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

DYNACOM

Providing Accounting & ERP Software Solutions Since 1990

DYNACOM

DYNACOM ADD-ON

SERVICE MANAGEMENT MODULE

Table of Contents

Main Objective 1
Features 1
Software 3
Required Edition 3
Configuration 3
System Initialization 3
Configuration 3
Maintenance 4
Customer Categories 4
Quote Conditions 5
Service Contract Frequencies 5
Brands and Models 6
Display Periods 7
Periodicities 7
Work Order Priorities 8
References 9
Restrictions 9
Media Sources 10
Work Order Status 10
Appointment Status 11
Equipment Support 13
Work Order Types 13
Service Contract Types 14
Warranty Types 15
System Types 15
Geographical Zones 16
Extended Screens 17
Items and Services – Details 17
Customers – Detailed Information 17
Customer – Contacts List 19
Customers – Credit Cards 20
Employee – Details 21
Quotes – Conditions 21
Invoices 22
Work Orders 24
Appointments 26
Equipments 28
Appointments Grid 33
Schedule 36
Work Order Authorization 38
Use 38
Work Orders 40
Use 40
Appointments History 41
Use 41
Appointments List 42
Use 42

Chapter 1

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

2

Requirements

Requirements Definition

Software

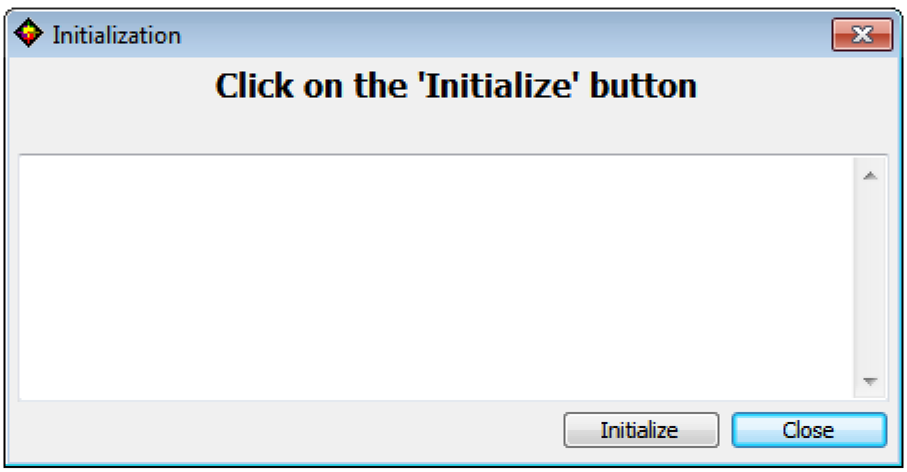
Required Edition

This add-on requires Dynacom Accounting Gold Edition.

Configuration

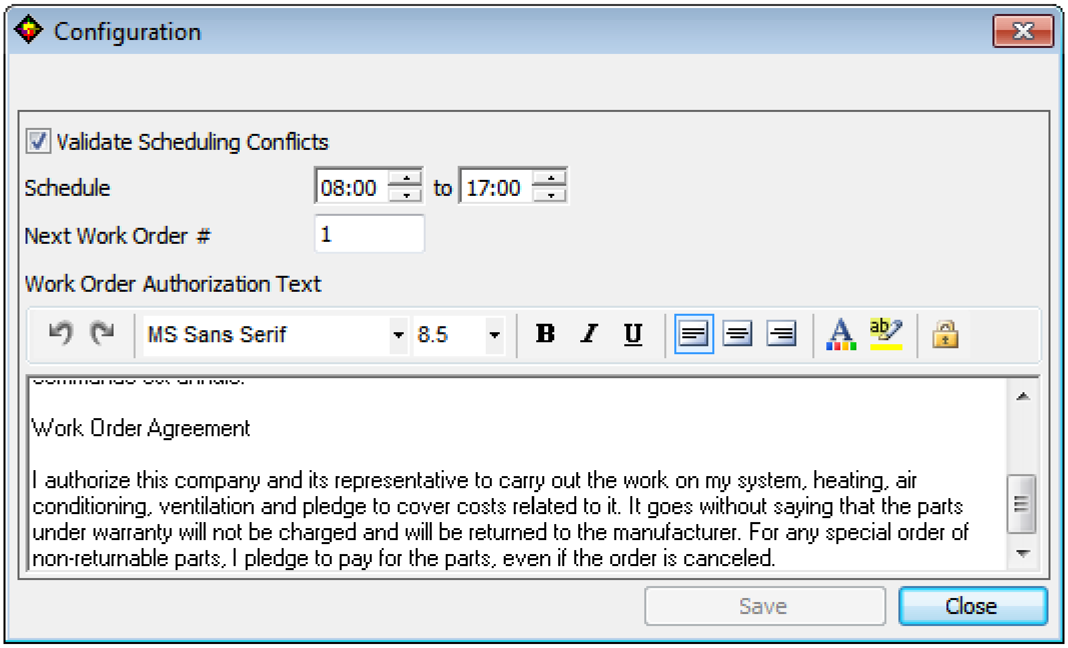
System Initialization

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.



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.

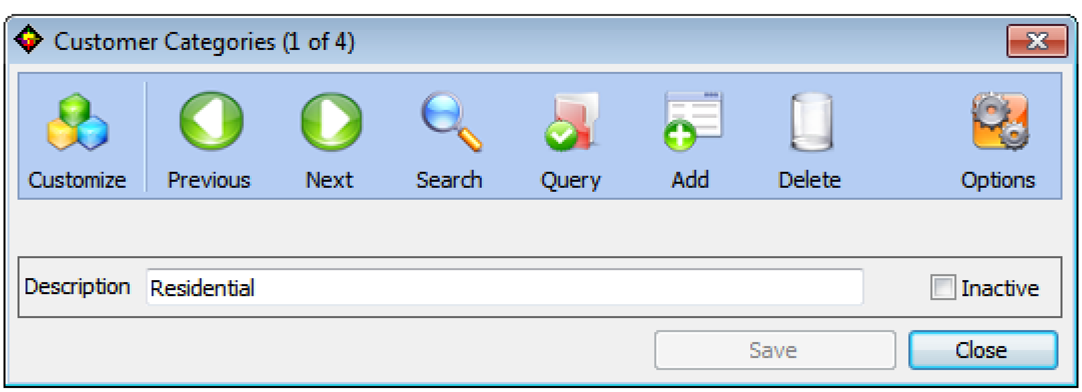


1) Open the *Configuration* screen (Configuration/Service Management/Configuration menu).
2) The *Validate Scheduling Conflicts* box configures whether the add-on must check and warn the user when a technician is assigned to more than one appointment at the same time.
3) The *Schedule* allows defining 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.



1) Open the *Customer Categories* screen (Maintenance/Service Management/Customer Categories menu).

2) Add a new record.

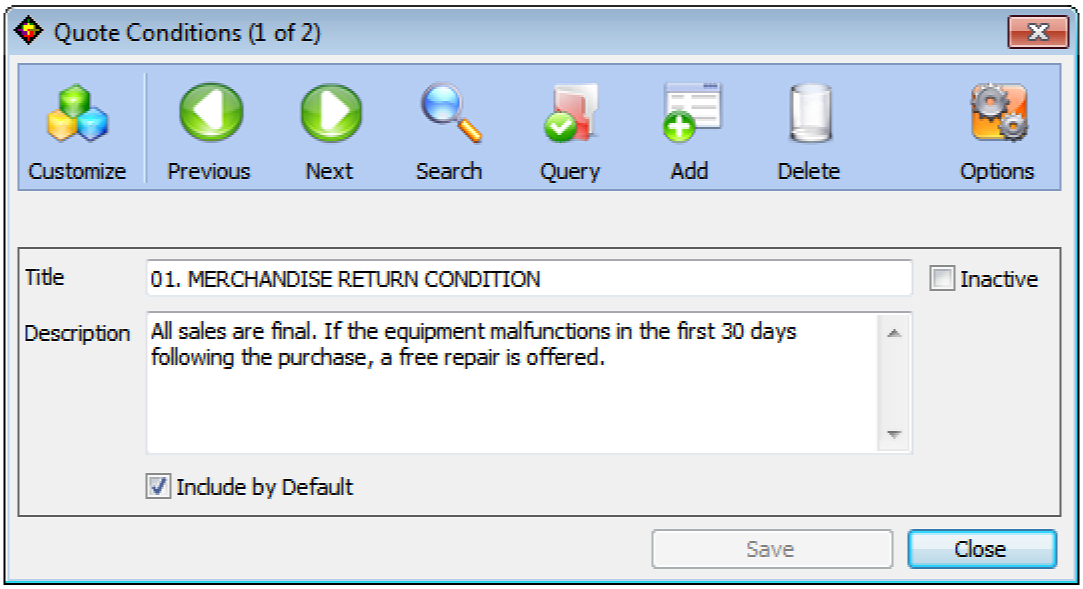
3) Fill in a *Description*.

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.



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*.

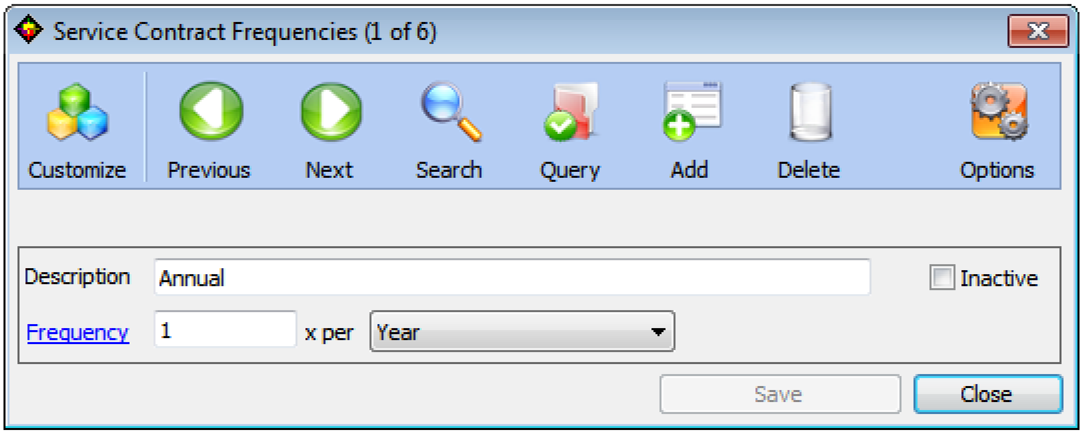
4) Check the *Inactive* box if you no longer wish to see the condition in selection lists.

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.



1) Open the *Service Contract Frequencies* screen (Maintenance/Service Management/Service Contract Frequencies menu).

2) Add a new record.

3) Fill in a *Description*.

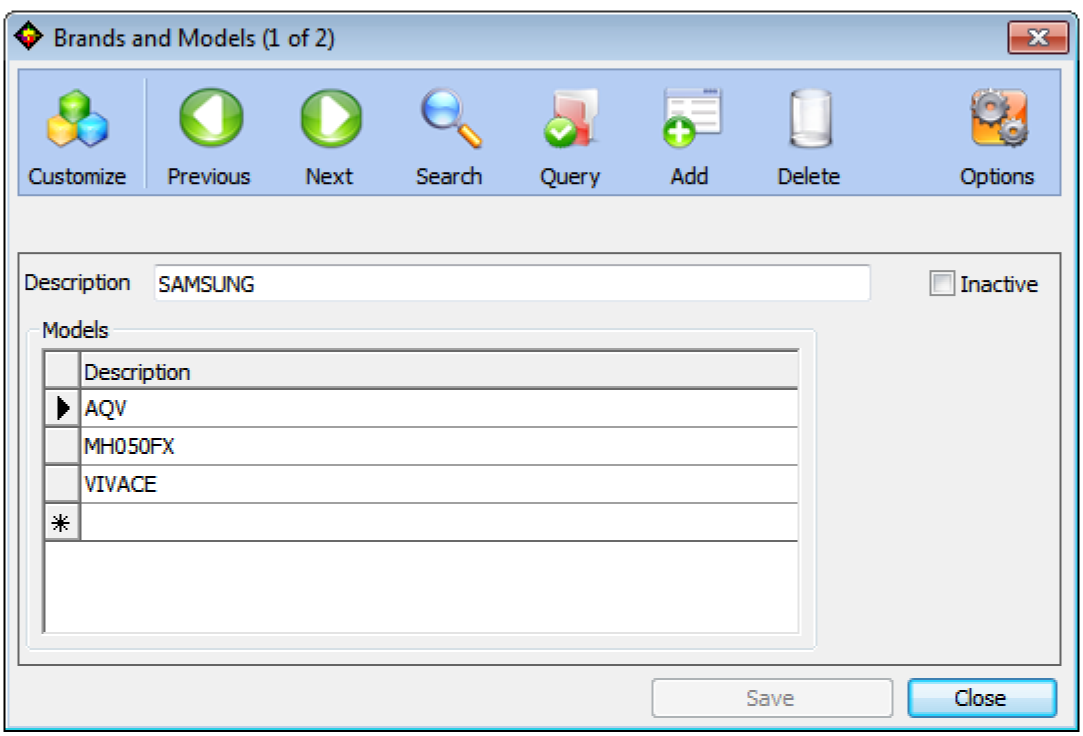
4) Check the *Inactive* box if you no longer wish to see the service contract frequency in selection lists.

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.



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.

