



ServicePoint Demonstration Handbook

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Introduction

Thank you for your interest in RTM's ServicePoint service management software for CounterPoint and Great Plains. This demonstration handbook is designed to assist you with the installation and startup of the accompanying software. It is intended to provide you with an understanding of the basic functions of our product and give you a general overview of many of ServicePoint's capabilities.

The demo software is fully functional and is installed with sample data. You may add your own data to more realistically emulate your specific working conditions. Some examples of industries to which the software can be applied are: pool and spa, computer repair, heating and air conditioning, marina services, electrical, plumbing, appliance repair, security and alarm, elevators, telecommunications, and office equipment.

We believe this demonstration will convince you of ServicePoint's extraordinary versatility, ease of use, reporting power and unquestionable ability to save you time and money! The scripted examples provided in this booklet barely scratch the surface of the software's functionality. Please explore the system by navigating each of the screens and trying the functions in ServicePoint as they may apply to your own business. The demo data can be set back to its original state at any time by using the ServicePoint Database Utility provided.

After reviewing the software, please contact your local reseller or RTM Computer Solutions for further information and pricing.



COMPUTER SOLUTIONS

4 Shad Ct.
Baltimore, Maryland 21220

Phone 866-879-3867
info@rtmcs.com
www.rtmcs.com

Package Contents

The ServicePoint demo package contains:

1. This demo handbook
2. ServicePoint SQL Installation Instructions
3. A ServicePoint server and workstation installation module

System Requirements

CounterPoint SQL version 8.2.9 and higher, Great Plains Dynamics v 7.5 through 9.0, with at least one company database installed.

Hardware that supports your CounterPoint or Great Plains software is sufficient to run ServicePoint.

ServicePoint utilizes a Microsoft SQL database. Data base engines currently supported include MS-SQL 2000 and 2005.

Installation of demo data will overwrite any existing data in the SQL database for the chosen accounting company, as well as the ServicePoint company.

Support

This demo handbook should enable you to use the software without additional help. However, if problems or questions arise that you cannot resolve using these materials, additional assistance is available by contacting RTM Computer Solutions at 866-879-4867.

Installation

Please refer to the ServicePoint Installation instructions, provided in a separate document. If you need a copy of the installation instruction, please contact us. Note that this demo relies on newly installed or refreshed demonstration data to reliably match the following steps exactly. Demo data installation instructions are included in the ServicePoint Installation instructions.

Demo Objectives

Work Order Processing

- Service work order overview. Use an existing work order to get an understanding of ServicePoint service call processing.
- Log a simple work order to show how quickly and efficiently calls may be entered into the ServicePoint system.
- Learn some of the more detailed features available in ServicePoint work order entry. Log a call for a customer with a credit problem. Directly access service history from service call entry. Put equipment on the work order task which has an auto-attach note. Print a work order for the call.

Scheduling and Dispatching

- An overview of scheduling and dispatching service work orders.

Service call completion and billing

- Complete a work order. Select, print and post work order invoices.

Customer equipment and service contracts

- View a customer's equipment. Look at warranties and PM schedules.
- Take a look at a service contract.
- Select, print and post contract invoices.

Reporting

- Review management reports.

Legend

The following is an explanation of the symbols and notation used throughout this handbook.



Enter key



Down arrow key



Up arrow key

ALT-<key>

Hold down the ALT key and press the indicated key

CTRL-<key>

Hold down the CTRL key and press the indicated key



Click

Single click of the left mouse button

Double-click



Rapidly click the left mouse button twice

Begin the demonstration


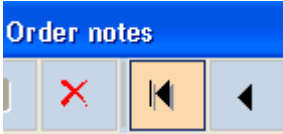
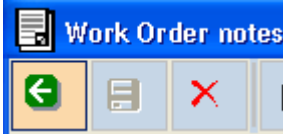
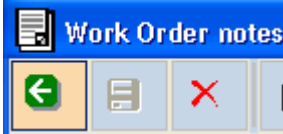
STEP	ACTION
1	<p>On your Windows desktop, find and double-click the ServicePoint icon .</p> <p>Alternatively, open ServicePoint by selecting Start > All Programs > ServicePoint > ServicePoint in Windows.</p> <p>RESULT: The ServicePoint <i>splash screen</i> is displayed along with a prompt for login.</p>
2	<p>Press , or click on “OK” button to accept the default login user, “DEMO”</p> <p>RESULT: The ServicePoint main window is displayed.</p>



Work order overview

Use an existing service work order to get a basic understanding of ServicePoint service call navigation.

STEP	ACTION
1	<p>In the ServicePoint menu bar, click on the “Maintenance” entry, then highlight and click on the “Work Orders” selection</p> <p>Alternatively, if you would rather use the keyboard, use ALT-M to highlight “<i>Maintenance</i>”, and then press “W” to start work order entry.</p> <p>RESULT: The <i>Work Order Maintenance window</i> will be displayed.</p>
2	<p>Click on the main lookup button on the top toolbar , or type CTRL-L if you prefer to use the keyboard.</p> <p>RESULT: The <i>Work Order Lookup window</i> will be displayed.</p> <p>NOTE: The Work Order Lookup window can be sorted by any column, by clicking on the top of the desired column. The sort order can be changed by clicking on that column again.</p>
3	<p>Highlight work order number 10721, by clicking on the correct row, using the arrow keys, or by typing into the keyword entry textbox.</p> <p>RESULT: Work Order number “10721” will be highlighted.</p>
4	<p>Press , or click to “OK” button to accept highlighted work order.</p> <p>RESULT: The work order will be displayed.</p> <p>NOTE: The work order maintenance window is organized into several tabs, each containing related information.</p> <p>Each tab may be displayed by clicking on the appropriate tab, or the keyboard may be used by typing ALT+<the shortcut letter of the tab>. For example ALT-L displays the Labor entry tab, while ALT-P will jump to work order Parts.</p>


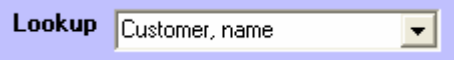
STEP	ACTION
5	<p>Click on the <i>Task Detail</i> tab, or press ALT-T</p> <p>RESULT: The work order's task information will be displayed.</p> <p>NOTE: Each work order can have multiple tasks defined. Each line in the grid shows a separately defined task, each with the ability to have parts, labor, and additional charges assigned. Each task may even be billed out separately, leaving the remaining task open to be completed and billed at a later time.</p>
6	<p>Highlight any work order task by clicking on its line in the grid, or by using ↓ or ↑ .</p> <p>RESULT: The task information displayed in the lower part of the window will change to show the detail for the currently highlighted task.</p>
7	<p>Make sure the first work order task is highlighted by clicking on the first line in the grid, or by using ↑ before performing the next step.</p>
8	<p>Click on the Labor tab, or press ALT-L.</p> <p>RESULT: The lower portion of the call screen will display the service technicians that worked on the call.</p> <p>NOTE: The currently selected work order task will always be displayed at the bottom of the <i>Labor, Parts Used, and Additional Charges</i> tabs. This is the task to which you will be adding line items. The selected task may be easily changed by using the up/down arrows next to the task Seq #.</p>
9	<p>Click on the <i>Parts Used</i> tab, or press ALT-P.</p> <p>RESULT: The lower portion of the call screen will display any parts used on the work order task.</p>
10	<p>Click on the Additional Charges tab, or press ALT-A</p> <p>RESULT: The lower portion of the call screen will display the additional charges for the call.</p>





