## Dynacom presents its Service Related Business Management solution



## **DYNACOM SERVICE MANAGEMENT SOLUTION**

# Documentation



Transportation industry Non-profit organizations Construction industry **Service-related businesses** Retail Recycling & Waste management Office furniture dealers Insurance claims

Providing Accounting & ERP Software Solutions Since 1990



**DYNACOM ADD-ON** 



## SERVICE MANAGEMENT MODULE

#### **Table of Contents**

Main Objective	
Features	1
Software	
Required Edition	
Configuration	
System Initialization	
Configuration	
Maintenance	
Customer Categories	
Quote Conditions	5
Service Contract Frequencies	5
Brands and Models	6
Display Periods	7
Periodicities	7
Work Order Priorities	
References	9
Restrictions	9
Media Sources	
Work Order Status	
Appointment Status	
Equipment Support	
Work Order Types	
Service Contract Types	
Warranty Types	
System Types	
Geographical Zones	
Extended Screens	
Items and Services – Details	
Customers – Detailed Information	
Customer – Contacts List	
Customers – Credit Cards	
Employee – Details	
Quotes – Conditions	
Invoices	
Work Orders	
Appointments	
Equipments	
Appointments Grid	
Schedule	
Work Order Authorization	
Use	
Work Orders	
Use	
Appointments History	
Use	
Appointments List	
Use	

## **Objectives**

Add-on Presentation

## Main Objective

The *Service Management* add-on enables Dynacom Accounting to manage customers, equipment and appointments. It lets you invoice customers and manage field service technician scheduling. It also handles product maintenance and service contracts.

## Features

Features offered by the add-on include:

- Customer Category Management
- Quote Conditions Management
- Service Contract Frequency Management
- Brand and Models Management
- Display Periods Management
- Periodicity Management
- Work Order Priorities Management
- References Management
- Restrictions Management
- Media Source Management
- Work Order Management
- Appointment Management
- System Types Management
- Service Contract Types Management
- Warranty Management
- Geographical Zones Management

- Equipments Management
- Appointments Grid Management
- Schedule Management

Chapter



## Requirements

**Requirements Definition** 

## Software

### **Required Edition**

This add-on requires Dynacom Accounting Gold Edition.

## Configuration

### System Initialization

The system initialization must be done from the *Initialization* screen (Configuration/Service Management/Initialization menu). Any attempt to access another screen provided by this add-on before initializing the system will fail.

🔶 Initialization		×
	Click on the 'Initialize' button	
		^
		~
	Initialize Clos	e

### Configuration

The *Configuration* screen (Configuration/Service Management/Configuration) allows the definition of parameters and behaviour for the add-on. These options will be used in various sections of the add-on.

♦ Configuration	×
Validate Scheduling Conflicts	
Schedule 08:00 + to 17:00 +	
Next Work Order # 1	
Work Order Authorization Text	
🖻 🍽 MS Sans Serif 🔹 8.5 🔹 🖪 🗾 🛄 🚍 🚍 🗛 찬 🔒	
Commando ou annaio.	
Work Order Agreement	
I authorize this company and its representative to carry out the work on my system, heating, air conditioning, ventilation and pledge to cover costs related to it. It goes without saying that the parts under warranty will not be charged and will be returned to the manufacturer. For any special order of non-returnable parts, I pledge to pay for the parts, even if the order is canceled.	•
Save	

- 1) Open the Configuration screen (Configuration/Service Management/Configuration menu).
- 2) The *Validate Scheduling Conflicts* box configures whether the add-on must check and warn the user when a technician is assigned to more than one appointment at the same time.
- 3) The *Schedule* allows defining the work hours for the company. The *Schedule* screen will use these hours to show only the useful time sections.
- 4) The Next Work Order # is the number that will be used during the creation of the next work order. If a work order with this number already exists, the next available number will automatically be used.
- 5) The Work Order Authorization Text will be printed directly on the Work Order Authorization report.
- 6) Save the configuration.

## Maintenance

#### **Customer Categories**

The *Customer Categories* screen (Maintenance/Service Management/Customer Categories menu) allows the addition of different customer types. By default, the following categories are available: Residential, Commercial, Contractor, Reseller. These categories will be used in the *Information* tab of the *Customer – Detailed Information* screen.

🔶 Custome	er Categories	(1 of 4)					<b>—</b>
8	$\bigcirc$		Q	3	0		<b>e</b>
Customize	Previous	Next	Search	Query	Add	Delete	Options
Description	Residential						Inactive
						Save	Close

- 1) Open the *Customer Categories* screen (Maintenance/Service Management/Customer Categories menu).
- 2) Add a new record.
- 3) Fill in a Description.
- 4) Check the *Inactive* box if you no longer wish to see the category in selection lists.
- 5) Repeat steps 2 to 4 for each customer category you need to create.

#### **Quote Conditions**

The *Quote Conditions* screen (Maintenance/Service Management/Quote Conditions menu) allows the creation of different condition types when generating a quote for a customer. These conditions will be used in the *Quote – Conditions* screen.

🔷 Quote C	Quote Conditions (1 of 2)										
8	$\bigcirc$		e	3	0			2			
Customize	Previous	Next	Search	Query	Add	Delete		Options			
Title	01. MERCHANDISE RETURN CONDITION										
Description		All sales are final. If the equipment malfunctions in the first 30 days following the purchase, a free repair is offered.									
	<b>V</b> Include by	Default									
						Save		Close			

- 1) Open the Quote Conditions screen (Maintenance/Service Management/Quote Conditions menu).
- 2) Add a new record.
- 3) Fill in a *Title* and a *Description*.
- 4) Check the *Inactive* box if you no longer wish to see the condition in selection lists.
- 5) Check *Include by Default* if you want this condition to be included by default in every quotes.
- 6) Repeat steps 2 to 5 for each quote conditions you need to create.

#### Service Contract Frequencies

The Service Contract Frequencies screen (Maintenance/Service Management/Service Contract Frequencies menu) allows the addition of service contract periods. By default, the following frequencies are available: Daily, Weekly, Monthly, Quarterly, Annual, Bi-Annual. These frequencies will be used in the Service Contracts tab of the Equipment screen.

Service C	Service Contract Frequencies (1 of 6)									
8	$\bigcirc$		Θ	3	0		<b>e</b>			
Customize	Previous	Next	Search	Query	Add	Delete	Options			
Description	Annual						Inactive			
Frequency	Frequency 1 x per Year									
						Save	Close			

- 1) Open the Service Contract Frequencies screen (Maintenance/Service Management/Service Contract Frequencies menu).
- 2) Add a new record.
- 3) Fill in a Description.
- 4) Check the *Inactive* box if you no longer wish to see the service contract frequency in selection lists.
- 5) Configure the frequency according to your needs (for example, if you want to create semi-weekly, the frequency should be 2 x per week).
- 6) Repeat steps 2 to 5 for each service contract frequency you need to create.