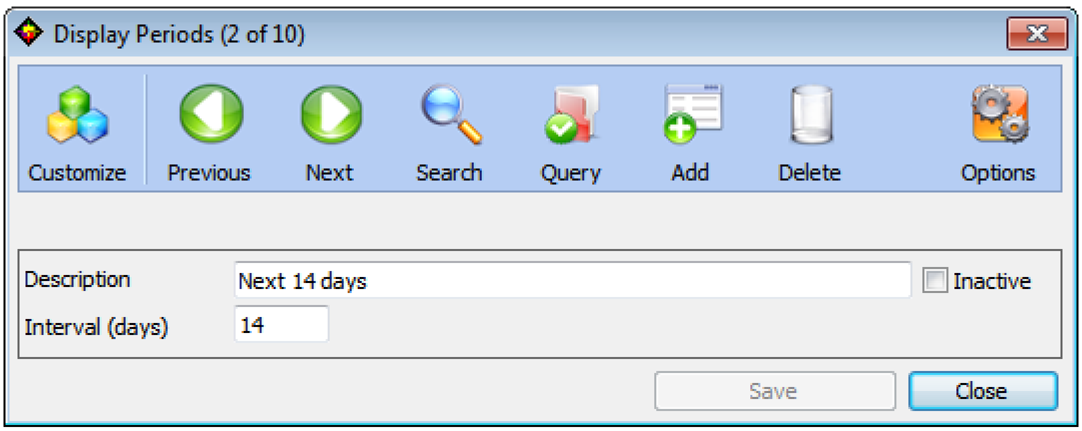
4) Fill in a *Description* for every model of the brand. You can create multiple models for the same brand, but at least one is required.

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.



1) Open the *Display Periods* screen (Maintenance/Service Management/Display Periods).

2) Add a new record.

3) Fill in a *Description*.

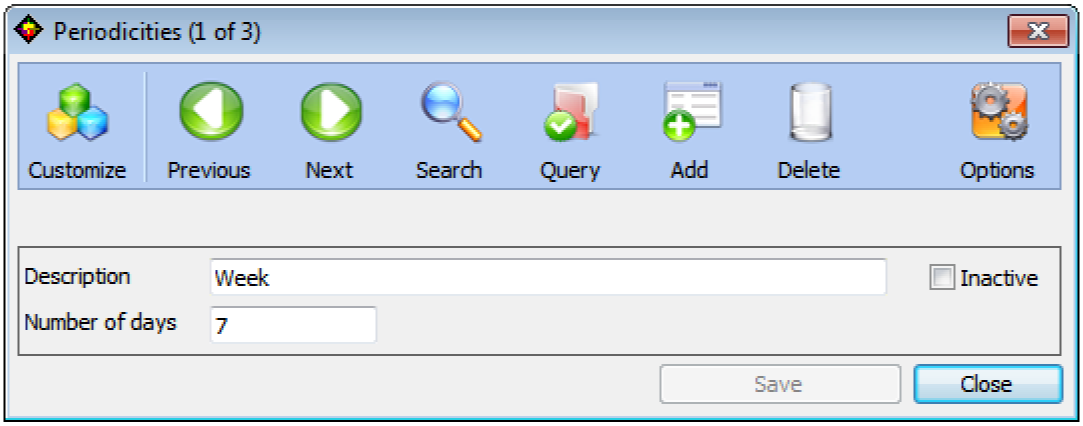
4) In the *Interval* field, specify the interval (in days) for the period. For past periods, use the « - » symbol.

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.



1) Open the *Periodicities* screen (Maintenance/Service Management/Periodicities).

2) Add a new record.

3) Fill in a *Description*.

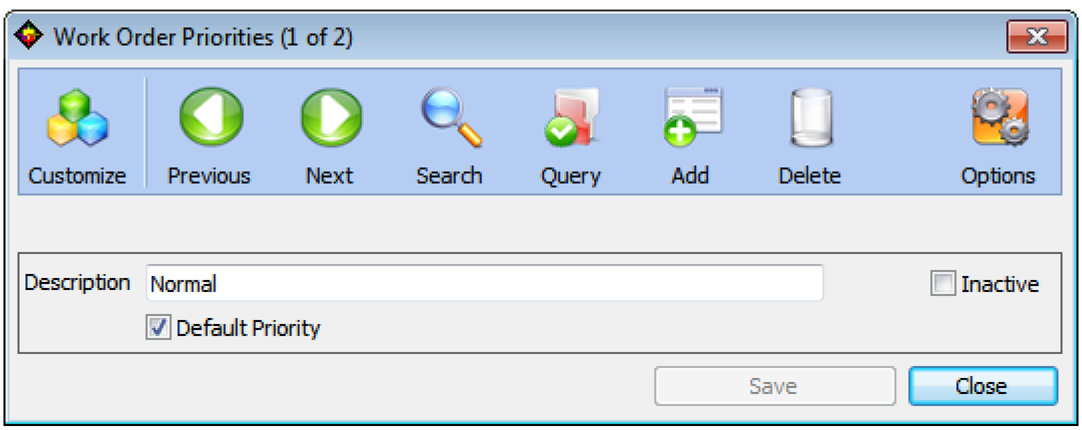
4) Fill in a number of days representing the periodicity.

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.



1) Open the *Work Order Priorities* screen (Maintenance/Service Management/Work Order Priorities).

2) Add a new record.

3) Fill in a *Description*.

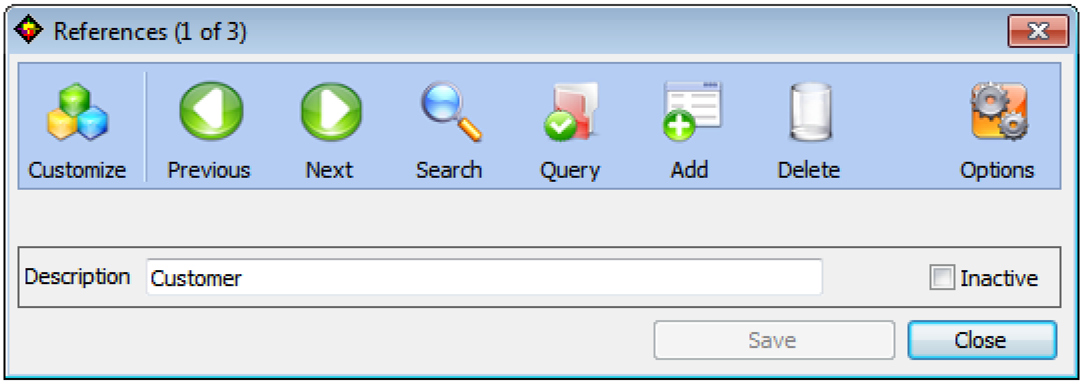
4) Check the *Inactive* box if you no longer wish to see the work order priority in selection lists.

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.



1) Open the *References* screen (Maintenance/Service Management/References).

2) Add a new record.

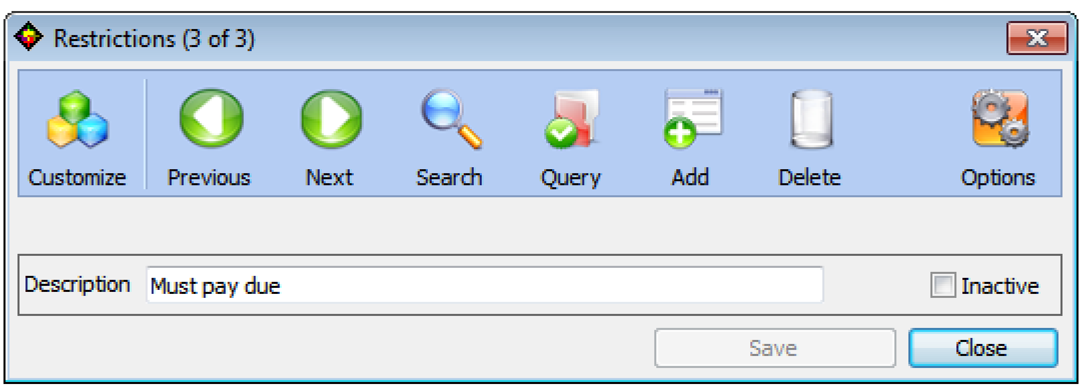
3) Fill in a *Description*.

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.



1) Open the *Restrictions* screen (Maintenance/Service Management/Restrictions).

2) Add a new record.

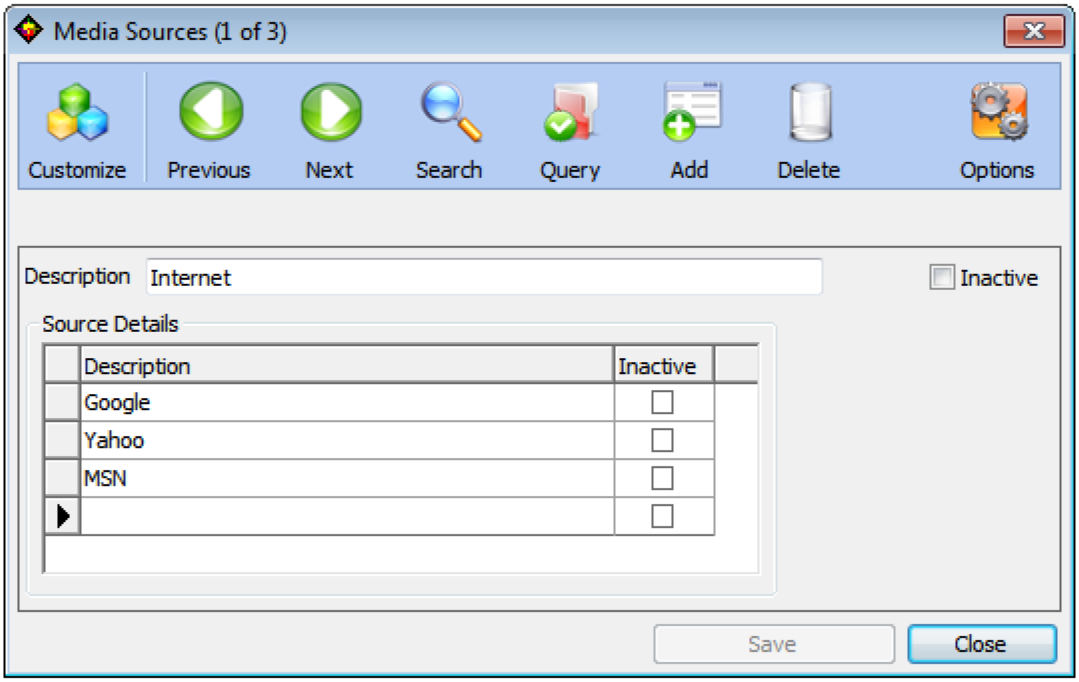
3) Fill in a *Description*.

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*.*



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.

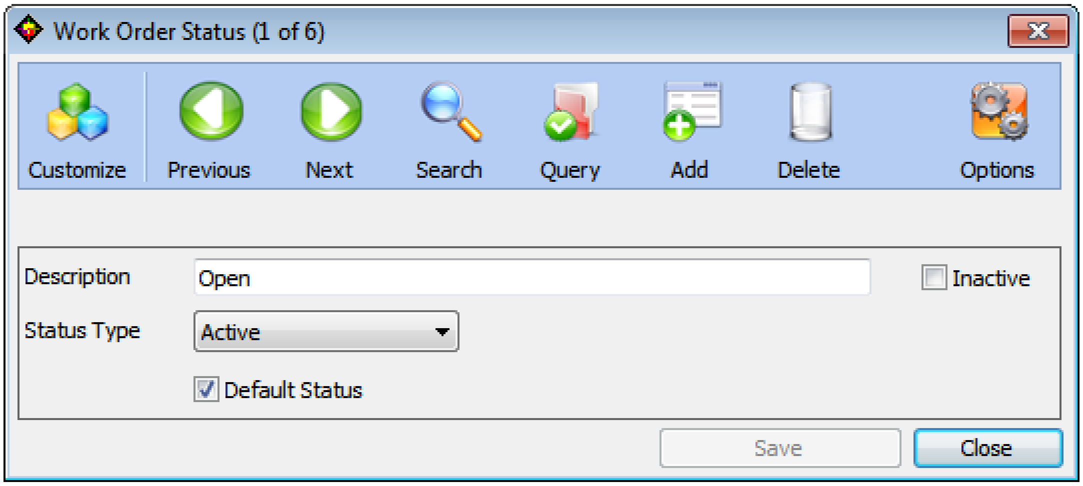
4) Fill in a *Description* for every detail of the media. You can create multiple details for the same media, but at least one is required. Check the *Inactive* box if you no longer wish to see the detail in the selection lists.

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.



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*.