STEP	ACTION
11	<p>Click on the work notes lookup button  on the main work order toolbar at the top of the maintenance window, or press CTRL-N.</p> <p>RESULT: The notes entry window will be displayed. Any notes that were previously attached to the work order can be reviewed, or new notes may be entered. Notes entered onto a work order can print on the technician work order form, invoice, or be entered for internal use only.</p> <p>NOTE: Multiple notes can be entered at the work order level, or at the line item level (task or labor item), by using the toolbar on the individual tabs.</p>
12	<p>Click the “First” button at the top of the Notes Entry window</p>  <p>RESULT: The first note on file for the work order will be displayed.</p>
13	<p>Click the Cancel button at the top of the Notes Entry window</p>  <p>RESULT: The notes window will be cleared.</p>
14	<p>Click the Cancel button at the top of the Notes Entry window again</p>  <p>RESULT: The notes window will be closed, and focus will return to the work order maintenance window</p>
15	<p>Press ALT-O</p> <p>RESULT: The <i>Work Order Summary</i> information window will be displayed.</p>


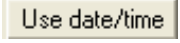
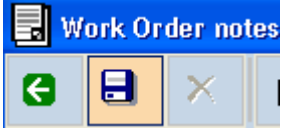
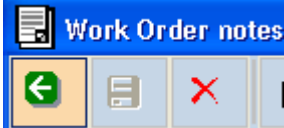

STEP	ACTION
16	<p>Press ALT-R</p> <p>RESULT: The work order <i>Profitability</i> window will be displayed.</p> <p>NOTE: The profitability tab shows price, cost, and profit % for each line item on the work order. Subtotals are given for each task, and a grand total line for the entire work order is displayed. The display may be sorted by clicking on the column headers. If a ServicePoint user is defined to NOT be able to see costs, this tab does not appear in work order maintenance.</p>
17	<p>NOTE: Experiment by accessing the various functions in the work order entry screen. The navigation buttons at the top of the maintenance window can be used to browse through the work orders in the database.</p>
18	<p>When you are finished, click the Cancel button  on the main toolbar at the top of the work order window, or press ESC to clear the maintenance window.</p> <p>RESULT: The <i>Work Order</i> screen will be cleared and the cursor will appear at the <i>Customer</i> field.</p> <p>NOTE: If you have made any changes to the work order, you will be prompted to save or abandon your changes before the screen is reset.</p>
19	<p>Click the Cancel button  on the main toolbar at the top of the work order window, or press ESC to close the Work Order Maintenance function.</p>


Logging a work order

Enter a simple work order to show how quickly and efficiently calls may be entered into the ServicePoint system.

STEP	ACTION
1	<p>In the ServicePoint menu bar, click on the “Maintenance” entry, then highlight and click on the “Work Orders” selection</p> <p>Alternatively, if you would rather use the keyboard, use ALT-M to highlight “<i>Maintenance</i>”, and then press “W” to start work order entry.</p> <p>RESULT: The <i>Work Order Maintenance window</i> will be displayed.</p>
2	<p>Click on the insert button on the top toolbar , or type CTRL-INSERT if you prefer to use the keyboard.</p> <p>RESULT: A new work order will be started, and the <i>Customer Lookup window</i> will be displayed.</p> <p>NOTE: The Customer Lookup window can be sorted by any column, by clicking on the top of the desired column. The sort order can be changed by clicking on that column again.</p> <p>There are several options for locating combinations of customers, service locations, and customer equipment. For the purposes of this demo objective, we will search by equipment serial number.</p>
3	<p>Pull down the lookup type selections by clicking on the <i>Lookup</i> combo box. </p> <p>RESULT: The customer lookup types will be displayed.</p>
4	<p>Click on the lookup type <i>Equipment, Serial #</i></p> <p>RESULT: The <i>customer lookup window</i> format will be changed to show your lookup preference.</p>


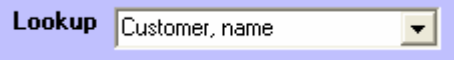
STEP	ACTION
5	<p>Click on the lookup window column header labeled “<i>Serial No</i>”</p> <p>RESULT: The <i>customer lookup window</i> will be re-sorted to be ordered by serial number.</p>
6	<p>Enter 210 into the <i>Keyword</i> textbox</p> <p>RESULT: As you type, the serial numbers on file will be filtered to match those containing the text you have entered.</p>
7	<p>Press  , or click to “OK” button to accept highlighted item.</p> <p>RESULT: All available information for the selected piece of equipment will be imported into the work order in progress. Customer, service location, and most equipment information will be filled in. The cursor now appears at the <i>task name</i>.</p>
8	<p>Click on the lookup button next to the problem code, near the lower left corner  , or press F9 if you prefer to use the keyboard.</p> <p>RESULT: The <i>Problem Code Lookup window</i> will be displayed.</p> <p>NOTE: The problems codes are setup codes within ServicePoint that allow a shortcut to define the types of work you perform most often. They can also be used later to analyze the profitability of service by type.</p>
9	<p>Select a problem code by double-clicking on a row, or highlight the desired line and press  .</p> <p>RESULT: The problem code is brought back into the task, and the task name is automatically filled in to match the type of work.</p>
10	<p>Click on the “Save task” button in the task toolbar  near the bottom of the work order window, or press CTRL-Enter to save the task.</p> <p>RESULT: The task will be saved, and will appear in the task list.</p>


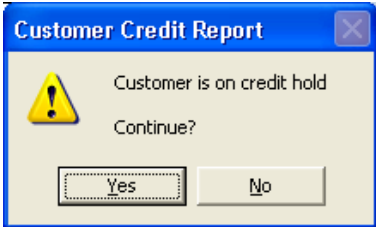
STEP	ACTION
11	<p>Click on the work notes lookup button  on the main toolbar at the top of the work order window.</p> <p>RESULT: The notes entry window will be displayed.</p> <p>NOTE: Multiple notes can be entered at the work order level, or at the line item level (task or labor item), by using the toolbar on the individual tabs.</p>
12	<p>Click on the “Use date/time” button  to assign the current date and time as the note ID.</p> <p>RESULT: The Note ID will be assigned, and the cursor will be placed into the text entry area of the notes window.</p>
13	<p>Enter the text briefly describing the problem to be addressed during this service work order. For example, type Pump not operating.</p> <p>Note: ServicePoint utilizes “rich text” notes. This allows the use of different fonts and colors, and to import or drag/drop other objects or pictures into the note text area.</p>
14	<p>Click the “Save note” button at the top of the Notes Entry window</p>  <p>Result: The work order note will be saved.</p>
15	<p>Click the Cancel button at the top of the Notes Entry window</p>  <p>RESULT: The notes window will be cleared.</p>
16	<p>Click on the save button on the top work order toolbar .</p> <p>RESULT: The work order will be saved, the <i>Work Order screen</i> will be cleared, and the cursor will appear at the <i>Customer</i> field.</p>

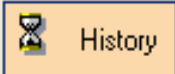



STEP	ACTION
17	Click the Cancel button  or press ESC to close the Work Order Maintenance function.






Learn some of the more detailed features in work order entry.





Log a call for a customer with a credit problem. Directly access service history from service call entry. Put equipment on the work order task which has an auto-attach note. Print a work order for the call.



