

Realtime Software Corporation - Service Order Manual

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SERVICE ORDERS

A. ORDER ENTRY

1. REGULAR CUSTOMER PAY ORDER

To enter a customer service order, type the **Screen Jump OE** at any menu. To lookup a customer by name **type ??** and partial name of customer to search.

```
OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          26 Jun 04
CUST#  ??HAR.....*XXXXX
```

Type the sequence number shown to the left of the customer you want to use. As a general rule, if there is a ship-to number listed in addition to the bill-to customer number, **always select the ship-to for orders**. A Ship-to number has the same customer number as the bill-to, but with a ship-to sequence. The example below is sequence 001. If no ship-to is available, select the bill-to customer.

```
OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          26 Jun 04

Seq. Customer                               Number             Searching on HARR
  1 HARRELLS VFD                             14860              HARRELLS NC
  2 HARRELL MEDICAL TRANSPORT                14870              GATESVILLE NC
  3 HARRELLSVILLE FIRE DEPARTMENT            14880              HARRELLSVILLE NC
  4 HARRELLSVILLE FIRE DEPARTMENT            14880*001          HARRELLSVILLE NC
  5 HARRIS EQUIPMENT CO.                     14890              WARRENTON NC

Enter Seq., * To Exit, PB Page Back, C Change Search, or (RTN) to page. 4....
```

If you need to change the ship-to address, **type S** to change and enter the correct information. Then **ENTER** to continue with order.

```
OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          26 Jun 04
CUST#  14880*001                          ** ORDER NO.

NAME      HARRELLSVILLE FIRE DEPARTMENT    1.      HARRELLSVILLE FIRE DEPARTMENT
ADDR 1    P O BOX 361                       2. S    158 JOHNSON AVE
ADDR 2                                          3. H T
CITY      HARRELLSVILLE                     4. I O HARRELLSVILLE
ST/CNTY   NC                               5. P    NC
ZIP/PST   27942                             6.      27942
COUNTRY                                       7.

ENTER * TO EXIT, S TO CHANGE SHIP-TO, Y OR RTN TO CONTINUE ORDER/QUOTE .
```

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ENTER at each field to step through the fields, typing whatever information is necessary. The **Order Type (Line 14)** is very important and you can do a **?** to look up the different order types available.

OE03A	CW REALTIME SOFTWARE CORP	ORDER ENTRY	03 Jul 04
CUST# 14880*001		** ORDER NO. 345962	
NAME	HARRELLSVILLE FIRE DEPARTMENT	1.	HARRELLSVILLE FIRE DEPARTMENT
ADDR 1	P O BOX 361	2. S	158 JOHNSON AVE
ADDR 2		3.	H T
CITY	HARRELLSVILLE	4. I O	HARRELLSVILLE
ST/CNTY	NC	5. P	NC
ZIP/PST	27942	6.	27942
COUNTRY		7.	
8. ORDER DATE	07/03/04	14. ORDER TYPE	?...
9. SINGLE/MULTIPLE SHIP DATES (S/M) S		15. SHIP VIA	UPS GROUND
10. SHIP DATE	07/03/04 CANCEL	16.	FOB
11. CUST P.O.	JASON	17. SLMN1	SLMN2 SLMN2 %
12. ORDERED BY	JASON	18. TERMS	30 NO \$ TICKET
13. SPECIAL INSTRUCTIONS		19. AR-CUST#	20. STATUS
		21. INTERNAL NOTES	22. FREE FREIGHT

In the screen print below, the order types that are service types have the Y under the Svc (Service) column on the right.

The order types shown below are typical defaults loaded onto all E-One Dealers. As these are completely maintainable, your actual list will probably be much different. The basic defaults are designed as follows. The **SQ** Order Type is for service quotes only. **DEM** and **NEW** are for internal service orders that will be used with special internal customer numbers. See the **NEW APPARATUS MANUAL** for more detailed instruction on internal service orders. The two default Order Types used most often for customer service orders are **SERV** for customer pay and **WARR** for warranty.

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This order is a customer pay so select Line 8.

OE03A	CW REALTIME SOFTWARE CORP	ORDER ENTRY	Jul 04
Display of the ORDER-TYPE table, by Code			
SQ	Code	Description	Drop Lbr Svc Futr Xfer Mrgn
1	APP	NEW APPARATUS SALES	Y R
2	DEM	DEMO EXPENSE	Y Y Y
3	FUTURE	EQPMT,NEW APPARATUS SALES	Y
4	NEW	NEW APPARATUS INTERNAL	Y Y Y
5	P	PARTS & EQUIPMENT	Y R
6	PD	PARTS DROP SHIP TO CUSTOMER	Y
7	Q	QUOTE LETTER	Y R
8	SERV	CUSTOMER REPAIR	Y Y Y
9	SERVD	CUSTOMER REPAIR, DROP SHIP	Y Y Y
10	SHOP	BENCH WORK	Y
11	SQ	SERVICE QUOTE LETTER	Y R
12	T	TRANSFERS TO MOBILE #1 & #2	Y Y
13	WARR	WARRANTY REPAIR	Y Y Y
14	WARRD	WARRANTY REPAIR, DROP SHIP	Y Y Y

(C)HANGE, (P)AGE, (B)ACK, (I)NDEX, (T)OGGLE, (R)ETURN, * TO VOID, SEQ# 8....
END OF SEARCH INDEX

By selecting a service order type, you will now be prompted for a part# and serial# for the unit you are working on.

If you don't know all the information on the serial#, there are a number of lookup options available. Type ?: to see an index list of part numbers on file. You can type C on the part# to search the customer's truck history. Type S for an index list of serial numbers on file. Type P to enter any portion of a serial# and all possible matches will be listed to choose from. The "P" for partial serial number look up gives a lot of flexibility in how you can retrieve information.

Selecting the correct serial number is important, so you don't get duplicate numbers set up for the same truck. In the sample below, the truck is not in the history so it will be added now.

OE03A	CW REALTIME SOFTWARE CORP	ORDER ENTRY	03 Jul 04
CUST# 14880*001	** ORDER NO. 345962		
NAME	HARRELLSVILLE FIRE DEPARTMENT	1.	HARRELLSVILLE FIRE DEPARTMENT
ADDR 1	P O BOX 361	2. S	158 JOHNSON AVE
ADDR 2		3. H T	
CITY	HARRELLSVILLE	4. I O	HARRELLSVILLE
ST/CNTY	NC	5. P	NC
ZIP/PST	27942	6.	27942
COUNTRY		7.	
1. ENTER ITEM# OR CROSS REFERENCE	PART#	C
2. ENTER '?' FOR INDEX LOOKUP	SERIAL#		
3. ENTER 'C' FOR S/N'S FOR CUSTOMER			
4. ENTER 'S' FOR LOOKAT BY SERIAL#			
5. ENTER 'P' FOR LOOKUP BY PARTIAL SERIAL#			

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If you can't find the serial number on file, you will need to set up a new record. **Type the part#** that is used to enter customer's trucks into the system. In this case we're using ENGINE. You can use APPARATUS or whatever you want but it must be set up in Inventory Master first.

What to enter for the serial# depends on company policy and procedure. You can easily use **the S/O#** or possibly the **last 8 of the vin#**, or possibly even the **Manufacturer's Serial#**. The most important thing is **to be consistent**. The example below is using the S/O#.

```
OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          03 Jul 04
CUST# 14880*001                ** ORDER NO. 345962

NAME      HARRELLSVILLE FIRE DEPARTMENT  1.      HARRELLSVILLE FIRE DEPARTMENT
ADDR 1    P O BOX 361                    2. S    158 JOHNSON AVE
ADDR 2                                         3. H T
CITY      HARRELLSVILLE                  4. I O  HARRELLSVILLE
ST/CNTY  NC                             5. P    NC
ZIP/PST   27942                          6.      27942
COUNTRY                                       7.
PART#                                           ADD+ENGINE
SERIAL#                                           158353.....
```

Once the data is entered, **type 1** to create the new record.

```
OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          03 Jul 04
CUST# 14880*001                ** ORDER NO. 345962

NAME      HARRELLSVILLE FIRE DEPARTMENT  1.      HARRELLSVILLE FIRE DEPARTMENT
ADDR 1    P O BOX 361                    2. S    158 JOHNSON AVE
ADDR 2                                         3. H T
CITY      HARRELLSVILLE                  4. I O  HARRELLSVILLE
ST/CNTY  NC                             5. P    NC
ZIP/PST   27942                          6.      27942
COUNTRY                                       7.
ADD+ENGINE*158353
IS NOT A VALID RECORD
1) CREATE RECORD
2) VIEW SERIAL NUMBER INDEX  1
```

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Type A for additional information that can be entered when setting up a new serial record.

SN02A CW REALTIME SOFTWARE CORP	SERIAL MASTER MAINTENANCE	03 Jul 04
SERIAL NUMBER 158353	PART # ADD+ENGINE DESC ENGINE	SITE
1. LOCATION	9. CONDITION CODE	
2. LINK SN# TO A/P	10. DEMO FLAG	
3. VENDOR#	11. WARRANTY EXP DATE	
4. PAYMENT FLAG	12. EXTENDED WARR (Y/N)	
5. AMOUNT PAID	13. EXT WARR CONTRACT#	
6. CHECK NUMBER	14. INSTALL DATE	
7. ACQUISITION COST	15. SERVICE ORDER COMMENTS	
8. ADDED VALUE VALUE TO ADD/SUBT.		
	LAST SERV ORD HR MTR READING	DATE
SERV ORD'S-N	SERV BLTN'S-N	SALES ORDER
RECEIVED DATE	INVOICE NO.	LINE
RECEIVER NO	DATE	PRICE

ENTER LINE#, (S)OLD TO, (C)URRENT OR (P)REVIOUS END USER, (A)DDITIONAL,
(I)NV/SALES DATA, (T)EXT, (DEL)ETE, * TO CANCEL, ^ TO POST **A..**

Select the line of the field you want to maintain. At the very least it is helpful to enter Lines 29-32. Line 31 can be used for the customer's own truck number that they've assigned. **ENTER** to return to the previous page.

SN02A CW REALTIME SOFTWARE CORP	SERIAL MASTER MAINTENANCE	03 Jul 04
SERIAL NUMBER 158353	PART # ADD+ENGINE DESC ENGINE	SITE
CREATED FROM CODE: SO	ON: 07/03/03	
1. ARRIVAL DATE	17. ENGINE MFR	
2. VEHICLE# (VIN) 123456789012345	18. ENGINE MODEL#	
3. CUSTOMER UNIT# E53	19. ENGINE TYPE/SPEC	
4. CUSTOMER ASSET# FA19835	20. ENGINE CODE	
5. APPARATUS TYPE	21. ENGINE SERIAL#	
	22. ENGINE WARRANTY	
	23. PAINT CODE	
	24. OIL FILTER	
9. REAR AXLE S/N	25. AIR FILTER	
10. REAR AXLE WARRANTY	26. FUEL FILTER	
11. WARRANTY REG DATE	27. WATER FILTER	
12. PAINT WARRANTY DATE	28. OTHER	
13. PUMP S/N	29. YEAR	1998
14. PUMP WARRANTY DATE	30. MAKE	E-ONE PUMPER
15. TRANSMISSION S/N	31. MODEL	T-121
16. TRANSMISSION DATE	32. MFR.	VIN#.....
	CREATED UNDER SERVICE ORDER#	345962

ENTER LINE TO CHANGE, * TO VOID, P TO PAGE, ^ OR **RTN** TO CONTINUE ...

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If you happen to know the sold date, **type I** and enter the date. This is helpful for warranty purposes. When finished **type ^ to post**.

SN02A	CW REALTIME SOFTWARE CORP	SERIAL MASTER MAINTENANCE	03 Jul 04
SERIAL NUMBER 158353		PART # ADD+ENGINE	SITE
		DESC ENGINE	
1. LOCATION		9. CONDITION CODE	
2. LINK SN# TO A/P	DUE DATE	10. DEMO FLAG	
3. VENDOR#	INVOICE#	11. WARRANTY EXP DATE	
4. PAYMENT FLAG		12. EXTENDED WARR (Y/N)	
5. AMOUNT PAID		13. EXT WARR CONTRACT#	
6. CHECK NUMBER	CHK DATE	14. INSTALL DATE	
7. ACQUISITION COST		15. SERVICE ORDER COMMENTS	
8. ADDED VALUE			
VALUE TO ADD/SUBT.			
	LAST SERV ORD HR MTR READING	DATE	
SERV ORD'S-N	SERV BLTN'S-N	SALES ORDER	
RECEIVED DATE		INVOICE NO.	LINE
RECEIVER NO		DATE	PRICE
ENTER LINE#, (S)OLD TO, (C)URRENT OR (P)REVIOUS END USER,			
(A)DDITIONAL, (I)NV/SALES DATA, (T)EXT, * TO CANCEL, ^ TO POST ^ .			

Type Y if the information is correct.

OE03A	CW REALTIME SOFTWARE CORP	ORDER ENTRY	03 Jul 04
CUST# 14880*001		** ORDER NO. 345962	
NAME	HARRELLSVILLE FIRE DEPARTMENT	1.	HARRELLSVILLE FIRE DEPARTMENT
ADDR 1	P O BOX 361	2. S	158 JOHNSON AVE
ADDR 2		3. H T	
CITY	HARRELLSVILLE	4. I O	HARRELLSVILLE
ST/CNTY	NC	5. P	NC
ZIP/PST	27942	6.	27942
COUNTRY		7.	
	PART#	ADD+ENGINE	
	SERIAL#	158353	
CURRENT END USER : 14880*001 HARRELLSVILLE FIRE DEPARTMENT			
BILL-TO CUSTOMER: 14880 HARRELLSVILLE FIRE DEPARTMENT			
IS THIS INFORMATION CORRECT (Y/N)? Y			

The system will now prompt for the most common fields on the service order. Separate screens contain many more fields.