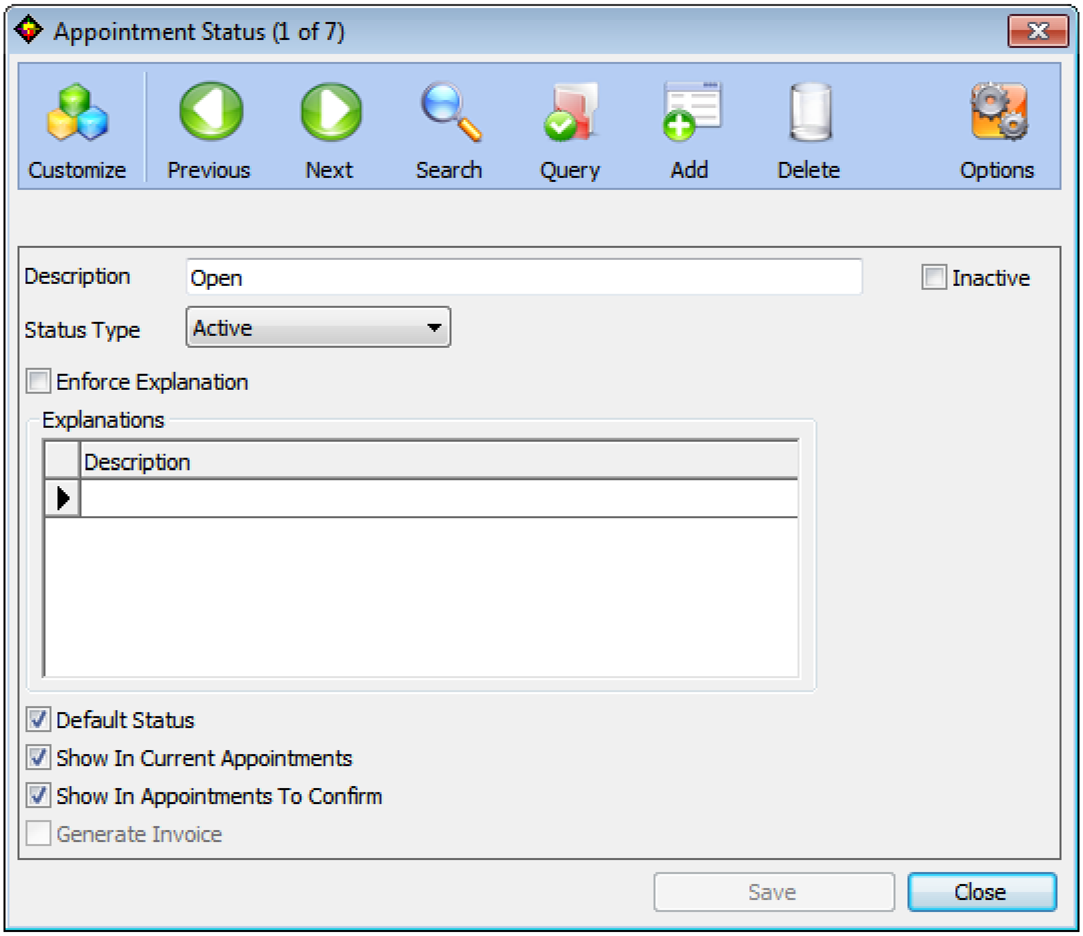
5) Check the *Inactive* box if you no longer wish to see the status in selection lists.

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.



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.

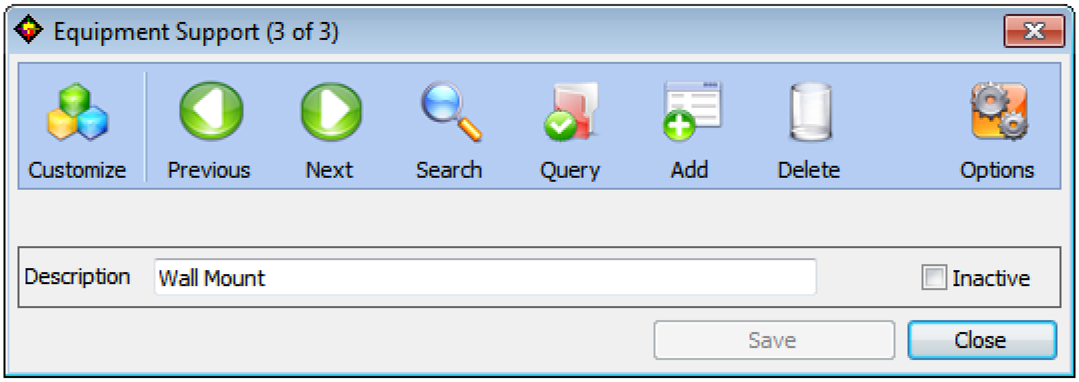
9) Check the *Generate Invoice* box if an invoice must be generated whenever an appointment is saved with this status.

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.



1) Open the *Equipment Support* screen (Maintenance/Service Management/Equipment Support).

2) Add a new record.

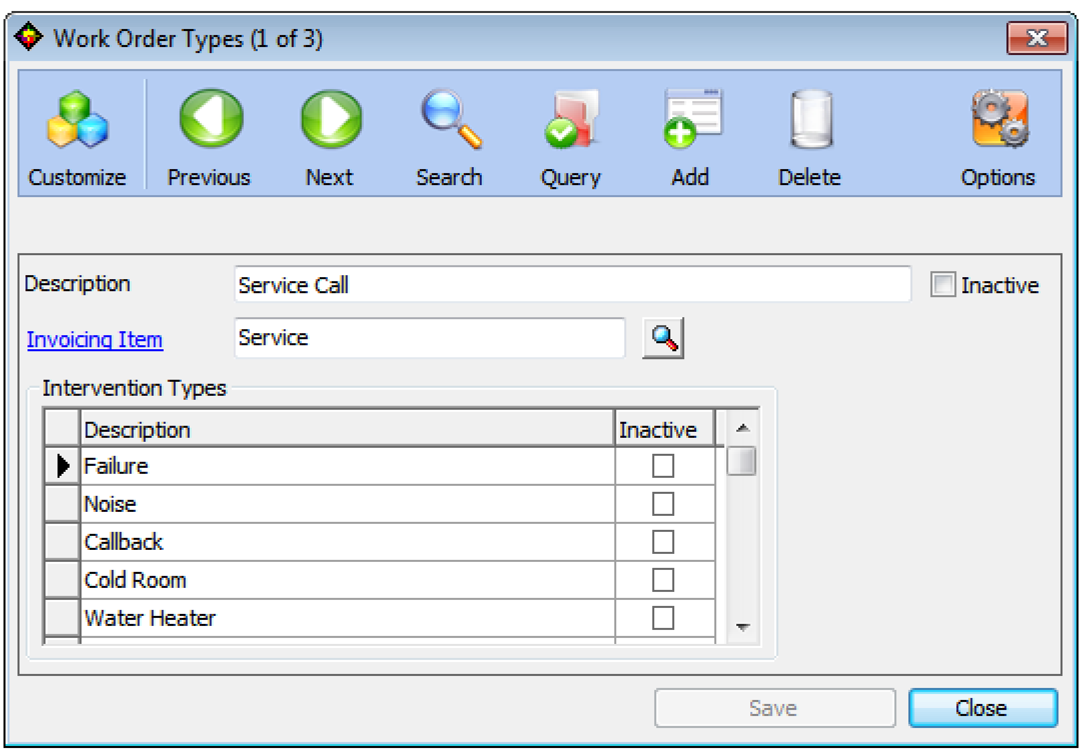
3) Fill in a *Description*.

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.



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.

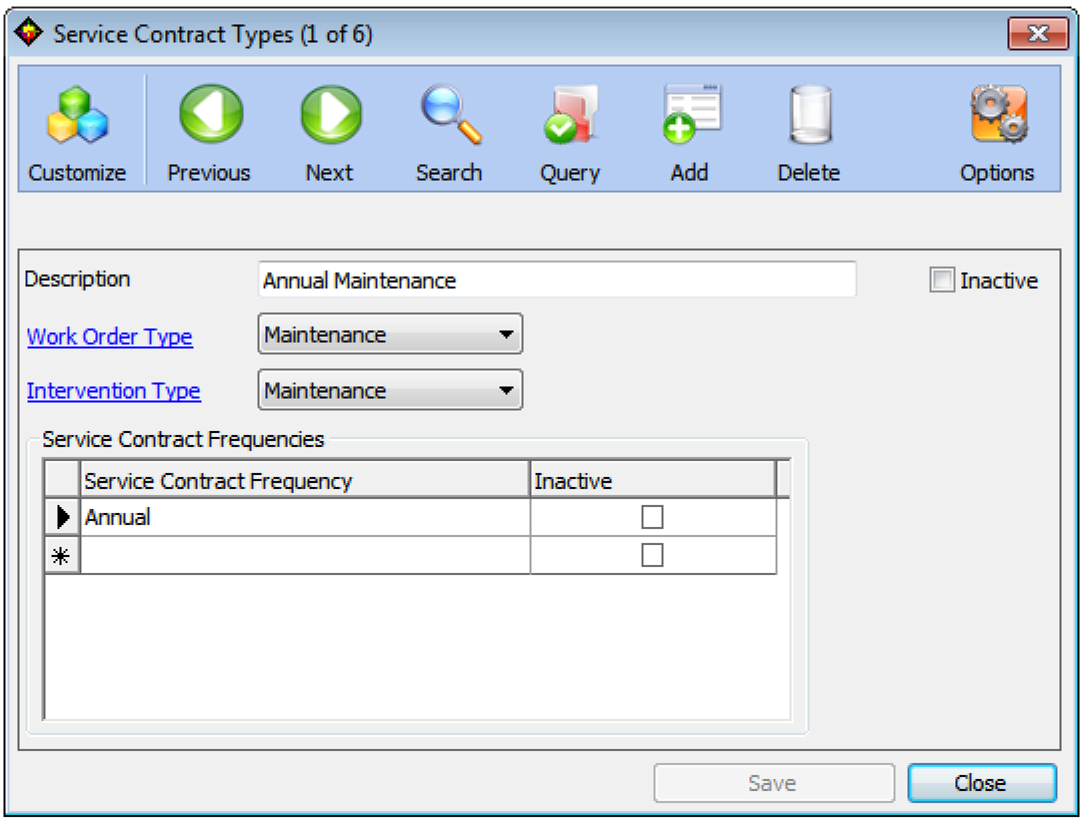
5) Fill in a *Description* for every intervention type of the work order type. You can create multiple intervention types for the same work order type, but at least one is required. Check the *Inactive* box if you no longer wish to see the intervention type in the selection lists.

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.



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*.

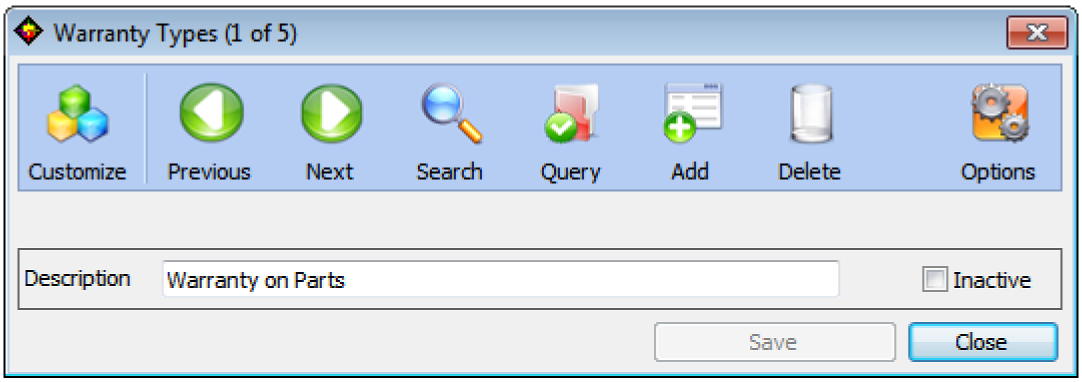
6) Fill in a *Description* for every possible frequency of the service contract type. You can define multiple frequencies for the same service contract type, but at least one is required. Check the *Inactive* box if you no longer wish to see the frequency in the selection lists.

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.



1) Open the *Warranty Types* screen (Maintenance/Service Management/Warranty Types).

2) Add a new record.

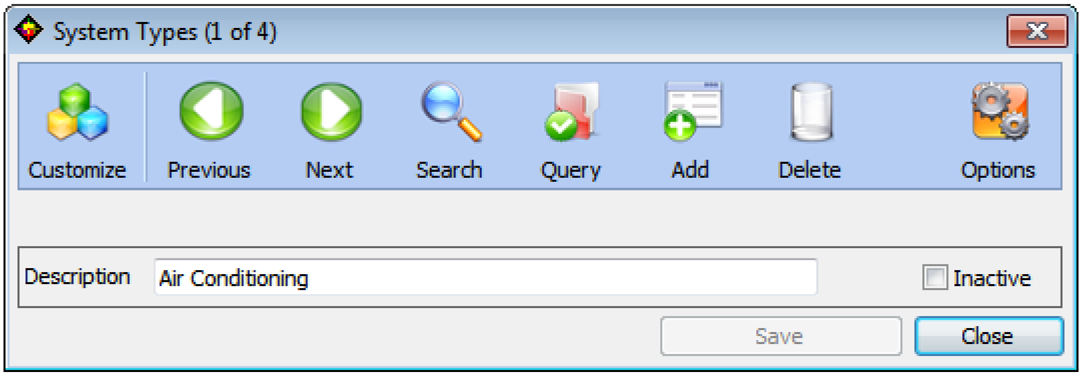
3) Fill in a *Description*.

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.

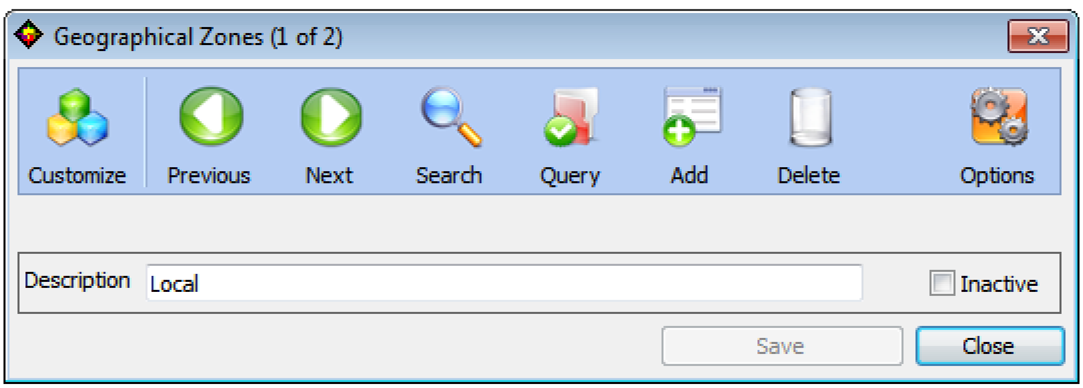
3) Fill in a *Description*.