STEP	ACTION
1	<p>In the ServicePoint menu bar, click on the “Maintenance” entry, then highlight and click on the “Work Orders” selection</p> <p>Alternatively, if you would rather use the keyboard, use ALT-M to highlight “<i>Maintenance</i>”, and then press “W” to start work order entry.</p> <p>RESULT: The <i>Work Order Maintenance window</i> will be displayed.</p>
2	<p>Click on the insert button on the top toolbar  , or type CTRL-INSERT if you prefer to use the keyboard.</p> <p>RESULT: A new work order will be started, and the <i>Customer Lookup window</i> will be displayed.</p> <p>NOTE: The Customer Lookup window can be sorted by any column, by clicking on the top of the desired column. The sort order can be changed by clicking on that column again.</p> <p>There are several options for locating combinations of customers, service locations, and customer equipment. For the purposes of this demo objective, we will search by service address.</p>
3	<p>Pull down the lookup type selections by clicking on the <i>Lookup</i> combo box. </p> <p>RESULT: The customer lookup types will be displayed.</p>
4	<p>Click on the lookup type Address</p> <p>RESULT: The <i>customer lookup window</i> format will be changed to show your lookup preference.</p>

STEP	ACTION
5	<p>Click on the lookup window column header labeled “<i>Address 1</i>”</p> <p>RESULT: The <i>customer lookup window</i> will be re-sorted to be ordered by street address.</p>
6	<p>Type main</p> <p>RESULT: As you type, the customer addresses will be filtered to match those containing the text you have entered.</p>
7	<p>Press </p> <p>RESULT: The customer and service address information will be imported into the call screen and the <i>Customer credit window</i> will be displayed, indicating a possible credit problem.</p> <p>NOTE: A customer credit problem – <i>Customer on credit hold</i> – may be displayed, depending on your customer demonstration data setup. Three different scenarios can cause the credit problem warning to occur: customer credit hold, customer over credit limit, and overdue invoice balances. There is also the option to suspend service for a single service address for a customer, preventing the entry of new work orders.</p>
8	<p>If the customer credit hold warning is displayed, Click on the “Yes” button, or press ENTER to continue with work order entry.</p>  <p>RESULT: The customer credit report notification will be cleared.</p>
9	<p>If the <i>General Info</i> tab is not visible, click on the <i>General Info</i> tab, or press ALT-G.</p> <p>RESULT: The lower portion of the call screen will display the general information for the work order.</p>


STEP	ACTION
10	<p>Click on the History button in the General Information tab</p>  <p>RESULT: The <i>View Work Order History window</i> will be displayed.</p> <p>NOTE: This window will open a view into work order history, pre-filtered for the customer you are processing in the work order maintenance screen. This is a convenient way to check prior service details for this customer, site, and/or equipment</p>
11	<p>Click on the main lookup button on the top toolbar  of the <i>View Work Order History window</i>, or type CTRL-L if you prefer to use the keyboard.</p> <p>RESULT: The <i>Work Order History Lookup window</i> will be displayed.</p> <p>NOTE: The Work Order History Lookup window can be sorted by any column, by clicking on the top of the desired column. The sort order can be changed by clicking on that column again.</p>
12	<p>Highlight any work order by clicking on the desired row, using the arrow keys, or by typing into the keyword entry textbox. Then, press , or click to “OK” button to accept highlighted work order.</p> <p>RESULT: The work order history will be displayed.</p> <p>NOTE: All information entered into the work order is available for viewing, including detailed task, labor, and parts used. All billing and internal notes are also saved, and can be viewed here.</p>
13	<p>When you are done looking at history, click the Cancel button , or press ESC to clear the window.</p> <p>RESULT: The view work order history window will be cleared.</p>

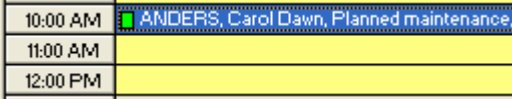

STEP	ACTION
14	<p>Click the Cancel button again , or press ESC to close the close the View Work Order History window.</p> <p>RESULT: You will be returned to the work order entry in progress.</p>
15	<p>Click on the <i>Task Detail</i> tab, or press ALT-T</p> <p>RESULT: The work order task information entry screen will be displayed.</p>
16	<p>Click the “Add new task” button  on the task toolbar near the bottom of the work order window, or press CTRL-Insert to begin adding a new task to the work order.</p> <p>RESULT: A work order number will be assigned to begin task assignment. A notification window will pop up.</p>
17	<p>Click the “OK” button in the work order number notification window.</p> <p>RESULT: A task sequence number will be assigned and the cursor will be placed into the task name field.</p>
18	<p>Click on the lookup button next to the problem code, or press F9.</p> <p></p> <p>RESULT: The <i>Problem Code Lookup window</i> will be displayed.</p> <p>NOTE: The problems codes are setup codes within ServicePoint. They allow a shortcut to define the types of work you perform most often. They can also be used later to analyze the profitability of service by type.</p>
19	<p>Select the PM problem code by double-clicking on the proper row, or highlight the correct line and press  .</p> <p>RESULT: The problem code is brought back into the task, and the task name is automatically filled in to match the type of work.</p>
20	<p>Click on the “Customer equipment lookup” button  next to the Model ID field.</p> <p>RESULT: The <i>Customer Equipment Lookup window</i> will be displayed.</p>

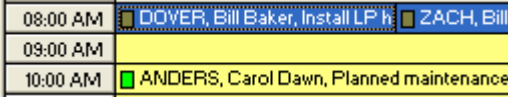
STEP	ACTION
21	<p>Double-click on the first line displayed in the window.</p> <p>RESULT: The customer equipment lookup window will close, and all the pertinent equipment information will be brought back into the task. The task invoicing code will default automatically based upon the specific type of coverage for the chosen equipment. The invoicing code is a powerful ServicePoint setup item that controls all aspects of service task billing.</p>
22	<p>Click on the work order print button on the top toolbar , or press CTRL-W if you prefer to use the keyboard.</p> <p>RESULT: The work order form print will be initiated. Since the work order has not yet been saved, a window will open indicating that the changes will be saved before printing.</p>
23	<p>Click “Yes”, or press ENTER to save the work order and continue to print.</p> <p>RESULT: The work order will be saved, and the <i>Print Work Order</i> window will be displayed.</p> <p>NOTE: The <i>Print Work Order</i> window allows the selection of the form to print, and will preview the form on the screen or send directly to the printer.</p>
24	<p>Click on the Preview button in the <i>Print Work Order</i> window .</p> <p>RESULT: The Report Viewer will open, with the work order form displayed. Using the report viewer, a ServicePoint report can be viewed and searched, as well as exported to various formats, emailed, or sent to a printer.</p> <p>All ServicePoint reports are written using Crystal Reports. Any of these reports are easily added to, or modified, to suit individual needs.</p>
25	<p>When you are done previewing the report, click the Close [X] button in  the Report Viewer window  to close the preview window.</p> <p>RESULT: The Report Viewer will close, and you will be returned to the work order entry in progress.</p>

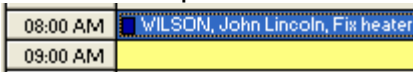
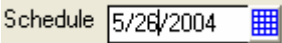
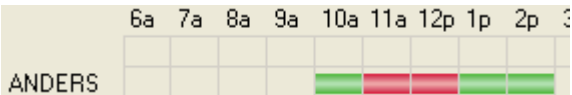
STEP	ACTION
26	<p>Click the Cancel button , or press ESC to clear the window.</p> <p>RESULT: The Work Order Maintenance window will be cleared.</p>
27	<p>Click the Cancel button again , or press ESC to close the Work Order Maintenance function.</p>

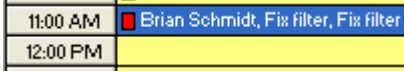
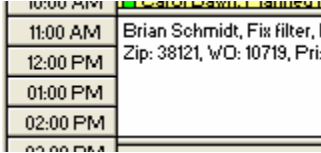

