

BRAND	If the model entered is not on the system the screen will prompt you to enter the brand code. If it is on the system, the brand code will be displayed. To accept the brand code, press (CR). To change it, press 'X' and enter the brand code.
ENTER SERIAL#	If you know the serial# of the item, enter it. If not, press (CR).
CORRECT (Y/N)	If what has been entered to this point is correct, press 'Y'. If not, press 'N' and the screen will return to the beginning to start over or exit the program.
CUST BILL CODE	If the person being billed is someone other than the customer above, ie.; a landlord, enter their code using the same format as above. If it is the same press (CR).
H/PHONE	The home phone will be displayed if already on file and the prompt will be at the end of the phone #. If such is the case and you want to change the phone #, press 'X' then enter the new phone #. If correct, press (CR). If the phone is not on file, enter it here using the area code then the number.
W/PHONE	If you want to change the work phone #, press 'X' then enter the telephone # using the area code then the number, If correct, press (CR).
WHERE PURCHASED	If you want to keep on file where the customer purchased the item being serviced, enter a code using the first 4 characters of the store's first name followed by the first 2 characters of its second name. Next, you will be able to enter a four line name and address. If you do not need this information, press (CR) instead of entering a code.
ORDER DATE	Today's date will be displayed for order date. To accept it, press (CR). To change it, press 'X' and the date you want for the order.
DUE DATE	The due date means one of two things. When the customer may expect to see a service tech at their home or when the Customer may expect the item being serviced fixed. If the due date wanted is ASAP, press (CR) and the due date will be set equal to the order date, or enter the due date wanted by the customer.
TIME	Enter the time the tech will be expected at the customer's site or the time the customer can pick up the item brought in for service.
PURCH. DATE	If the date the item was purchased is known, enter it. If not, press (CR).
SHIP-VIA	This means, where are you going to work on customer's appliance/electronic/other needing service. To see the different methods of delivery press '?' at the ship via code and the screen will display the various delivery methods and let you choose or, enter the delivery method number you plan to use for this order.

TERMS	The sales terms code describes how the balance of the order will be paid. To see the different sales terms press '?' at the terms code and the screen will display the various sales terms the system allow and let you choose, or enter the terms code to be used for this order.
ORDER TAKER	Enter the operator# of the person who processed the order.
AUTH#	If a special authorization # has been given from the vendor to do the service needed, enter it here.
VDR	If the item being serviced is not under extended warranty, press (CR). If it is enter the extended warranty vendor code. Remember, however, the warranty vendor must be set up as a customer code and be on the customer file.
R/M	Enter the referral media code. How did the customer hear about you. See 'SRM' for the different referral media codes on the system.
?	If the information entered to this point is correct, press 'A' to accept the header information. If a mistake has been made, press 'X' and the screen will return to the beginning to start the order over again.
CATS	The item# and brand code will be displayed. If the item being serviced is on your serial history the major category will be displayed. If not, enter the two character major category code for the item (i.e. RE for refrigerator). If you are using minor categories in addition to the major category, enter the two character minor category here.
FAULT	If you have set up fault codes and are using them, enter the fault code to be used to describe what is wrong with the item needing service.
SERV. AGREEMENT#	If the item has a service agreement # on file it will be displayed. If not, and the customer has a service agreement, enter the agreement# here.
EXP. DATE	If the service agreement expiration date is on file, it will be displayed. If not and a service agreement # was entered, enter the date the agreement will expire.
ESTIMATE PRICE	If you have an estimated price for item being serviced, enter it here.
?	If the line displayed is correct, press 'A' to accept it. If it is not correct, press 'X' and the line will be erased. The brand and model # will be re-displayed and the screen prompt will send you back to M/CAT to re-process the line.
CASH	If a cash deposit is made on the order, enter the amount here. If not, press (CR).

CHECK If a check deposit is made on the order, enter the amount here.

C/C Enter the 2 character credit card code if a payment is being made using a credit card followed by the payment amount. If a credit card is not used or to be able to continue beyond this point, enter 'ZZ' for the credit card code.