#### **Brands and Models**

The *Brands and Models* screen (Maintenance/Service Management/Brands and Models menu) allows the creation of product brands with their associated models.

ind Models (i	L of 2)					×
O Previous	Next	e Search	Juery	Add	Delete	Options
SAMSUNG						Inactive
ption					_	
0FX )E					_	
					_	
					5740	Close
	Previous SAMSUNG ption	SAMSUNG ption DFX	Previous Next Search SAMSUNG	Previous Next Search Query SAMSUNG DFX	Previous Next Search Query Add     SAMSUNG     ption   DFX E	Image: Next     Image: Search     Image:

- 1) Open the *Brands and Models* screen (Maintenance/Service Management/Brands and Models menu).
- 2) Add a new record.
- 3) Fill in a *Description* for the product brand.
- 4) Fill in a *Description* for every model of the brand. You can create multiple models for the same brand, but at least one is required.
- 5) Check the *Inactive* box if you no longer wish to see the brand in selection lists.
- 6) Repeat steps 2 to 5 for each brand you need to create.

#### **Display Periods**

The *Display Periods* screen (Maintenance/Service Management/Display Periods) allows the creation of display periods for the *Appointments Grid*. You can then filter the appointments by period. The default display periods include Next 7 days, Next 14 days, Past 7 days.

💠 Display P	Display Periods (2 of 10)										
8		) (		Θ	3	5		<b>e</b>			
Customize	Previo	us	Next	Search	Query	Add	Delete	Options			
Description		Next 14	4 days					Inactive			
Interval (day	/s)	14									
L							Save	Close			

- 1) Open the Display Periods screen (Maintenance/Service Management/Display Periods).
- 2) Add a new record.
- 3) Fill in a Description.
- 4) In the Interval field, specify the interval (in days) for the period. For past periods, use the « » symbol.
- 5) Check the *Inactive* box if you no longer wish to see the display period in selection lists.
- 6) Repeat steps 2 to 5 for each display period you need to create.

#### **Periodicities**

The *Periodicities* screen (Maintenance/Service Management/Periodicities) allows the creation of time periods. By default, the following periodicities are available: Year, Month, Week. These periodicities will be used when configuring the frequencies in the *Service Contract Frequencies* screen.

💠 Periodici	ties (1	L of 3)						
8				Θ	3	0		<b>e</b>
Customize	Prev	vious	Next	Search	Query	Add	Delete	Options
Description		Week						Inactive
Number of da	ays	7						
							Save	Close

- 1) Open the *Periodicities* screen (Maintenance/Service Management/Periodicities).
- 2) Add a new record.
- 3) Fill in a Description.
- 4) Fill in a number of days representing the periodicity.
- 5) Check the *Inactive* box if you no longer wish to see the periodicity in selection lists.
- 6) Repeat steps 2 to 5 for each periodicity you need to create.

#### Work Order Priorities

The *Work Order Priorities* screen (Maintenance/Service Management/Work Order Priorities) allows the creation of different priority levels. By default, the following priorities are available: Normal, Urgent.

🔶 Work Or	der Priorities	(1 of 2)					<b>X</b>
8			Q	3	0		<b>e</b>
Customize	Previous	Next	Search	Query	Add	Delete	Options
Description	Normal						Inactive
	V Default Pri	iority					
						Save	Close

- 1) Open the Work Order Priorities screen (Maintenance/Service Management/Work Order Priorities).
- 2) Add a new record.
- 3) Fill in a *Description*.
- 4) Check the *Inactive* box if you no longer wish to see the work order priority in selection lists.
- 5) Check the *Default Priority* box if you wish the current priority to be the one selected by default when a new work order is created. There must always be one (and only one) default priority.
- 6) Repeat steps 2 to 5 for each priority you need to create.

### References

The *References* screen (Maintenance/Service Management/References) allows the creation of reference types to identify the source through which a new customer might have heard of the company. By default, the following priorities are available: Other, Customer, Supplier. These references are used in the *Information* tab of the *Customers – Detailed Information* screen.

💠 Referenc	es (1 of 3)						<b>-</b> ×
8			Q	3	0		<b>e</b>
Customize	Previous	Next	Search	Query	Add	Delete	Options
Description	Customer						Inactive
						Save	Close

- 1) Open the *References* screen (Maintenance/Service Management/References).
- 2) Add a new record.
- **3)** Fill in a *Description*.
- 4) Check the *Inactive* box if you no longer wish to see the reference in selection lists.
- 5) Repeat steps 2 to 4 for each reference you need to create.

#### Restrictions

The *Restrictions* menu (Maintenance/Service Management/Restrictions) allows the creation of restriction notes. By default, the following restrictions are available: In Collection, Payment must be made by credit card and Must pay due. These restrictions are usable in the *Information* tab of the *Customers – Detailed Information* screen. Once a restriction is specified on a customer, it will appear in red at the bottom of this customer's work orders.

Restriction	ons (3 of 3)						<b>—</b>
8			Q	3	<u>_</u>		<b>e</b>
Customize	Previous	Next	Search	Query	Add	Delete	Options
Description	Must pay due						Inactive
						Save	Close

- 1) Open the *Restrictions* screen (Maintenance/Service Management/Restrictions).
- 2) Add a new record.
- 3) Fill in a Description.
- 4) Check the *Inactive* box if you no longer wish to see the restriction in selection lists.

5) Repeat steps 2 to 4 for each restriction you need to create.

#### Media Sources

The *Media Sources* screen (Maintenance/Service Management/Media Sources) allows the creation of different media sources from which a customer might have heard about your company. By default, the following media sources are available: Directories, Internet, Newspapers and Magazines. These media sources are used in the *Information* tab of the *Customers – Detailed Information* screen.

🔶 Media S	ources (1 of 3	3)					×
Customize	Previous	Next	Search	Query	Add	Delete	Options
				<i>'</i>			
Description	Internet						Inactive
Source De						-	
Descr				Ir	nactive	_	
Goog	e						
Yahoo	0						
MSN							
ļ							
						Save	Close
						Save	Close

- 1) Open the *Media Sources* screen (Maintenance/Service Management/Media Sources).
- 2) Add a new record.
- 3) Fill in a *Description* for the media source.
- 4) Fill in a *Description* for every detail of the media. You can create multiple details for the same media, but at least one is required. Check the *Inactive* box if you no longer wish to see the detail in the selection lists.
- 5) Check the *Inactive* box if you no longer wish to see the media source in the selection lists.
- 6) Repeat steps 2 to 5 for each media source you need to create.

#### Work Order Status

The *Work Order Status* screen (Maintenance/Service Management/Work Order Status menu) allows the addition of different work order states. By default, the following states are available: Open, Current, Standby, To process, Cancelled and Closed. These attributes will be used when creating work orders in the *Status* section.

🔶 Work Ord	ler Status (1	of 6)					<b>—</b>
8	$\bigcirc$		Q	3	0		<b>8</b>
Customize	Previous	Next	Search	Query	Add	Delete	Options
Description Status Type	Open Active V Defau	lt Status	•				Inactive Inactive
						Save	Close

- 1) Open the Work Order Status screen (Maintenance/Service Management/Work Order Status menu).
- 2) Add a new record.
- **3)** Fill in a *Description*.
- 4) Fill in the Status Type.
- 5) Check the *Inactive* box if you no longer wish to see the status in selection lists.
- 6) Check the *Default Status* box if you wish the current status to be the one selected by default when a new work order is created. There must always be one (and only one) default status.
- 7) Repeat steps 2 to 6 for each work order status you need to create.