Type the mileage (hour meter), status defaults to O for open, **select the tech number** in charge of the order if known at that time (? for look-up), and service tag# if your manual service orders are pre-printed with numbers. You will then be taken to a text screen to enter the customer's complaint.

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```

OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          03 Jul 04
CUST# 14880*001                          ** ORDER NO. 345962

NAME      HARRELLSVILLE FIRE DEPARTMENT  1.      HARRELLSVILLE FIRE DEPARTMENT
ADDR 1    P O BOX 361                    2. S    158 JOHNSON AVE
ADDR 2                                         3. H T
CITY      HARRELLSVILLE                  4. I O HARRELLSVILLE
ST/CNTY  NC                             5. P    NC
ZIP/PST  27942                          6.      27942
COUNTRY                                       7.

PART#          ADD+ENGINE
SERIAL#        158353
END USER :
BILL-TO :

A. HOUR METER      15353
B. STATUS          O   OPEN
C. TECH            45   GREG HIGH
D. SERVICE TAG#
E. SERVICE NOTES
    
```

The Status flag prompt **B** works off of a Background Table that some users find helpful. This same field is also available as choice 20 on the Header screen. If you choose to track your orders with this field, it's very simple for anyone in the company to see the status from Order Inquiry. The following screen shows the default entries and the possible flags.

```

OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          03 Jul 04
      Display of the ORDER-STATUS table, by Status Code
SQ      Status Description                Bill      OA Adjust  OA Change
1      A      APPROVAL PENDING           Y          Y
2      C      COMPLETED ORDER           Y          Y
3      O      OPEN, IN PROCESS           Y          Y
4      P      WAITING ON PARTS           Y          Y
    
```

```

OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          03 Jul 04
CUST# 14880*001                          ** ORDER NO. 345962

NAME      HARRELLSVILLE FIRE DEPARTMENT  1.      HARRELLSVILLE FIRE DEPARTMENT
ADDR 1    P O BOX 361                    2. S    158 JOHNSON AVE
1. SERVICE COMMENTS (COMPLAINT)

FIX ENGINE OIL LEAK

Text Window                                Insert
    
```

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When finished typing complaint, **ENTER** until a blank line is added. At this point you will have the option of adding any Condition/Cure comments.

WOULD YOU LIKE TO ENTER CONDITION / CURE COMMENTS (Y/N)? **N**

If you select Yes, you will have a similar text field for each comment.

Once all the comments are entered, you will be returned to the previous screen. If no changes need to be made, **ENTER** to continue.

```
OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          03 Jul 04
CUST# 14880*001                          ** ORDER NO. 345962
NAME    HARRELLSVILLE FIRE DEPARTMENT    1.    HARRELLSVILLE FIRE DEPARTMENT
ADDR 1  P O BOX 361                       2. S  158 JOHNSON AVE
ADDR 2                                     3. H T
CITY    HARRELLSVILLE                     4. I O HARRELLSVILLE
ST/CNTY NC                               5. P  NC
ZIP/PST 27942                             6.    27942
COUNTRY                                     7.
PART#                                       ADD+ENGINE
SERIAL#                                  158353
A. HOUR METER          15353                END USER :
B. STATUS              0    OPEN              BILL-TO  :
C. TECH               45    GREG HIGH
D. SERVICE TAG#
E. SERVICE NOTES
  (REPAIR #1)
  FIX OIL LEAK
ENTER CHOICE A-E, RTN TO CONTINUE, OR * TO VOID .
```

The repair #1 note is only here on Multiple Repair Order Types.

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Line 15 has a ? look up or anything can be typed in the field. Line 17 SLMN1 defaults to the territory salesman assigned to this customer. **SLMN2** needs to be entered with your own salesman number to track who entered the order. When you get to the bottom of the screen, type any sequence number to return to a field and change it. **ENTER** to continue.

```

OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          03 Jul 04

CUST# 14880*001                ** ORDER NO. 345962

NAME      HARRELLSVILLE FIRE DEPARTMENT  1.      HARRELLSVILLE FIRE DEPARTMENT
ADDR 1   P O BOX 361                    2. S    158 JOHNSON AVE
ADDR 2                                         3. H T
CITY     HARRELLSVILLE                   4. I O HARRELLSVILLE
ST/CNTY  NC                              5. P    NC
ZIP/PST  27942                           6.      27942
COUNTRY                                     7.
8. ORDER DATE 07/03/04                    14. ORDER TYPE SERV    OPEN/45
9. SINGLE/MULTIPLE SHIP DATES (S/M) S    15. SHIP VIA    UPS GROUND
10. SHIP DATE 07/03/04 CANCEL            16. FOB
11. CUST P.O. JASON                       17. SLMN1 14    SLMN2 15 SLMN2 %
12. ORDERED BY JASON                       18. TERMS 30    NO $ TICKET
13. SPECIAL INSTRUCTIONS                   19. AR-CUST#    20. STATUS O
                                           21. INTERNAL NOTES  22. FREE FREIGHT

ENTER LINE NUMBER TO CHANGE, * TO VOID, OR RTN TO CONTINUE ..
    
```

This screen is used more for when the order is in process or ready to close. Any of the fields can be used for more information. Type C to adjust the Service / Repair comments you added earlier.

```

OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          03 Jul 04

CUST # 14880*001                HARRELLSVILLE FIRE DEPART  SLM1 14  ON ORD    380.23
ORDER# 345962                   ORD DT 07/03/04  CR LIMIT          A/R BAL
TYPE SERV          RENTAL COST%          ORD VAL
PART*SER# ADD+ENGINE*158353          WARRANTY EXPIRE
1. DATE SOLD                    14. WARRANTY CLAIM#
2. REPAIR DATE                  15. VENDOR CREDIT#/DATE
3. FAILURE DATE 07/03/04        16. CREDIT DUE CUST#/CREDIT#
4. HOUR METER 15353             17. HOURS WORKED/BILLED
5. PROMISE DATE                  18. DOLLARS WORKED/BILLED
6. $ ESTIMATE                    19. PARTS FILED/RECEIVED
7. QUOTE NUMBER                  20. LABOR FILED/RECEIVED
8. MODEL NAME ENGINE            21. SERVICE TAG#
9. PICKUP?                       22. SERVICE AUTH#
10. DELIVER?                     23. VENDOR CONTACT
11. SERV CALL? DISTANCE          24. MISC EXPENSES
12. STATUS O TECH 45             COMMENT:
13. BULLETIN#                   GREG HIGH
                                           'SO' TO VIEW 0 SERVICE ORDERS, 'SB' FOR 0 BULTNS
25. FAILED PARTS                LAST SO HR METER/DATE: =>

ENTER #, A# -ALL, * -VOID, H)DR, C)MNTS, L)ABOR, W)RNTY PRNT, OR RTN -CONT ...
    
```

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There are 2 main types of service orders. Normal Repair, and Multiple Repair. The Multiple Repair Order Type allows each different type of work to be done to be assigned separate repair numbers within the service order. All labor and part numbers used on the service order must be attached to a repair number. If you are using a Multiple Repair Order Type, then at least one set of Repair Comments needs to be present. To enter the Repair comments in either case, **type C** at this screen.

Using a **NORMAL REPAIR** type will give you this screen for Comment maintenance.

```
OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          03 Jul 04

CUST # 14880*001          HARRELLSVILLE FIRE DEPART  SLM1 14  ON ORD
ORDER# 345944          ORD DT 10/07/04  CR LIMIT          A/R BAL
      TYPE  SERV          RENTAL COST%          ORD VAL
PART*SER# ADD+ENGINE*158353          WARRANTY EXPIRE
  1. SERVICE COMMENTS (COMPLAINT)
      FIX OIL LEAK

  2. SERVICE CONDITION (CAUSE)

  3. SERVICE CORRECTION (CURE)

  4. ADDITIONAL COMMENTS
  5. REASON FOR OVERRIDE OF LABOR COMMENTS
  A. SERVICE TEXT CODES TO BE PERFORMED

  B. SERVICE TEXT CODES COMPLETED

ENTER NUMBER, * OR RTN TO GO BACK TO PREV SCREEN  . . .
```

Using a **MULTIPLE REPAIR** type will give you this screen for Comment maintenance.

```
OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          03 Jul 04

CUST # 14880          HARRELLSVILLE FIRE DEPART  SLM1 14  ON ORD
ORDER# 345944          ORD DT 10/07/04  CR LIMIT          A/R BAL
      TYPE  SERVM          RENTAL COST%          ORD VAL
PART*SER# ADD+ENGINE*158353          WARRANTY EXPIRE

R#  TYPE  COMMENT TEXT          LAST REPAIR# ENTERED 1
--  ----  -
  1  COMPL FIX OIL LEAK

      ENTER R# TO MAINTAIN A REPAIR, OR P TO PAGE REPAIR COMMENTS
  A. SERVICE TEXT CODES TO BE PERFORMED

  B. SERVICE TEXT CODES COMPLETED

ENTER NUMBER, * OR RTN TO GO BACK TO PREV SCREEN  R1.
```

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To maintain an existing repair comment, or add a new one, enter R for Repair, and the number of the repair you wish to maintain. In this example, R1 will pull up the comments for repair 1.

Now each of the 3 associated fields (Complaint, Cause, and Cure) are displayed, and can be adjusted. To further this example, let's add a cause.

```
OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          03 Jul 04
CUST # 14880          HARRELLSVILLE FIRE DEPART  SLM1 14  ON ORD
ORDER# 345944        ORD DT 10/07/04  CR LIMIT          A/R BAL
      TYPE  SERVM      RENTAL COST%          ORD VAL
                                REPAIR# 1
1. SERVICE COMMENTS (COMPLAINT)
  FIX OIL LEAK

2. SERVICE CONDITION (CAUSE)

3. SERVICE CORRECTION (CURE)

ENTER COMMENT FIELD TO MAINTAIN, * OR RTN FOR PREV DISPLAY  2
```

```
OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          03 Jul 04
CUST # 14880          HARRELLSVILLE FIRE DEPART  SLM1 14  ON ORD
ORDER# 345944        ORD DT 10/07/04  CR LIMIT          A/R BAL
      TYPE  SERVM      RENTAL COST%          ORD VAL
                                REPAIR# 1
2. SERVICE CONDITION (CAUSE)

The customer thinks it may be related to the rough terrain they had
to drive through recently.<

Text Window                                                    Insert
```

Note how the text field expands to fill the entire screen during maintenance.

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ENTER a blank line to finish this field, and also to leave the Cure field, which is pulled up automatically – because it is empty. **ENTER** at the change line to go back to the summary list.

```

OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          03 Jul 04

CUST # 14880          HARRELLSVILLE FIRE DEPART  SLM1 14  ON ORD
ORDER# 345944        ORD DT 10/07/04  CR LIMIT          A/R BAL
      TYPE  SERVM      RENTAL COST%          ORD VAL
PART*SER# ADD+ENGINE*158353          WARRANTY EXPIRE

R#  TYPE  COMMENT TEXT                      LAST REPAIR# ENTERED 1
-----
 1  COMPL FIX OIL LEAK
 1  CAUSE The customer thinks it may be related to the rough terrain they had
      to drive through recently.

      ENTER R# TO MAINTAIN A REPAIR, OR P TO PAGE REPAIR COMMENTS
A. SERVICE TEXT CODES TO BE PERFORMED

B. SERVICE TEXT CODES COMPLETED

ENTER NUMBER, * OR RTN TO GO BACK TO PREV SCREEN    ...
    
```

The display seen above will continue for as many Repair comments as are on file.

The system allows for up to 99 separate repairs on a single Service Order.

When you are done with Repair Comments, **ENTER** to return to the Service Screen.

```

OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          03 Jul 04

CUST # 14880*001      HARRELLSVILLE FIRE DEPART  SLM1 14  ON ORD          380.23
ORDER# 345962        ORD DT 07/03/04  CR LIMIT          A/R BAL
      TYPE  SERV      RENTAL COST%          ORD VAL
PART*SER# ADD+ENGINE*158353          WARRANTY EXPIRE
 1. DATE SOLD          14. WARRANTY CLAIM#
 2. REPAIR DATE        15. VENDOR CREDIT#/DATE
 3. FAILURE DATE 07/03/04  16. CREDIT DUE CUST#/CREDIT#
 4. HOUR METER 15353      17. HOURS WORKED/BILLED
 5. PROMISE DATE        18. DOLLARS WORKED/BILLED
 6. $ ESTIMATE          19. PARTS FILED/RECEIVED
 7. QUOTE NUMBER        20. LABOR FILED/RECEIVED
 8. MODEL NAME  ENGINE          21. SERVICE TAG#
 9. PICKUP?            22. SERVICE AUTH#
10. DELIVER?           23. VENDOR CONTACT
11. SERV CALL?  DISTANCE      24. MISC EXPENSES
12. STATUS  O  TECH  45      COMMENT:
13. BULLETIN#          GREG HIGH
                        'SO' TO VIEW 0 SERVICE ORDERS, 'SB' FOR 0 BULTNS
25. FAILED PARTS          LAST SO HR METER/DATE: =>

ENTER #, A# -ALL, * -VOID, H)DR, C)MNTS, L)ABOR, W)RNTY PRNT, OR RTN -CONT ...
    