ORDER OK? (Y/VOID) If a mistake has been made somewhere in the entry of the order, key in "VOID" and the order will be voided. If the information entered is correct enter 'Y' (CR) and the order will be accepted and the screen will prompt "PRINT TICKET? (Y/N). If you want to print the order(s) out so that you can give the customer a copy, press 'Y'. If not, press 'N'.

SERVICE ORDER WRITING (SVOW)

The Service Order Writing program ('SVOW'), prints out on order forms, those orders processed in the service order entry program ('SOE'). The screen will prompt the following:

ENTER ORDER TYPE - APPLIANCE/ELECTRONICS/OTHER (A/E/O)

To print out all of the appliance service orders, press 'A'. To print out all of the electronics service orders, press 'E'. Otherwise, press 'O'.

ENTER STORE#

Enter the store# you want to print orders for.

ENTER START ORDER#

Enter the order# you want to start printing from, or press '1' to start from the beginning.

END OF DAY SERVICE ORDER WRITING

This program ('CLOSESVOW') is usually processed at the end of the day. It prints those service orders entered in ('SOE') during the day and lets you empty the file to begin the next day. The screen will prompt the following:

PRINT THOSE ORDERS ALREADY PRINTED? (Y/N)

If you have already printed the day's orders and do not want to reprint them, press 'N' and the system will scan the file checking to be sure that each order has been printed. If it has not been previously printed, it will be printed now. If you want to print another copy of the orders, press 'Y'. At the end of the file, the screen will display:

REPRINT? (Y/N)

Press 'N' if you do not want to print the orders again. The file will be erased and the program will end.

Press 'Y' if you do want to print the orders again. The program will end leaving the orders on the file to print them at your convenience.

DAILY SERVICE ORDER REGISTER (SVR)

This program ('SVR') is usually printed at the end of the day. It lists those orders entered in the service order entry ('SOE') and printed in the order writing programs. The screen will prompt the following:

ENTER STORE#

Enter the store# you want to process or press (CR) to end the program.

The report will print the order#, order date and time entered, due date, customer code and name, extended warranty vendor code, referral code, warranty, Mfg. authorization#, order taker code, job status, major category of the item needing service, as well as any deposits made.

When the report has finished printing the screen will display "REPRINT? (Y/N)". If you do want to reprint the register press 'Y' and the program will end leaving the data in the file. If you do not want to reprint, press 'N' and the file will be emptied for the store# entered above and the program will end.

SERVICE CHANGE ORDER (SCO)

This program, ('SCO'), lets you add to, change, or cancel, an existing service order. The screen is displayed below.

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Cache TRM:688
File Edit Help
Order# 101671      Tech#: 51  O/S: CO OK? (YCE)Y  Ord-Date 02/09/96      [SCO]
Cust#  DOUTPA      OP- 1  BILL-TO DOUTPA      Due-Date 02/10/96
PATRICIA DOUTY      PATRICIA DOUTY      Telephone 973-694-8200
EMPIRE - 214, INC.  EMPIRE - 214, INC.  Ship-Via 5  Purch:10/20/95
153 NEWARK POMPTON TPKE. 153 NEWARK POMPTON TPKE.  Frt-Terms 4  Sales-Terms40
LITTLE FALLS NJ 07424  NJ 07424      S/Loc ? 101671
WARR (Y) N  PARTS (Y) Y OTH (Y) N  Wk#973-694-8201  AUTH#
PART#/LABOR#      BRD QTY      START ARR  END  DATE  TECH JS  UN-PRICE  EXT-AMT  ?
TRAVL TIME TIME  #
EHH066      WHL FREEZER NOT COLD ENOUGH
E

PREV-DEPOSITS      TOTAL PARTS      0.00
ADD CASH      0.00      MISC CHARGE      0.00
ADD CHECK      0.00      COMP-CALL      0.00
C/C CODE ZZ  ADD C/CARD      DIAGNOSTIC      0.00
Code      TOTAL LABOR      0.00
00      TRAVEL FEE      0.00
CORRECT? (Y/VOID)  ****      TOTAL AMOUNT      0.00
  
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The screen will prompt the following:

ORDER TYPE (C=CHANGE K=CANCEL) To cancel a service order, press 'K'. To change it, press 'C'.