#### Appointment Status

The Appointment Status screen (Maintenance/Service Management/Appointment Status) allows the creation of different appointment statuses. By default, the following statuses are available: Open, Current, Standby, Completed, Cancelled, Billed, Non billable. These appointment statuses are used when creating appointments, in the *Status* section.

🔶 Appointr	ment Status (	(1 of 7)					×
8	$\bigcirc$		Θ	3	5		<b>e</b>
Customize	Previous	Next	Search	Query	Add	Delete	Options
Description	Open						Inactive
Status Type	Active		•				
Enforce E Explanation	xplanation ns						
Descri							
Default S	tatus						
Show In 🤇	Current Appoi	ntments					
	Appointments	To Confirm					
Generate	Invoice						
						Save	Close

- 1) Open the Appointment Status screen (Maintenance/Service Management/Appointment Status).
- 2) Add a new record.
- 3) Fill in a *Description* for the status.
- 4) Fill in the Status Type.
- 5) Check the *Enforce Explanation* box if you wish to require an explanation whenever an appointment is saved with this status.
- 6) Fill in a *Description* for every explanation of the status. You can create multiple explanations for the same status, but at least one is required.
- 7) Check the *Default Status* box if you wish the current status to be the one selected by default when a new appointment is created. There must always be one (and only one) default status.
- 8) Check the Show In Current Appointments or Show In Appointments To Confirm boxes if you wish to see appointments with this status in the current appointments and appointments to confirm tabs of the Appointments Grid screen.
- 9) Check the *Generate Invoice* box if an invoice must be generated whenever an appointment is saved with this status.
- **10)** Check the *Inactive* box if you no longer wish to see the appointment status in selection lists.

**11)** Repeat steps 2 to 10 for each appointment status you need to create.

## **Equipment Support**

The *Equipment Support* screen (Maintenance/Service Management/Equipment Support) allows the creation of the different support types included with the products to install. These supports are used in the *Equipments* screen.

🔶 Equipme	ent Support (3	3 of 3)					×
8			Q	3	0		<b>e</b>
Customize	Previous	Next	Search	Query	Add	Delete	Options
Description	Wall Mount						Inactive
						Save	Close

- 1) Open the Equipment Support screen (Maintenance/Service Management/Equipment Support).
- 2) Add a new record.
- 3) Fill in a Description.
- 4) Check the *Inactive* box if you no longer wish to see the equipment support in selection lists.
- 5) Repeat steps 2 to 4 for each support type you need to create.

### Work Order Types

The *Work Order Types* screen (Maintenance/Service Management/Work Order Types) allows the creation of different work order types. By default, the following work order types are available: Service Call, Maintenance, Installation.

🧇 W	ork Ord	der Type	es (1 o	of 3)					×
6	6				Θ	3	0		<b>2</b>
Cust	omize	Previo	us	Next	Search	Query	Add	Delete	Options
Deso	ription		Servi	ce Call					Inactive
Invo	icing Ite	m	Servi	ce			٩		
Int	erventio	n Types							
	Descrip	otion				I	nactive	*	
	Failure								
	Noise								
	Callbac	k							
	Cold R	oom							
	Water	Heater						-	
						1	1		
								Save	Close

- 1) Open the Work Order Types screen (Maintenance/Service Management/Work Order Types).
- 2) Add a new record.
- 3) Fill in a *Description* for the work order type.
- 4) Fill in an *Invoicing Item*. This item must be a service. It will be used during the invoice generation when an appointment linked to the work order is saved with a status shaving the *Generate Invoice* box checked.
- 5) Fill in a *Description* for every intervention type of the work order type. You can create multiple intervention types for the same work order type, but at least one is required. Check the *Inactive* box if you no longer wish to see the intervention type in the selection lists.
- 6) Check the Inactive box if you no longer wish to see the work order type in selection lists.
- 7) Repeat steps 2 to 6 for each work order types you need to create.

### Service Contract Types

The Service Contract Types screen (Maintenance/Service Management/Service Contract Types) allows the creation of different maintenance types performed on a customer's product. By default, the following service contract types are available: Annual Maintenance, Bi-Annual Maintenance, Daily Maintenance, Monthly Maintenance, Quarterly Maintenance, Weekly Maintenance.

<b>\$</b> :	Service (	Contract Typ	pes (1 of 6)					<b>×</b>
	\$			e	3	<u>_</u>		<b>8</b>
Cu	stomize	Previous	Next	Search	Query	Add	Delete	Options
Des	cription	[	Annual Mainte	enance				Inactive
Wo	rk Order	Type (	Maintenance	•				
Int	erventio	<u>1 Type</u>	Maintenance	-				
S	ervice Co	ontract Frequ	iencies					
	Servio	e Contract F	requency		Inactive			
	Annu	al						
1 ±	*							
							Save	Close

- 1) Open the Service Contract Types screen (Maintenance/Service Management/Service Contract Types).
- 2) Add a new record.
- 3) Fill in a *Description* for the service contract type.

- 4) Fill in a Work Order Type.
- **5)** Fill in an *Intervention Type*.
- 6) Fill in a *Description* for every possible frequency of the service contract type. You can define multiple frequencies for the same service contract type, but at least one is required. Check the *Inactive* box if you no longer wish to see the frequency in the selection lists.
- 7) Check the *Inactive* box if you no longer wish to see the service contract type in selection lists.
- 8) Repeat steps 2 to 7 for each service contract type you need to create.

#### Warranty Types

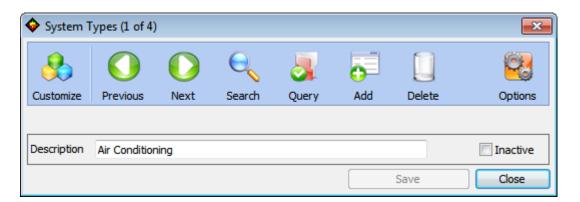
The *Warranty Types* screen (Maintenance/Service Management/Warranty Types) allows the creation of different warranties. By default, the following warranty types are available: Extended Warranty, Warranty on Labour, Warranty on Parts, Warranty on Parts and Labour, Warranty on Used Parts. These warranty types are used in *Warranties* tab of the *Equipments* screen.

🔶 Warranty	7 Types (1 of	5)					<b>—</b>
8			Q	3	0		<b>8</b>
Customize	Previous	Next	Search	Query	Add	Delete	Options
Description	Warranty o	n Parts					Inactive
						Save	Close

- 1) Open the *Warranty Types* screen (Maintenance/Service Management/Warranty Types).
- 2) Add a new record.
- **3)** Fill in a *Description*.
- 4) Check the *Inactive* box if you no longer wish to see the warranty type in selection lists.
- 5) Repeat steps 2 to 4 for each warranty type you need to create.

#### System Types

The *System Types* screen (Maintenance/Service Management/System Types) allows the creation of different system types sold or serviced by your company. By default, the following system types are available: Air Conditioning, Water Heater, Electric Arc Furnace, Heat Pump.