```

ENTER to continue to the parts detail screen.

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In the parts detail screen, **type 01** for Site (or whatever site is applicable) then the **quantity** and **part number**. **You need at least one part number to open a work order** so it works well to use service supplies since it is typically charged to the customer on service orders. **If this is a Multiple Repair Order, Every Line Item must tie to a Repair#**. The dollar amount can be changed later before closing the service order. Other parts will be added later as the technician finds out what is needed. Labor will be added later as well. **ENTER** to go to the final screen.

OE03A CW REALTIME SOFTWARE CORP		ORDER ENTRY			03 Jul 04	
CUST # 14880*001	HARRELLSVILLE FIRE DEPART		SLM1 14	ON ORD	380.23	
ORDER# 345962	ORD DT 07/03/04 CR LIMIT			A/R BAL		
SITE # 01				ORD VAL		
SEQ	QTY	ITEM NO.	ORD	QTY TO	PRICE	EXTENSION
	ORD'D	DESCRIPTION	UOM	SHIP		
001	1	LAB,SUPPLIES	EA.	1	0.00000	0.00
		MISC. SERV. SUPPLIES				REPAIR#
TEXT						
		SI LOCATN	ON-HAND	COMM	AVAIL	O/O DROP
		01	9955	20	9935	
		02	-66	2	-68	
		03	-56	3	-59	
			-----	-----	-----	-----
			9833	25	9808	0 0

To return to the very first screen type H for header. To return to the parts screen, type D for detail. Otherwise **type S** to save or I to print a pick ticket.

OE03A CW REALTIME SOFTWARE CORP		ORDER ENTRY			03 Jul 04	
CUST # 14880*001	HARRELLSVILLE FIRE DEPART		SLM1 14	ON ORD	380.23	
ORDER# 345962	ORD DT 07/03/04 CR LIMIT			A/R BAL		
	TERMS 30 0.000%			ORD VAL	0.00	
PRODUCT TOTAL	0.00					
2. DISCOUNT (\$/%) \$	0.00		DISCOUNTABLE AMOUNT		0.00	
			-TAXABLE-- TAX			
			ORDER LINE CODE	RATE%	TAX AMT	
3. FREIGHT			Y			
4. MISCELLANEOUS						
5. MINIMUM ORDER CHG						
6. ORDER TAX AMOUNT			0.00 T	7.000 (%/\$) \$	0.00	
TOTAL TAX AMOUNT	0.00					
ORDER TOTAL	0.00					
			** PRODUCT TOTAL INCLUDES **			
			BROKEN PKG CHARGES			
			TOTAL OTHER MISC			
ENTER (F)UTURE DATING, (H)EADER, (B)ILL, (C)ASH						
LINE TO CHANGE, (D)ETAIL, * TO VOID, S TO POST/SPOOL, I TO POST/PICK S						

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To enter a service quote, type the **Screen Jump QE** at any menu and proceed the same as a regular service order. The order type will be SQ or whatever has been set up with a description of “service quote”. It will then prompt for part number and serial number of the machine you’re working on, but you can enter past it because it is not required on a quote. You can use the service comment fields for complaint and correction for quote purposes.

SERVICE ORDERS

A. ORDER ENTRY

2. WARRANTY ORDER

To enter a warranty service order, the instructions from the previous section A 1. are the same with a few small changes. Type **Screen Jump OE** and at the customer prompt, **type ??WARR** to find the correct warranty customer.

```
OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          03 Jul 04
CUST#  ??WARR . . . *XXXXX
```

Select the correct warranty customer and **ENTER**.

```
OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          03 Jul 04
Seq. Customer          Number          Searching on WARR
 1 WARRANTY, E-ONE      23006
 2 WARRANTY, OTHER MISC. 23007
 3 WARRANTY, SAULSBURY  23008
Enter Seq., * To Exit, PB Page Back, C Change Search, or (RTN) to page. 1 . . . .
```

Type S to change the ship-to. Then **type ??** and **the first letters** of the customer's name.

```
OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          03 Jul 04
CUST# 23006                ** ORDER NO.
NAME      WARRANTY, E-ONE          1.      WARRANTY, E-ONE
ADDR 1    2. S
ADDR 2    3. H T
CITY      4. I O
ST/CNTY   5. P
ZIP/PST   6.
COUNTRY   7.
ENTER * TO EXIT, S TO CHANGE SHIP-TO, Y OR RTN TO CONTINUE ORDER/QUOTE S
```

```
OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          03 Jul 04
CUST# 23006                ** ORDER NO. 345963
NAME      WARRANTY, E-ONE          1.      ??CLARK . . . . .
ADDR 1    2. S
ADDR 2    3. H T
CITY      4. I O
ST/CNTY   5. P
ZIP/PST   6.
COUNTRY   7.
MANUALLY ENTER NAME, USE ANOTHER CUSTOMER NUMBER, OR ENTER ?
```

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Select the number for the correct customer and **ENTER**.

OE03A CW REALTIME SOFTWARE CORP	ORDER ENTRY	03 Jul 04
Seq. Customer	Number	Searching on CLARK
1 CLARKS NECK VOLUNTEER	12740	WASHINGTON NC
2 TOWN OF CLARKTON	12750	CLARKTON NC

Enter Seq., * To Exit, PB Page Back, C Change Search, or (RTN) to page. 1...

The default order type (Line 14) is **WARR**. When you get to that field you will be prompted for the part# and serial# of the unit you're working on.

OE03A CW REALTIME SOFTWARE CORP	ORDER ENTRY	03 Jul 04
CUST# 23006	** ORDER NO. 345963	
NAME WARRANTY, E-ONE	1.	CLARKS NECK VOLUNTEER
ADDR 1	2. S	FIRE DEPARTMENT
ADDR 2	3. H T	5440 CLARKS NECK ROAD
CITY	4. I O	WASHINGTON
ST/CNTY	5. P	NC
ZIP/PST	6.	27889
COUNTRY	7.	
8. ORDER DATE 07/03/04	14. ORDER TYPE	WARR ..
9. SINGLE/MULTIPLE SHIP DATES (S/M) S	15. SHIP VIA	
10. SHIP DATE 07/03/04 CANCEL	16. FOB	
11. CUST P.O. CHARLES	17. SLMN1	SLMN2 SLMN2 %
12. ORDERED BY CHARLES	18. TERMS	NO \$ TICKET
13. SPECIAL INSTRUCTIONS	19. AR-CUST#	20. STATUS
	21. INTERNAL NOTES	22. FREE FREIGHT

As with the Service Order, there are multiple lookup methods. For this sample, **type C** to look up the customer's trucks.

OE03A CW REALTIME SOFTWARE CORP	ORDER ENTRY	03 Jul 04
CUST# 23006	** ORDER NO. 345963	
NAME WARRANTY, E-ONE	1.	CLARKS NECK VOLUNTEER
ADDR 1	2. S	FIRE DEPARTMENT
ADDR 2	3. H T	5440 CLARKS NECK ROAD
CITY	4. I O	WASHINGTON
ST/CNTY	5. P	NC
ZIP/PST	6.	27889
COUNTRY	7.	
1. ENTER ITEM# OR CROSS REFERENCE	PART#	C
2. ENTER '?' FOR INDEX LOOKUP	SERIAL#	
3. ENTER ' C ' FOR S/N'S FOR CUSTOMER		
4. ENTER 'S' FOR LOOKAT BY SERIAL#		
5. ENTER 'P' FOR LOOKUP BY PARTIAL SERIAL#		

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Always **select 2** for the ship-to. The bill-to is E-One Warranty.

```

OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          03 Jul 04
CUST# 23006                               ** ORDER NO. 345963

      WHICH CUST# WOULD YOU LIKE TO SEE?
      1. BILL-TO CUST# 23006 OR
      2. SHIP-TO CUST# 12740 ?
  
```

Type the sequence number to the left of the truck you are working on. Verify the S/O# to make sure you have selected the correct truck. You can also see the sold date to the right, which is helpful when handling warranty work.

```

OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          03 Jul 04
CUST# 23006                               ** ORDER NO. 345963

CUST NUMBER 12740                          CLARKS NECK VOLUNTEER
                                           S S
SEQ SERIAL#      PART NUMBER      DESCRIPTION  O B ORDER#  INVCE#  INV DATE  ITGP
-----
001 18856        ADD+ENGINE      ENGINE
002 18857        ADD+ENGINE      ENGINE
003 126292       EON+COMPUMP     COMM. PUMPER Y   345042  429482  03/31/03
ENTER (C)HANGE, (P)AGE, (PB) PAGE BACK, SEQ TO SELECT OR * TO EXIT
  
```

If there is already an open service order on the truck you select, you will be informed of this on the screen at this time. This step is to make sure you have not already opened a service order for this particular job. It also helps eliminate duplicate orders. However, it is possible to have more than one order at any given time for a specific truck. **Type Y** to continue. You can always check later to see what the other order is that's open. If duplicates, cancel one of them.

```

OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          03 Jul 04
CUST# 23006                               ** ORDER NO. 345963

NAME      WARRANTY, E-ONE                  1.      CLARKS NECK VOLUNTEER
ADDR 1    2. S      FIRE DEPARTMENT
ADDR 2    3. H T 5440 CLARKS NECK ROAD
CITY      4. I O WASHINGTON
ST/CNTY   5. P      NC
ZIP/PST   6.      27889
COUNTRY   7.

PART#      EON+COMPUMP
SERIAL#    126292

CURRENT END USER : 12740 CLARKS NECK VOLUNTEER
BILL-TO CUSTOMER: 12740 CLARKS NECK VOLUNTEER

IS THIS INFORMATION CORRECT - AND ARE YOU AWARE THAT THERE ARE
1 OPEN SERVICE ORDERS ATTACHED TO THIS PART#*S/N (Y/N)
  
```

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When you get to this screen, notice Line 14 and Line 22. These can be used for warranty orders if you like. Also notice information on the hour meter last time it was in for service work. Finish entering the order the same as you would for a customer's service order.

```
OE03A  CW REALTIME SOFTWARE CORP          ORDER ENTRY          03 Jul 04

CUST # 23006          WARRANTY, E-ONE          SLM1 14  ON ORD    -5,329.38
ORDER# 345963        ORD DT 07/03/04  CR LIMIT          A/R BAL    25,794.47
      TYPE WARR          RENTAL COST%          ORD VAL
PART*SER# EON+COMPUMP*126292          WARRANTY EXPIRE    03/25/04
1. DATE SOLD        03/31/04          14. WARRANTY CLAIM#
2. REPAIR DATE
3. FAILURE DATE    07/03/04          15. VENDOR CREDIT#/DATE
4. HOUR METER      1355          16. CREDIT DUE CUST#/CREDIT#
5. PROMISE DATE
6. $ ESTIMATE
7. QUOTE NUMBER
8. MODEL NAME      COMM. PUMPER          17. HOURS WORKED/BILLED
9. PICKUP?          22. SERVICE AUTH#          18. DOLLARS WORKED/BILLED
10. DELIVER?          23. VENDOR CONTACT
11. SERV CALL?     DISTANCE          24. MISC EXPENSES
12. STATUS        O   TECH      44          COMMENT:
13. BULLETIN#      JOEL TURNAGE
                        'SO' TO VIEW 1 SERVICE ORDERS, 'SB' FOR 0 BULTNS
25. FAILED PARTS          LAST SO HR METER/DATE: 2189 => 05/07/03

ENTER #, A# -ALL, * -VOID, H)DR, C)MNTS, L)ABOR, W)RNTY PRNT, OR RTN -CONT ...
```

SERVICE ORDERS

B. ORDER INQUIRY

Type the **Screen Jump OI** at any menu to inquire on an order. If you know the order number type it in at the Order# prompt.

```
OE12  CW REALTIME SOFTWARE CORP          OPEN ORDER INQUIRY          07 Jul 04
ORDER #  345962
(ENTER 'C' FOR INQUIRY BY CUSTOMER PURCHASE ORDER NUMBER)
(ENTER 'T' FOR INQUIRY BY SERVICE TAG NUMBER)
(ENTER '?' FOR INQUIRY BY ORDER NUMBER)
```

You can also **type a ?** in place of the order# which takes you to an open orders scroll. **Type another ?** here to see which department you want to list first. Select line 6 or S for service. Leave this blank to see all departments.

```
OE07G CW REALTIME SOFTWARE CORP          OPEN ORDERS SCROLL          07 Jul 04
ENTER DEPARTMENT OR '?' TO LOOKUP (NULL = ALL)  ?
```

```
OE07G CW REALTIME SOFTWARE CORP          OPEN ORDERS SCROLL          07 Jul 04
      Display of the OT-DEPT table, by Dept
SQ  Dept  Description
 1  A     APPARATUS
 2  E     EQUIPMENT
 3  F     FUTURE NEW APPARATUS SETUP
 4  N     NEW APPARATUS
 5  P     PARTS & EQPMT
 6  S     SERVICE
(C)HANGE, (P)AGE, (B)ACK, (I)NDEX, (T)OGGLE, (R)ETURN, * TO VOID, SEQ# .....
END OF SEARCH INDEX
```

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You can then see all the service orders that are in process. To the far right you can identify these as service orders by the S. The DP here is for Department. When you find the order you want, **select the sequence number on the left** and you will automatically be taken into the order.