OP# Enter your operator#

ORDER# Enter the service order# you want to process or press (CR) to exit the program. The screen will display the customer/bill-to name & address data as well as other header information.

TECH# The prompt will be positioned after the tech#. If the tech# is correct, press (CR). To change it, press 'X' and enter the new tech#.

OK? (YNE) If the rest of the header is correct as displayed and there is nothing else you want to change, press 'Y' and the header will be accepted. If you want to change any field, press 'N' and the prompt will stop after each field and allow you press (CR) to accept it or press 'X' to change it. At the '?', if you decide you want to start the order over again or want to end the program, press 'X'. To continue processing the order, press 'A' to accept the header.

Each detail line of the order will be displayed a line at a time. The prompt will be at the end of the line. You have three (3) choices:

- 'A' Accepts the line
- 'D' Deletes the line from the order
- 'X' Lets you change something on the line. After all lines on the order have been displayed the prompt will be positioned at the beginning of the next line to let you add another line item to the order or enter 'E' (CR) to end the detail.

ORD.STATUS The prompt will be positioned after the order status code. To change the order status, press 'X' and enter the new order status code. To accept the order status as displayed, press (CR).

S/LOC The prompt will let you accept or change the service location of where the item being serviced is. To accept it, press (CR); to change it press 'X' and the new service location code.

SERVICES PERFORMED You have up to three (3) lines to describe the services performed on this order to date. Any parts and labor charges will be displayed.

FRT If there are any freight charges, enter the amount here.

CORRECT? (Y/VOID) If the change order is correct, press 'Y' & (CR). If you made an mistake, enter 'VOID' and the order will not reflect any of the changes made to it. The prompt will give you the ability to print on forms or update only the service change order and then return to the beginning so that you can process another order or exit the program.

SERVICE CHANGE ORDER WRITING (SCOW)

This program ('SCOW') lets you print on forms or update only, orders processed in the service change order ('SCO') entry program. The screen will prompt the following:

PRINT/UPDATE (P/U) To print the change orders, press 'P'. To update only, press 'U'.
If you choose 'P' for printing the screen will prompt the following:

ENTER STORE Enter the store# you want to process.

START ORDER# Enter the starting service order# or press (CR) to end the program. If you want to start from the beginning, enter '1'.

END OF DAY SERVICE CHANGE ORDER WRITING

This program ('CLOSESCOW') is the same as ('SCOW') in that it prints or updates only, service change orders processed in ('SCO'). This program is usually processed at the end of the day and lets you empty the print file after processing.

CHANGE ORDER TRANSACTION REGISTER (VTR)

This program, ('VTR'), is usually processed at end of day. It is a printout of all orders processed in ('SCO') for the day. It print by store# and technician showing order#, customer, and any parts/labor charges. After printing you have the option of deleting the daily register.

SERVICE INVOICE PROCESSING (SIP)

This program ('SIP') finalizes a service order and generates a service invoice. The screen is displayed below.

Cache TRM:688

File Edit Help

ORDER# 101671 TECH#- 51 Ord-Date 02/09/96
 CUST# DOUTPA V/WARR: DOUTPA Inv-Date 08/14/08
 PATRICIA DOUTY Telephone 973-694-8200
 EMPIRE - 214, INC. Ship-Via 5 DOP: 10/20/95
 153 NEWARK POMPTON TPKE. Frt-Terms 4 Sales-Terms 40
 LITTLE FALLS NJ 07424 S/Loc ? 101671

WARR (Y) N PARTS (Y) Y OTH (Y) N OP# 1 AUTH#

PART#/LABOR#	BRD	QTY	START	ARR	END	DATE	TECH	JS	UN-PRICE	EXT-AMT
			TRAVL	TIME	TIME			#		
EHH066	WHL	FREEZER	NOT	COLD	ENOUGH					
PARTS	WHL	1				08/14/08			89.950	89.95
LABOR	STD		0	0		08/14/08	51	B	109.950	109.95