- 1) Open the *Product Systems* screen (Maintenance/Service Management/System Types).
- 2) Add a new record.
- 3) Fill in a Description.
- 4) Check the *Inactive* box if you no longer wish to see the system type in selection lists.
- 5) Repeat steps 2 to 4 for each system types you need to create.

### **Geographical Zones**

The *Geographical Zones* screen (Maintenance/Service Management/Geographical Zones) allows the creation of different levels of distance between the company and the customer. By default, the following zones are available: Local, Remote.

💠 Geograpi	hical Zones (	1 of 2)					<b>—</b>
8			Q	3	<u>_</u>		<b>e</b>
Customize	Previous	Next	Search	Query	Add	Delete	Options
Description	Local						Inactive
						Save	Close

- 1) Open the Geographical Zones screen (Maintenance/HVAC Management/Geographical Zones).
- 2) Add a new record.
- **3)** Fill in a *Description*.
- 4) Check the *Inactive* box if you no longer wish to see the geographical zone in selection lists.
- 5) Repeat steps 2 to 4 for each geographical zone you need to create.

#### Items and Services – Details

The *Items and Services – Details* screen allows you to specify if the item can have a serial number as well as more technical information. This information will be used during the equipment creation and the addition of a detail in an invoice.

Items and Service	s - Details		X
System Type	Heat Pump	•	
Brand	SAMSUNG	٩	
Model	MH050FX	٩	
	🔽 Can have a serial number		
Default Detail Tex	t		
			*
			_
			Close

The available fields are:

- The system type of the item (required if Can have a serial number is checked)
- The brand of the item (required if Can have a serial number is checked)
- The model of the item (required if Can have a serial number is checked)
- The default detail text

### **Customers – Detailed Information**

The Customers - Detailed Information screen gives access to a more detailed profile for the customer.

Detailed Information				
Information Equipme	ent List Work Order List			
Customer Category	Commercial 🗸	Reference Type	Other 💌	
Geographical Zone	Local 👻	Reference Media	Internet 🔹	
Service Restriction	<none></none>	Reference Media Detail	Google	
Additional Notes				
				*
				*
				Close

In the Information tab, the fields you can fill in are:

- Customer Category
- Geographical Zone
- Service Restriction
- Reference Type
- Reference Media
- Reference Media Detail
- Additional Notes

D	atai	led Information										
Ľ	cual											
	Infi	ormation Equipment List Wo	ork Order List									
											Add	Delete
	Г	Serial Number	Item Code	Brand		Model	Year	Support	Туре	Description		
		SAM2005-2003553-AQV220	HP-SAMSUNG-AQV	SAMSUN	G	AQV	2005	Wall Mou	int	Heat pump		
	 								Constant C			
	Not	ies		_	Warranties	•			Service C	ontracts		
					Туре			In Effect	Туре			In Effect
					Warranty	on Parts		Yes		laintenance		No
									Annual N	laintenance		Yes
				-								
												Close

In the *Equipment List* tab:

- By clicking on Add, you can create new equipment for the customer.
- By clicking on *Delete*, you can directly delete an equipment.
- The equipment notes, warranties and service contracts are shown on the lower part of the tab.
- By double-clicking on a record in the grid, the *Equipment* screen opens. From this screen, you can transfer the equipment to another customer.

	ed Information								
fo	ormation Equipme	nt List Work Ord	er List						
								Add	Delete
	Work Order #	Status	Priority	Туре	Intervention Type	Reference Number	Contact Name	Actual Duration	
	1	Open	Normal	Service Call	Noise		The White Whale	0h00	
	es								
	es								
te	es								
te	es								
te	es								
te	es							_	
	es								

In the Work Order tab:

- By clicking on *Add*, you can create a new work order for the customer.
- By clicking on *Delete*, you can directly delete a work order.
- The equipment notes are shown on the lower part of the tab.
- By double-clicking on a record in the grid, the Work Order screen opens.

### **Customer – Contacts List**

The *Customers – Contacts List* screen allows the creation of multiple customer contacts. These contacts will be used in the *Work Order* screen to determine the servicing address.

Contacts List (1 of 2)					
🚴 🔇		Θ	3	5	
Customize Previou	s Next	Search	Notes a	Add	Delete
Code	WHITC-1				Inactive
Contact Name	The White W	nale			
Title					
Relationship	Franchise				
Address	225 Berri				
City	Montreal				
Zip/Postal Code	F5K 9L2				
Country	CAN - Canada	а			٩
Phone (Work)	(514) 445-93	82			
Phone (Home)					
Phone (Cellular)					
Phone (Other)					
Fax	(514) 445-33	95			
Email (Work)	thewhitewhal	e@wcmarke	ts.com		
Email (Home)					
			Sa	ve	Close

The available fields are:

- Code
- Contact Name
- Title
- Relationship
- Address
- City
- Zip/Postal Code
- Country
- Phone (Work)
- Phone (Home)
- Phone (Cellular)
- Phone (Other)
- Fax
- Email (Work)
- Email (Home)

## **Customers – Credit Cards**

The Customers – Credit Cards screen allows you to define one or more credit cards linked with the customer.

Credit Cards (1 o	f 2)						
Justomizi Prev	ious Ne	xt Se	arch	Add	Delete	Options	s
Credit Card Type	e (	American Ex	press	•			
Number	[	4444 1111	1111 1111				
Security Code C	VV2	582					
Expiration Date		11/12					
Card Holder Nan	ne	Steve Sulliva	an				
		Default C	redit Card				
					Save	Close	

The available fields are:

- Credit Card Type
- Number
- Security Code CVV2
- Expiration Date
- Card Holder Name
- Default Credit Card (one card, and only one, must be defined as a default credit card)

### Employee – Details

The *Employee – Details* screen allows you to specify if the employee is a technician. Only technicians can be added to a customer's work order.

Employees - Details	
V Technician	
	Close

#### **Quotes – Conditions**

The Quotes – Conditions screen allows you to specify which conditions should be attached to the current quote. When a new quote is created, every quote condition with the *Include by Default* box checked are automatically added.

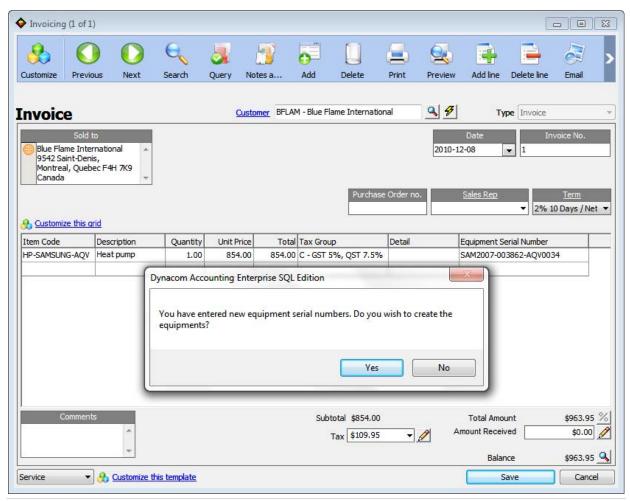
Qu	ote - Conditions		X
		Description	
	01. MERCHANDISE RETURN CONDITION	All sales are final. If the equipment malfunctions in the first 30 days following the purchase, a free repair is offered.	
*			
L			
		Close	

The *Title* field allows you to pick a condition.

