differences:

- All equipment added to a contract will be flagged as already invoiced and will not be invoiced again until the next invoicing frequency period is reached. This is set in the contract header billing parameters.
- The date From and To of the next period of time (contract invoice term) to be invoiced by the module is completely maintainable by the user.

To use this task effectively, the following key information about each contract should be extracted from the old contract application, along with the normal information such as contract start date, [termination](#) date, equipment covered and corresponding inclusion dates, and so on.

## **Invoice Frequency**

This will only apply if there are to be any instalments within the [invoice term](#), for example, four instalments within an invoice term of 12 months would need the months between invoices to be set to 3. If instalments are not applicable, the months between invoices should be set to the same value as the [normal invoice term](#).

For each [contract](#) to be loaded, you must determine what period of time is to be invoiced next, and whether instalments are required.

The [next term starts on](#) date must not equal the contract start date, as this would mean that the contract has never been invoiced before. If this is the case, the contract should not be entered using the Contract Initial Load [task](#). Use the standard Contracts maintenance task instead.

If the contract [termination](#) date equals the [next term ends on](#) date, the contract has previously been fully invoiced.

**Note:** A warning tells you if the date is not a multiple of the contract start date and the frequency [terms](#). If you press Enter or select F8 a second time, this will remove this message and enable you to continue.

The warning is displayed in both the Contract Initial Load and the standard Contracts maintenance tasks, to notify you that the next term starts on date and the next term ends on date may be getting out of step. However, as long as the next term starts on date is always earlier than the next term ends on date (except in the case of a fully invoiced [contract](#)), the module will allow almost any values for these two dates to be entered.

## **Scheduled Service Visits**

If these are applicable, they will be generated from the contract start date until the contract [termination](#) date.

However, since the software never generates [visits](#) before today's date, only those visits forward from today's date will be created for each piece of equipment. All visits generated for a contract should be checked.



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# Appendix A Glossary

A

## **Accounting Period**

A specific number of days, identified by a start and end date, which controls postings to Accounts Receivable and General Ledger

## **Agreement Type**

A code used to describe the duration and [terms](#) associated with a specific class of [contract](#)

## **Billing Period**

This is the period of time for which a contract is protected from a price increase.

## **Billing Term**

This is the period of time for which a contract is protected from a price increase.

## **Branch**

A sub-[division](#) of a [company](#), a branch is an organisational unit that controls its own service operations, but shares certain data with other branches of the same company

## **Call**

A service [job](#) is a defined set of work at a single customer [site](#), identified by a unique application-generated job number. It may consist of one or more [job lines](#), that is, pieces of equipment. Each job line is treated as a separate unit of work within the job, with its own job category, fault code, customer contact name, target response date/time, status and engineer.

## **Company**

This is a completely self-contained environment for Service Management operation. Each company is identified by a unique two-character code.

## **Contract Conditions**

This is a price entered against a piece of equipment on a [contract](#), which overrides the price calculated automatically by the application, using the [visit](#) and supplement fees on the contract rates file. The price may be applied at contract header, or machine and peripheral levels; it may cover, for example, fixed service and visit charges, or rentals, or copies/vends rates and standing charges. A [special price](#) applies to the [normal invoice term](#) of the contract.

## **Contract Invoice Term**

This is the period of time for which a [contract](#) is protected from a price increase.

## **Contract Type**

A code used to describe the duration and [terms](#) associated with a specific class of [contract](#)

## **Contract**

The [terms](#) and conditions of maintenance, agreed with a customer, for the provision of service to equipment installed at a customer's [site](#) or sites

**Cover Type**

This defines the equipment price to be charged for an item of equipment in [contract](#) pricing, and the charge matrix to be used in [job](#) pricing.

**Delivery Address**

A [location](#) where equipment is located, and where [jobs](#) will be carried out by field service engineers

**Division**

A grouping of products, used for segregating [calls](#)

For example, a [company](#) may have a common service call administration for two teams of engineers, covering the same geographic area, but requiring quite different skill sets.