```

OE07G  CW REALTIME SOFTWARE CORP          OPEN ORDERS SCROLL          07 Jul 04
      Display of the OO-XREF table, by Dept
SQ  Order# Cust#  Customer Name          Date          Total          Ship To          DP
 1  345882 23006  WARRANTY, E-ONE        05/07/04     1,215.69     BLACK CREEK FIR S
 2  345884 23006  WARRANTY, E-ONE        05/08/04           0.00     TOWN OF MARION S
 3  345907 23006  WARRANTY, E-ONE        05/08/04     351.65     EMERGENCY ONE, S
 4  345909 23006  WARRANTY, E-ONE        05/08/04     169.00     BETHANY RURAL V S
 5  345911 23006  WARRANTY, E-ONE        05/08/04     321.75     CLARKS NECK VOL S
 6  345916 10560  NEW APPARATUS SALES    05/08/04    21,884.04     TOWN OF ABINGDO S
 7  345924 18470  SALISBURY FIRE DEPAR  05/08/04     466.22     SALISBURY FIRE S
 8  345925 18470  SALISBURY FIRE DEPAR  05/08/04      90.00     SALISBURY FIRE S
 9  345926 14140  FOSCOE FIRE DEPARTME  05/08/04     106.00     FOSCOE FIRE DEP S
10  345927 11650  BEAVER DAM FIRE DEPT  05/08/04     475.00     BEAVER DAM FIRE S
11 345962 14880  HARRELLSVILLE FIRE D  07/03/04     325.00     HARRELLSVILLE F S
12  345963 23006  WARRANTY, E-ONE        07/03/04           0.00     CLARKS NECK VOL S
  
```

(C)HANGE, (P)AGE, (B)ACK, (I)NDEX, (T)OGGLE, (R)ETURN, * TO VOID, SEQ# **11**...
 END OF SEARCH INDEX

Type D to see the quantity and items ordered in detail. **Type T** to go the totals screen. **Type A** for account Distribution. You can also **type O** for other header information to see the invoice number if this order has been completed. **The order status in this case shows that this order is open (O).**

```

OE07G  CW REALTIME SOFTWARE CORP          OPEN ORDERS SCROLL          07 Jul 04

ORDER #  345962
CUST#    14880                               SHIP-TO 001
NAME     HARRELLSVILLE FIRE DEPARTMENT      HARRELLSVILLE FIRE DEPARTMENT
ADDR 1   P O BOX 361                          S  158 JOHNSON AVE
ADDR 2                                       H T
CITY     HARRELLSVILLE                        I O HARRELLSVILLE
ST/CNTY  NC                                  P   NC
ZIP/PST  27942                               27942
COUNTRY

ORDERED BY JASON
ORDER DATE 07/03/04                          TERMS      30          TECH: 45
SINGLE/MULTIPLE SHIP DATES (S/M) S          ORDER TYPE SERV    STAT: O
SHIP DATE  07/03/04                          SHIP VIA   UPS GROUND
CUST P.O.  JASON                               FOB
SPECIAL INSTRUCTIONS                          SLMN1 14  SLMN2 15  SLMN2 %
OVERWRITE LINE ITEM TAX CD
QUOTE#                                         P/O#
A/R CUSTOMER#

(S)ERVICE, (L)ABOR, (M)ANIFEST, (U)SER HIST          ORDER STATUS O
ENTER * FOR NEXT ORDER, PI/PO TO PAGE INSTR/ORDER NOTES, (A)CCT DIST.
(D)ETAIL LINES, (T)OTALS, RTN FOR NEXT ORDER, (O)THER HEADER INFORMATION ..
  
```

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From the detail screen, you have the option to **type S** for service information or **L** for labor information.

OE12		CW REALTIME SOFTWARE CORP		OPEN ORDER INQUIRY		07 Jul 04	
CUST # 14880*001		HARRELLSVILLE FIRE DEPART		SLM1 14	ON ORD	325.00	
ORDER# 345962		ORD DT 07/03/04		CR LIMIT	A/R BAL		
					ORD VAL	325.00	
SEQ	QTY	ITEM/MISC	ORD QTY TO	QTY	PRICE	EXTENSION	
	ORD'D	DESCRIPTION	UOM	SHIP SHIPPED			
001	01	1 LAB,SUPPLIES	EA	1	0.00000	0.00	
		MISC. SERV. SUPPLIES					
002	01	1 LAB,C45	EA	1	325.00000	325.00	
		CUSTOMER LABOR, GH					
ENTER * FOR NEXT ORDER, P)AGE, PN TO SEARCH PART#, S)ERVICE, L)ABOR, T)OTALS M)ANIFEST, SEQ FOR DISPLAY, RTN TO REDISPLAY HEADER ...							

Service Screen

OE12		CW REALTIME SOFTWARE CORP		OPEN ORDER INQUIRY		07 Jul 04	
CUST # 14880		HARRELLSVILLE FIRE DEPART		SLM1 14	ON ORD	325.00	
ORDER# 345962		ORD DT 07/03/04		CR LIMIT	A/R BAL		
					ORD VAL	325.00	
PART# ADD+ENGINE		SERIAL# 158353					
DATE SOLD		WARRANTY CLAIM#					
REPAIR DATE		VENDOR CREDIT#/DATE					
FAILURE DATE 07/03/04		CREDIT DUE CUST#/CREDIT#					
HOUR METER 15353		HOURS WORKED/BILLED		5.00	5.00		
PROMISE DATE		DOLLARS WORKED/BILLED		325.00	325.00		
\$ ESTIMATE		PARTS FILED/RECEIVED					
QUOTE NUMBER		LABOR FILED/RECEIVED					
MODEL NAME ENGINE		SERVICE AUTH#		SERVICE TAG#			
PICKUP?		VENDOR CONTACT					
DELIVER?		MISC EXPENSES					
SERV CALL? DISTANCE							
IN SHOP? O TECH 45							
BULLETIN#		'SO' TO VIEW 1 SERVICE ORDER(S), 'SB' FOR 0 BULTN(S)					
FAILED PARTS							
ENTER * -VOID, M)ANFST, C)MNTS, L)BR, T)TLS, D)ETL, W)RTY PRINT, RTN -HEADR ...							

Choosing the Comments screen will take you to the same Comments Maintenance screen

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This display is nearly identical to the one explained in the Entry screen. The difference is that you do not have the option to call up a repair. Instead all the text entered will be displayed in the Comments section in the middle of the screen.

```

OE12   CW REALTIME SOFTWARE CORP           OPEN ORDER INQUIRY           07 Jul 04

CUST # 14880                HARRELLSVILLE FIRE DEPART  SLM1 14  ON ORD           0.00
ORDER# 345944              ORD DT 10/07/04  CR LIMIT           A/R BAL
                                           ORD VAL           0.00
PART# ADD+ENGINE          SERIAL# 158353              WARRANTY

R#   TYPE   COMMENT TEXT
--   -
1    COMPL  FIX OIL LEAK
1    CAUSE  The customer thinks it may be related to the rough terrain they had
           to drive through recently.

                                           ENTER P TO PAGE REPAIR COMMENTS

6. SERVICE TEXT CODES TO BE PERFORMED

7. SERVICE TEXT CODES COMPLETED

ENTER NUMBER, * OR RTN TO GO BACK TO PREV SCREEN
    
```

Labor Screen

```

OE12   CW REALTIME SOFTWARE CORP           OPEN ORDER INQUIRY           07 Jul 04

CUST # 14880                HARRELLSVILLE FIRE DEPART  SLM1 14  ON ORD           325.00
ORDER# 345962              ORD DT 07/03/04  CR LIMIT           A/R BAL
                                           ORD VAL           325.00

SEQ T DATE    EMPL#   I LAST NAME    HOURS    PRICE    COST    START STOP  JOB
-----
001 07/07/04  45    G HIGH         2.00    130.00   32.00  08:30 10:30 001
002 07/07/04  45    G HIGH         3.00    195.00   48.00  01:00 04:00 001
           ** TOTALS **    5.00    325.00   80.00

ENTER * FOR NEXT INVOICE, P)AGE DETAIL, S)ERVICE, M)ANIFEST,
T)OTALS, D)ETAIL LINES, RTN TO REDISPLAY HEADER           ...
    
```

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Totals Screen

OE12 CW	REALTIME SOFTWARE CORP	OPEN ORDER INQUIRY	07 Jul 04
CUST # 14880	HARRELLSVILLE FIRE DEPART	SLM114 ON ORD	325.00
ORDER# 345962	ORD DATE 07/03/04	CR LIMIT A/R BAL	
	TERMS 30	0.000% ORD VAL	325.00
PRODUCT TOTAL	325.00	LINE ITEM TAX AMOUNT	0.00
DISCOUNT (\$/%) \$	0.00	DISCOUNTABLE AMOUNT	0.00
		-TAXABLE-- TAX	
FREIGHT		ORDER LINE CODE RATE%	TAX AMT
MISCELLANEOUS		Y	
MINIMUM ORDER CHG			
ORDER TAX AMOUNT	0.00	T 7.000% (%/\$)	\$ 0.00
TOTAL TAX AMOUNT	0.00		
ORDER TOTAL	325.00	** PRODUCT TOTAL INCLUDES **	
		BROKEN PKG CHARGES	
		TOTAL OTHER MISC	
ENTER F)UTURE DATING, S)ERVICE, L)ABOR, M)ANIFEST			
ENTER * FOR NEXT ORDER, D)ETAIL LINES, RTN TO REDISPLAY HEADER .			

To inquire on a quote, type **Screen Jump QI** and enter the quote number. The rest of the inquiry screen will be the same as regular sales orders inquiry.

You can also start in the Customer Inquiry (**CI**) program to find orders or quotes for a specific customer and then go out to order or quote inquiry from there.

You can also start in the Serial Inquiry (**SI**) program to find orders linked to a specific serial number (S/O#), and then go out to order inquiry from there.

You can also start in the Inventory Inquiry (**II**) program to find orders on a specific item number and then go out to the order inquiry from there.

SERVICE ORDERS

C. ORDER ADJUSTMENTS

Type the **Screen Jump OA** to adjust or make changes to an existing order, or to print a pick ticket. **Type the order #** at the prompt.

```
OE07A  CW REALTIME SOFTWARE CORP          OPEN ORDER ADJUSTMENTS          07 Jul 04
ORDER#  345962
(ENTER '?' TO ENTER/LOOKUP BY OPEN ORDER#)
(ENTER 'T' TO ENTER/LOOKUP BY SERVICE TAG#)
```

If you just need to print a ticket, **type I** and it will print and return you to a menu. Any of the fields with a prompt number to the left can be changed at this screen. When finished **ENTER** to continue.