The *Description* field will automatically take the value of the chosen condition. This field can be modified without affecting the base condition.

#### Invoices

The *Invoices* screen was modified to enable the specification of serial numbers and additional details to the invoices details.



When the invoice is saved, if at least one detail has a serial number defined, an item with the *Can have a serial number* box checked and for which no equipment with the serial number already exists, an automatic equipment creation function will be suggested.

The automatic equipment creation will add, for each valid detail, an equipment with the invoice's customer as the owner.

## Functionality

## Detailed Description Of The Add-on Features

## Work Orders

#### Use

The Work Orders screen (Service Management/Work Orders menu) offers 3 tabs:

- o Information
- o Equipments
- o Appointments

#### Information tab

♦ Work Orders (1 of 1)		
Customize Previous Next		elete Add line Delete line Authoriz Work Or Invoice Options
Information Equipments Appoint Work Order #1 Status Status		Customer Info Customer WHITC - White Clover Markets
Priority Type Work Order Type Intervention Type	Normal   Service Call  Noise	Billing Address     1774 de la Gauchetière       Contact Info     WHITC-1 - The White Whale
Others Reference Number Internal Notes		Service Address 225 Berri
	•	ZoneLocalCategoryCommercialTerm2% 10 Days / Net 30 Days
Appointments Duration Summary		Payment Method General Customer Credit Card
Planned Actual Billable	0h00 0h00 0h00	Payment Type None>
Work Order #1		Save

The following fields are mandatory:

• Status (initialized with the default work order status)

- **Priority** (initialized with the default work order priority)
- Work Order Type
- Intervention Type
- Customer
- Contact Info

This tab allows the creation of the work order with an intervention type and a priority for the technician. You can also specify a reference number and some internal notes on the work order.

The Appointments Duration Summary section will automatically be updated from the appointments in the Appointments tab.

The *Customer* field allows the selection of the customer. By clicking the lens button, the information will be loaded automatically. The *Contact Info* field allows to specify the Service Address of the work order. If the customer had at least one credit card configured (in the detail screen *Customer – Credit Cards*), the corresponding section will be filled automatically.

The work order number is automatically set when the work order is saved. The next work order number can be changed in the *Configuration* screen (Configuration/Service Management/Configuration menu).

|--|

¢	Work Ore	ders (1 of 1)															
	\$			Θ	5		0		<b>-</b>	:		<b>R</b>	Q	Ş			2
CL	stomize	Previous	Next	Search	Quer	y Notes a	Add	Delete	Add line	Delete	e line	Authoriz	Work Or	Invoice			Options
I	nformation	n Equipments	Appoir	ntments													
Шr	Serial I	Number		Product Number	r Br	rand	Model			Year	Suppor	rt Type	Description	ı			
	SAM20	005-2003553-A	QV220	HP-SAMSUNG-A	QV S/	AMSUNG	AQV			2005	Wall M	lount	Heat pump	)			
	*																
	otes					Warranties						Service Con	tracts				
	leat pump	, ,			~	Туре			In	Effect		Туре				In Ef	fect
						Warranty on I	Parts		Ye	s		Annual Mai	ntenance			No	
												Annual Mai	ntenance			Yes	
					Ŧ												
We	rk Order	#1												[	Save		Close
		-													Jave		Ciuse

The customer's equipment can be linked with the work order by typing the serial number in the *Serial Number* field. To create new equipment owned by the work order customer, click on *Add line*. To remove an equipment from the list, click on *Delete line*.

By double-clicking on a record in the grid, the *Equipment* screen opens. The lower part of the tab shows the notes, warranties and service contracts of the selected equipment.

#### Appointments tab

ustomize	Previous	Next Se	🔧 🏹 arch Quer	y Notes			<b>i</b> E			<u>s</u>	9
	Previous	Next Se	arch Quer	y Notes	a Add						
nformation					a Auu	Delete Ad	d line 🛛 Delete li	ne Authoriz	Work Or	Invoice	Optio
nformation											
	Equipments	Appointments	۶ <b>ـــــ</b>								
Status		Main Technician	Expected D	ate Co	onfirm Date	Appointment Tin	ne Actual Dura	tion Invoid	e Number		
Open		Laura Callahan	2010-12-13	3		9h15					
*										]	
otes				Technici	ans			Technician	s Notes		
		ange noise is com	ning out of 🛛 🔺	Laura C	allahan						
The custom	ier says a stra										
	ump.										
The custom	ier says a stra ump.										
he custor	ier says a stra ump.										

Click on *Add line* to create an appointment. The *Appointment* screen opens to handle the appointment creation. Once an appointment is created, you can see the details by double-clicking it in the grid. The lower part of the tab shows the notes, the technicians and the technicians' notes for the selected appointment.

The Authorization button of the toolbar allows you to preview the Work Order Authorization Report. The Work Order button of the toolbar allows you to preview the Work Order Report for the selected appointment.

The *Invoice* button of the toolbar allows you to show the invoice linked with the selected appointment. For this to work, the appointment status must be set at *Done* and the *Generate Invoice* box must be checked.

## Appointments

#### Use

The Appointments screen (Service Management/Appointments menu) offers 2 tabs:

- o Information
- o Technicians

#### Information tab

Appointments	(1 of 1)										_ • <b>×</b>
8			9	3	0						<u></u>
Customize Prev	vious N	lext S	earch (	Query	Add	Delete	Work Or				Options
Information Tec	chnicians										
Status		Open		•							
Work Order		1 - WHI	TC - White C	Clover Mar	kets - Noise	٩ 0	eposit Amount				
Manual Invoice	Number					ŝ	tatus Explanati	ion	<none></none>	•	
Appointment No						D	etailed Status E	Explanation	1		
The customer s	ays a su an	ge noise is d	coming out d	n the field	c pump.	*					^
Dates and Time	s										
Planned Date		2010-12	-13 👻								
Confirmed Date			-	•							
Time		09 🔻	h 15 🔻	min							
Planned Duratio	n	03 🔻	h 00 🔻	min							
Actual Duration		00 🔻	h 00 -	min							-
Billable Duration	1	00 🔻	h 00 🔻	min		P	rint Date			•	
[										Save	Close

The following fields are mandatory:

- Status (Initialized with the default appointment status)
- Work Order (Initialized if the appointment is created from a work order)
- Planned Date
- Time
- **Status Explanation** (if the status has the *Enforce Explanation* box checked)
- At least one technician

The *Work Order* field allows to link the appointment to an existing work order. If the appointment is created from a work order, this field is read-only.

The *Manual Invoice Number* field allows to specify an invoice number for the appointment. When the appointment will be billed (which happens automatically when the appointment is saved with a status having the *Generate Invoice* box checked), the created invoice will have this number. In a similar way, the invoice will have a deposit amount equivalent to the amount stored in the *Deposit Amount* field.

The *Appointment Notes* field will hold notes about the appointment and the actual work to be done by the technicians.

The *Planned Date* field will hold the initial appointment date. Once the final date is confirmed with the customer, you can set the *Actual Date* field accordingly.