E

PREV-DEPOSITS					TOTAL PARTS	89.95
ADD CASH	0.00	BAL	206.20		MISC CHARGE	0.00
ADD CHECK	206.20	BAL	0.00		COMP.CALL	109.95
C/C CODE	ADD C/CARD				DIAGNOSTIC	0.00
	BAL. DUE				TOTAL LABOR	109.95
		DLV	0.00		TRAVEL FEE	0.00
TAX CODE 101		SALES TAX%	7.000		SALES TAX	6.30

CORRECT? (Y/B/VOID) **

The screen will prompt the following:

- INVOICE DATE** Enter the date wanted for billing. If a (CR) is pressed, the date used will be today's date.
- OP#** Enter your operator#
- ORDER#** Enter the service order# or press (CR) to exit the program. The screen will display the customer/bill-to name & address data as well as other header information.
- TECH#** The prompt will be positioned after the tech#. If the tech# is correct, press (CR). To change it, press 'X' and enter the new tech#.
- OK? (YCE)** If the data displayed in the header is correct and there is no other changes press 'Y' and the header will be accepted. If you need to change any header field, press 'C' and the prompt will stop after each field and allow you to change it or accept it. If you want to exit the program or start the order over, press 'E'.
- ?** At this point if you decide you do not want to continue to process this invoice, press 'X' and the prompt will return to the beginning where you can start over or exit the program. To continue, press 'A' to accept the header.

Each detail line of the invoice will be displayed a line at a time. The prompt will be at the end of the line. You have three (3) choices here.

A=Accept the line and if the item billed is a stock item, the screen will prompt you to enter the location the item was taken from stock
D=Deletes the line from the invoice
X=Lets you change something on the line.

After all lines on the invoice have been displayed the prompt will be positioned at the beginning of the next line to let you add an additional line item(s) to the invoice or enter 'E' (CR) to end the detail.

If you want to give a discount on the entire invoice (prior to calculating sales tax), the screen will display the sub-total amount and prompt you to enter a discount percentage. To disallow a discount, press (CR). Otherwise, enter the discount percentage to be given and the system will deduct the discount percentage from the selling price on each line item and re-calculate the price and the extended amount.

- ORD COMPLETE DATE** Enter the date in the format of MMDDYY, the service order was completed.
- SERVICES PERFORMED** You have up to three (3) lines to describe the services performed on this invoice. The screen will display all parts and labor charges.
- TAX CODE** If you want to change the sales tax code displayed for this invoice press 'X' and enter the tax code you want for this invoice. If it is correct, press (CR).
- SALES TAX%** The sales tax percentage will be displayed. To accept it, press (CR); to change, press 'X' . The prompt will return you to the tax code above. The sales tax amount will be calculated and displayed.

FRT If there are any freight charges, enter the amount here.

ADD CASH Enter any cash payments being made on this invoice.

ADD CHECK Enter any check payments & the check# being made on the invoice.

C/C CODE If a credit card is used to pay for this invoice, enter the two character credit card code, the credit card#, and the amount paid. The prompt will return to credit card code. To continue beyond this point, enter 'ZZ'.

CORRECT? (Y/VOID) If the invoice is correct, press 'Y' (CR). If you made an mistake enter 'VOID' and the invoice will be voided. The prompt will return to the beginning so that you can start of invoice again or end the program.

PRINT INVOICE NOW?To print the invoice press 'Y' and the invoice will print out on the form selected . The screen will return to the beginning to process another invoice or exit the program. If you want to print the invoices later, press 'N'.

AUTOMATIC INVOICE PROCESSING (AUTOSIP)

This program, ('AUTOSIP'), generates a service invoice for a service order but it does not allow for changing of anything on the invoice except for the adding of payments.

SERVICE INVOICE WRITING (SIW)

This program ('SIW'), prints the service invoices generated in 'SIP', 'DSIP', and 'ESIP'. The screen will prompt the following:

ENTER INVOICE TYPE - APPLIANCE/ELECTRONICS /OTHER (A/E/O)

Press 'A' for Appliance, 'E' for Electronics, or 'O' for Other.