```
OE07A  CW REALTIME SOFTWARE CORP          OPEN ORDER ADJUSTMENTS          07 Jul 04
ORDER#  345962
CUST#   14880                               SHIP-TO 001
NAME    HARRELLSVILLE FIRE DEPARTMENT     1.    HARRELLSVILLE FIRE DEPARTMENT
ADDR 1  P O BOX 361                        2. S  158 JOHNSON AVE
ADDR 2                                     3. H T
CITY    HARRELLSVILLE                      4. I O HARRELLSVILLE
ST/CNTY NC                                5. P   NC
ZIP/PST 27942                              6.    27942
COUNTRY                                     7.
SINGLE/MULTIPLE SHIP DATES (S/M) S
8. ORDER DATE 07/03/04                    13. TERMS 30          NO $ TICKET
9. SHIP DATE 07/03/04 CANCEL              14. ORDER TYPE SERV  OPEN/45
10. CUST P.O. JASON                        15. SHIP VIA  UPS GROUND
11. ORDERED BY JASON                       16. FOB
12. SPECIAL INSTRUCTIONS                   17. SLMN1 14  SLMN2 15  SLMN2 %
                                           18. OVERRIDE LINE ITEM TAX CD
                                           19. A/R-CUSTOMER#
                                           20. FREE FREIGHT      21. STATUS O
                                           OPEN TICKETS
ENTER LINE#, * TO VOID, (DEL) TO DELETE, (T)OTALS, (CAN) TO CANCEL,
S TO POST/SPOOL, I TO POST/PICK, RTN TO CONTINUE          ...
```

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Any of the fields on this service screen can be changed. To add comments, **type C** and **ENTER**.

OE07A	CW REALTIME SOFTWARE CORP	ORDER ADJUSTMENTS	07 Jul 04
CUST # 14880	HARRELLSVILLE FIRE DEPART	SLM1 14 ON ORD	705.23
ORDER# 345962	ORD DT 07/03/04 CR LIMIT	A/R BAL	
TYPE SERV	RENTAL COST%	ORD VAL	325.00
PART*SER#	ADD+ENGINE*158353	WARRANTY EXPIRE	
1. DATE SOLD	14. WARRANTY CLAIM#		
2. REPAIR DATE	15. VENDOR CREDIT#/DATE		
3. FAILURE DATE 07/03/04	16. CREDIT DUE CUST#/CREDIT#		
4. HOUR METER 15353	17. HOURS WORKED/BILLED 5.00	5.00	
5. PROMISE DATE	18. DOLLARS WORKED/BILLED 325.00	325.00	
6. \$ ESTIMATE	19. PARTS FILED/RECEIVED		
7. QUOTE NUMBER	20. LABOR FILED/RECEIVED		
8. MODEL NAME ENGINE	21. SERVICE TAG#		
9. PICKUP?	22. SERVICE AUTH#		
10. DELIVER?	23. VENDOR CONTACT		
11. SERV CALL? DISTANCE	24. MISC EXPENSES		
12. STATUS 0 TECH 45	COMMENT:		
13. BULLETIN#	GREG HIGH		
	'SO' TO VIEW 1 SERVICE ORDERS, 'SB' FOR 0 BULTNS		
25. FAILED PARTS	LAST SO HR METER/DATE: =>		
ENTER #, A# -ALL, * -VOID, H)DR, C)MNTS, L)ABOR, W)RNTY PRNT, OR RTN -CONT ...			

The first four sections will print on the customer's invoice. You will always want the complaint filled out, you may not always use the cause except for warranty situations, and you always want the cure for the problem before billing a service order.

OE07A	CW REALTIME SOFTWARE CORP	ORDER ADJUSTMENTS	07 Jul 04
CUST # 14880	HARRELLSVILLE FIRE DEPART	SLM1 14 ON ORD	705.23
ORDER# 345962	ORD DT 07/03/04 CR LIMIT	A/R BAL	
TYPE SERV	RENTAL COST%	ORD VAL	325.00
PART*SER#	ADD+ENGINE*158353	WARRANTY EXPIRE	
1. SERVICE COMMENTS (COMPLAINT)	FIX ENGINE OIL LEAK		
2. SERVICE CONDITION (CAUSE)			
3. SERVICE CORRECTION (CURE)			
4. ADDITIONAL COMMENTS			
5. REASON FOR OVERRIDE OF LABOR COMMENTS			
6. SERVICE TEXT CODES TO BE PERFORMED			
7. SERVICE TEXT CODES COMPLETED			
ENTER NUMBER, * OR RTN TO GO BACK TO PREV SCREEN ..			

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As you have noticed, the previous screen is for a normal Service Repair. If it were a Multiple Repair Type, you would see the following screen.

Just like with the Normal Repair, the comment fields will print on the Customer's Invoice. The Order Type itself has a flag to determine whether the line items will print in sequence order, or in Repair # Order.

OE07A CW REALTIME SOFTWARE CORP		OPEN ORDER ADJUSTMENTS		07 Jul 04	
CUST # 14880	HARRELLSVILLE FIRE DEPART	SLM1 14	ON ORD	0.00	
ORDER# 345944	ORD DT 10/07/04	CR LIMIT	A/R BAL		
TYPE SERVM	RENTAL COST%		ORD VAL	0.00	
PART*SER#	ADD+ENGINE*158353		WARRANTY EXPIRE		
R#	TYPE	COMMENT TEXT	LAST REPAIR# ENTERED 1		

1	COMPL	FIX OIL LEAK			
1	CAUSE	The customer thinks it may be related to the rough terrain they havd to drive through recently.			
ENTER R# TO MAINTAIN A REPAIR, OR P TO PAGE REPAIR COMMENTS					
A. SERVICE TEXT CODES TO BE PERFORMED					
B. SERVICE TEXT CODES COMPLETED					
ENTER NUMBER, * OR RTN TO GO BACK TO PREV SCREEN ...					

At the detail screen, you can change quantities and item numbers, or add new lines the same as you would while in order entry. Notice line 2 in this example is for customer labor. **You should Never change the QTY on a Labor Line.** This amount is updated every time labor is posted to the order. The dollar amount can be changed with this screen before closing a service order. You may not be able to charge the customer as much time as what was worked. Or you may be able to charge them more than the time that was worked. If the amount is changed, it will only affect this line item. The labor screen will still show the total time entered for this job. **ENTER** at the change line to go to the final totals screen.

OE07A CW REALTIME SOFTWARE CORP		OPEN ORDER ADJUSTMENTS		07 Jul 04		
CUST # 14880*001	HARRELLSVILLE FIRE DEPART	SLM1 14	ON ORD	705.23		
ORDER# 345962	ORD DT 07/03/04	CR LIMIT	A/R BAL			
SITE # 01			ORD VAL	325.00		
REM						
SEQ	QTY	ITEM NO.	ORD	QTY TO	PRICE	EXTENSION
		ORD'D DESCRIPTION	UOM	SHIP		
001	1	LAB,SUPPLIES	EA	1	0.00000	0.00
	RPR# 1	MISC. SERV. SUPPLIES		BIN#		
002	1	LAB,C45	EA	1	325.00000	325.00
	RPR# 1	CUSTOMER LABOR		BIN#		
ENTER SEQ TO CHANGE, (H)EADER, (P)AGE, * TO VOID, RTN TO CONTINUE ...						

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The **RPR#** field is only present when dealing with a Multiple Repair Type.

OE07A CW REALTIME SOFTWARE CORP	OPEN ORDER ADJUSTMENTS	07 Jul 04
CUST # 14880*001	HARRELLSVILLE FIRE DEPART SLM1 14 ON ORD	705.23
ORDER# 345962	ORD DT 07/03/04 CR LIMIT A/R BAL	
	TERMS 30 0.000% ORD VAL	325.00
PRODUCT TOTAL	325.00	
2. DISCOUNT (\$/%)	\$ 0.00	
	DISCOUNTABLE AMOUNT	325.00
	-TAXABLE-- TAX	
	ORDER LINE CODE RATE%	TAX AMT
3. FREIGHT	Y	
4. MISCELLANEOUS		
5. MINIMUM ORDER CHG		
6. ORDER TAX AMOUNT	0.00 T 7.000 (%/\$)	\$ 0.00
TOTAL TAX AMOUNT	0.00	
ORDER TOTAL	325.00	

ENTER (F)UTURE DATING, (L)INE#, (H)EADER, (B)ILL, (C)ASH
 (D)ETAIL, (M)IN ORDER CHECK, * TO VOID, S TO POST/SPOOL, I TO POST/PICK .

Make any changes as needed here. Then **type S** to save or **I** to print pick ticket.

If a purchase order is attached to a sales order, you will see a slightly different screen after typing in the order number. It's just a warning that there is a PO link and to be careful with changes to the order. **Type Y** to acknowledge and continue.

OE07A CW REALTIME SOFTWARE CORP	OPEN ORDER ADJUSTMENTS	07 Jul 04
ORDER# 345962		
CUST# 14880	SHIP-TO 001	
NAME HARRELLSVILLE FIRE DEPARTMENT	1. HARRELLSVILLE FIRE DEPARTMENT	
ADDR 1 P O BOX 361	2. S 158 JOHNSON AVE	
ADDR 2	3. H T	
CITY HARRELLSVILLE	4. I O HARRELLSVILLE	
ST/CNTY NC	5. P NC	
ZIP/PST 27942	6. 27942	
COUNTRY	7.	
SINGLE/MULTIPLE SHIP DATES (S/M) S		
8. ORDER DATE 07/03/03		
9. SHIP DATE 07/03/04 CANCEL	14. ORDER TYPE SERV NOPEN/45KET	

ORDER IS ATTACHED TO P/O# 136877 'Y' TO ACKNOWLEDGE **Y**
 *** **CHANGES TO SALES ORDER CAN CORRUPT LINKS TO P/O** ***

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To **adjust a quote** type the **Screen Jump QA** at any menu. The screens will be the same as order adjustments.

```
CQ07A  CW REALTIME SOFTWARE CORP          OPEN QUOTE ADJUSTMENTS          30 Jun 04

ORDER#  112244
CUST#   13270                               SHIP-TO
NAME    DARLINGTON VOLUNTEER              1.  DARLINGTON VOLUNTEER
ADDR 1  FIRE DEPARTMENT                   2.  S  FIRE DEPARTMENT
ADDR 2  2611 HEDGEPEETH ROAD              3.  H T 2611 HEDGEPEETH ROAD
CITY    HALIFAX                           4.  I O HALIFAX
ST/CNTY NC                               5.  P  NC
ZIP/PST 27839                             6.    27839
COUNTRY                                7.
SINGLE/MULTIPLE SHIP DATES (S/M) S
8. QUOTE DATE 06/30/04                   13. TERMS 30          NO $ TICKET
9. SHIP DATE 06/30/04 CANCEL              14. QUOTE TYPE SQ
10. CUST P.O.                             15. SHIP VIA  UPS GROUND
11. ORDERED BY                             16. FOB
12. SPECIAL INSTRUCTIONS                   17. SLMN1 11  SLMN2 15  SLMN2 %
                                           18. OVERRIDE LINE ITEM TAX CD
                                           19. A/R-CUSTOMER#
                                           20. FREE FREIGHT      21. STATUS

ENTER LINE#, * TO VOID, (DEL) TO DELETE, (T)OTALS, (CAN) TO CANCEL,
(R)ELEASE, S TO POST/SPOOL, I TO POST/PICK, RTN TO CONTINUE      ...
```

Again, the only difference with quotes is the second screen has the contact information, which you can change if needed.

```
CQ07A  CW REALTIME SOFTWARE CORP          QUOTE ENTRY          30 Jun 04

CUST # 13270          DARLINGTON VOLUNTEER          SLM1 11  ON ORD
QUOTE# 112244          QUO DT 06/30/04  CR LIMIT          A/R BAL          0.00
                                           QUO VAL          390.75

1. NAME  DARLINGTON VOLUNTEER          13. CONTACT#
2. ADDR 1 FIRE DEPARTMENT              14. MR/MS
3. ADDR 2 2611 HEDGEPEETH ROAD          15. F-NAME          JOHN
4. CITY  HALIFAX                       16. M-INIT
5. STATE NC                             17. L-NAME          FOR
6. ZIP  27839                            18. TITLE           FIRE CHIEF
7. INTRO
8. STATUS
9. QUOTE NOTES

13. CONTACT#
14. MR/MS
15. F-NAME          JOHN
16. M-INIT
17. L-NAME          FOR
18. TITLE           FIRE CHIEF
19. F/B TEXT
20. PACKAGE
21. LEASE CODE

ENTER LINE#, (A#) FOR ALL, * TO VOID, (H)EADER, OR RTN TO CONTINUE      ...
```

If you want to **convert a service quote to a sales order**, at the first (or header) screen, **select Line 14** and **change the order type** to the correct one for a sales order. You can type ? to display all order types. SQ is only for quotes. Then **type R** to release. If you need additional instructions, refer to the previous section on Sales Orders, Section D.

SERVICE ORDERS

D. CUSTOMER CHANGE

If you have an open service order that was entered with the wrong customer number, you can change it by typing the **Screen Jump COC** for customer order change. Or perhaps the job started as a customer pay, but turned into a warranty. Then the bill-to would need to change to a warranty customer. **Type the order number** at the prompt.

```
OE07D  CW REALTIME SOFTWARE CORP          OPEN ORDER CUSTOMER CHANGE    30 Jun 04
ORDER#  345358
```

Type C to change the customer. You will be taken up to the customer number and you can either search with a ?? and name or type the customer number in. Then you will be taken to the ship-to. In this case the ship-to is the customer we originally had as the bill-to but we are now going to bill for warranty.

```
OE07D  CW REALTIME SOFTWARE CORP          OPEN ORDER ADJUSTMENTS       07 Jul 04
ORDER#  345358
CUST#   12730                               SHIP-TO
NAME    CIVIETOWN FIRE DEPARTMENT          1.
ADDR 1  P O BOX 146                         2. S
ADDR 2                                     3. H T
CITY    SHALLOTTE                           4. I O
ST/CNTY NC                                 5. P
ZIP/PST 28459                               6.
COUNTRY                                     7.
SINGLE/MULTIPLE SHIP DATES (S/M) S

ORDER DATE 04/16/04                          TAX CODE    T
SHIP DATE  04/16/04 CANCEL                    TERMS      30
CUST P.O.  TANK UPF                          ORDER TYPE  SERV
SPECIAL INSTRUCTIONS                        SHIP VIA   UPS GROUND
FOB
SLMN1 15   SLMN2 40   SLMN2 %
OVERRIDE LINE ITEM TAX CD
A/R-CUSTOMER#
OPEN TICKETS

ENTER LINE#, * TO VOID, (C)USTOMER#,
R TO REPRICE, S TO POST/SPOOL, I TO POST/PICK
```

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You will then be asked if you want to re-price the order. If you've given the customer a special pricing different than regular pricing, then don't re-price. You will use this option more with an order that was first entered under the customer, but then turned into a warranty. Warranty pricing is generally different than customer pricing. **Type Y** if you want to re-price, then **S** to save or **I** to print.

OE07D	CW REALTIME SOFTWARE CORP	OPEN ORDER ADJUSTMENTS	07 Jul 04
ORDER#	345358		
CUST#	23006	SHIP-TO	
NAME	WARRANTY, E-ONE	1.	CIVIETOWN FIRE DEPARTMENT
ADDR 1		2.	S P O BOX 146
ADDR 2		3.	H T
CITY		4.	I O SHALLOTTE
ST/CNTY		5.	P NC
ZIP/PST		6.	28459
COUNTRY		7.	
SINGLE/MULTIPLE SHIP DATES (S/M) S			
ORDER DATE	04/16/04	TAX CODE	
SHIP DATE	04/16/04 CANCEL	TERMS	
CUST P.O.	TANK UPF	ORDER TYPE	SERV
SPECIAL INSTRUCTIONS		SHIP VIA	UPS GROUND
		FOB	
		SLMN1	SLMN2 40 SLMN2 %
		OVERVERRIDE LINE ITEM TAX CD	
		A/R-CUSTOMER#	
		OPEN TICKETS	
CUSTOMER# CHANGED, DO YOU WANT TO RE-PRICE (Y/N)?			Y

If changing from a customer service order to a warranty service order, it is very important to use the correct order type. When changing a customer number as just described, you will not be able to change the order type from that screen. Type the **Screen Jump OA** and change line **14** to **WARR** or other applicable warranty order type. You can use the ? to find the right one. **ENTER** to get back to the change line. Then type **S** to save. **Do not forget this step – if you don't save, the Order Type will NOT change..**

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```
OE07A  CW REALTIME SOFTWARE CORP          OPEN ORDER ADJUSTMENTS          07 Jul 04

ORDER#   345358
CUST#    23006                               SHIP-TO
NAME     WARRANTY, E-ONE                     1.   CIVIETOWN FIRE DEPARTMENT
ADDR 1                                       2. S   P O BOX 146
ADDR 2                                       3. H T
CITY     4. I O SHALLOTTE
ST/CNTY  5. P   NC
ZIP/PST  6.   28459
COUNTRY  7.

SINGLE/MULTIPLE SHIP DATES (S/M) S
8. ORDER DATE 04/16/04                     13. TERMS                NO $ TICKET
9. SHIP DATE  04/16/04 CANCEL              14. ORDER TYPE  WARR..  OPEN/44
10. CUST P.O. TANK UPF                     15. SHIP VIA    UPS GROUND
11. ORDERED BY                               16. FOB
12. SPECIAL INSTRUCTIONS                    17. SLMN1        SLMN2 40   SLMN2 %
                                           18. OVERRIDE LINE ITEM TAX CD
                                           19. A/R-CUSTOMER#
                                           20. FREE FREIGHT      21. STATUS O
                                           OPEN TICKETS

ENTER LINE#, * TO VOID, (DEL) TO DELETE, (T)OTALS, (CAN) TO CANCEL,
S TO POST/SPOOL, I TO POST/PICK, RTN TO CONTINUE
```