**Engineer Report**

This is also called a [technical report](#). It is a document, a [service report](#) or service sheet, completed by an engineer after performing a service [call](#) at a customer [site](#). The report holds the details of labour and travel times, parts used and miscellaneous expenses. This information is entered into Service Management through the technical reporting windows in the Engineer Work Allocation option.

Technical reporting can be made promptly, efficiently and accurately by using [remote communications](#) technology, whereby the engineer reports parts used and so on into a portable [terminal](#).

**Field Service Group**

The relationships you define between field service groups, territories, geocodes and teams or engineers are the basis for selecting a team or engineer when scheduling work in [call](#) logging.

If your territories are small, you can set up a team with several engineers for each territory. The software will schedule the member of the team with the lightest workload. This is no problem where the distances to be travelled are not significant.

However, if your territories tend to be large – more than 50 miles across – then this set up is unlikely to suit you. The software could select the engineer within the team who is located the furthest from the [job](#).

You can avoid this problem by setting up a single engineer for a territory, and then specifying that engineer as the prime engineer for the territory. You would then specify a first, second, and perhaps a third alternative engineer to cover if the prime engineer is unavailable.

You can define any geocode to more than one territory. This is useful if you have service areas that overlap for different products.

**IN Currency**

An IN currency is a European currency that is linked to the Euro currency with a fixed exchange rate.

**Installation**

One or more items of equipment located on a [site](#)

**Installation Address**

A [location](#) where equipment is located, and where [jobs](#) will be carried out by field service engineers

**Invoice Consolidation Level**

This is a control flag that determines the way in which invoice lines for a customer are grouped on invoices. The levels available are 1 (account level), 2 (account/address level) or 3 ([job](#) or [contract](#) level).

When [World Trade](#) and [multi-currency](#) are active, currency breaks and tax regime changes will affect these groupings.

**Invoice Frequency**

A sub-[division](#) of the [normal invoice term](#), this represents the number of months between invoices, if the [contract invoice term](#) is to be invoiced in instalments.

**Invoice From and Invoice To Dates**

These are two dates held on [contract](#) invoice lines only, which indicate the period of time that the charge on the invoice line actually covers. This may be the full [contract invoice term](#), or a part of it, if instalment or pro-rata invoicing is involved.

**Invoice Period**

This is the period of time for which a [contract](#) is protected from a price increase.

**Invoice Term**

This is the period of time for which a [contract](#) is protected from a price increase. It is also the number of months for which the contract is normally invoiced at any one invoicing run, for example, 6, 12 or 24 months.

**Job**

A service job is a defined set of work at a single customer [site](#), identified by a unique Service-generated job number. It may consist of one or more [job lines](#), that is, pieces of equipment. Each job line is treated as a separate unit of work within the job, with its own job category, fault code, customer contact name, target response date and time, status and engineer.

**Job Line**

This is a sub-[division](#) of a [job](#). It is a unit of work to be performed on a specific piece of equipment. A job line is identified by the combination of job number, [model](#) number and [serial number](#).

**Location**

A location where equipment is located, and where [jobs](#) will be carried out by field service engineers

**Model**

This is a category of machine or equipment. Models exist within model sub-groups, within model groups, within [divisions](#). The model name is usually descriptive of the equipment and is the name by which it is known to sales and customers.

**Multi-currency**

The choice between multi-currency and single currency is made in the Accounts Receivable [company](#) profile. When active, [sites](#) can be invoiced in the valid General Ledger currency set on their Additional Service Details records: this is the prime currency.

The ledgers, including costs, will be maintained in base currency: converting between currencies is system generated, in conformance with exchange rates set in General Ledger.

**Next Term Ends On**

This is the date on which the next [contract invoice term](#) to be priced will end. This date is held on the [contract](#) billing parameters.

**Next Term Starts On**

This is the date on which the next [contract invoice term](#) to be priced will start. This date is held on the [contract](#) billing parameters.

**Normal Invoice Term**

This is the number of months between invoices.

**Owner**

When defined against a piece of equipment, the owner is a customer who actually owns that equipment, and who may be invoiced.

**Pending Invoice Line**

This is an invoice line not yet assigned an invoice number or posted to the ledgers. It is waiting to be grouped with other invoice pending lines to form an invoice. This grouping is dependent on the customer's [invoice consolidation level](#).