PRINT ONLY A SINGLE INVOICE OR ALL ? (S/A)

To print just one invoice press 'S'. To print all invoices, press 'A'.

SERVICE INVOICE WRITING (CLOSESIW)

This program ('CLOSESIW'), usually processed at the end of the day, prints the service invoices for all locations. It also allows for the deleting of the file to close the day. The screen will prompt the following:

PRINT INVOICES ALREADY PRINTED ? (Y/N)

If you want to print only those invoices that have not been printed, press 'N'. If you want to include those invoices printed earlier today, press 'Y'. After all invoices have been processed, the screen will display:

REPRINT? (Y/N)

If you want to reprint the invoices, press 'Y' and the program will end leaving the data on file. If you do not need another copy of the invoice, press 'N' and the file will be emptied and the program will end.

OPEN SERVICE ORDER REPORT BY BRAND/MODEL

This program ('VOI'), prints on hard copy, those orders in the open service order file in brand and model # order. It will list the order#, customer code, slip#, technician's #, order date, due date, quantity, extended amount, customer name, model #, and description. The screen will print the following:

SELECTIVE PRINT? (Y/N)

If you only want to print a model or two, press 'Y', otherwise, press 'N'.

ENTER START BRAND

Enter the brand code you want to start the report at. If a (CR) is pressed instead of entering a brand code, the program will end.

ENTER START MODEL#

Enter the part# / labor code you want to start from.

DIRECT COUNTER INVOICING (DSIP)

This program ('DSIP') lets you process and print a service invoice for over the counter selling of parts and accessories. The screen is displayed below.

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Cache TRM:688
File Edit Help
ORDER# 101671      TECH#- 51      Ord-Date 02/09/96
CUST#  DOUTPA      V/WARR: DOUTPA  Inv-Date 08/14/08
PATRICIA DOUTY    Telephone 973-694-8200
EMPIRE - 214, INC. Ship-Via 5 DOP: 10/20/95
153 NEWARK POMPTON TPKE. Frt-Terms 4 Sales-Terms 40
LITTLE FALLS NJ 07424 S/Loc ? 101671
WARR (Y) N PARTS (Y) Y OTH (Y) N OP# 1 AUTH#
PART#/LABOR# BRD QTY START ARR END DATE TECH JS UN-PRICE EXT-AMT %
TRAVL TIME TIME #
EHH066 WHL FREEZER NOT COLD ENOUGH
PARTS WHL 1 08/14/08 89.950 89.95
LABOR STD 0 0 08/14/08 51 B 109.950 109.95
E
PREV-DEPOSITS TOTAL PARTS 89.95
ADD CASH 0.00 BAL 206.20 MISC CHARGE 0.00
ADD CHECK 206.20 BAL 0.00 COMP.CALL 109.95
C/C CODE ADD C/CARD DIAGNOSTIC 0.00
BAL. DUE TOTAL LABOR 109.95
DLV 0.00 TRAVEL FEE 0.00
TAX CODE 101 SALES TAX% 7.000 SALES TAX 6.30
CORRECT? (Y/B/VOID) *****
  
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The screen will prompt the following:

- INVOICE DATE** Enter the date wanted for billing. If a (CR) is pressed, the date used will be today's date.
- STORE#** Enter the selling store# or press (CR) to end the program.
- APPL/ELECT/OTHER** Enter type of invoice. For appliance, press 'A'. For electronic, press 'E'. For other, press 'O'.
- CUST#** Enter the customer's code.
- TECH#** The prompt will be positioned after the tech#. If the tech# is correct, press (CR). To change it, press 'X' and enter the correct tech#.
- SHIP-VIA** Enter the method of delivery for this invoice. If unsure of what code to use, enter '?' and the screen will display the different ship-via codes & descriptions on the system.
- SALES TERMS** Enter the terms code being used for paying this invoice. If unsure of what code to use, enter '?' and the screen display the different sales terms & descriptions on the system.
- ?** If the information displayed to this point is correct and you want to continue, enter "A" to accept and the screen will display the invoice# being used. To start over, enter "X" and the program will start over.