14

SERVICE ORDERS

E. EMPLOYEE MAINTENANCE

In order to enter time against a mechanic an employee record must be on file. To set up a new employee an existing employee record will normally be copied over. To get to Employee Maintenance users can enter "EM" for employee maintenance from any menu. The following screen will then display. You can either pull up an existing employee or enter COPY to create a new one.

```
EM01    CW C.W. Williams                EMPLOYEE MAINTENANCE                09 Oct 04

EMPLOYEE NO    COPY..                (ENTER # OR ? FOR EMPLOYEE LOOKUP)
                                           (Enter COPY to copy from another employee)
```

```
COPY CW    C.W. Williams                MASTER COPY - EMPLOYEE

COPY FROM EMPLOYEE    47                Enter * at COPY FROM to exit

COPY TO EMPLOYEE    99.....                Enter * at 'COPY TO' to return
                                           to 'COPY FROM' prompt
```

```
EM01    CW C.W. Williams                EMPLOYEE MAINTENANCE                09 Oct 04

EMPLOYEE NO    99                LAST MAINTENANCE

1. FIRST NAME    MARGARET
2. MIDDLE NAME
3. LAST NAME    HOBBS
4. LABEL        MARGARET HOBBS
5. ADDRESS 1
6. ADDRESS 2
7. CITY
8. STATE/COUNTY
9. ZIP/POST CD
10. COUNTRY
11. SOC. SEC. NO. 111-11-1111
12. HOME PHONE
13. WORK PHONE
14. EXTENSION
15. NATIONAL ORIGIN
16. SEX (M/F)    M

17. LEGAL MARITAL STATUS
18. BIRTH DATE    11/11/11
19. ORIGINAL HIRE DATE    01/11/11
20. MOST RECENT HIRE DATE    01/11/11
21. SENIORITY DATE
22. COMPANY OFFICER (Y/NULL)
23. DIVISION MGR. (Y/NULL)
24. PENSION PLAN (Y/NULL)

ENTER #, W)AGES SCREEN, * TO VOID, PH) PAY HISTORY, C)OPY TO NEW EMP#
I)NDEX, N)EXT, P)REV, (DEL)ETE, ^ TO POST, RTN TO CONTINUE W..
```

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The employee file on the screen above is also used for payroll. For mechanics and labor entry most of the above fields are not relevant. The “**W**” for wages screen has some fields of importance.

EM01	CW C.W. Williams	EMPLOYEE MAINTENANCE	09 Oct 04
		(ENTER RESPONSE OR ? FOR TABLE LOOKUP)	
	EMPLOYEE NO 99	MARGARET HOBBS	
1.	JOB CODE	001	CUSTOMER LABOR
2.	DEPARTMENT	001	DEPARTMENT 1
3.	COST/WORK CENTER	001	COST CENTER 001
4.	EMP STATUS		
5.	PAY TYPE (H/S)	H	7A. O/H RATE 35.00
6.	PAY FREQ (W/B/S/M)	B	10. EIC
7.	PAY RATE	28.00	11. STATE WORKS IN NC
8.	JOB TICKETS (Y/NULL)	Y	12. EMPLOYEE SHIFT 1
9.	TERMINATION CODE	DATE	13. HIGH/LOW FLAG
		FEDERAL	STATE
	TAX CODE	FD	17.
	TAX MARITAL STATUS	14.	18.
	NO. EXEMPTIONS	15.	19.
	ADDITIONAL W/H	16.	20.
			21.
			22.
			23.
			24.
			25.
			26.
			27.
			28.
			29.
			SDI
30.	FICA EXEMPT (Y/NULL)		32. SUTA EXEMPT (Y/NULL)
31.	FUTA EXEMPT (Y/NULL)		33. OVERTIME EXEMPT (Y/NULL)
ENTER #, E)MPLYEE, D)EDCTN, PH) PAY HIST, * -VOID, ^ -POST, RTN TO CONT ..			

On the screen above, prompt 8 must be set to “Y” in order to apply labor to a mechanic. If you are going to have accumulated labor go into a WIP G/L account then prompts 7 and 7A will be the amount of money that will go into WIP per hour worked. The employees pay rate plus the Overhead rate will determine the WIP amount.

At the change line users can post the employee record.

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1. INVENTORY MAINTENANCE

Item numbers are used in the system to accumulate labor on orders. Item numbers used for labor need to be “flagged” as labor type item numbers. If you go into Inventory Maintenance by typing in IM you can maintain existing item numbers or copy them over to new numbers. **IM** will take you to the following screen.

```
IN02A  CW C.W. Williams                INVENTORY MAINTENANCE          09 Oct 04

ITEM NUMBER  LAB,C001.....

Enter ITEM number or
'?' + DESCRIPTION to search for similar-sounding names or
'??'+ DESCRIPTION to search for partial EXACT spelling of a Description
'?:'+ ITEM NUMBER to see an INDEX By Item number
'?;'+ DESCRIPTION to see an INDEX By Description

Enter COPY to copy an existing Item to a new Item#

Enter PL to scroll through the Product Line Table
```

On the following screen you can enter “A” for additional information.

```
IN02A  CW C.W. Williams                INVENTORY MAINTENANCE          09 Oct 04

ITEM NUMBER  LAB,C001

1. DESCRIPTION CUSTOMER LABOR
2. PROD GROUP 20 STOCK UOM EA  18. XREF NUMBER C001  ++
3. TYPE          POR          19. SHELF LIFE (DAYS)
4. COST              0.00000    20. GROUP PRICE ID
5. PRICE
6. MSRP              0.00000    21. PRODUCT CODE
7. LAST COST        56.59000    22. WEIGHT
8. PRICE DISC CODE  LAB          23. ORDER NON-TAX (Y/NULL)  Y
9. PRICE CALC CODE  LAB          24. NLA FLAG/DATE
10. CATEGORY/COMMODITY L      25. MAKE/BUY CODE
11. PACKAGE QTY
12. STATUS
13. ABC CLASS
14. CATALOG
15. PRIMARY VENDOR  10717      26. MFG PART TYPE          MAKE-TO-ORDER
16. LEAD TIME      OFFSET      27. MATL MOVE CODE
17. INACTIVE FLAG
18. XREF NUMBER C001  ++
19. SHELF LIFE (DAYS)
20. GROUP PRICE ID
21. PRODUCT CODE
22. WEIGHT
23. ORDER NON-TAX (Y/NULL)  Y
24. NLA FLAG/DATE
25. MAKE/BUY CODE
26. MFG PART TYPE          MAKE-TO-ORDER
27. MATL MOVE CODE
28. ORDER POLICY CD
29. PLANNER CODE
30. SHRINK FACTOR
31. CARRY RATE
32. REPLACED BY PART
33. BIN/LOT/SERIAL FLAG
ENTER S)ITE MAINT. & POST ABOVE DATA, C)ONVERSION FACTOR MAINT., O)PTIONS
ENTER#, * - VOID, D)ELETE, N)EXT, P)REVIOUS, I)NDEX, ^ OR RTN - POST  A.
```

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Prompt 20 on the next screen needs to have a value in order to link labor to this item number. This field can have a value of "L" for labor or "F" for flat rate labor. "L" for labor will have the system accumulate dollars to the sales order based on the amount of time worked. "F" for flat rate will be for item numbers where a fixed selling price is established for labor, regardless of how much time it takes the mechanic to do the work.

IN02A	CW C.W. Williams	INVENTORY MAINTENANCE	09 Oct 04
ITEM NUMBER	LAB,C001	CUSTOMER LABOR	STOCK UOM EA
1. ITEM GROUP		LAST DATE	05/30/03
2. INBOUND FREIGHT		CREATE DATE	05/30/03
3. SETUP TIME			
4. SETUP AMOUNT		17. WARRANTY DAYS	
5. MANUAL COST		18. EXTENDED WARR ADD DAYS	
6. IGNORE REBATES Y/N ?		TOTAL WARRANTY DAYS ==>	0
7. REBATE AMOUNT			
8. REBATE ORDER-TYPE		19. EXTENDED WARRANTY AMT	
9. REBATE CUSTOMER#		20. LABOR PART (L/F/NULL)	L
10. PRICE BOOK AMOUNT		21. NO BATCH BILLING	
11. PRICE BOOK PAGE			
12. PRICE BOOK MODEL			
13. COMPETITOR CATALOG			
14. COMPETITOR ITEM#			
15. COMPETITOR PRICE			
16. RETURN CODE			
ENTER LINE TO CHANGE, * TO VOID, ^ OR RTN TO CONTINUE			...

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2. JOB CODE TABLE

The Job Code Table is used to setup labor 'categories' to be performed or tracked in the system. Each Job Code can be flagged with the following parameters. Inactive - yes/no, minimum / maximum salary rates specified, Labor and Setup charge rates, and whether the code is to be considered for Internal or External use

JC01	CW C.W. Williams	JOB CODE MAINTENANCE	09 Oct 04
	JOB CODE 001		
			*** EXISTING ITEM ***
1.	DESCRIPTION CUSTOMER LABOR		
2.	INACTIVE (Y/NULL)		
3.	W/COMP RATE		
4.	MAX W/COMP YTD GROSS		
5.	MINIMUM SALARY	0.00	
6.	MAXIMUM SALARY	99.00	
7.	CURRENT LABOR RATE/HR	65.00	
8.	CURRENT SETUP RATE/HR	0.00	
11.	JOB FLAG (I)NTERNAL, (E)XTERNAL	E	
ENTER LINE #, * TO VOID, D)ELETE, I)NDEX, N)EXT, P)REV., ^ OR RTN TO POST ..			

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3. EMPLOYEE JOB CODE TABLE

The Employee Job Code Table will determine the item number that gets added to the order based on a combination of the employee number and job code worked. The table is under Labor Company Maintenance. The employee number can be left blank so that all employees “share” the same part number for a job code.

```
EJCl CW C.W. Williams                EMPLOYEE JOB CODE MAINT.        09 Oct 04
```

```
EMPLOYEE #                            JOB CODE  001
                                      CUSTOMER LABOR
1. PART#          LAB,C001             CUSTOMER LABOR
2. LABOR RATE OVERRIDE FLAG (Y/NULL)
3. LABOR RATE PER HOUR
```

```
ENTER LINE TO CHANGE, * TO VOID, D TO DELETE, ^ OR RTN TO POST
ENTER (I)NDEX, (N)EXT, (P)REVIOUS EMPLOYEE JOB CODE INFO.      .
```

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E. POSTING OR CLOCKING TIME

There are two ways to post a technician's time to a service order. It can be posted manually by the service department from a time card showing the time worked and the applicable order number. You can also have a computer designated for the technicians to clock in and out of the jobs themselves during the day. Some service departments use a combination of both. Their in-house techs clock in and out and their outside techs submit their time and order numbers to be posted manually since they're out on the road most of the time.

1. POSTING TIME MANUALLY

At the Business Control Programs menu, **select 11** for Labor Distribution and 2 for Job Ticket Processing.

SCREEN CW REALTIME SOFTWARE CORP	Business Control Programs	07 Jul 04
10 CWW		DS
SBCP	ENTER SELECTION NUMBER: 11	13:01:59
HS		
FUNCTION	NMBR	DESCRIPTION
	0	Select Printer
	1	Initialize Applications Processing
	2	Inventory (Finished Goods)
	3	Order Entry
	4	Billing
	5	Accounts Receivable
	6	Sales Analysis
	7	Purchase Order
	8	Vendor Rating System
	9	Accounts Payable
	10	Payroll
	11	Labor Distribution
	12	General Ledger Interface
	13	General Ledger
	14	Direct Mail (Labels)
	15	Master File Audit Reports
	16	Serial Number Tracking

SCREEN CW REALTIME SOFTWARE CORP	Labor Distribution	07 Jul 04
10 CWW		DS
SL/D	ENTER SELECTION NUMBER:	13:08:41
HS		
FUNCTION	NMBR	DESCRIPTION
	0	Select Printer
Company	1	Company Processing
Job Tickets	2	Job Ticket Processing
	3	Daily Job Ticket Report
	4	Job Ticket Balancing With Payroll
	5	Missing Job Tickets Report
	6	Job Ticket Balancing Errors Report
	7	Job Ticket Review Report
	8	Department Job Ticket Recap Report
	9	Period End Job Ticket Update
History	10	Job Ticket History Processing
Reports	11	Job Ticket Reports

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You can also **type SLD02** at any menu to reach this screen instead of navigating the different menus. **Select line 1 to enter time manually.** There also may be a **Screen Jump TIME** that can be typed at any menu.

```
SCREEN CW REALTIME SOFTWARE CORP          Job Ticket Processing          07 Jul 04
10 CWW                                     DS
SLD02                                     ENTER SELECTION NUMBER:          13:10:37
HS
      FUNCTION          NMBR          DESCRIPTION
      0  Select Printer
      1  Job Ticket Maintenance
      2  Employee Maintenance
      3  Employee Master List
      4  Employee Name And Address List
      5  Daily Time Clock
      6  Unclosed Time Report for Manual Labor Entry
      7  Daily Time Clock Inquiry
      8  Daily Time History Report
```

At the prompt, **type the technician's number** and change the **date** to the correct date of the work done. **ENTER** to continue.

```
LD02A  CW REALTIME SOFTWARE CORP          JOB TICKET MAINTENANCE          07 Jul 04
1. EMPLOYEE NUMBER 45 . . . .
2. TRANS DATE 07/07/04
```

```
LD02A  CW REALTIME SOFTWARE CORP          JOB TICKET MAINTENANCE          07 Jul 04
1. EMPLOYEE NUMBER 45          GREG HIGH          PAY TYPE H  FREQ B
2. TRANS DATE 07/01/04
      TUESDAY
ENTER LINE TO CHANGE, * TO VOID, ^ OR RTN TO CONTINUE .
```

The first prompt you will see is the Shift code. This is pretty straightforward. One cool feature here is that if the labor does not relate to a specific order, you can enter a Shift of Zero and still track it.