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.



1) Open the *Geographical Zones* screen (Maintenance/HVAC Management/Geographical Zones).

2) Add a new record.

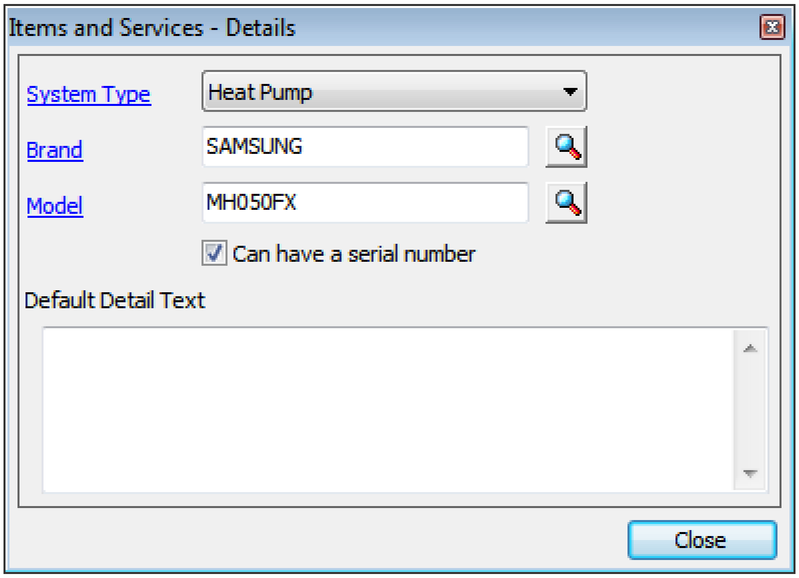
3) Fill in a *Description*.

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.

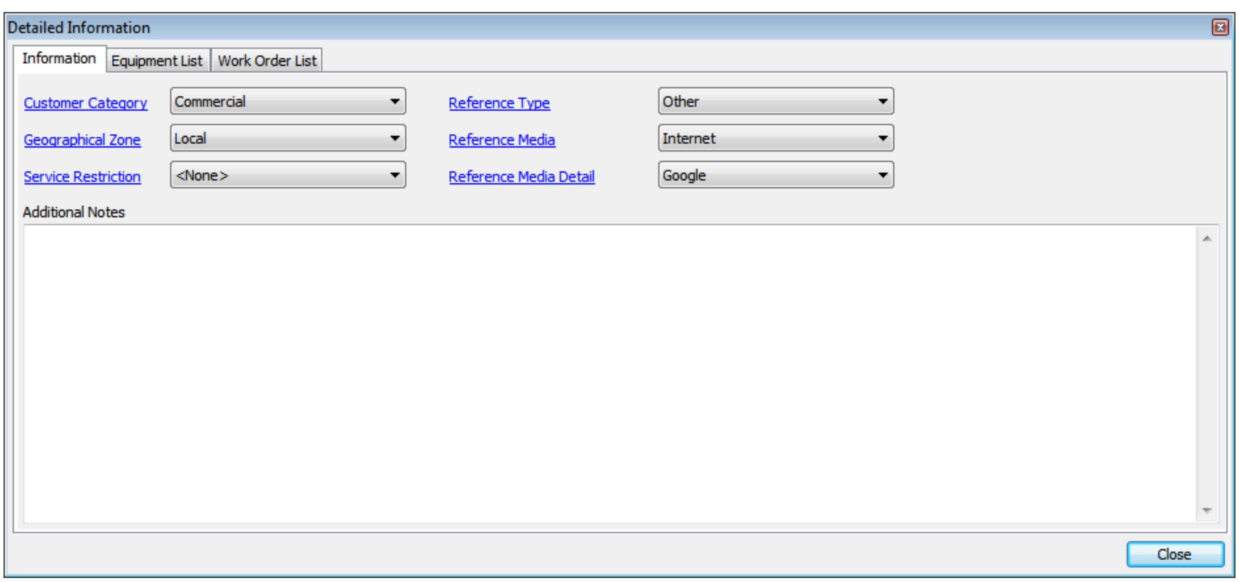


The available fields are:

- 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

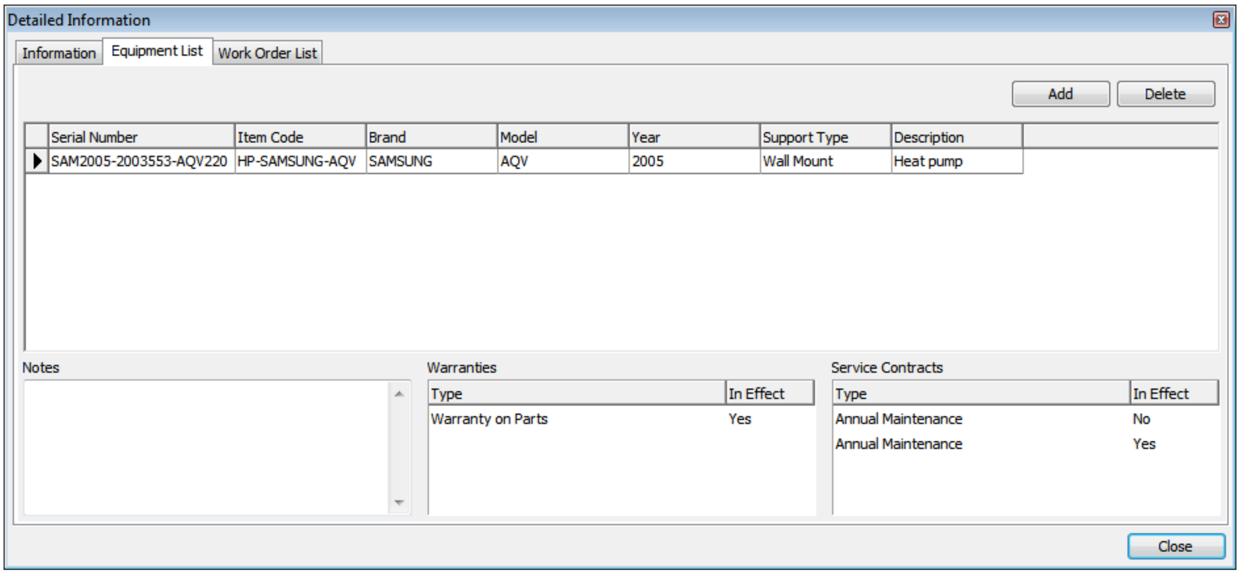
Customers – Detailed Information

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



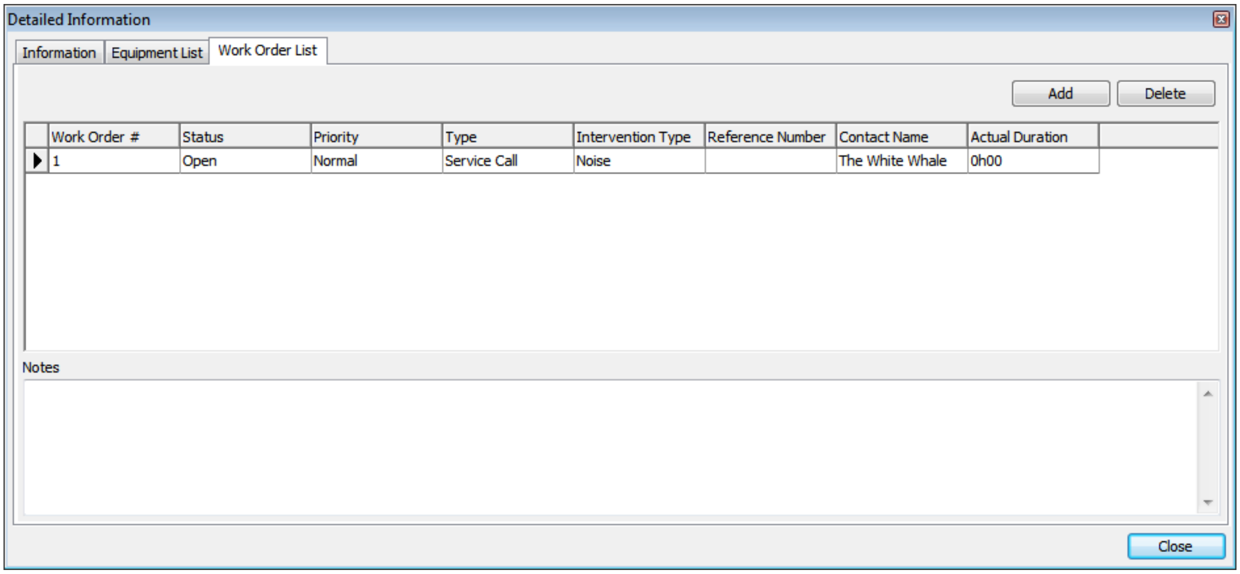
In the *Information* tab, the fields you can fill in are:

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



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.

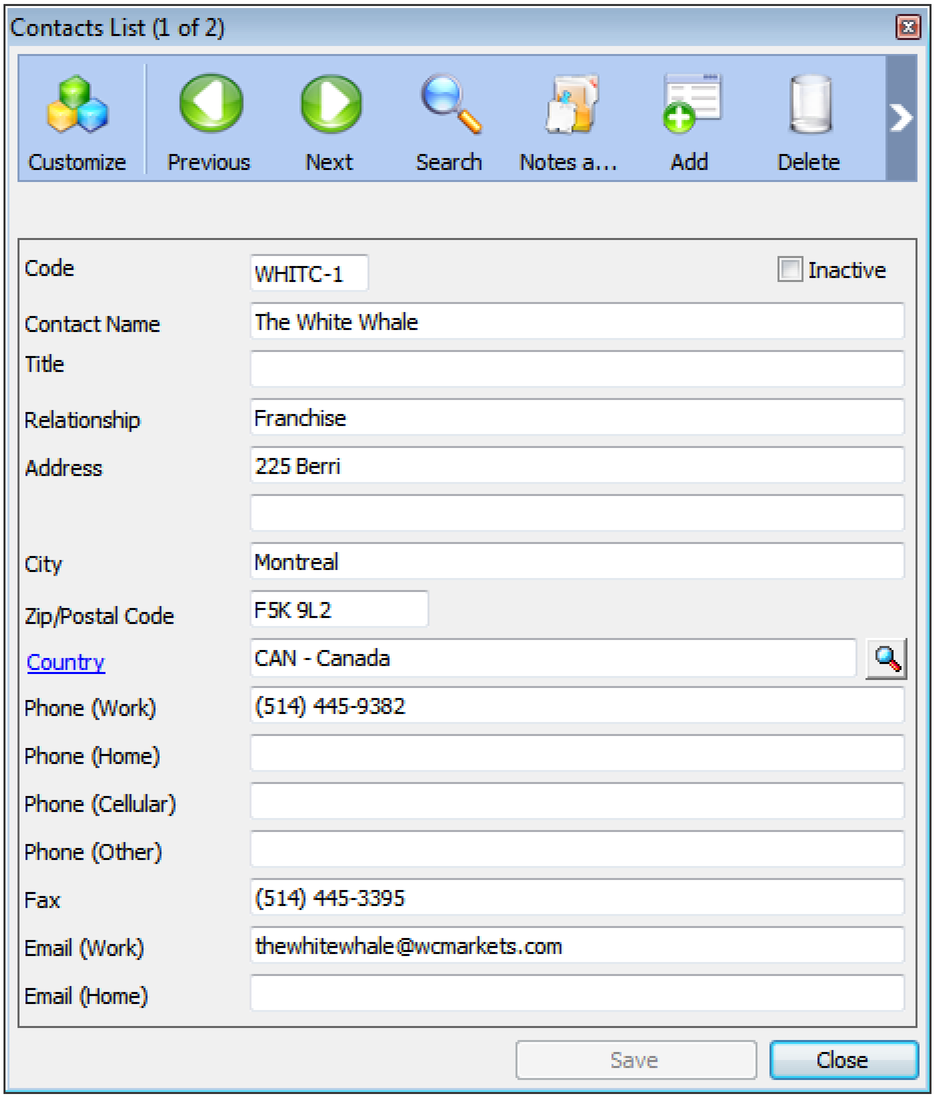


In the *Work Order* tab:

- 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.

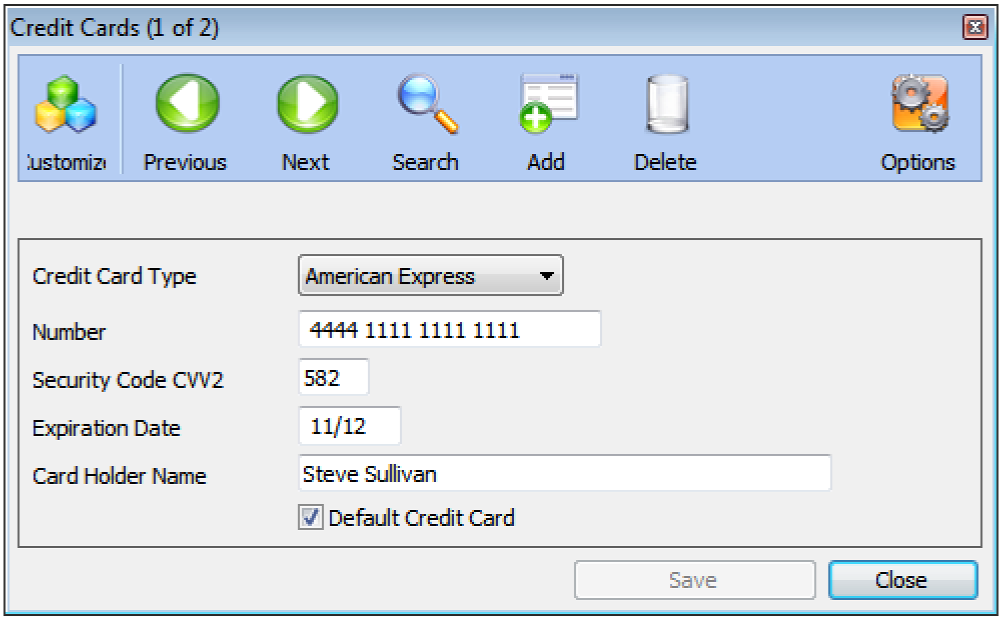


The available fields are:

- 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.