An overview of scheduling and dispatching work orders


STEP	ACTION
1	<p>In the ServicePoint menu bar, click on the “Maintenance” entry, then highlight and click on the “Schedule/Dispatch” selection</p> <p>Alternatively, if you would rather use the keyboard, use ALT-M to highlight “<i>Maintenance</i>”, and then press “D” to start scheduling.</p> <p>RESULT: The <i>Schedule board</i> will be displayed with the current month displayed.</p> <p>NOTE: The board is broken up into three panels. The upper left panel contains a day-timer view that displays allocated labor, hour by hour, for the schedule day. The lower panel displays, and allows maintenance to, detailed labor information for the item highlighted in the day-timer view. The upper right panel contains multiple tabs to view a monthly calendar, a calendar for the week, a Gantt chart view of daily labor, and to see detail about the currently selected work order task. The ServicePoint demonstration data already contains labor information entered into the month of May, 2004.</p>
2	<p>Double-click in the <i>Date</i> textbox at the top of the screen</p> <p>. Then enter 5/26/04 and press the ENTER key.</p> <p>Alternatively, pull down the calendar by clicking on the button to the right of the <i>Date</i> field and navigate to the date 5/26/04.</p> <p>RESULT: The schedule for the month of May, 2004 will be displayed, with the day of Wednesday, 05/26/04 highlighted.</p> <p>NOTE: The labor items for the selected date are shown in the day-timer view on the left side of the screen.</p>

STEP	ACTION
3	<p>Click on the top line of a labor item in the left side panel of the screen.</p>  <p>RESULT: The labor detail for the selected item will be shown in the bottom panel of the scheduling screen.</p> <p>NOTE: The labor maintenance window in the scheduling function is the same as in the work order maintenance function. Any entry or changes made here are reflected immediately throughout the system.</p>
4	<p>Click on the <i>Work Order</i> tab in the right panel of the scheduling screen, or press ALT-O if you prefer to use the keyboard.</p> <p>RESULT: The <i>Work Order</i> tab will be displayed</p> <p>NOTE: The work order tab includes detail for the labor item's work order, including detail for the service task to which the labor is attached. Work order notes may be accessed or entered, and the address of the work order may be displayed on a map, using the appropriate toolbar button</p>
5	<p>NOTE: If you have internet connectivity and would like to view a map of the current task's address, perform the following steps (6 and 7).</p> <p>If you wish to skip this function, please proceed to step 8.</p>
6	<p>Click on the Mapping button  in the <i>Work Order</i> tab to open a web browser linked to Google maps.</p> <p>RESULT: Your preferred web browser will open as a separate window, containing a map of the current work order address.</p> <p>NOTE: The interface to Google Maps allows the easy generation of travel directions to a site. These may then be put into the work order or into the service address as a note that will automatically print on work order forms.</p> <p>The mapping function is available in Scheduling/Dispatching, Service work order maintenance and viewing, History viewing, and in Service Address maintenance.</p>



STEP	ACTION
7	<p>NOTE: Close the web browser window to return to the ServicePoint program window.</p>
8	<p>Click on the top line of a different labor item in the left side panel of the screen.</p>  <p>RESULT: The labor panel will display the detail for the newly selected labor item, and the work order tab will show the information for the item's work order and task.</p>
9	<p>Click on the <i>Gantt Chart</i> tab in the right panel of the scheduling screen, or press ALT-G if you prefer to use the keyboard.</p> <p>RESULT: The <i>Gantt chart</i> tab will be displayed</p> <p>NOTE: This tab is a graphical representation of the time allotted for the current schedule date, by technician or crew.</p>
10	<p>Click on the <i>Week View</i> tab in the right panel of the scheduling screen, or press ALT-W if you prefer to use the keyboard.</p> <p>RESULT: The <i>Week View</i> tab will be displayed</p> <p>NOTE: This tab contains a grid of the time scheduled for the current schedule week, by technician or crew. The columns of the grid may be resized by clicking and dragging with the mouse, and will hold their settings for next use. The displayed information for each call includes work order #, customer name, town, scheduled time, and equipment model.</p>
11	<p>Click on the <i>Month View</i> tab in the right panel of the scheduling screen, or press ALT-M if you prefer to use the keyboard.</p> <p>RESULT: The <i>Month View</i> tab will be displayed</p> <p>NOTE: Many functions can be performed through the use of the Scheduling/Dispatch function, including the assignment of unscheduled tasks to technicians and the rescheduling of existing labor. Easy lookup of scheduled work customer, location, or job type is supported.</p>


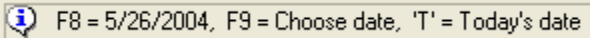
STEP	ACTION
12	<p>Click on May 25th in the monthly calendar</p> <p>RESULT: The labor items for the newly selected date are shown in the day-timer view on the left side of the screen.</p>
13	<p>We will be rescheduling the tasks assigned to this day. For each labor item in the left panel of the screen perform the following steps:</p> <ul style="list-style-type: none"> ○ Click on the top line of the labor item  <ul style="list-style-type: none"> ○ Change the schedule date to 5/26/04 by typing this value into the schedule date in the lower panel of the screen, or by pulling down the calendar by clicking on the button to the right of the <i>Schedule Date</i> field and selecting the date 5/26/04.  <p>RESULT: The labor items will be moved to 5/26.</p>
14	<p>Click on May 26th in the monthly calendar</p> <p>RESULT: The labor items for the newly selected date are shown in the day-timer view on the left side of the screen.</p>
15	<p>Click on the <i>Gantt Chart</i> tab in the right panel of the scheduling screen, or press ALT-G if you prefer to use the keyboard.</p> <p>RESULT: The <i>Gantt Chart</i> tab will be displayed</p> <p>NOTE: This tab is a graphical representation of the time scheduled for the current schedule date, by technician or crew. The red bar indicates an overlap of scheduled times for a tech. Redistributing the times is a simple process.</p>
16	<p>Click on the red bar that represents the overlapping time in the Gantt chart.</p>  <p>RESULT: The selected technician for display will be changed from “All” techs to the selected tech. The overlap is clearly visible in the day-timer, using the priority-coded colors in the left panel. Drag and drop can be used to reschedule the task times visually.</p>








STEP	ACTION
17	<p>Double-click on the top line of the bottommost labor item in the left side panel of the screen.</p>  <p>RESULT: The labor item will “open” for dragging, as indicated by the color change and the appearance of drag bars at the top and bottom of the task duration.</p> 
18	<p>Click and hold on the top drag bar of the opened labor item. While holding the left mouse button down, drag the top bar of the labor task to the 2:00 PM time slot. Release the mouse button and then click on the day-timer view anywhere outside of the open labor task.</p> <p>RESULT: The labor item is rescheduled, and the change in schedule time will be reflected in the timeline in the Gantt chart panel.</p> <p>NOTE: Alternatively, the scheduled time of a labor item can be changed by typing in the new schedule time in the labor maintenance panel at the bottom of the window. Dragging the bottom drag bar of an open labor item will adjust the allocated time for the task.</p>
19	<p>Click on the <i>Month View</i> tab in the right panel of the scheduling screen, or press ALT-M if you prefer to use the keyboard.</p> <p>RESULT: The <i>Month View</i> tab will be displayed</p> <p>NOTE: Notice that the displayed tasks for the month are now limited by the selected technician.</p>
20	<p>Click on the “All techs” button to the far right of the <i>Tech</i> field at the top of the screen.</p>  <p>RESULT: All displays will be reset to display information for “All” technicians or crews.</p> <p>NOTE: Notice that the displayed tasks for the month are no longer limited by a single technician.</p>










STEP	ACTION
21	Click the Cancel button  , or press ESC to close the Scheduling function.