You can specify the *Time* at which the appointment will take place. You can also indicate the *Planned Duration* of the appointment, to help planning your technician's schedule. The *Actual* 

*Duration* and *Billable Duration* fields must be filled in when the appointment is completed by the technicians, to report the real appointment duration and the duration that will be billed to the customer, respectively.

The *Status Explanation* field allows to specify an explanation for the current status. It is possible to define a more detailed explanation using the *Detailed Status Explanation* field.

Technicians tab

Information     Technicians Notes     Technicians Notes	🔶 Appoint	ments (1 of 1	)							
Customize       Previous       Next       Search       Query       Add       Delete       Work Or       Options         Information       Technicians	-			Θ		2		Ċ,		<u> </u>
Information       Technicians         IcALL       Laura Callahan         *	Customize	Previous	Next	-			Delete	Work Or		Options
Code       Full Name         LCALL       Laura Callahan         *					,				 	
Code       Full Name         LCALL       Laura Callahan         *		Tochnician								
LCALL Laura Callahan     **        Technicians Notes	Information		s							
LCALL Laura Callahan     **        Technicians Notes	Code	2	Full Name	•						
Technicians Notes	▶ LCAI	L	Laura Cal	lahan						
	*									
	Tocheirie	na Nataa								
Save Close	Technica	ins notes								*
Save Close										
Save Close										
Save Olise										_
Save Close										
	L								Save	Close

This tab allows the definition of technicians assigned to an appointment.

The *Code* field allows to choose a technician to assign to the appointment. Only the employees having the *Technician* box checked can be assigned to an appointment. Once the appointment is completed by the technicians, they can write their notes in the lower part of the tab.

## Equipments

#### Use

The Equipments screen (Service Management/Equipments menu) offers 4 tabs:

- o Equipment
- o Warranties
- Service Contracts
- o History

#### Equipment tab

🚴 🔍	) 🜔 🔍 🎩 🥫		] 💣		<b>e</b> .
ustomize Previ			ete Transfer		Option
Equipment Warr	anties Service Contracts History				
quipment Type	Internal	•	Owner	WHITC - White Clover Markets	C
Product Code	HP-SAMSUNG-AQV	۹	Installation Date	2007-09-10 💌	
escription	Heat pump	*	Invoice Number		
			Notes		
		-			4
System Type	Heat Pump	Ŧ			
Brand	SAMSUNG	9			
<u>Iodel</u>	AQV				
Support Type	Wall Mount	•			
'ear	2005				
erial Number	SAM2005-2003553-AQV220				

The following fields are mandatory:

- Equipment Type
- Serial Number
- Owner
- Installation Date
- Product Code (if the equipment type is internal)
- Description (if the equipment type is external)
- System Type (if the equipment type is internal)
- Brand (if the equipment type is internal)
- Model (if the equipment type is internal)

This tab allows the creation of a customer's equipment or product (internal or external) and to link it to its owner.

The *Equipment Type* field allows to specify if the equipment is internal or external. If the equipment is internal, an item exists to represent it. Else, the equipment can be defined manually as an external equipment.

The *Product Code* field allows to link an internal equipment to the corresponding item. The list will only show the items with the *Can have a serial number* box checked. If the equipment is external, the field *Product Code* is read-only.

The *Description, System Type, Brand* and *Model* fields are automatically filled from the item if the equipment is internal. If the equipment is external, these fields can be manually filled to describe the equipment as accurately as possible.

The *Support Type* field allow to specify the support type of the equipment. The *Year* field allows to specify the creation year of the equipment.

The Serial Number field allows to specify the unique serial number of the equipment.

The *Owner* and *Installation Date* fields are linked to the actual owner of the equipment. They are also visible in the *History* tab. The *Owner* field can only be modified during the creation or transfer of the equipment.

The *Invoice Number* field allows to keep the customer's invoice number for when he bought the equipment. The *Notes* field allows to keep some general notes about the equipment.

#### Warranties tab

Image: Service Contracts       History         Image: Service Contracts       Image: Service Contracts         Image: Service Contracts       History         Image: Service Contracts       Image: Service Contracts         Image: Service Contracts       Service Contracts         Ima	<b>\$</b> 1	quipmer	nts (1 of 1)									[	- • •
Equipment       Warranties       Service Contracts       History         Warranty Type       Number       Start Date       Duration       End Date       In Effect         Warranty on Parts       2007-09-10       4 years       2011-09-10       Image: Contract of the service of the	¢	8	0		Q	3	0		<b></b>	-	<b></b>		<b>e</b>
Warranty Type       Number       Start Date       Duration       End Date       In Effect         Warranty on Parts       2007-09-10       4 years       2011-09-10       Image: Comparison of the second of the secon	Cus	stomize	Previous	Next	Search	Query	Add	Delete	Transfer	Add line	Delete line		Options
Warranty Type       Number       Start Date       Duration       End Date       In Effect         Warranty on Parts       2007-09-10       4 years       2011-09-10       Image: Comparison of the second of the secon													
Warranty on Parts         2007-09-10         4 years         2011-09-10         Image: Control of the second se	Ec	uipment	Warranties	Service Co	ontracts His	story							
						Number				-			
		_	nty on Parts					2007	-09-10	4 years		2011-09-10	
	ľ	ŧ											
		otes											
×													
Save Clean													~
5dVE LIOSE												Save	Close

The *Warranties* tab allows the configuration of the equipment warranties. You can add or remove warranties using the *Add line* and *Delete line* buttons in the toolbar.

The *Warranty Type* field allows to specify the warranty type.

The *Number* field allows to specify a warranty number to help dissociate different warranties of the same type.

The *Start Date* field determines the start of the warranty. The *End Date* field cannot be directly edited; to determine the end of the warranty, the *Duration* must be defined. To define the *Duration*, the *Duration Editor* must be used.

The *In Effect* field is automatically calculated according to the current date.

In the lower part of the tab, the Notes field allows to keep some notes about the selected warranty.

#### Duration Editor

🔶 Du	ration Editor	x
Durat	tion	
4	Year(s) 0	• Week(s)
0	▲ Month(s) 0	⊥ Day(s)
Start	2007-09-10 💌	End 2011-09-10 💌
	ОК	Cancel

The *Duration Editor* screen allows to define a duration. It can be accessed from the *Warranties* and *Service Contracts* tabs of the *Equipments* screen.

The *Start Date* field is automatically filled with the value from the calling screen. It can be edited from this screen; the value will subsequently be updated in the calling screen.

The *End Date* field is automatically filled by adding the duration to the start date. If the *Start Date* is specified, directly specifying the *End Date* will result in the *Duration* being automatically calculated.

The *Duration* section allows to define the duration. A duration is defined in years, months, weeks or days, or any combination of the 4. Whenever the duration is modified, the *End Date* is automatically adjusted to reflect the change. The *Duration* must be of at least one day.

<b>S</b>   🔰 🎈	) 🔍	- 🎝	0		ş 🤹 -			<u>e</u>
stomize Previous N	ext Search	Query	Add	Delete Tran	sfer Work Or	Add line Delete	line	Option
uipment Warranties Se	vice Contracts	History						
Service Contract Type	Frequency	Number	Reference	Start Date	Duration	End Date	In Effect	Work Orders Were Created
Annual Maintenance	Annual			2007-09-10	2 years	2009-09-10		
Annual Maintenance	Annual			2009-09-10	2 years	2011-09-10	✓	
÷								
N	I		1					
		1	1					
otes								

#### Service Contracts tab

The Service Contracts tab allows the configuration of the customer's service contracts. You can add or remove service contracts using the Add line and Delete line buttons in the toolbar.