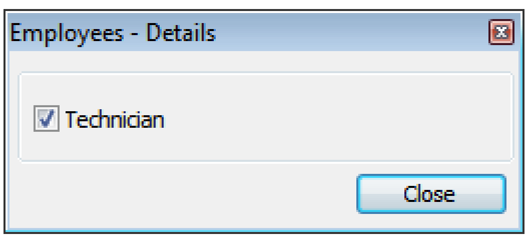


The available fields are:

- 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)

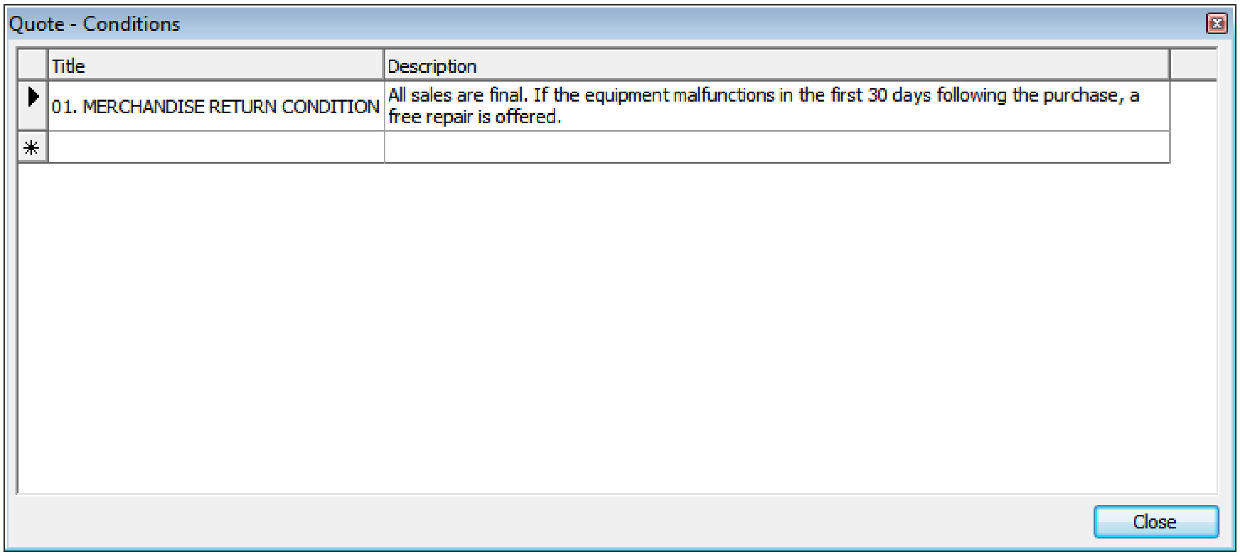
Employee – Details

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.



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.

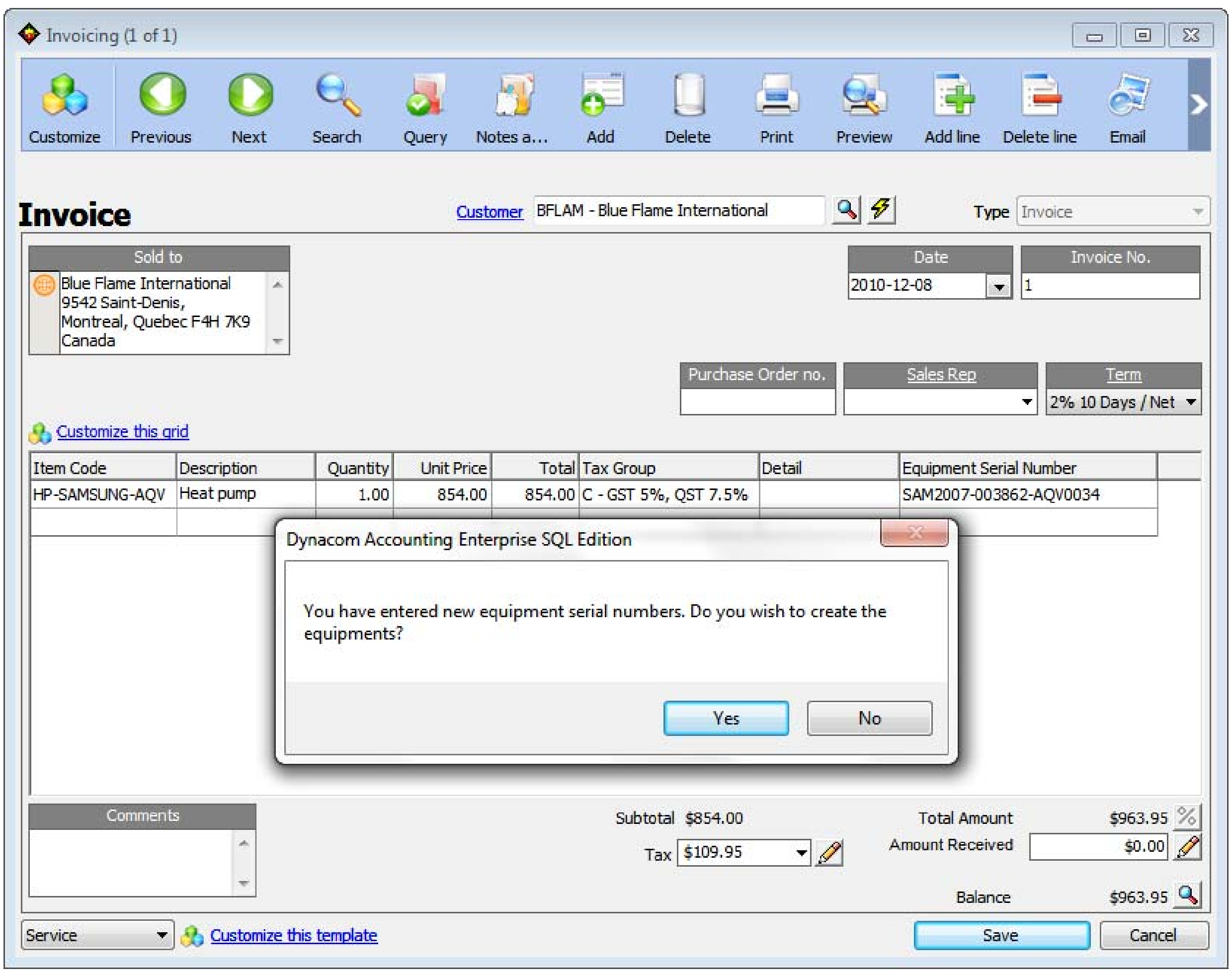


The *Title* field allows you to pick a condition.

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.

Chapter
3

Functionality

Detailed Description Of The Add-on Features

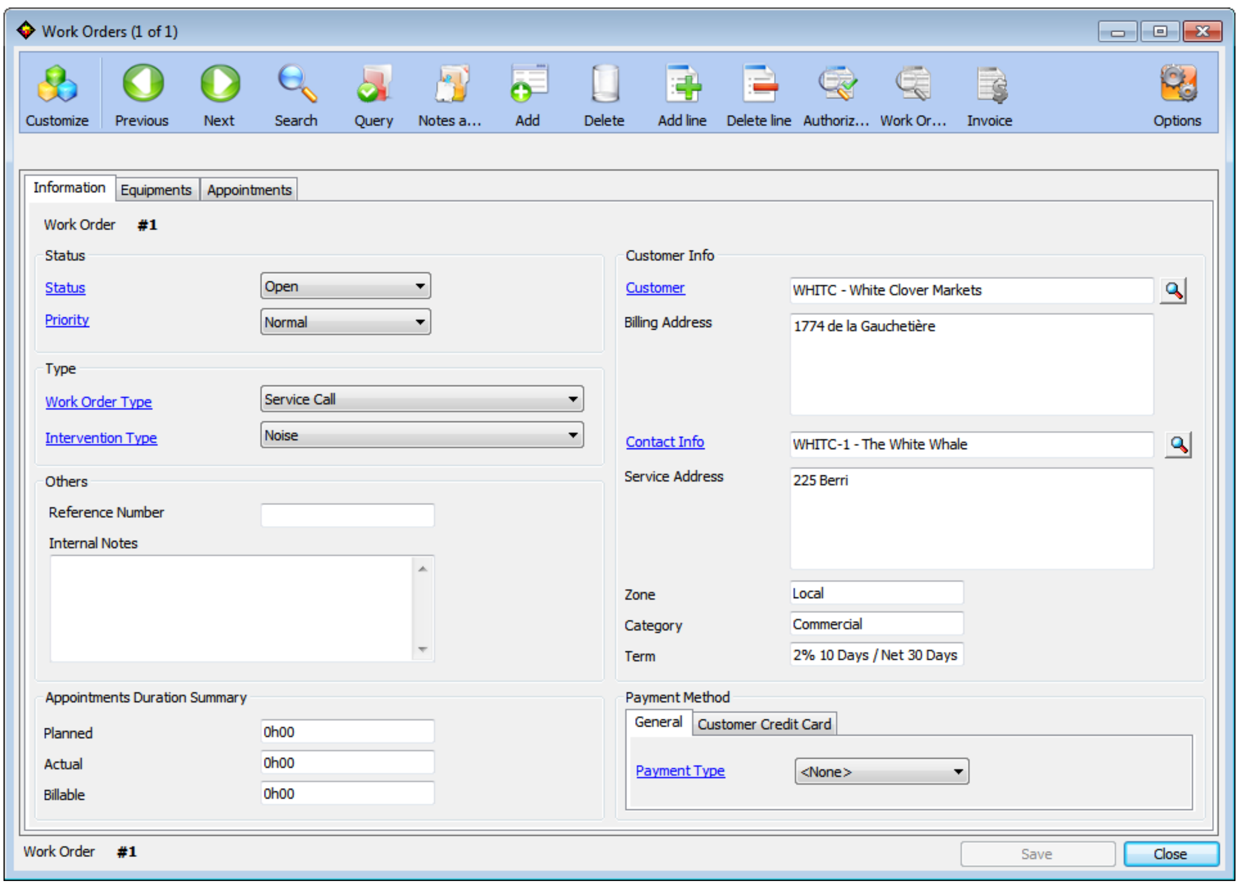
Work Orders

Use

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

- Information
- Equipments
- Appointments

<u>Information tab</u>



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**

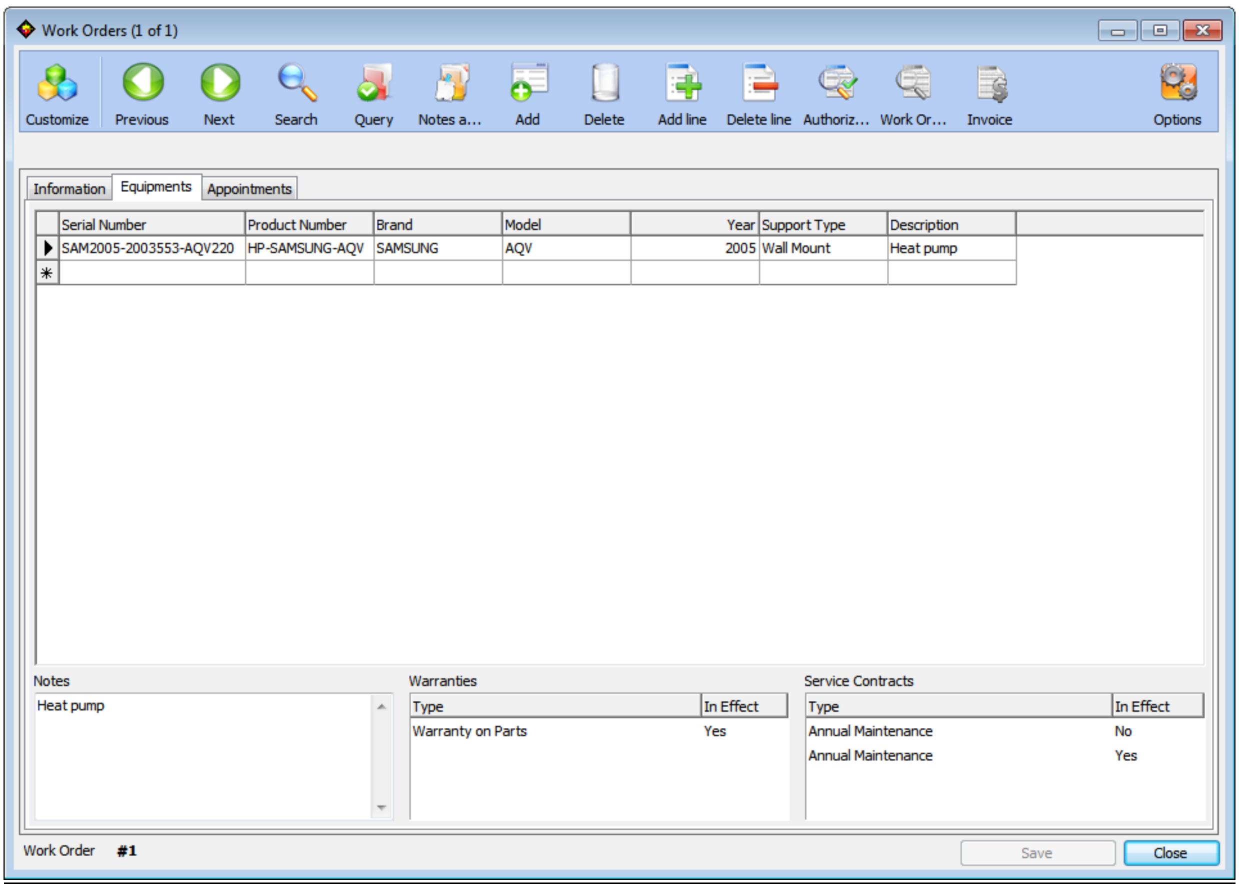
This tab allows the creation of the work order with an intervention type and a priority for the technician. You can also specify a reference number and some internal notes on the work order.