Each detail line of the order will be displayed a line at a time. The prompt will be at the end of the line. You have three (3) choices here. You can press 'A' to accept the line and if item billed is a stock item, the screen will prompt you to enter the location the item was taken from stock; press 'D' to delete the line from the order; or press 'X' to be able to change something on the line. After all lines on the order have been displayed the prompt will be positioned at the beginning of the next line to let you add additional line items to the invoice or enter 'E'(CR) to end the detail.

- PART#/LABOR#** Enter the part#/labor code# being billed or 'E' to end the detail part of the invoice
- BRAND QTY** Enter the brand code for the part#/labor#. If the item being sold is not labor, enter the quantity taken.
- SHIP LOC** Enter the inventory location the item was in.
- DATE** Enter transaction date or if the date is same as invoice date, press (CR).
- TECH** Enter the technician # for this item. If tech# is the same as what is displayed above, press (CR).
- UN.PRICE** The unit price will be displayed. If correct, press (CR). To change it, enter 'X' and the amount wanted.
- ?** The extended amount will be displayed. If the line entered is correct, press 'A' to accept the line. To do the line over again, press 'X'.

If you wish to give a discount on the entire invoice (prior to calculating sales tax), the screen will display the sub-total amount and prompt you to enter a discount percentage. To disallow a discount, press (CR). Otherwise, enter the discount percentage to be given and the system will

deduct the discount percentage from the selling price on each line item and re-calculate the price and the extended amount.

SERVICES PERFORMED You have up to three (3) lines to describe the services performed on this invoice. The screen will display all parts and labor charges.

TAX CODE If you want to change the tax code displayed used for the calculating of sales tax and for the monthly sales tax report, press 'X' and enter the code you want to change it to. If it is correct, press (CR).

SALES TAX% The sales tax percentage will be displayed. To accept it, press (CR); to change, enter 'X' & the percentage you want to change it to. The sales tax amount will be calculated and displayed.

FRT If there are any freight charges, enter the amount here.

ADD CASH Enter any cash payments being made on this invoice.

ADD CHECK Enter any check payments and the check# being used on the invoice.

C/C CODE If a credit card is used to pay for this invoice, enter the two character credit card code, the credit card #, and the amount paid. The prompt will return to credit card code. To continue beyond this point, enter 'ZZ'.

CORRECT? (Y/VOID) If the invoice is correct, enter 'Y' (CR). If you made an mistake, enter 'VOID' and the invoice will be voided. The prompt will return to the beginning so that you can start of invoice again or end the program.

PRINT INVOICE NOW? To print the invoice now press 'Y' and the invoice will print out on the form selected then the screen will return to the beginning to process another invoice or end the program. If you want to print the invoices later, press 'N'.

ASSIGN A TECHNICIAN TO AN ORDER (ET)

This program ('ET') lets you schedule, or re-schedule, a technician to a service order and update the tech's worklog. The screen will prompt the following:

TECH# Enter the technician code.

ORDER# Enter the service order# you want to schedule the tech's time on.

S/DATE Enter the date scheduled for the tech.

S/TIME Enter the start time scheduled for the tech.

TECHNICIAN ITINERARY REPORT (TI)

This program ('TI') prints a report by technician, of service orders scheduled to be worked on with the option of printing a copy of the service order/invoice showing what has been done to date. The itinerary portion will print the order# to be worked on, customer code, name, city, state, telephone#, and time.

TECHNICIAN TIME SHEET ENTRY (TB)

This program ('TB') lets you enter and keep track of a technician's time. It updates a time sheet register that can be printed on either a daily or weekly basis. The screen will prompt the following:

TECH#	Enter the technician's code or press (CR) to end the program.
ORDER#	Enter the order# worked on.
OS	Enter the present order status code.
START TRAVEL	Enter start travel time or (CR).
JOB TIME	Enter start time on the job.
END TIME	Enter the end time on the job.
S.LOC	Enter the service location of the item being repaired.