ENTER and you will proceed to the time entry field. Depending on how your system is configured, you will either enter the total worked hours with decimals (1.5, 2.3, etc.) or fill in a start-time / stopped-time pair of fields to track time on the job. [This configuration can be changed to your preference in Labor Distribution, Company Processing.] After entering the time, enter the order number.

The correct job code (J/C) will come up based on the order number but can be overridden if necessary. You may have a different job code for travel time, but the time spent doing the work is what will default on this screen (customer, warranty, internal).

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```

LD02A  CW REALTIME SOFTWARE CORP          JOB TICKET MAINTENANCE          07 Jul 04

      EMPLOYEE NUMBER 45          GREG HIGH          PAY TYPE H  FREQ B
      TRANS DATE 07/01/04          TOTAL HOURS  0.00
      TUESDAY
SEQ SH TOTAL START  STOP          LAB ORD  NO
NBR FT HOURS  TIME  TIME  ORDER#  LINE#  CUSTOMER NAME  RPR J/C COM STAT PRT

001 1
SERVICE CODES PERFORMED:
    
```

The hours fill in from your start and stop time. Notice the job code is now 003 because this is a warranty and 003 is the job code set up for warranty.

```

LD02A  CW REALTIME SOFTWARE CORP          JOB TICKET MAINTENANCE          07 Jul 04

      EMPLOYEE NUMBER 45          GREG HIGH          PAY TYPE H  FREQ B
      TRANS DATE 07/01/04          TOTAL HOURS  0.00
      TUESDAY
SEQ SH TOTAL START  STOP          LAB ORD  NO
NBR FT HOURS  TIME  TIME  ORDER#  LINE#  CUSTOMER NAME  RPR J/C COM STAT PRT

001 1    1.75  08:30 10:15  345358          WARRANTY, E-ONE          003
SERVICE CODES PERFORMED:
    
```

If the order you are clocking time against is a Multiple Repair order, you will be asked for the Repair# that this labor relates to. If you are not sure which repair it is, use the ? to see the Complaint field from each repair on file.

```

LD02A  CW REALTIME SOFTWARE CORP          JOB TICKET MAINTENANCE          07 Jul 04

      EMPLOYEE NUMBER 45          GREG HIGH          PAY TYPE H  FREQ B
      TRANS DATE 07/01/04          TOTAL HOURS  0.00
      TUESDAY
SEQ SH REG  O/T  D/T          LAB ORD  NO
NBR FT HOURS  HOURS HOURS  ORDER#  LINE#  CUSTOMER NAME  RPR J/C COM STAT PRT

001 1    1.00          345944          HARRELLSVILLE FIR  1. 001
SERVICE CODES PERFORMED:

ENTER ? TO VIEW REPAIRS ATTACHED TO ENTERED ORDER
    
```

```

LD02A  CW REALTIME SOFTWARE CORP          JOB TICKET MAINTENANCE          07 Jul 04
      Display of special lookup table, by code
SQ  Code  Description
  1  1    FIX OIL LEAK
    
```

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You can enter as many lines as necessary for this technician number and this date. If you're entering a new date, finish this one first and then start a new screen with the new date. Notice line 2 is a customer job and the job code is 001. When finished **^ to post**.

LD02A	CW REALTIME SOFTWARE CORP	JOB TICKET MAINTENANCE	07 Jul 04
EMPLOYEE NUMBER	45	GREG HIGH	PAY TYPE H FREQ B
TRANS DATE	07/01/04		TOTAL HOURS 3.25
	TUESDAY		
SEQ SH TOTAL START STOP			LAB ORD NO
NBR FT HOURS TIME TIME ORDER# LINE# CUSTOMER NAME			RPR J/C COM STAT PRT
SERVICE CODES PERFORMED:			
001 1	1.75 08:30 10:15	345358	WARRANTY, E-ONE 003
002 1	1.50 10:15 11:45	345962	HARRELLSVILLE FIR 001
ENTER SEQ TO CHANGE, P TO PAGE, D TO DELETE, A TO ADD, * TO VOID, ^ TO POST ...			

You will be taken back to the prompt screen to enter a new tech and date combination. When completely finished posting time, **ENTER** will return you to a menu.

LD02A	CW REALTIME SOFTWARE CORP	JOB TICKET MAINTENANCE	07 Jul 04
1.	EMPLOYEE NUMBER		
2.	TRANS DATE 07/01/03		

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2. CLOCKING IN AND OUT

Go to the **SLD02** menu. Select line **5** to enter time by clocking in and out.

SCREEN CW REALTIME SOFTWARE CORP	Job Ticket Processing	07 Jul 04
10 CWW		DS
SLD02	ENTER SELECTION NUMBER:	13:10:37
HS		
FUNCTION	NMBR	DESCRIPTION
	0	Select Printer
	1	Job Ticket Maintenance
	2	Employee Maintenance
	3	Employee Master List
	4	Employee Name And Address List
	5	Daily Time Clock
	6	Unclosed Time Report for Manual Labor Entry
	7	Daily Time Clock Inquiry
	8	Daily Time History Report

This is the screen that the technicians will see every day to clock in and out of their different jobs.

LD02B CW REALTIME SOFTWARE CORP	DAILY CLOCK-IN/CLOCK-OUT	07 Jul 04		
		13:42:45		
EMPL#	EMPLOYEE NAME	ORDER# LINE ORDER R# CUST#	CUSTOMER NAME	START TIME
		TYPE		
ENTER EMPLOYEE# (? = LIST), D)AILY HIST, E)XIT, P)AGE, OR R)EFRESH				

Technicians **enter their employee number**

LD02B CW REALTIME SOFTWARE CORP	DAILY CLOCK-IN/CLOCK-OUT	07 Jul 04		
		13:42:45		
EMPL#	EMPLOYEE NAME	ORDER# LINE ORDER R# CUST#	CUSTOMER NAME	START TIME
		TYPE		
42	CHRIS VLASEK	ENTER ORDER#	
ENTER EMPLOYEE# (? = LIST), D)AILY HIST, E)XIT, P)AGE, OR R)EFRESH 42				

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Then the **order number** they're clocking in on. It will show the customer name. If it is the correct order they will **type Y**.

LD02B	CW REALTIME SOFTWARE CORP	DAILY CLOCK-IN/CLOCK-OUT	07 Jul 04
			13:42:45
EMPL#	EMPLOYEE NAME	ORDER# LINE ORDER R# CUST#	CUSTOMER NAME
		TYPE	START TIME
42	CHRIS VLASEK	ENTER ORDER#	345962
CUST# 14880	HARRELLSVILLE FIRE DEPARTMENT	CORRECT ORDER# (Y/N)? Y	
ENTER EMPLOYEE# (? = LIST), D)AILY HIST, E)XIT, P)AGE, OR R)EFRESH			42

If the entered order number is for a multiple repair order, you will be asked for a repair# before the Correct Order Verify prompt. Just as in the labor posting, you can do a ? lookup for Repair Info.

LD02B	CW REALTIME SOFTWARE CORP	DAILY CLOCK-IN/CLOCK-OUT	07 Jul 04
			13:42:45
EMPL#	EMPLOYEE NAME	ORDER# LINE ORDER R# CUST#	CUSTOMER NAME
		TYPE	START TIME
42	CHRIS VLASEK	ENTER ORDER#	345944
			REPAIR# 1
ENTER EMPLOYEE# (? = LIST), D)AILY HIST, E)XIT, P)AGE, OR R)EFRESH			42

The screen will display everyone that is clocked in.

When an employee needs to clock out, and into another job, he'll **type his number again** and enter a different order number.

LD02B	CW REALTIME SOFTWARE CORP	DAILY CLOCK-IN/CLOCK-OUT	07 Jul 04
			13:49:24
EMPL#	EMPLOYEE NAME	ORDER# LINE ORDER R# CUST#	CUSTOMER NAME
		TYPE	START TIME
42	CHRIS VLASEK	345944	SERVM 1 14880 HARRELLSVILLE FIRE 13:47
45	GREG HIGH	345358	WARR 23006 WARRANTY, E-ONE 13:47
ENTER EMPLOYEE# (? = LIST), D)AILY HIST, E)XIT, P)AGE, OR R)EFRESH			45

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LD02B	CW REALTIME SOFTWARE CORP	DAILY CLOCK-IN/CLOCK-OUT				07 Jul 04	
					13:49:24		
EMPL#	EMPLOYEE NAME	ORDER#	LINE	ORDER R#	CUST#	CUSTOMER NAME	START TIME
				TYPE			
42	CHRIS VLASEK	345944		SERVM 1	14880	HARRELLSVILLE FIRE	13:47
45	GREG HIGH	345358		WARR	23006	WARRANTY, E-ONE	13:47
<p>42 CHRIS VLASEK ENTER ORDER# 345963</p> <p>CUST# 23006 WARRANTY, E-ONE CORRECT ORDER# (Y/N)? Y</p> <p>ENTER EMPLOYEE# (? = LIST), D)AILY HIST, E)XIT, P)AGE, OR R)EFRESH 42</p>							

If they clock out of a job but not into another one, they will **ENTER** at the order# prompt and be asked if they're sure they want to clock out. They will **type Y** which will clock them out of the job they're in and will remove their name from the clock-in screen. At the end of the day, this screen should be blank showing that everyone clocked out of their jobs before leaving.

LD02B	CW REALTIME SOFTWARE CORP	DAILY CLOCK-IN/CLOCK-OUT				07 Jul 04	
					14:28:13		
EMPL#	EMPLOYEE NAME	ORDER#	LINE	ORDER R#	CUST#	CUSTOMER NAME	START TIME
				TYPE			
45	GREG HIGH	345358		WARR	23006	WARRANTY, E-ONE	13:47
42	CHRIS VLASEK	345963		WARR	23006	WARRANTY, E-ONE	14:28
<p>42 CHRIS VLASEK ENTER ORDER#</p> <p>ARE YOU SURE YOU WANT TO UPDATE AND CLOCK OUT OF THIS ORDER (Y/N) ? Y</p> <p>ENTER EMPLOYEE# (? = LIST), D)AILY HIST, E)XIT, P)AGE, OR R)EFRESH 42</p>							

Type D for daily history to display everything that happened that day (who clocked in and out on what jobs). **ENTER** to return to clock screen and **type E** to exit.

LD02B	CW REALTIME SOFTWARE CORP	DAILY CLOCK-IN/CLOCK-OUT				07 Jul 04			
					14:33:27				
SEQ	EMPL#	EMPLOYEE NAME	ORDER#	LINE	ORDER R#	CUST#	START TIME	END TIME	TOTAL TIME
					TYPE				
001	42	CHRIS VLASEK	345944		SERVM 1	14880	13:47	14:28	00:41
002	45	GREG HIGH	345358		WARR	23006	13:47	14:33	00:45
003	42	CHRIS VLASEK	345963		WARR	23006	14:28	14:31	00:03
<p>ENTER RTN, * OR ^ FOR PREV, SEQ#, P)AGE, OR R)EFRESH ...</p>									

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If there are any errors, in the Clock in/out records, you can use the Posting Labor method to correct.

There is a daily job ticket update that needs to be run in order for the efficiency reports to be updated and give accurate information. Type the **Screen Jump TIME-DAILY** at any menu to run this process. You can also **type SL/D** and **select #3** option from the menu for Daily Job Ticket Report. This needs to be run whether you posted manually or clocked in and out.

SCREEN CW REALTIME SOFTWARE CORP	Labor Distribution	07 Jul 04
10 CWW		DS
SL/D	ENTER SELECTION NUMBER:	14:37:23
HS		
FUNCTION	NMBR	DESCRIPTION
	0	Select Printer
Company	1	Company Processing
Job Tickets	2	Job Ticket Processing
	3	Daily Job Ticket Report
	4	Job Ticket Balancing With Payroll
	5	Missing Job Tickets Report
	6	Job Ticket Balancing Errors Report
	7	Job Ticket Review Report
	8	Department Job Ticket Recap Report
	9	Period End Job Ticket Update
History	10	Job Ticket History Processing
Reports	11	Job Ticket Reports

Type the date option you want and then the data option you want

LD03	CW REALTIME SOFTWARE CORP	DAILY JOB TICKET REPORT	07 Jul 04
1.	TRANS DATE OF JOB TICKETS	FROM C	
		TO	
	ENTER IN THE TRANSACTION DATE RANGE OF JOB TICKETS		
	ENTER 'D' FOR SPECIFIED DATE, 'O' FOR AN OFFSET FROM CURRENT DATE		
	'S' TO INPUT A SPECIAL DATE CODE, ' C ' FOR CURRENT DATE, OR NO ENTRY TO SKIP		

LD03	CW REALTIME SOFTWARE CORP	DAILY JOB TICKET REPORT	07 Jul 04
1.	TRANS DATE OF JOB TICKETS	C	07/07/04 TO
2.	HOME DEPARTMENT		
3.	EMPLOYEE NUMBER		
	ENTER DATA TYPE FROM THE FOLLOWING LIST A		
	R	- ENTER RANGE OF DATA	
	A	- SELECT ALL DATA	
	I	- INDIVIDUAL DATA ENTRY (MULTIVALUED)	
	N	- INDIVIDUAL DATA ENTRY NOT EQUAL TO (MULTIVALUED)	

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Do not answer Y to accept until the report has been checked for accuracy. Type N and go back to Job Ticket Maintenance and make changes by typing the technician number and date, and then correct whatever lines needed. Then run the Daily Job Ticket Report again and if acceptable, **type Y.**

LD03 CW REALTIME SOFTWARE CORP DALIY JOB TICKET REPORT 07 Jul 04

*** REPORT NOW BEING PROCESSED ***Hold Entry # 27

NOTE: IF ACCEPTED,
UPDATES WILL TAKE PLACE AND REPORT CAN NOT BE RERUN.

IS THE REPORT ACCEPTABLE? (Y/N) **Y**

SERVICE ORDERS

F. CLOSING SERVICE ORDERS & BILLING

There are several things that need to be checked before “closing” a service order and printing the final pick ticket for billing. All changes will be made in Order Adjustments (**OA**).

Verify that all labor has been posted to the order. Check the completion date on the tech’s working copy and look at the labor screen in the order to see the last date that time was posted. If the dollar amount of labor needs to be adjusted, do so.

Verify that all parts that were used on the job have been added to the order and are priced correctly. There should be no detail lines with a “ship 0 quantity” if the “order quantity is greater than 0” or the entire order will not be billed. The incomplete detail lines will be left open. It is possible that in these cases all the purchase orders haven’t been received into the system yet.

It is possible to have certain Order Types prevent backorders. This will force all the line items to be at the proper value before billing or closing is possible.

Verify that EPA, DELIVERY, SUPPLIES, etc. have been charged if applicable.

Verify that the machine and S/O# from the tech’s working copy matches the machine and S/O# in the computer. Double check sold date if this is a warranty order.

Make sure Complaint, Cause, and Correction text on the service comments field have been completed.

If this is a warranty order, check to ensure that all applicable information for the vendor has been filled out such as claim#, engine s/n, authorization#, etc.

Make sure order type is correct.

To bill the service order into an invoice, refer to the SALES ORDER MANUAL, Section F. You can either use the billing program, **Screen Jump BILL**, or order adjustments **Screen Jump OA**. When working with service orders, if the person who is doing the billing is also checking over the order to make sure all the above points have been done, it would be better to use order adjustments for billing. They are already in Order Adjustments, and when everything is completely checked out, you just have to type in “BILL” on the Totals screen. If any changes are made, make sure to print one last pick ticket before billing, so all the information is correct for the customer’s service file.

SERVICE ORDERS

G. REPORTS

1. OPEN ORDERS

To print an open order report, type the **Screen Jump OOR** at any menu. **Select the number** of the profile you want to use and **ENTER**.