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).

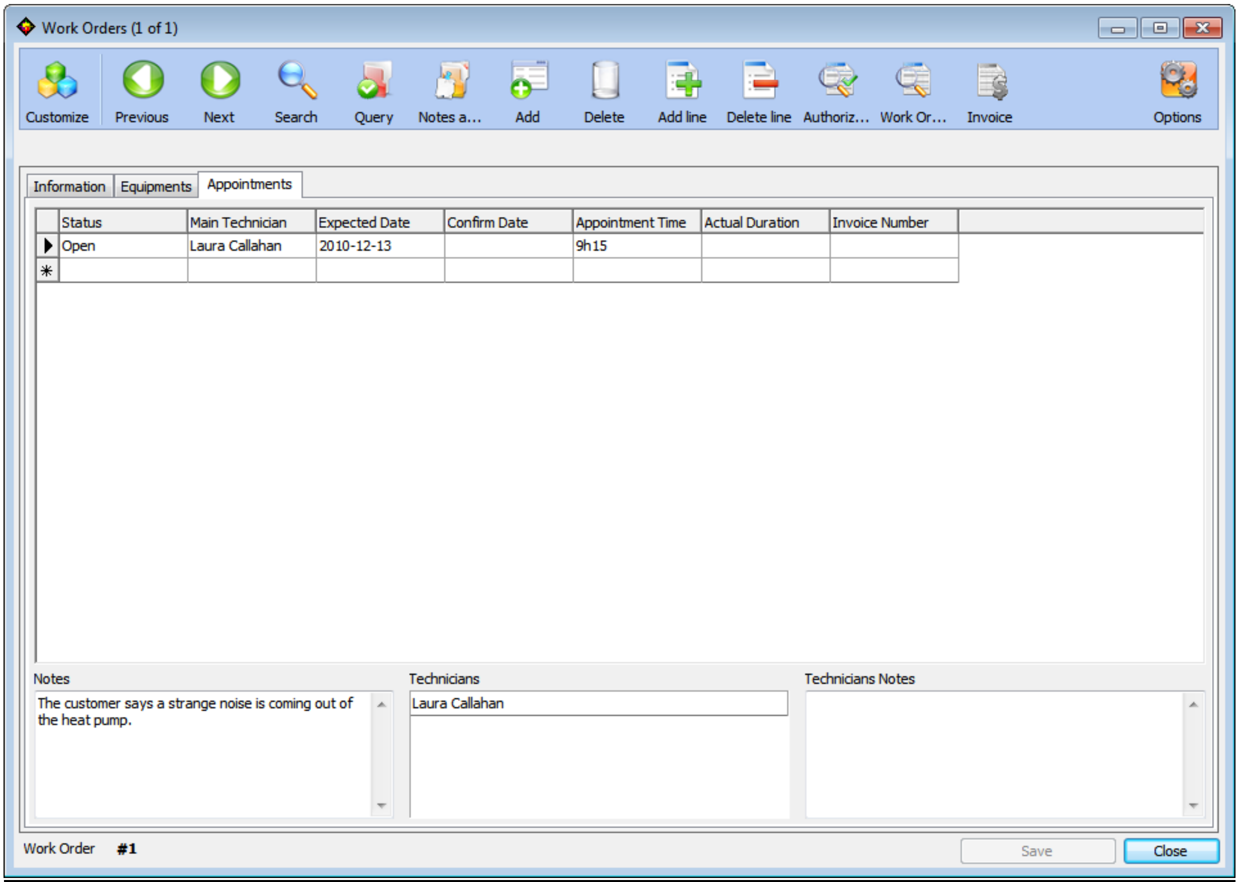
Equipments tab



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



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.

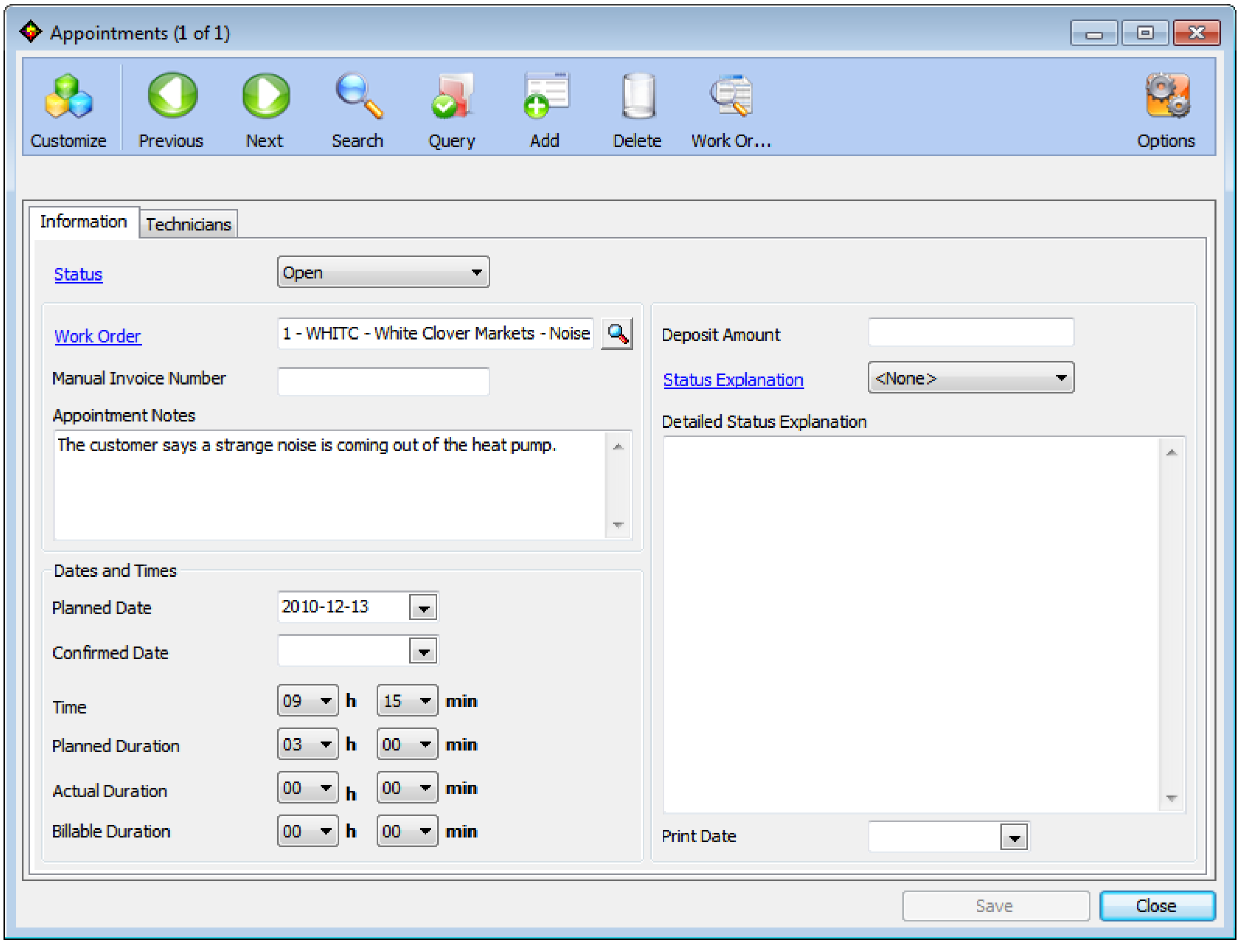
Appointments

Use

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

- Information
- Technicians

Information tab



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.

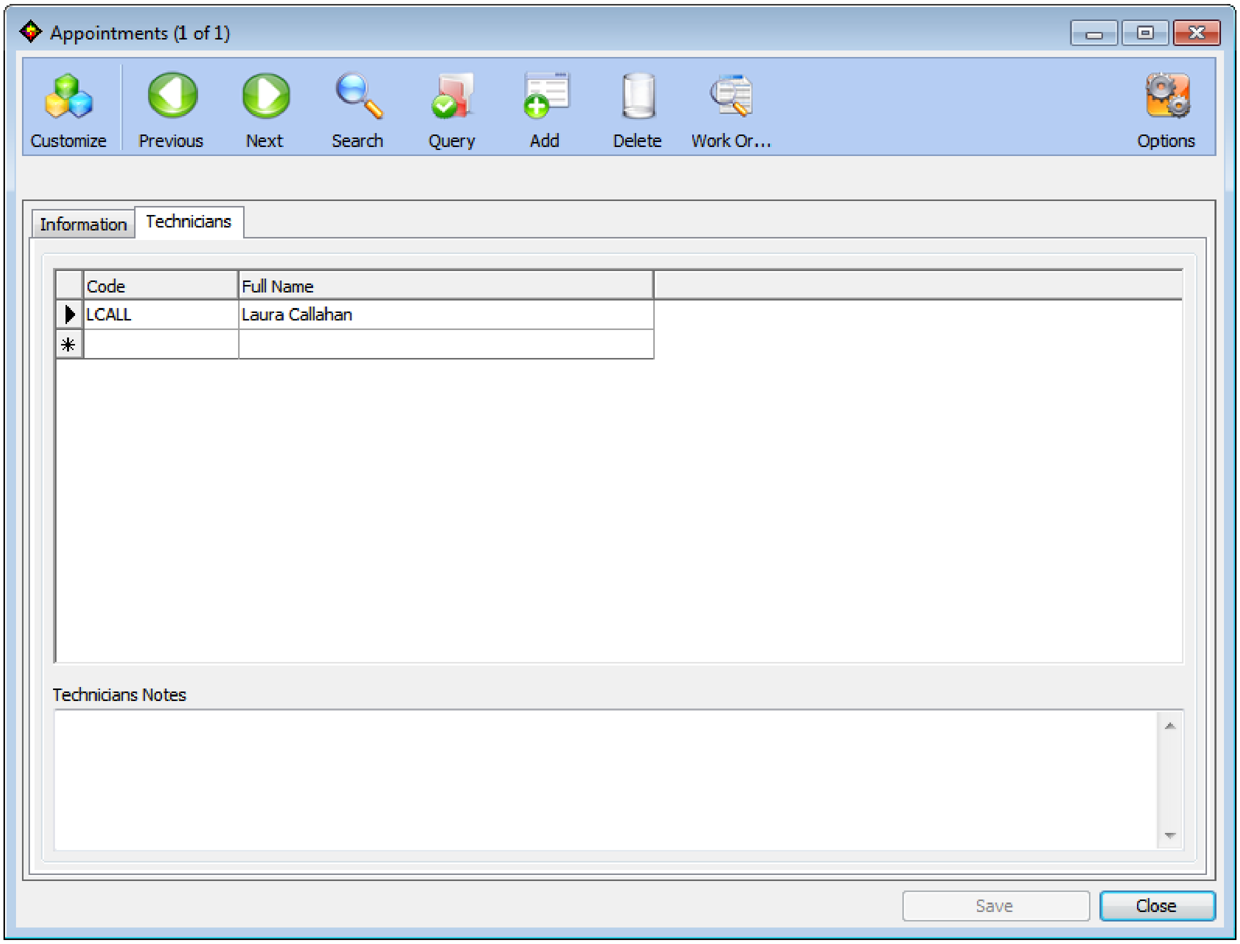
The *Planned Date* field will hold the initial appointment date. Once the final date is confirmed with the customer, you can set the *Actual Date* field accordingly.

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.

<u>Technicians tab</u>



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.

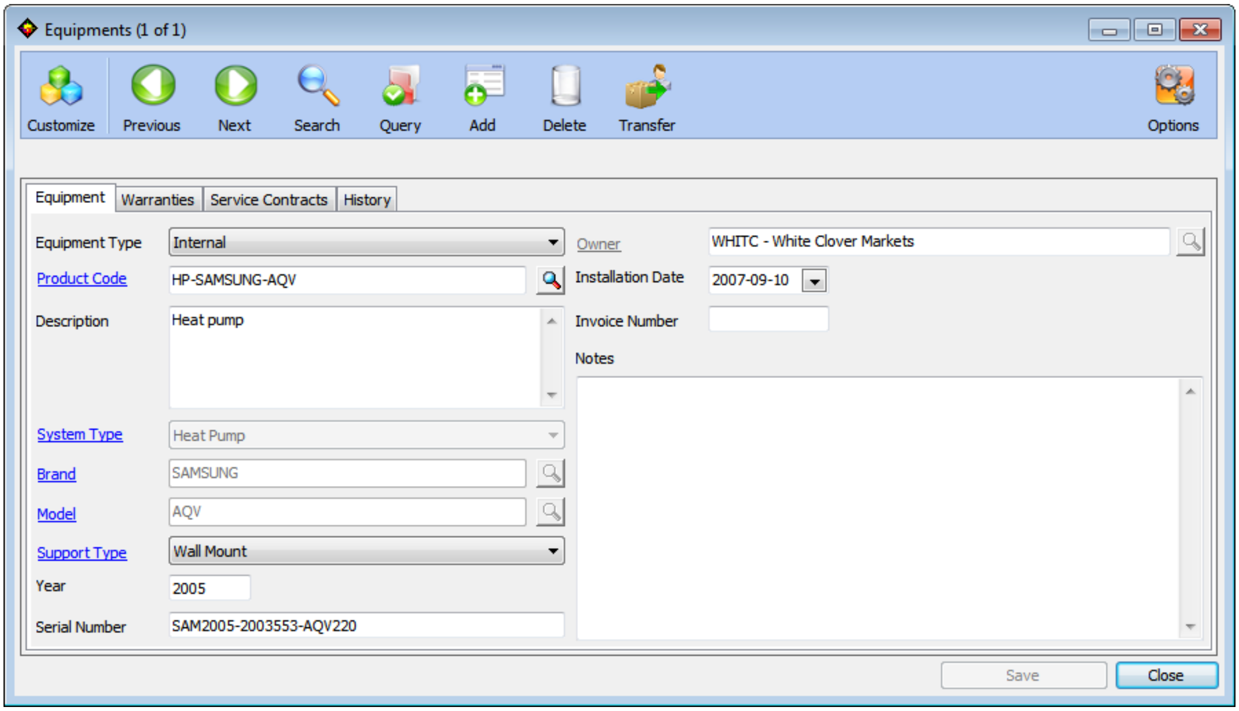
Equipments

Use

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

- Equipment
- Warranties
- Service Contracts
- History

Equipment tab



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.