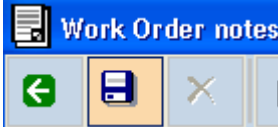
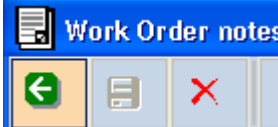
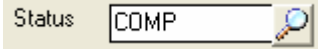


Complete work orders. Select, print and post work order invoices




STEP	ACTION
1	<p>In the ServicePoint menu bar, click on the “Maintenance” entry, then highlight and click on the “Work Orders” selection</p> <p>Alternatively, if you would rather use the keyboard, use ALT-M to highlight “<i>Maintenance</i>”, and then press “W” to start work order entry.</p> <p>RESULT: The <i>Work Order Maintenance window</i> will be displayed.</p>
2	<p>Click on the main lookup button on the top toolbar  , or type CTRL-L if you prefer to use the keyboard.</p> <p>RESULT: The <i>Work Order Lookup window</i> will be displayed.</p> <p>NOTE: The Work Order Lookup window can be sorted by any column, by clicking on the top of the desired column. The sort order can be changed by clicking on that column again.</p>
3	<p>Highlight work order number 10719, by clicking on the correct row, using the arrow keys, or by typing into the keyword entry textbox.</p> <p>RESULT: Work Order number “10719” will be highlighted.</p>
4	<p>Press  , or click to “OK” button to accept highlighted work order.</p> <p>RESULT: The selected work order will be displayed.</p> <p>NOTE: The work order maintenance window is organized into several tabs, each containing related information. Each tab may be displayed by clicking on the appropriate tab, or the keyboard may be used by typing ALT+<the shortcut letter of the tab>. For example ALT-L displays the Labor entry tab, while ALT-P will jump directly to work order Parts.</p>
5	<p>Click on the <i>Labor</i> tab, or press ALT-L.</p> <p>RESULT: The lower portion of the call screen will display the service technician that worked on the call.</p>



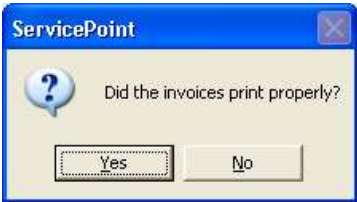
STEP	ACTION
6	<p>Click in the <i>Start</i> date field to place the cursor in the textbox.</p> 
7	<p>In the <i>Start date</i> field, press F8 to accept the default date.</p> <p>RESULT: The default date will be entered, and the cursor will advance to the start time field.</p> <p>NOTE: The available shortcut options for a field are always displayed in the status bar at the bottom of the main ServicePoint window. </p>
8	<p>At the <i>Start Time</i> field, type 11A, then press TAB</p> <p>RESULT: The time of 11:00 AM will be displayed, and the cursor will advance to the stop date field.</p> <p>NOTE: All ServicePoint time fields have flexible entry that allows formats such as 11A, 11:00, 2P, 1400, etc.</p>
9	<p>At the <i>Stop Date</i> field, press F8 to accept the default date</p> <p>RESULT: The default date will be entered, and the cursor will advance to the stop time field.</p>
10	<p>At the <i>Stop Time</i> field, type 2P, then press TAB</p> <p>RESULT: The time of 2:00 PM will be displayed, and the <i>Hours to bill</i> will be displayed.</p> <p>NOTE: The hours to bill are calculated using rules found in the ServicePoint invoicing code assigned to the task. Rules applied can include minimum time on site, time covered by a flat charge, and rounding increments. Hours to bill can also be entered directly, without the need to enter start and stop times.</p>
11	<p>Click on the <i>Parts Used</i> tab, or press ALT-P.</p> <p>RESULT: The lower portion of the call screen will display any parts used on the work order task.</p> <p>NOTE: We will be entering the inventory items used during the completion of the task.</p>



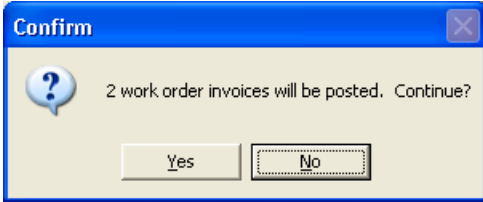
STEP	ACTION
12	<p>Click the “Add new part” button    on the parts used toolbar near the bottom of the work order window, or press CTRL-Insert to begin adding a new part onto the work order.</p> <p>RESULT: A part sequence number will be assigned and the Inventory Item Lookup window will be displayed.</p> <p>NOTE: The lookup window can be sorted by any column, by clicking on the top of the desired column. The sort order can be changed by clicking on that column again.</p>
13	<p>Click on the lookup window column header labeled “<i>Description</i>”</p> <p>RESULT: The <i>Inventory Item lookup window</i> will be re-sorted to be ordered by item description.</p>
14	<p>Enter BU into the <i>Keyword</i> textbox</p> <p>RESULT: As you type, the inventory items will be filtered to match those containing the text you have entered.</p>
15	<p>Press </p> <p>RESULT: information for the selected item will be imported into the work order in progress.</p>
16	<p>In the <i>Quantity Used</i> field, enter 3.</p>
17	<p>Click the “Save part” button    on the parts used toolbar near the bottom of the work order window, or press CTRL-Enter to save the part onto the work order parts list.</p> <p>RESULT: The part will be saved, and will appear in the parts used grid.</p> <p>NOTE: When an item is added to a work order, the quantity used is committed (reserved) in the inventory module. When posting occurs, the quantities will be relieved from the on-hand amounts.</p>

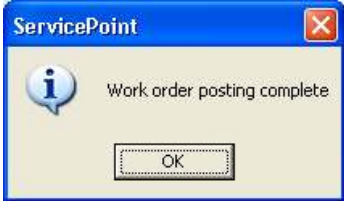


STEP	ACTION
18	<p>Click the “Add new part” button    on the parts used toolbar near the bottom of the work order window, or press CTRL-Insert to begin adding another new part.</p> <p>RESULT: A part sequence number will be assigned and the Inventory Item Lookup window will be displayed.</p>
19	<p>Enter INC into the <i>Keyword</i> textbox</p> <p>RESULT: As you type, the inventory items will be filtered to match those containing the text you have entered.</p>
20	<p>Press , or click “OK”</p> <p>RESULT: information for the selected item will be imported into the work order in progress.</p>
21	<p>Click the “Save part” button    on the parts used toolbar near the bottom of the work order window, or press CTRL-Enter to save the part onto the work order parts list.</p> <p>RESULT: The quantity will default to “1”, the part will be saved and will appear in the parts used grid.</p>
22	<p>Click on the Work Order Notes lookup button  on the main toolbar at the top of the work order window</p> <p>RESULT: The notes entry window will be displayed. Any notes that were previously attached to the work order can be reviewed, or new notes may be entered. Notes entered onto a work order can print on the technician work order form, invoice, or be entered for internal use only.</p> <p>NOTE: Multiple notes can be entered at the work order level (main toolbar), or at the line item level by task or labor item, by using the toolbar on the individual tabs.</p>
23	<p>Click on the Use date/time button  to assign the current date and time as the note ID.</p> <p>RESULT: The Note ID will be assigned, and the cursor will be placed into the text entry area of the notes window.</p>

STEP	ACTION
24	Type " Cleaned filter to restore flow. Balanced properly ".
25	<p>Check the box labeled "Print on invoice" button  by clicking on it.</p> <p>RESULT: The note will be designated as an invoice note, to be printed on the invoice form.</p>
26	<p>Click the "Save note" button at the top of the Notes Entry window</p>  <p>RESULT: The work order invoice note will be saved, the <i>Work Order note screen</i> will be cleared, and the cursor will appear at the <i>Note ID</i> field.</p>
27	<p>Click the Cancel button at the top of the Notes Entry window</p>  <p>RESULT: The notes window will be closed, and the focus will return to the Work Order Maintenance window.</p>
28	<p>Click on the lookup button to the right of the work order status, in the upper right corner of the work order window.</p>  <p>RESULT: The <i>Status Code lookup</i> window will be displayed.</p>
29	<p>Select the RFI (Ready for Invoicing) status code by double-clicking on the proper row, or highlight the correct line and press  .</p> <p>RESULT: The RFI status code is assigned to the work order, and the status restriction against any changes is displayed.</p>
30	<p>Click on the Save button on the top work order toolbar  .</p> <p>RESULT: The work order will be saved, the <i>Work Order screen</i> will be cleared, and the cursor will appear at the <i>Customer</i> field.</p>