The Service Contract Type field allows to specify the service contract type. The Frequency field allows to choose the frequency at which the maintenance appointments must be made.

The *Number* field allows to specify a service contract number to help dissociate different service contracts of the same type.

The *Start Date* field determines the start of the service contract. The *End Date* field cannot be directly edited; to determine the end of the service contract, the *Duration* must be defined. To define the *Duration*, the *Duration Editor* must be used.

The *In Effect* field is automatically calculated according to the current date.

In the lower part of the tab, the *Notes* field allows to keep some notes about the selected service contract.

From this tab, the *Create Work Orders* button is available for any existing service contract with the *Work Orders Were Created* box unchecked. By clicking the button, the maintenance work orders will automatically be created for the whole duration of the service contract.

#### Owner's History tab

🔒 🚺 💽 🔍 🤅	5		<b>\$</b>		<b>e</b>
ustomize Previous Next Search C	Query Add	Delete	Transfer		Options
Equipment Warranties Service Contracts History	у				
Owner		Start Date		End Date	
WHITC - White Clover Markets		2007-09-10		2009-09-08	
BFLAM - Blue Flame International		2009-09-08		2010-04-28	
WHITC - White Clover Markets		2010-04-28			

The History tab allows you to track the previous owners of the equipment.

The *Owner* and *Start Date* fields for the current record (the one without an *End Date*) are the same values from the first tab.

The *Owner* field is always read-only, except when the equipment is being created or transferred to another customer. To transfer the equipment, use the *Transfer* button in the toolbar.

The *Start Date* and *End Date* fields are editable for the previous owners, to allow for adjustments. The *End Date* field is read-only for the current record.

Equipment Transfer

Equipment Tra	ansfer X
Current Owner	WHITC - White Clover Markets
End Date	2010-11-22 💌
New Owner	BFLAM - Blue Flame International
Start Date	2010-11-22 💌
	OK Cancel

The Equipment Transfer screen allows to transfer an equipment from a customer to another.

The Current Owner field shows the current owner of the equipment.

The End Date field indicates the last day of possession of the equipment for the current owner.

The New Owner allows to define the new owner of the equipment.

The Start Date field indicates the first day of possession of the equipment for the new owner.

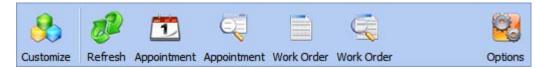
## **Appointments Grid**

#### Use

The *Appointments Grid* screen (Service Management/Appointments Grid menu) allows you to quickly see all appointments for a specific day or period. This screen offers 3 tabs:

- Current Appointments
- o Appointments By Period
- o Appointments To Confirm

The toolbar has special buttons in this screen.



The *Refresh* button will refresh the data in the current tab. Whenever an appointment is modified, this button will allow you to stay up to date.

The Show the Appointment button will show on screen the currently selected appointment.

The *Report – Appointment List* button will show on screen the appointment list report for the currently active tab.

The Show Work Order button will show on screen the work order linked with the currently selected appointment.

The *Report – Work Order* button will show on screen the work order report for currently selected appointment.

#### Current Appointments tab

4	► A	opointments (	Grid							[	- • •
	6	6		· -							<b>e</b>
Ľ	Just	omize Refre	sh Appointment Appo	ointment Work	Order Work Order						Options
ſ	Our	rent Appointme	ents Appointments by	Devia da Liña a	internets To Confirm						
	Cur	ent Appointine	Appointments by	Periods App							Country of
	_									Appointments	
	Ŀ	Work Order	Appointment Status			Date			Geographical Zone	Main Technician	Printed on
	▶	4	Open	Normal	WHITC - White Clover M	2010-12-09	13h30	Service Call	Local	Mike Rivers	
									Neter		
		ress 74 de la Gauche	-tière		Technicians Mike Rivers				Notes		
	17.	rt de la Gauche	evere		Mike Rivers						*

The *Current Appointments* tab allows you to see all the appointments with a confirmed date equal or lower than the current date (or, if the date isn't confirmed, those with a planned date equal to the current date) and with a status having the *Show In Current Appointments* box checked.

Appointments without a confirmed date are shown in yellow.

Appointments with a confirmed date lower than the current date are shown in red.

The lower part of the tab shows the customer address, the technician list and the technician notes for the currently selected appointment.

#### Appointments by Periods tab

J	6 🧭									e
st	omize Refre	sh Appointment App	ointment Wo	ork Order Work Order						Opti
Cun	rent Appointme	Appointments by	Periods Ap	opointments To Confirm						
ita	atus ( <ali></ali>	•	Period		▼ Fr	om 201	0-12-08 💌 to 2	010-12-15 💌	Appointme	ents Count: 4
	Work Order	Appointment Status	Priority	Customer Name	Date	Time	Work Order Type	Geographical Zone	Main Technician	Printed on
•	1	Open	Normal	WHITC - White Clover M	2010-12-13	10h15	Service Call	Local	Laura Callahan	
	2	Open	Normal	BFLAM - Blue Flame Inte	2010-12-13	10h00	Maintenance		Mike Rivers	
	3	Completed	Normal	BFLAM - Blue Flame Inte	2010-12-13	13h00	Installation		Laura Callahan	
	4	Open	Normal	WHITC - White Clover M	2010-12-09	13h30	Service Call	Local	Mike Rivers	
dd	dress			Technicians				Notes		

The *Appointments by Period* tab allows you to see all the appointments with a confirmed date (or, if the date isn't confirmed, a planned date) corresponding to a date filter and with a status corresponding to a status filter.

The Status field allows the filtering of appointments by status.

The Period field allows to load period values relative to the current date in the date controls.

The date controls allow the filtering of appointments by confirmed date (or, if the date isn't confirmed, by planned date).

Appointments without a confirmed date and with a status of any other type than Done are shown in yellow.

The lower part of the tab shows the customer address, the technician list and the technician notes for the currently selected appointment.

#### Appointments To Confirm tab

		opointments	C.44									
ľ	A	opointments	Grid									~
	6	6 🧔	) 🛅 🤇								2	
C	Cust	omize Refre	sh Appointment Appo	ointment Work	Order Work Order						Optio	ons
ſ	Cur	rent Appointme	ents Appointments by	Periode App	ointments To Confirm							
١ŕ												
	Арр	ointments To (	Confirm up to 2010-	-12-15 💌						Appointm	ents Count: 2	
		Work Order	Appointment Status	Priority	Customer Name	Date	Time	Work Order Type	Geographical Zone	Main Technician	Printed on	
	▶	1	Open	Normal	WHITC - White Clover M			Service Call	Local	Laura Callahan		
		4	Open	Normal	WHITC - White Clover M	2010-12-09	13h30	Service Call	Local	Mike Rivers		
	Add	iress			Technicians				Notes			
		iress 74 de la Gauch	- #2									
	17.	/4 de la Gauch	etere		<ul> <li>Laura Callahan</li> </ul>				The customer says heat pump.	a strange noise is com	ing out of the	4

The Appointments To Confirm tab allows you to see all appointments without a confirmed date and with a status having the Show In Appointments To Confirm box checked.