```
OE08F  CW REALTIME SOFTWARE CORP  OPEN ORDERS REPORT  02 Jul 04
      Display of the PROFILE-HEADER table, by Profile
SQ  Profile          Description
 1  ALL              ALL OPEN SALES ORDERS
 2  DEAN            DEAN'S OPEN ORDER REPORT

(C)HANGE, (P)AGE, (B)ACK, (I)NDEX, (T)OGGLE, (R)ETURN, * TO VOID, SEQ# 1....
END OF SEARCH INDEX
```

At the profile detail screen, you **can select line numbers** to the left and change any of the printing parameters as needed. If you want the profile as is, **type Y** and then **ENTER** at the printer prompt to run the report.

```
OE08F  CW REALTIME SOFTWARE CORP  OPEN ORDERS REPORT  02 Jul 04

 0.  ENTER PROFILE TO USE      ALL      DESC - ALL OPEN SALES ORDERS

 1.  ENTER SELECTION-----]    2  BY SITE BY CUST#
 2.  ENTER CATEGORY
 3.  ENTER SITE
 4.  ENTER ITEM#
 5.  ENTER DEPARTMENT
 6.  ENTER ORDER TYPE
 7.  ENTER SALESMAN 1
 8.  ENTER DATE RANGE          TO
 9.  ENTER CUSTOMER#
10.  ENTER CUSTOMER CLASS
11.  ENTER PGC
12.  PRINT ITEM DESC ON 2ND LINE      Y  YES
13.  QTY TO SHIP > 0 (Y/N)          Y  YES
14.  ORDER STATUS CODE

ENTER #, S)AVE PROFILE, * TO VOID, OR 'Y' TO EXECUTE
```

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In this case **5** was selected and the **department S** was entered to give a report of only service orders. To save the profile as a new profile, **type S** to save and **assign a different name and description** to the profile. Then it will be there for you next time you run the report.

```
OE08F  CW REALTIME SOFTWARE CORP  OPEN ORDERS REPORT  07 Jul 04

0.  ENTER PROFILE TO USE      ALL      DESC - ALL OPEN SALES ORDERS

1.  ENTER SELECTION-----]      2  BY SITE BY CUST#
2.  ENTER CATEGORY
3.  ENTER SITE
4.  ENTER ITEM#
5. ENTER DEPARTMENT              S
6.  ENTER ORDER TYPE
7.  ENTER SALESMAN 1
8.  ENTER DATE RANGE          TO
9.  ENTER CUSTOMER#
10. ENTER CUSTOMER CLASS
11. ENTER PGC
12. PRINT ITEM DESC ON 2ND LINE      Y  YES
13. QTY TO SHIP > 0 (Y/N)          Y  YES
14. ORDER STATUS CODE

ENTER #, S)AVE PROFILE, * TO VOID, OR 'Y' TO EXECUTE          S.
PROFILE DATA HAS CHANGED, SAVE PROFILE WITH 'S' OPTION
```

```
OE08F  CW REALTIME SOFTWARE CORP  OPEN ORDERS REPORT  07 Jul 04

0.  ENTER PROFILE TO USE      ALL      DESC - ALL OPEN SALES ORDERS

1.  ENTER SELECTION-----]      2  BY SITE BY CUST#
2.  ENTER CATEGORY
3.  ENTER SITE
4.  ENTER ITEM#
5.  ENTER DEPARTMENT              S
6.  ENTER ORDER TYPE
7.  ENTER SALESMAN 1
8.  ENTER DATE RANGE          TO
9.  ENTER CUSTOMER#
10. ENTER CUSTOMER CLASS
11. ENTER PGC
12. PRINT ITEM DESC ON 2ND LINE      Y  YES
13. QTY TO SHIP > 0 (Y/N)          Y  YES
14. ORDER STATUS CODE

PROFILE - SERV          DESC - ALL OPEN SERVICE ORDERS.....
```

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To print a Summary Service Report, go to the **SOE08** menu and pick option **8**.

```
SCREEN CW REALTIME SOFTWARE CORP          Job Ticket Processing          07 Jul 04
10 CWW                                     DS
SOE08                                ENTER SELECTION NUMBER: 8          13:10:37
HS
```

FUNCTION	NMBR	DESCRIPTION
	0	Select Printer
DETAIL	1	Inventory Detail Open Orders
	2	Misc Charges Detail Open Orders
	3	To-Be-Shipped Date Detail Open Orders
Summary	4	Summary Open Orders
	5	Open Order WIP Report
	6	Detail Open Orders Report With Options
	7	Fill Rate Report
	8	Summary Service Open Orders Report
	9	Future Order Report
	10	Detail Open Order Quantity Status Report
	11	Booked Orders Report

Select the number of the profile you want to use and **ENTER**.

```
OE08I  CW REALTIME SOFTWARE CORP          SUMMARY SERVICE ORDERS REPORT          07 Jul 04

ENTER PROFILE TO USE          RT-DA  DESC - DAILY - ALL STATUSES

1. ENTER SELECTION              C B    BY DEPARTMENT BY CUST#
2. ENTER DEPARTMENT              A
3. ENTER TECHNICIAN              A
4. ENTER DATE RANGE              R C 07/07/04  TO C 07/07/04
5. ENTER CUSTOMER#              I
6. ENTER SERVICE ORDER TYPE      I
7. ENTER SERVICE ORDER STATUS    A
```

Select #, S)AVE, DEL)ETE PROFILE, OR **Y** TO EXECUTE ...

Make changes if you would like to see something more specific. Or **Y** to run the report.

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To print an Open Order WIP Report, go to the **SOE08** menu and pick option **5**.

```
SCREEN CW REALTIME SOFTWARE CORP          Job Ticket Processing          07 Jul 04
10 CWW                                     DS
SOE08                                ENTER SELECTION NUMBER: 8          13:10:37
HS
```

FUNCTION	NMBR	DESCRIPTION
	0	Select Printer
DETAIL	1	Inventory Detail Open Orders
	2	Misc Charges Detail Open Orders
	3	To-Be-Shipped Date Detail Open Orders
Summary	4	Summary Open Orders
	5	Open Order WIP Report
	6	Detail Open Orders Report With Options
	7	Fill Rate Report
	8	Summary Service Open Orders Report
	9	Future Order Report
	10	Detail Open Order Quantity Status Report
	11	Booked Orders Report

Select the number of the profile you want to use and **ENTER**. Note that this report has options for either a Detailed or a Summary report.

```
OE08E CW REALTIME SOFTWARE CORP          OPEN ORDERS PROFIT REPORT          07 Jul 04
```

ENTER PROFILE TO USE	RT-DF-D	DESC -	DETAIL -	QTY ORDERED
1. ENTER SELECTION	C 2	BY DEPT	BY ORDER#	
2. ENTER DEPARTMENT	I			
3. ENTER DATE RANGE	R D	TO D		
4. SUMMARY OR DETAIL LINES	C D	DETAIL LINES		
5. QTY ORDERED OR QTY TO SHIP	C O	QTY ORDERED		
6. ITEM#				
7. ORDER#	I			

Select #, S)AVE, DEL)ETE PROFILE, OR '**Y**' TO EXECUTE ...

Make changes if you would like to see something more specific. Or **Y** to run the report.

SERVICE ORDERS

G. REPORTS

2. LABOR REPORTS

Type **SLD11** at any menu to see the different options for Labor reports. The first two reports show all the time posted for service technicians, either detail or summary.

SCREEN CW REALTIME SOFTWARE CORP	Job Ticket Reports	07 Jul 04
10 CWW		DS
SLD11	ENTER SELECTION NUMBER:	17:30:24
AS		
FUNCTION	NMBR	DESCRIPTION
	0	Select Printer
	1	Job Ticket Report - Detail
	2	Job Ticket Report - Summary
	3	Labor Report-Dollars Worked/Billed Detail
	4	Labor Report-Dollars Worked/Billed Summary

Here is an example of a report profile that includes both open and closed service orders. These parameters can be changed for different dates, just closed orders, etc.

LD11A CW REALTIME SOFTWARE CORP	JOB TICKET REPORT - DETAIL	07 Jul 04
0. ENTER PROFILE TO USE	WEEKLY	DESC - WEEKLY LABOR REPORT
1. ENTER SELECTION	C	BY EMPLOYEE BY JOB CODE
2. ENTER DATE RANGE	O -5	07/02/04 TO C 07/07/03
3. HOME DEPARTMENT		
4. EMPLOYEE NUMBER		
5. JOB CODE		
6. ORDER#		
7. CUSTOMER#		
8. TEXT CODES AND SERVICE NOTES	Y	YES
9. SELECT JOB TICKET TYPE	A	ALL JOB TICKETS
10. SELECT TIME TYPE	A	ALL TIME ENTERED
ENTER #, S)AVE PROFILE, * TO VOID, OR 'Y' TO EXECUTE ..		
PROFILE DATA HAS CHANGED, SAVE PROFILE WITH 'S' OPTION		

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The last two reports show the efficiency of the technicians by comparing hours of actual work (dollar amount) on a specific job versus dollars billed to the customer, either detail or summary..

```
SCREEN CW REALTIME SOFTWARE CORP          Job Ticket Reports          07 Jul 04
10 CWW                                     DS
   SLD11          ENTER SELECTION NUMBER:          17:30:24
AS

      FUNCTION          NMBR          DESCRIPTION
              0  Select Printer
              1  Job Ticket Report - Detail
              2  Job Ticket Report - Summary
              3  Labor Report-Dollars Worked/Billed Detail
              4  Labor Report-Dollars Worked/Billed Summary
```

Here are two sample report profiles that will look at either the current month you're in, or the previous month's history.

```
LD11C  CW REALTIME SOFTWARE CORP  JOB TICKET REPORT - DETAIL          07 Jul 04
      Display of the PROFILE-HEADER table, by Profile
SQ  Profile          Description
  1  CP          CURR PERIOD TECH-EFFICIENCY
  2  LP          LAST PERIOD TECH-EFFICIENCY

(C)HANGE, (P)AGE, (B)ACK, (I)NDEX, (T)OGGLE, (R)ETURN, * TO VOID, SEQ#  ....
END OF SEARCH INDEX
```

Again, any of these parameters can be changed as needed.

```
LD11C  CW REALTIME SOFTWARE CORP  JOB TICKET REPORT - DETAIL          07 Jul 04

0.  ENTER PROFILE TO USE          CP          DESC - CURR PERIOD TECH-EFFICIENCY

1.  ENTER SELECTION          C  BY EMPLOYEE BY JOB-CODE
2.  ENTER DATE RANGE          S  CPSD 06/01/04 TO S CPED 06/30/03
3.  HOME DEPARTMENT
4.  EMPLOYEE#
5.  JOB CODE
6.  INVOICE#
7.  CUSTOMER#
8.  LABOR PART#
9.  LABOR PGC
10. ENTER CURRENT OR HISTORY          C  CURRENT

ENTER #, S)AVE PROFILE, * TO VOID, OR 'Y' TO EXECUTE          ..
```