STEP	ACTION
31	<p>Click the Cancel button  or press ESC to close the Work Order Maintenance function.</p> <p>RESULT: The <i>Work Order Maintenance window</i> will be closed.</p>
32	<p>In the ServicePoint menu bar, click on the “Invoicing” entry, then highlight the “Work Orders” selection, and click on the “Select for Billing” in the sub-menu that opens.</p> <p>Alternatively, if you would rather use the keyboard, use ALT-I to highlight “Invoicing”, and then press “W”, then “S” to start work order billing selection.</p> <p>RESULT: The <i>Select Work Orders window</i> will be displayed.</p> <p>NOTE: Only work orders that have a status allowing invoicing appear on this window. Several options exist to filter the selections.</p>
33	<p>Click on the “Select All” button. </p> <p>RESULT: Each displayed work order will be selected for invoicing, as indicated by a “Y” in the “Sel for bill” column of the grid.</p> <p>NOTE: In addition to using the 'Select All' and 'Deselect All' buttons to apply the appropriate selection status, a work order can be individually toggled by clicking on its line in the displayed grid.</p>
34	<p>Click the Cancel button  or press ESC to close the <i>Select Work Orders</i> window.</p> <p>RESULT: The <i>Select Work Orders</i> will be closed.</p>




STEP	ACTION
35	<p>In the ServicePoint menu bar, click on the “Invoicing” entry, then highlight the “Work Orders” selection, and click on the “Print Invoices” in the sub-menu that opens.</p> <p>Alternatively, if you would rather use the keyboard, use ALT-I to highlight “Invoicing”, and then press “W”, then “I” to start work order invoice printing.</p> <p>RESULT: The <i>Print Work Order Invoices window</i> will be displayed.</p> <p>NOTE: Several options exist to filter the work orders to print, as well as controlling the appearance of the invoices.</p>
36	<p>Click on the “Print Invoices” button near the bottom of the window.</p>  <p>RESULT: The Report Viewer will open, with the work order form displayed. Using the report viewer, a ServicePoint report can be viewed and searched, as well as exported to various formats, emailed, or sent to a printer.</p> <p>All ServicePoint reports are written using Crystal Reports. Any of these reports are easily added to, or modified, to suit individual needs.</p>
37	<p>When you are done previewing the report, click the Close [X] button in the Report Viewer window  to close the window.</p> <p>RESULT: The Report Viewer will close, and you will be asked if the invoices have printed properly.</p>
38	<p>Click “Yes” to answer the question.</p>  <p>RESULT: The invoiced work orders will be marked as printed successfully, and will be available for posting.</p>




STEP	ACTION
39	<p>Click the Cancel button  or press ESC to close the <i>Print Work Order Invoices</i> window.</p> <p>RESULT: The <i>Print Work Order Invoices</i> will be closed.</p>
40	<p>In the ServicePoint menu bar, click on the “Invoicing” entry, then highlight the “Work Orders” selection, and click on the “Post” in the sub-menu that opens.</p> <p>Alternatively, if you would rather use the keyboard, use ALT-I to highlight “Invoicing”, and then press “W”, then “P” to start work order invoice posting.</p> <p>RESULT: The <i>Post Work Order Invoices window</i> will be displayed.</p> <p>NOTE: Several options exist to filter the work orders to post, as well as controlling whether or not the posting journal report prints. The posting process will transfer invoiced work orders to ServicePoint history, as well as system history in the interfaced accounting system. Inventory quantities are also relieved, and GL distributions are created into the accounting system in accordance with ServicePoint billing setup.</p>
41	<p>Click on the “Post” button near the bottom of the window.</p> <p></p> <p>RESULT: The posting process will begin, and a confirmation window will open indicating the number of invoices that are eligible to be posted.</p>
42	<p>Click “Yes” in the confirmation window.</p> <p></p> <p>RESULT: The posting process will commence, with a progress bar indicating the percentage of completion. When the posting is finished, a message box will appear with a notification.</p>





STEP	ACTION
43	<p>Click “OK” to acknowledge the completion message.</p>  <p>RESULT: The work order distribution journal will open in a report preview window. This report shows a summary of all GL transactions created as a result of the posting process.</p>
44	<p>When you are done previewing the report, click the Close [X] button in</p>  <p>the Report Viewer window to close the window.</p> <p>RESULT: The Report Viewer will close.</p>
45	<p>Click the Cancel button  or press ESC to close the <i>Post Work Order Invoices</i> window.</p> <p>RESULT: The <i>Post Work Order Invoices</i> window will be closed.</p>

View a customer's equipment. Look at warranties and PM schedules.



STEP	ACTION
1	<p>In the ServicePoint menu bar, click on the “Maintenance” entry, then highlight and click on the “Customer Equipment” selection</p> <p>Alternatively, if you would rather use the keyboard, use ALT-M to highlight “<i>Maintenance</i>”, and then press “E” to start Customer Equipment maintenance.</p> <p>RESULT: The <i>Customer Equipment</i> maintenance window will be displayed.</p> <p>NOTE: Having customer equipment on file provides a valuable way to track service, and its associated costs and profits, by individual item, model, customer, etc. In addition, PM’s (Preventive Maintenance) may be tracked and scheduled.</p>
2	<p>Click on the “Last” button , or press CTRL-END if you prefer to use the keyboard.</p> <p>RESULT: The last piece of customer equipment in the database will be displayed.</p> <p>NOTE: The <i>Warranty</i>, <i>PM schedule</i>, <i>Work cat</i> and <i>Location</i> fields are used during service work order entry. The <i>Next PM date</i> is derived from the last PM date, using the schedule setup in the <i>PM schedule</i>. The <i>Warranty</i>, <i>PM schedule</i> and <i>Work category</i> are codes that are predefined in the ServicePoint Setup functions.</p>
3	<p>Click the Cancel button  or press ESC.</p> <p>RESULT: The <i>Customer Equipment</i> maintenance window will be cleared.</p>




STEP	ACTION
4	<p>Click on the main lookup button on the top toolbar , or type CTRL-L if you prefer to use the keyboard.</p> <p>RESULT: The <i>Customer Equipment Lookup window</i> will be displayed.</p> <p>NOTE: The Customer Equipment Lookup window can be sorted by any column, by clicking on the top of the desired column. The sort order can be changed by clicking on that column again.</p>
5	<p>Click on the lookup window column header labeled “<i>Serial No</i>”</p> <p>RESULT: The <i>Customer Equipment Lookup window</i> will be re-sorted to be ordered by serial number.</p>
6	<p>Enter 020 into the <i>Keyword</i> textbox</p> <p>RESULT: As you type, the serial numbers on file will be filtered to match those containing the text you have entered.</p>
7	<p>Press , or click “OK”</p> <p>RESULT: The selected piece of equipment will be displayed.</p> <p>NOTE: Notice that this piece of equipment is covered under a service contract, as indicated by the contract number display in the upper right.</p>
8	<p>Click on the “Contract info” tab, or press ALT-C.</p> <p>RESULT: The contract information that relates directly to this equipment will be displayed.</p> <p>NOTE: The contract related information for equipment cannot be changed here. It can only be updated if the equipment is accessed though service contract maintenance.</p>
9	<p>Click the Cancel button  or press ESC.</p> <p>RESULT: The <i>Customer Equipment</i> maintenance window will be cleared.</p>