**Pending Invoice Line Availability Date**

This is a date held on each [pending invoice line](#), which defines when the invoice line may be released for consolidation into an invoice. For in advance [contract](#) invoice lines, this will be the start date of the [contract invoice term](#) or instalment period. For in arrears contract invoice lines, this will be the end date of the contract invoice term or instalment period. For [job](#) invoice lines, this will be the date on which the line was created, that is, the pricing date.

**Quotation**

This is a set of records identical to a [contract](#), but with a special status of quotation.

**Remote Communications**

This [term](#) refers to the interaction of Service Management and a variety of hand-held terminals to pass information between the centre and field engineers. The [call](#) centre can send the engineers information about which customers require a service [visit](#) and when, and the engineers can send back [technical reports](#).

**Scheduled Visit Profile**

This defines the number, type and frequency of scheduled maintenance [visits](#), by means of relative [service periods](#) and [job](#) categories.

**Serial Number**

This is a number that, in combination with a [model](#) code, uniquely identifies a single unit to be serviced. The use of serial numbers is strongly recommended where it is practicable.

If the use of serial numbers is not practicable, then Service Management enables you to enter a quantity instead. This means that the system still has an exact record of the equipment you have at each [installation](#), even if individual pieces of equipment cannot be identified.

**Service Agreement**

The [terms](#) and conditions of maintenance, agreed with a customer, for the provision of service to equipment installed at a customer's [site](#) or sites

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## Service Contract

The [terms](#) and conditions of maintenance, agreed with a customer, for the provision of service to equipment installed at a customer's [site](#) or sites

## Service Period

A specific number of days, identified by a start and end date, that controls scheduling and monitoring of service [jobs](#)

## Service Report

This is a document, a service report or service sheet, completed by an engineer after performing a service [call](#) at a customer [site](#). The report holds the details of labour and travel times, parts used and miscellaneous expenses. This information is entered into Service Management through the [technical reporting](#) windows in the Engineer Work Allocation [task](#).

Technical reporting can be made promptly, efficiently and accurately by using [remote communications](#) technology, whereby the [engineer reports](#) parts used and so on into a portable [terminal](#). This means that information does not have to be re-keyed at all.

## Site

A [location](#) where equipment is located, and where [jobs](#) will be carried out by field service engineers

## Special Price

This is a price entered against a piece of equipment on a [contract](#), which overrides the price calculated automatically by the application, using the [visit](#) and supplement fees on the Contract Rates file. The price may be applied at contract header, or machine and peripheral levels; it may cover, for example, fixed service and visit charges, or rentals, or copies/vends rates and standing charges. A special price applies to the [normal invoice term](#) of the contract.

## Task

A service [job](#) is a defined set of work at a single customer [site](#), identified by a unique application-generated job number. It may consist of one or more [job lines](#), that is, pieces of equipment. Each job line is treated as a separate unit of work within the job, with its own job category, fault code, customer contact name, target response date/time, status and engineer.

## Technical Report

This is a document, a [service report](#) or service sheet, completed by an engineer after performing a service [call](#) at a customer [site](#). The report holds the details of labour and travel times, parts used and miscellaneous expenses. This information is entered into Service Management through the technical reporting windows in the Engineer Work Allocation option.

Technical reporting can be made promptly, efficiently and accurately by using [remote communications](#) technology, whereby the [engineer reports](#) parts used and so on into a portable [terminal](#). This means that information does not have to be re-keyed at all.

## Term

This is the period of time for which a [contract](#) is protected from a price increase.

## Visit

A service [job](#) is a defined set of work at a single customer [site](#), identified by a unique application-generated job number. It may consist of one or more [job lines](#), that is, pieces of equipment. Each job

line is treated as a separate unit of work within the job, with its own job category, fault code, customer contact name, target response date/time, status and engineer.

### **World Trade**

The correct documentation of service parts transfers and [job](#) invoices, where more than one country is involved, within and outside the EC, is the scope of World Trade.

Service Management interfaces with it for customer, stockroom, country and item maintenance. Currencies and differing tax regimes (for example, tax and GST) are processed specifically at invoicing, and where stock movements are involved.