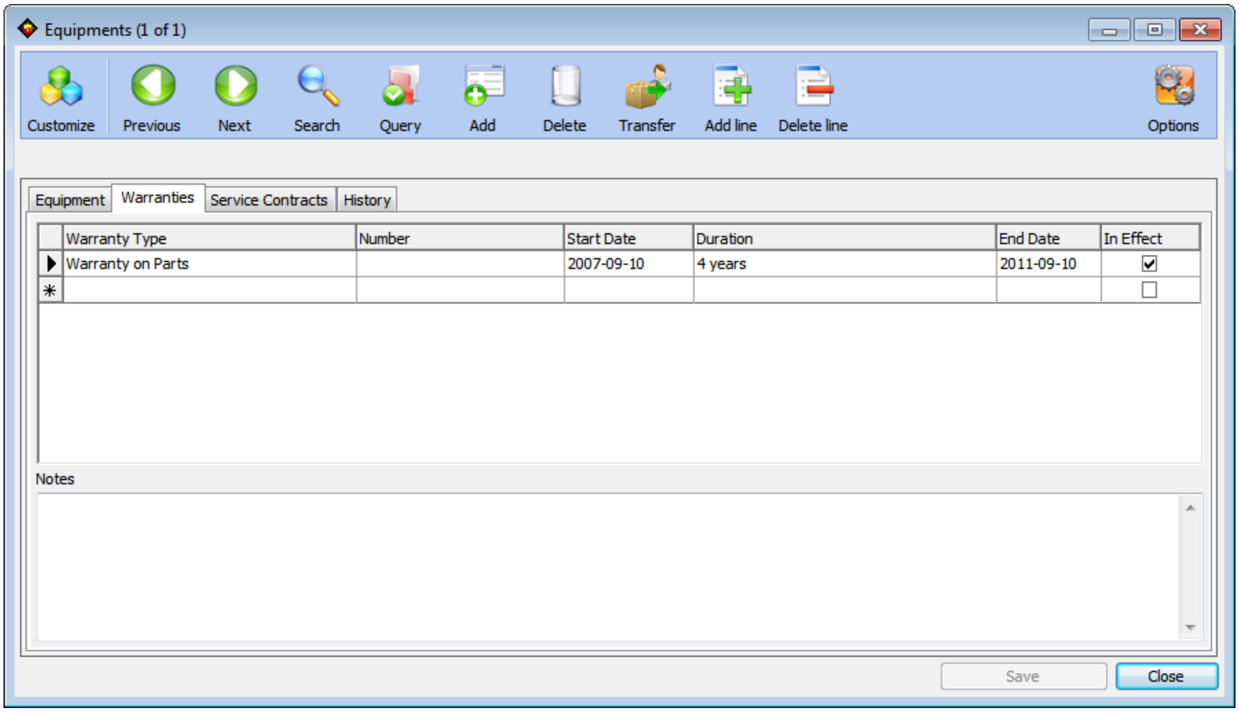
The *Support Type* field allow to specify the support type of the equipment. The *Year* field allows to specify the creation year of the equipment.

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



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.

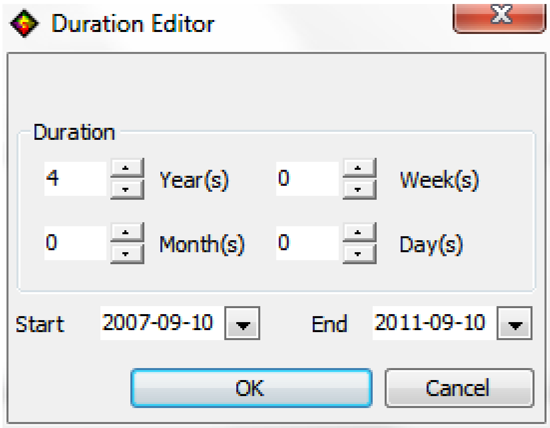
The *Number* field allows to specify a warranty number to help dissociate different warranties of the same type.

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



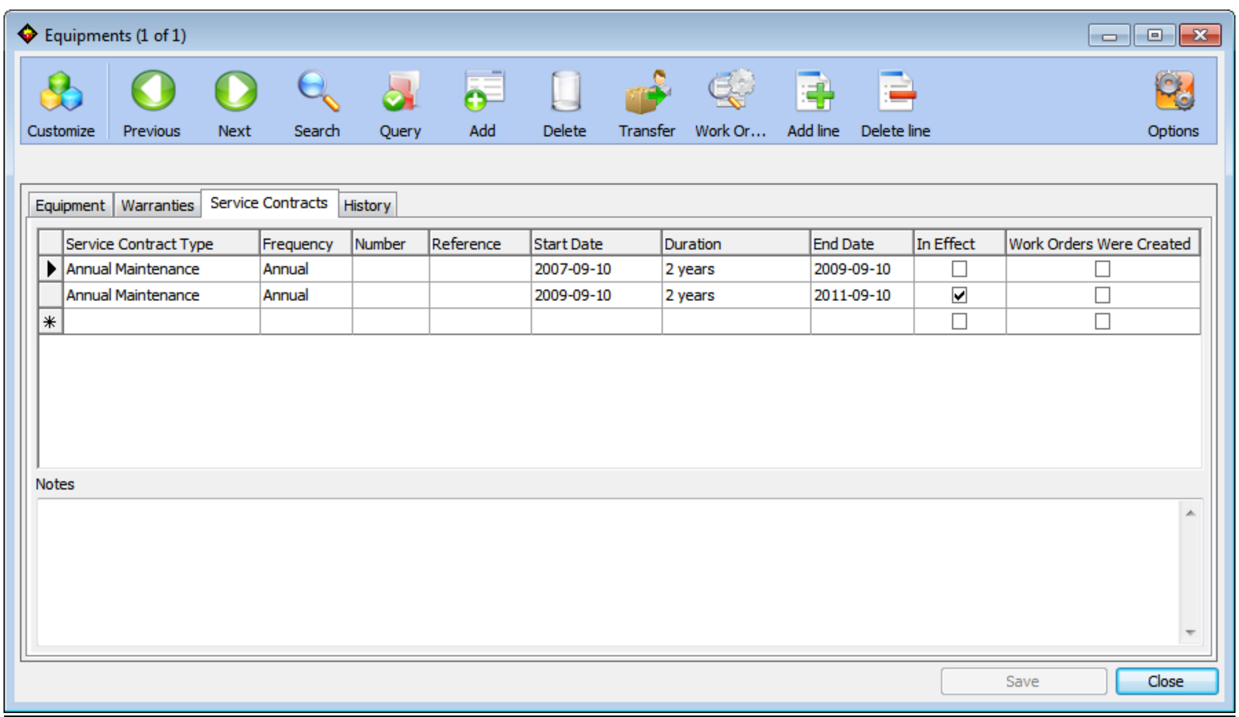
The *Duration Editor* screen allows to define a duration. It can be accessed from the *Warranties* and *Service Contracts* tabs of the *Equipments* screen.

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.

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.

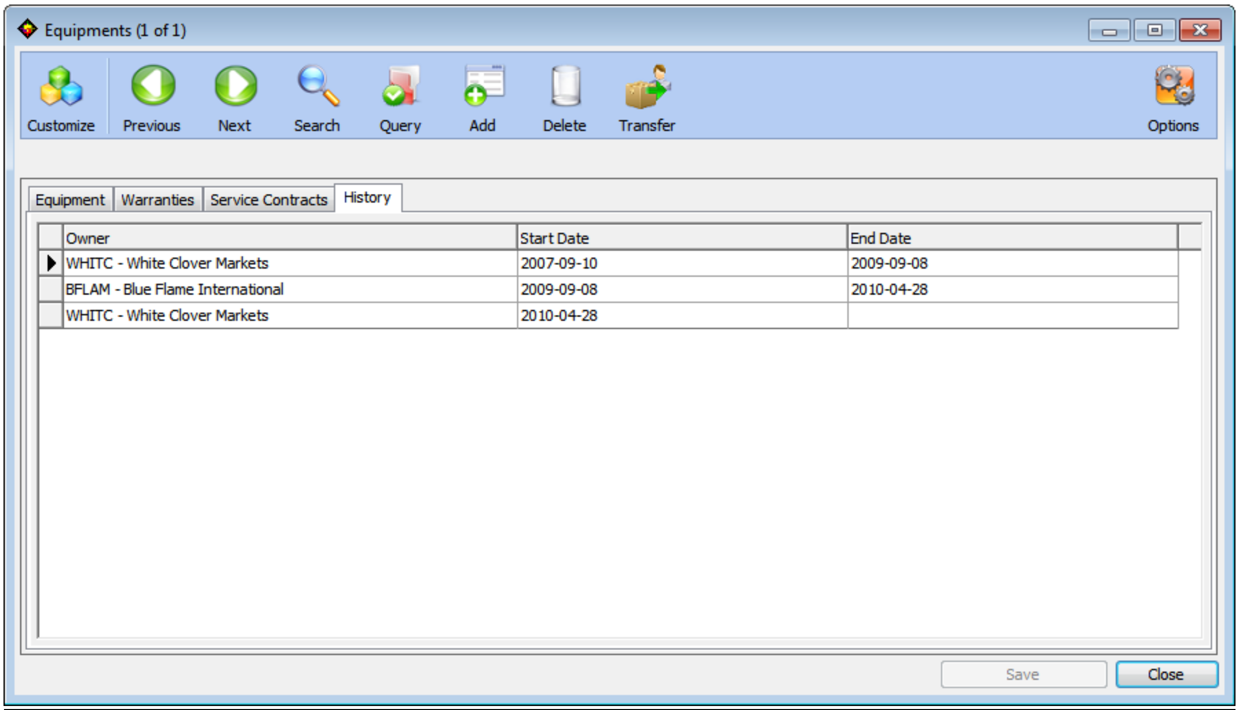
The *Start Date* field determines the start of the service contract. The *End Date* field cannot be directly edited; to determine the end of the service contract, the *Duration* must be defined. To define the *Duration*, the *Duration Editor* must be used.

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



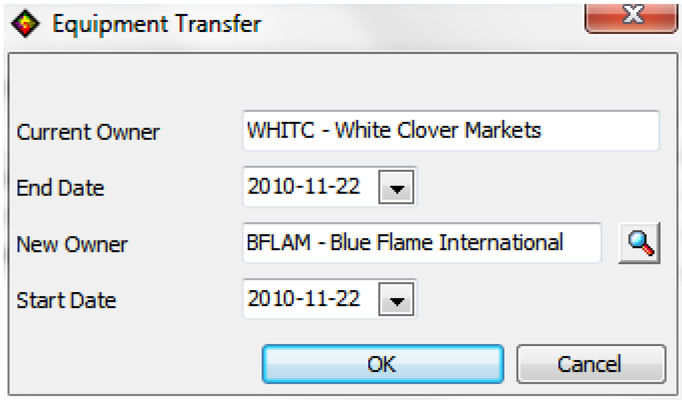
The *History* tab allows you to track the previous owners of the equipment.

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



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.

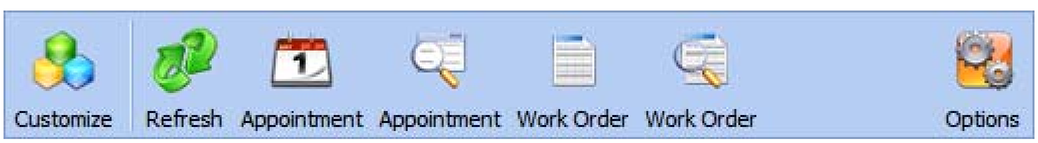
Appointments Grid

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
- Appointments By Period
- 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.