STEP	ACTION
10	<p>Click the Cancel button  or press ESC.</p> <p>RESULT: The <i>Customer Equipment</i> maintenance window will be closed.</p>
11	<p>In the ServicePoint menu bar, click on the “Setup” entry, then highlight and click on the “PM Schedules” selection</p> <p>Alternatively, if you would rather use the keyboard, use ALT-S to highlight “<i>Maintenance</i>”, and then press “S” then ENTER to start PM Schedule maintenance.</p> <p>RESULT: The <i>PM Schedule</i> maintenance window will be displayed.</p> <p>NOTE: The Preventive Maintenance schedules are a setup item that can be attached to equipment, thereby providing a method to schedule periodic service.</p>
12	<p>Click on the “Next” button , or press PgDn if you prefer to use the keyboard.</p> <p>RESULT: The next PM schedule in the database will be displayed.</p> <p>NOTE: This is a “date” type of PM schedule. The values in the <i>PM Dates</i> fields are calendar dates. An early/late window is available to define the time frame in which the PM should occur. With this type of schedule, even if a scheduled date is missed, the next PM will be scheduled for the next calendar date shown.</p>
13	<p>Click on the “Next” button , or press PgDn if you prefer to use the keyboard.</p> <p>RESULT: The next PM schedule in the database will be displayed.</p> <p>NOTE: This is an “interval” type of PM schedule. The <i>PM interval</i> is specified using a number, followed by a frequency. The frequency can be Days, Weeks, Months, or Years. An early/late window is available to define the time frame in which the PM should occur. With this type of schedule, the next PM date is based upon the combination of equipment last PM date and the PM schedule interval.</p>

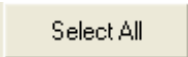

STEP	ACTION
14	<p>Click the Cancel button  or press ESC.</p> <p>RESULT: The <i>PM schedule</i> maintenance window will be cleared.</p>
15	<p>Click the Cancel button  or press ESC.</p> <p>RESULT: The <i>PM schedule</i> maintenance window will be closed.</p>
16	<p>In the ServicePoint menu bar, click on the “Setup” entry, then highlight and click on the “Warranties” selection</p> <p>Alternatively, if you would rather use the keyboard, use ALT-S to highlight “<i>Maintenance</i>”, and then press “W” to start Warranty Code maintenance.</p> <p>RESULT: The <i>Warranty Code</i> maintenance window will be displayed.</p> <p>NOTE: The warranty codes are a setup item that can be attached to equipment, used in conjunction with the equipment warranty start date to determine if warranty coverage is in effect.</p>
17	<p>In the warranty <i>Code</i> field, type ‘HSSPA’, then press ENTER</p> <p>RESULT: The information for the HSSPA warranty will be displayed.</p> <p>NOTE: A warranty can specify several different, successive periods of coverage. An invoicing code is assigned to each segment, which is then used as the work order default when equipment service falls within the specified time period. The time periods are defined using a number, followed by a frequency. The frequency can be Days, Weeks, Months, or Years.</p>
18	<p>Click the Cancel button  or press ESC.</p> <p>RESULT: The <i>Warranty Code</i> maintenance window will be cleared.</p>
19	<p>Click the Cancel button  or press ESC.</p> <p>RESULT: The <i>Warranty Code</i> maintenance window will be closed.</p>





Take a look at a service contract.


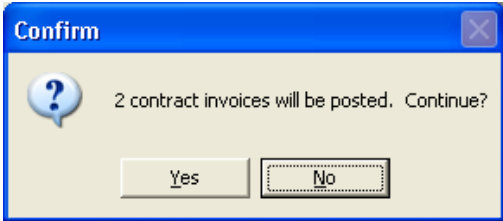
STEP	ACTION
1	<p>In the ServicePoint menu bar, click on the “Maintenance” entry, then highlight and click on the “Contracts” selection</p> <p>Alternatively, if you would rather use the keyboard, use ALT-M to highlight “<i>Maintenance</i>”, and then press “C” to start work order entry.</p> <p>RESULT: The <i>Contract Maintenance window</i> will be displayed.</p>
2	<p>Click on the main lookup button on the top toolbar  , or type CTRL-L if you prefer to use the keyboard.</p> <p>RESULT: The <i>Contract Lookup window</i> will be displayed.</p> <p>NOTE: The Contract Lookup window can be sorted by any column, by clicking on the top of the desired column. The sort order can be changed by clicking on that column again.</p>
3	<p>Highlight a contract by clicking on the desired row, using the arrow keys, or by typing into the keyword entry textbox.</p> <p>RESULT: The desired contract will be highlighted.</p>
4	<p>Press  , or click to “OK” button to accept highlighted contract.</p> <p>RESULT: The contract will be displayed.</p> <p>NOTE: The contract maintenance window shows general contract information in the top of the contract window, and displays a grid of all equipment attached to the contract in the lower half of the contract screen. The contract billing amount is displayed in the upper right of the window. This is a total of the billing amounts in the individual equipment lines.</p>




STEP	ACTION
5	<p>Double-click on one of the equipment lines in the grid in the bottom half of the contract maintenance screen.</p> <p>RESULT: The <i>Contract equipment maintenance screen</i> will be displayed. The information for the selected piece of equipment is shown.</p> <p>NOTE: You may notice the similarity between the contract equipment maintenance screen and the standard customer equipment maintenance screen. Customer equipment records may be added and maintained from either function.</p> <p>The contract equipment screen has additional fields that may be maintained related to contract processing. On the “Contract info” tab, <i>Contract billing amount</i> and <i>Sales account</i> are used for contract billing and posting. The billing amount specifies the amount to be included on the contract invoice for this equipment. The field <i>Work order invoicing code</i> provides billing defaults when providing service for this equipment during the contract coverage period.</p>
6	<p>Click the Cancel button  or press ESC.</p> <p>RESULT: The contract equipment screen will be closed and you will be returned to the equipment selection window in contract maintenance</p>
7	<p>Click the Cancel button  or press ESC.</p> <p>RESULT: The contract window will be cleared.</p>
8	<p>Click the Cancel button  or press ESC.</p> <p>RESULT: The <i>Contract Maintenance</i> function will be closed.</p>

Select, print and post contract invoices

STEP	ACTION
1	<p>In the ServicePoint menu bar, click on the “Invoicing” entry, then highlight the “Contracts” selection, and then click on the “Select for Billing” in the sub-menu that opens.</p> <p>Alternatively, if you would rather use the keyboard, use ALT-I to highlight “Invoicing”, and then press “C”, then “S” to start contract billing selection.</p> <p>RESULT: The <i>Select Contracts window</i> will be displayed.</p> <p>NOTE: Contracts that match the current filter options appear in this window. Several options exist to filter the selections.</p>
2	<p>Click on the “Select All” button. </p> <p>RESULT: Each displayed contract will be selected for invoicing, as indicated by a “Y” in the “Sel for bill” column of the grid.</p> <p>NOTE: In addition to using the 'Select All' and 'Deselect All' buttons to apply the appropriate selection status, a contract can be individually toggled by clicking on its line in the displayed grid.</p>
3	<p>Click the Cancel button  or press ESC to close the <i>Select Contracts</i> window.</p> <p>RESULT: The <i>Select Contracts</i> will be closed.</p>
4	<p>In the ServicePoint menu bar, click on the “Invoicing” entry, then highlight the “Contracts” selection, and then click on the “Print Invoices” in the sub-menu that opens.</p> <p>Alternatively, if you would rather use the keyboard, use ALT-I to highlight “Invoicing”, and then press “C”, then “I” to start contract invoice printing.</p> <p>RESULT: The <i>Print Contract Invoices window</i> will be displayed.</p> <p>NOTE: Several options exist to filter the contracts to print, as well as controlling the appearance of the invoices.</p>