The date control allows to define the maximum planned date of the unconfirmed appointments. By default, it shows the next 7 days.

The lower part of the tab shows the customer address, the technician list and the technician notes for the currently selected appointment.

## Schedule

#### Use

The *Schedule* screen (Service Management/Schedule menu) allows you to see the complete schedule of your technicians for a specific date. You can filter which technician is displayed and select which date you need to see.

F	ilter Technicians	Date 2010-12-13 👻
	Callahan, Laura (LCALL)	Rivers, Mike (MRIVE)
3h00		
3h15		
3h30		
3h45		
9h00		
h15		
9h30		
9h45		
10h00		
10h15		
10h30		
10h45		
11h00		
11h15		
11h30		
11h45		
12h00 12h15		
12h15 12h30		
12h45		
13h00		
13h15		
13h30		
13h45		
14h00		
14h15		
14h30		
14h45		
Choo		

The Filter Technicians button allows to choose which technician should be displayed in the grid.

The *Date* field allows to define which date should be displayed in the grid.

An appointment is displayed in green. An unconfirmed appointment is displayed in yellow. Two conflicting appointments are displayed in red.

The hours displayed are defined in the *Configuration* screen.

## Reports

Detailed Description of Available Reports

## Work Order Authorization

Use

The *Work Order Authorization* report allows to print a work order confirmation request to be signed by the customer before starting any work.

Colds	bpark		e d'autorisation de travaux Order Agreement Form	Page 1
	-	Bon d	le travail / Work Order # 1	
Autorisation d'e	ffectuer les trava	nux		
m'engage à régle	r les coûts qui s our toutes comm	i rattacherons. Il va	fectuer les travaux sur mon système de chauffi 1 de soit que les pièces sous garantie ne seron 2 pièce non retournable, je m'engage à payer le	pas facturées et retournées au
Work Order Age	reement			
pledge to cover	costs related to	it. It goes without s	arry out the work on my system, heating, air co aying that the parts under warranty will not be mable parts, I pledge to pay for the parts, ever	e charged and will be returned to
225 Berri		Service Addre		
225 Berri Client / Custor	ner : White C		SS : Mandataire / Mandatory Nom / Name	
Adresse der 225 Berri Client / Custor Contact :	ner : White C The Whi	lover Markets ite Whale	Mandataire / Mandatory	
225 Berri Client / Custor	ner : White C The Whi	lover Markets ite Whale <u>lature :</u>	Mandataire / Mandatory Nom / Name	
225 Berri Client / Custor	ner : White C The Whi <u>Sign</u>	lover Markets ite Whale <u>lature :</u>	Mandataire / Mandatory Nom / Name	
225 Berri Client / Custor	ner : White C The Whi <u>Sign</u>	lover Markets ite Whale <u>lature :</u>	Mandataire / Mandatory Nom / Name	
225 Berri Client / Custor	ner : White C The Whi <u>Sign</u>	lover Markets ite Whale <u>lature :</u>	Mandataire / Mandatory Nom / Name 	
225 Berri Client / Custor	ner : White C The Whi <u>Sign</u>	lover Markets ite Whale <u>ature :</u>	Mandataire / Mandatory Nom / Name 	
225 Berri Client / Custor	ner : White C The Whi <u>Sign</u> Date	lover Markets ite Whale <u>ature :</u>	Mandataire / Mandatory Nom / Name 	

It shows the company name, the work order number, the work order authorization text (as defined in the *Configuration* screen) and some basic information about the customer.

This report is available from the Work Orders screen.

#### Use

The *Work Orders* report allows to print all the information related to an appointment of a work order so the technicians on site can have easy access to all the required information.

<b>C⊛ldSpark</b>	ColdSpark inc. Work Order # 1	Page 1	CældSpark	ColdSpark inc. Work Order # 1	Page
Work Order Type : Intervention Type : Customer : Contact : Phone : Phone (other) : Fax : Technicians : Laura Callahan [Main Teo Appointment Notes :	Senice Call Noise White Clover Markets White Clover Markets Appointment Conta Phone : Cell Phone		Payment     Cash       Amount I	Printed on 20  Cheque Credit Card  Card Type: MasterCar  Card No: Y Authorization No:	d Uisa
Vork Order # 1		Pape 1	Work Order # 1		Page

It shows the technicians assigned to the appointment, the location and time of the appointment, the customer contact information, the work order type, the appointment notes and the customer equipment list.

This report is available from the Work Orders, Appointments and Appointments Grid screens.

#### Use

The Appointments History report allows to print the list of every appointments for a customer.

14:48:26		ColdSpark inc. Appointments History	,	Page 1
Work Orde Type :	F # 1 Service Call			
Custome Name : Phone: Address:	White Clover Markets (514) 445-9382 The White Whale	Code : WHITC Cell Phone:	Contact : Fax : (514) 445-3395	
	225 Berri, Montreal, F5K 9L2 Canada			
	ments History	i Astrono Datas		
Status Invoice#	Planned Date Technicians	/ Actual Date Time / Internal Notes	Actual Duration Technicians Notes	
			A STUDY OF	
Open	2010-12-13 Laura Callahan	/ 10h15 / The customer says a strange noise is coming out of the heat pump.		
Open	2010-12-09 Mike Rivers	/ 13h30		

It shows the basic customer information and, for every appointment, the status, main technician, planned and confirmed date, the time and the real duration, the technicians' notes and the appointment notes.

This report is available from the Customers screen.

#### Use

The Appointments List report allows to print every appointments in the currently active grid in the Appointments Grid screen.

ColdSpark inc.	Appointments List	2010-12-09
	Date	
WO # Status Priority Date Time 1 Open Normal 10h15 Address 225 Berri Techniclans: Laura Callahan (Main Technician)	Work Order Type Print Date Service Call Customer : White Clover Markets Code : WHITC Zone : Local	Notes The customer says a strange noise is coming out of the heat pump.
WO # Status Priority Date Time 4 Open Normal 13h30 Address 225 Berri Technicians: Mike Rivers [Main Technician]	Work Order Type Print Date Service Call Customer : White Clover Markets Code : WHITC Zone : Local	Notes
WO # Status Priority Date Time 2 Open Normal 2010-12-13 10h00 Address 8854 Blvd. Dagenais West Technicians : Mike Rivers [Main Technician]	Work Order Type Print Date Maintenance Customer : Blue Flame International Code : BFLAM Zone :	Notes
WO # Status Priority Date Time 3 Completed Normal 2010-12-13 13h00 Address 8854 Bhd. Dagenais West Technicians : Laura Callahan (Main Technician)	Work Order Type Print Date Installation Customer : Blue Flame International Code : BFLAM Zone :	Notes Install the new heat pump.
Printed on : 2010-12-09 14:54:43		Page

It shows the work order number, the appointment status, the priority, the confirmed date, the time, the work order type, the print date, the address, the customer code and name, the geographical zone, the appointment technicians and the appointment notes.

This report is available from the Appointments Grid screen.