STEP	ACTION
5	<p>Click on the “Print Invoices” button near the bottom of the window.</p>  <p>RESULT: The Report Viewer will open, with the contract invoice forms displayed. Using the report viewer, a ServicePoint report can be viewed and searched, as well as exported to various formats, emailed, or sent to a printer.</p> <p>All ServicePoint reports are written using Crystal Reports. Any of these reports are easily added to, or modified, to suit individual needs.</p>
6	<p>When you are done previewing the report, click the Close [X] button in</p>  <p>the Report Viewer window to close the window.</p> <p>RESULT: The Report Viewer will close, and you will be asked if the invoices have printed properly.</p>
7	<p>Click “Yes” to answer the question.</p>  <p>RESULT: The included contracts will be marked as printed successfully, and will be available for posting.</p>
8	<p>Click the Cancel button  or press ESC to close the <i>Print Contract Invoices</i> window.</p> <p>RESULT: The <i>Print Contract Invoices</i> will be closed.</p>

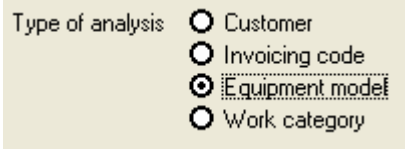



STEP	ACTION
9	<p>In the ServicePoint menu bar, click on the “Invoicing” entry, then highlight the “Contracts” selection, and then click on the “Post” in the sub-menu that opens.</p> <p>Alternatively, if you would rather use the keyboard, use ALT-I to highlight “Invoicing”, and then press “C”, then “P” to start contract invoice posting.</p> <p>RESULT: The <i>Post Contract Invoices window</i> will be displayed.</p> <p>NOTE: Several options exist to filter the contracts to post, as well as controlling whether or not the posting journal report prints. The posting process will transfer invoiced contracts to ServicePoint history, as well as system history in the interfaced accounting system. GL distributions are created into the accounting system in accordance with ServicePoint billing setup.</p>
10	<p>Click on the “Post” button near the bottom of the window.</p>  <p>RESULT: The posting process will begin, and a confirmation window will open indicating the number of invoices that are eligible to be posted.</p>
11	<p>Click “Yes” in the confirmation window.</p>  <p>RESULT: The posting process will commence, with a progress bar indicating the percentage of completion. When the posting is finished, a message box will appear with a notification.</p>




STEP	ACTION
12	<p>Click “OK” to acknowledge the completion message.</p>  <p>RESULT: The service contract distribution journal will open in a report preview window. This report shows a summary of all GL transactions created as a result of the posting process.</p>
13	<p>When you are done previewing the report, click the Close [X] button in</p>  <p>the Report Viewer window to close the window.</p> <p>RESULT: The Report Viewer will close.</p>
14	<p>Click the Cancel button  or press ESC to close the <i>Post Contract Invoices</i> window.</p> <p>RESULT: The <i>Post Contract Invoices</i> window will be closed.</p>




Print and review some management reports.




Several ServicePoint reports are outlined in this section. When finished, please take some time to look at samples of other reports that ServicePoint offers. They include powerful features certain to be useful in your business.

Work Order Profit Analysis	
STEP	ACTION
1	<p>In the ServicePoint menu bar, click on the “Reports” entry, then highlight the “Management” selection, and click on the “Work Order Profit Analysis” in the sub-menu that opens.</p> <p>RESULT: The <i>Print Work Order Profit Analysis</i> selection will be displayed.</p> <p>NOTE: This report is a powerful tool to help you analyze the profitability of your service work in a number of different ways. A wealth of information is presented, including sales and cost information broken down by line type, profit and margin information, and averages by selected criteria.</p>
2	<p>Click on the “Print Report” button near the bottom of the window.</p>  <p>RESULT: The Report Viewer will open, with the work order profit analysis displayed.</p>
3	<p>When you are done previewing the report, click the Close [X] button in</p>  <p>the Report Viewer window to close the preview window.</p> <p>RESULT: The Report Viewer will close, and you will be returned to the work order profit analysis selection window.</p>

STEP	ACTION
4	<p>Click on the “Equipment model” option button to select printing of the report, ordered and subtotaled by type of equipment.</p>  <p>RESULT: The work order profit analysis report may be selected and printed by any of the displayed options. The report will be ordered and subtotaled based on the selected item.</p>
5	<p>Click on the “Print Report” button near the bottom of the window.</p>  <p>RESULT: The Report Viewer will open, with the work order profit analysis displayed, printed based on the new criteria.</p>
6	<p>When you are done previewing the report, click the Close [X] button in</p>  <p>the Report Viewer window to close the preview window.</p> <p>RESULT: The Report Viewer will close, and you will be returned to the work order profit analysis selection window.</p>
7	<p>Click the Cancel button , or press ESC to close the Work Order Profit Analysis report.</p>

Work Order Listing	
STEP	ACTION
1	<p>In the ServicePoint menu bar, click on the “Reports” entry, then highlight the “Management” selection, and click on the “Work Order Listing” in the sub-menu that opens.</p> <p>RESULT: The <i>Print Work Order Listing</i> selection will be displayed.</p> <p>NOTE: This report will print a list of existing work orders, selected by various criteria. Various forms of the report are supported, along with version that include profit and margin information.</p>
2	<p>Click on the “Print Report” button near the bottom of the window.</p> <div style="text-align: center;">  </div> <p>RESULT: The Report Viewer will open, with the work order listing displayed.</p>
3	<p>When you are done previewing the report, click the Close [X] button in</p> <div style="text-align: center;">  </div> <p>the Report Viewer window to close the preview window.</p> <p>RESULT: The Report Viewer will close, and you will be returned to the work order listing selection window.</p>
4	<p>Click the Cancel button , or press ESC to close the Work Order Listing report.</p>

Reprint Work Order Invoices	
STEP	ACTION
1	<p>In the ServicePoint menu bar, click on the “Reports” entry, then highlight the “Management” selection, and click on the “Reprint WO Invoices” in the sub-menu that opens.</p> <p>RESULT: The <i>Reprint WO Invoices</i> selection will be displayed.</p> <p>NOTE: This report reproduces invoices, exactly as they were originally printed during the work order billing process. An individual invoice may be selected, as well as ranges based on invoice number and invoice print date.</p>
2	<p>Click on the “Print Report” button near the bottom of the window.</p> <div style="text-align: center;">  </div> <p>RESULT: The Report Viewer will open, with the work order invoice reprint displayed.</p>
3	<p>When you are done previewing the report, click the Close [X] button in</p> <div style="text-align: center;">  </div> <p>the Report Viewer window to close the preview window.</p> <p>RESULT: The Report Viewer will close, and you will be returned to the reprint invoices selection window.</p>
4	<p>Click the Cancel button  , or press ESC to close the Reprint WO Invoices report.</p>

Technician Schedules	
STEP	ACTION
1	<p>In the ServicePoint menu bar, click on the “Reports” entry, then highlight the “Management” selection, and click on the “Technician Schedule” in the sub-menu that opens.</p> <p>RESULT: The <i>Print Tech Schedule</i> selection will be displayed.</p> <p>NOTE: The technician schedule report will print work order task information, sorted by assigned technician, based on various selection criteria. The report can be printed for unbilled work orders (current schedule), or from history to recap all hours worked and/or billed for a technician for a selected time period.</p>
2	<p>Click on the “Print Report” button near the bottom of the window.</p> <div style="text-align: center;">  <p>The image shows a rectangular button with a light blue background. At the top, there is a small printer icon. Below the icon, the text "Print Report" is written in a dark blue font.</p> </div> <p>RESULT: The Report Viewer will open, with the technician schedule displayed.</p>
3	<p>When you are done previewing the report, click the Close [X] button in</p> <div style="text-align: center;">  <p>The image shows a standard Windows window title bar with three buttons: minimize (blue square), maximize (blue square), and close (red square with a white X). Below the buttons is the BusinessObjects logo.</p> </div> <p>the Report Viewer window to close the preview window.</p> <p>RESULT: The Report Viewer will close, and you will be returned to the technician schedule selection window.</p>
4	<p>Click the Cancel button , or press ESC to close the Technician Schedule report.</p> <p>The image shows a square button with a light blue background and a green arrow pointing to the left.</p>