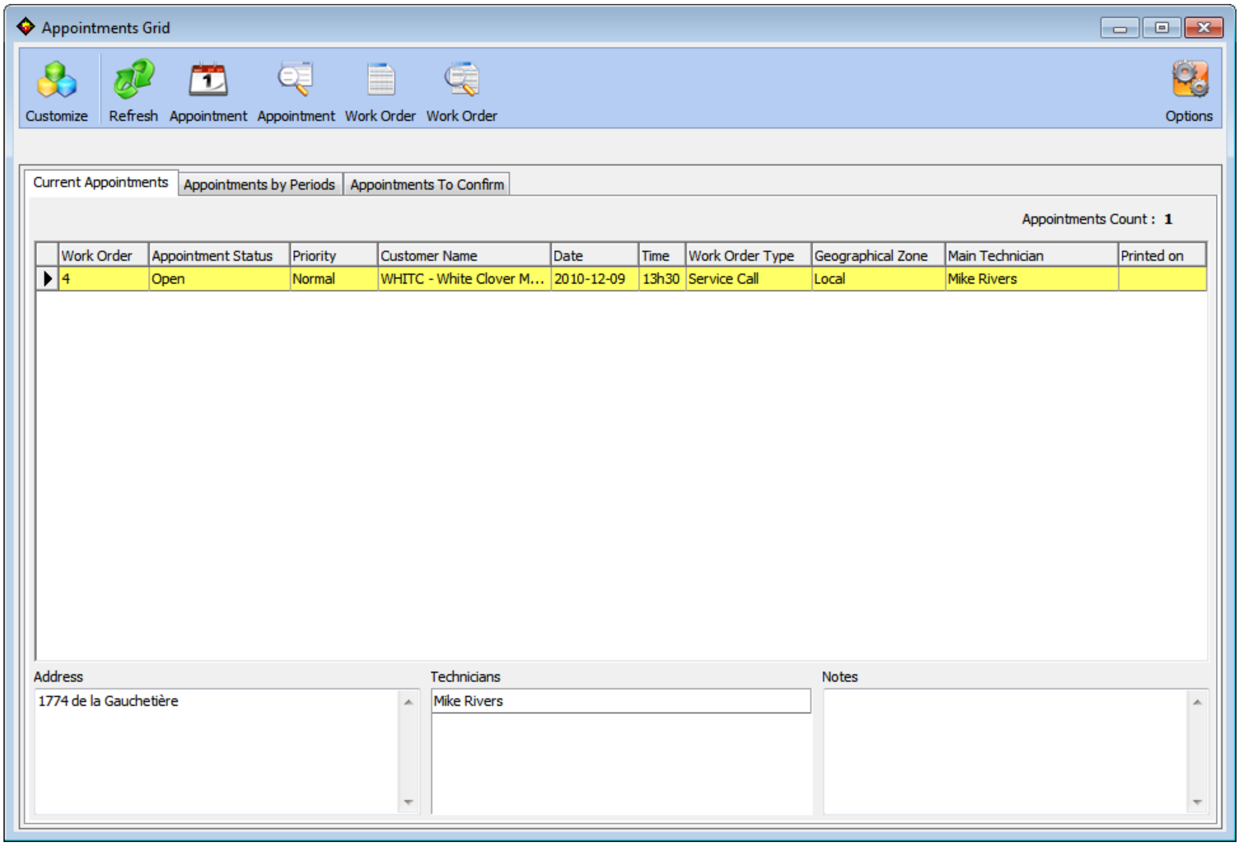
The *Show the Appointment* button will show on screen the currently selected appointment.

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



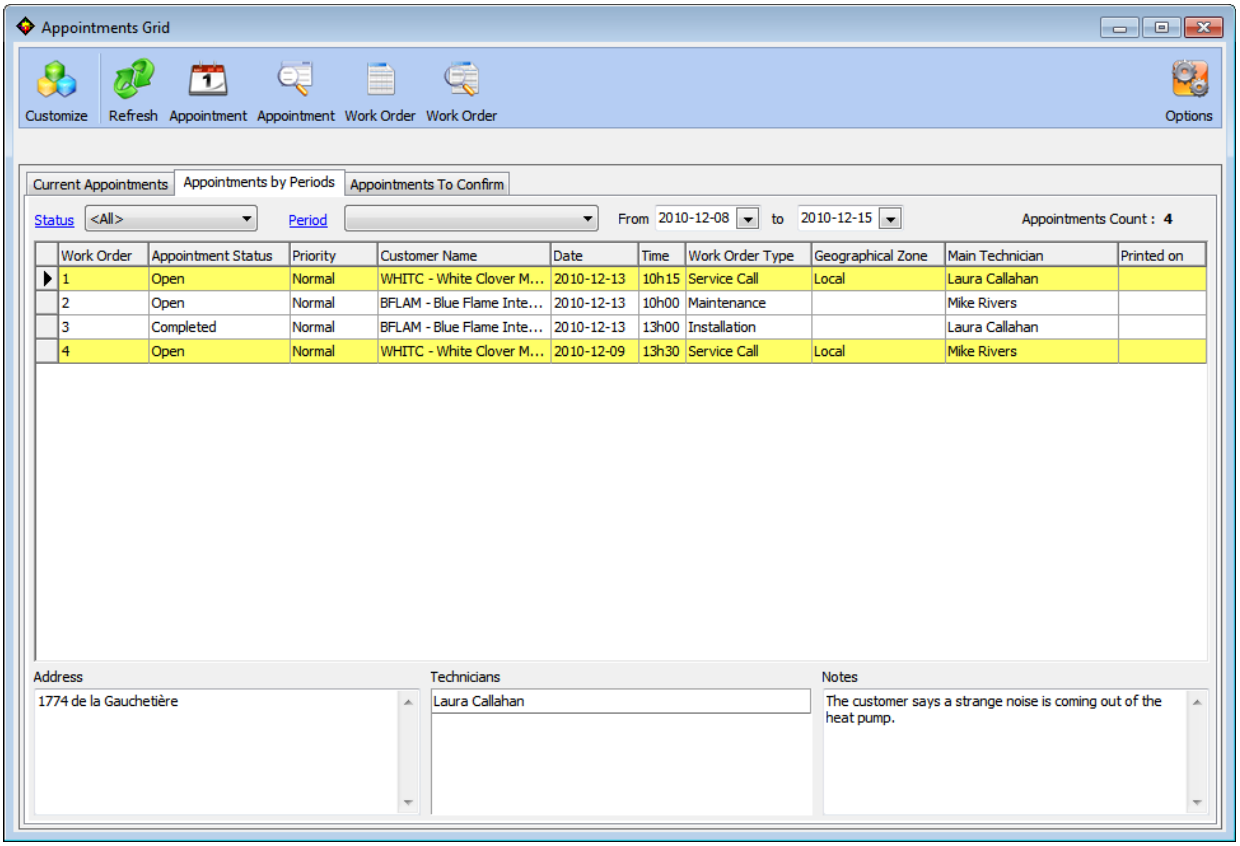
The *Current Appointments* tab allows you to see all the appointments with a confirmed date equal or lower than the current date (or, if the date isn't confirmed, those with a planned date equal to the current date) and with a status having the *Show In Current Appointments* box checked.

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



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.

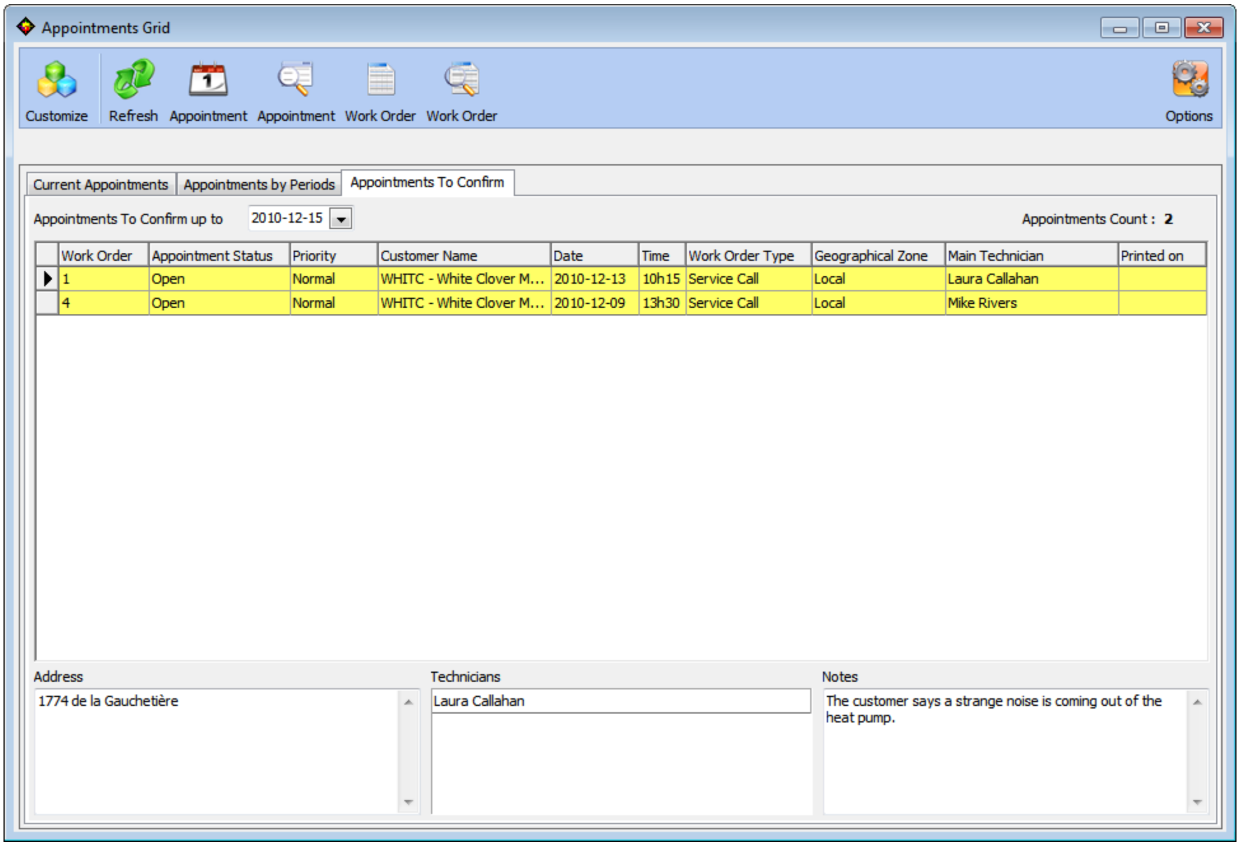
The *Period* field allows to load period values relative to the current date in the date controls.

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



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.

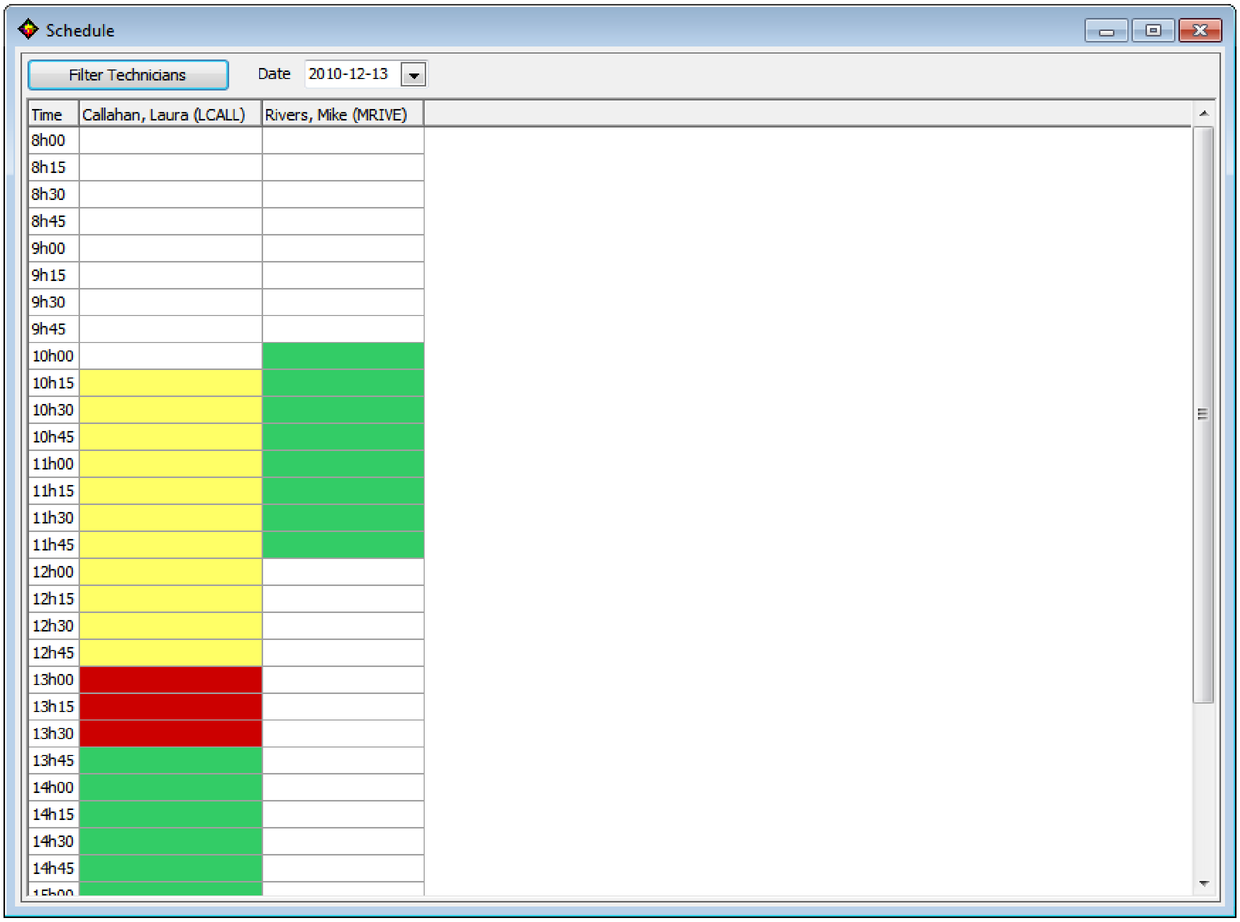
The date control allows to define the maximum planned date of the unconfirmed appointments. By default, it shows the next 7 days.

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.



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.

Chapter

4

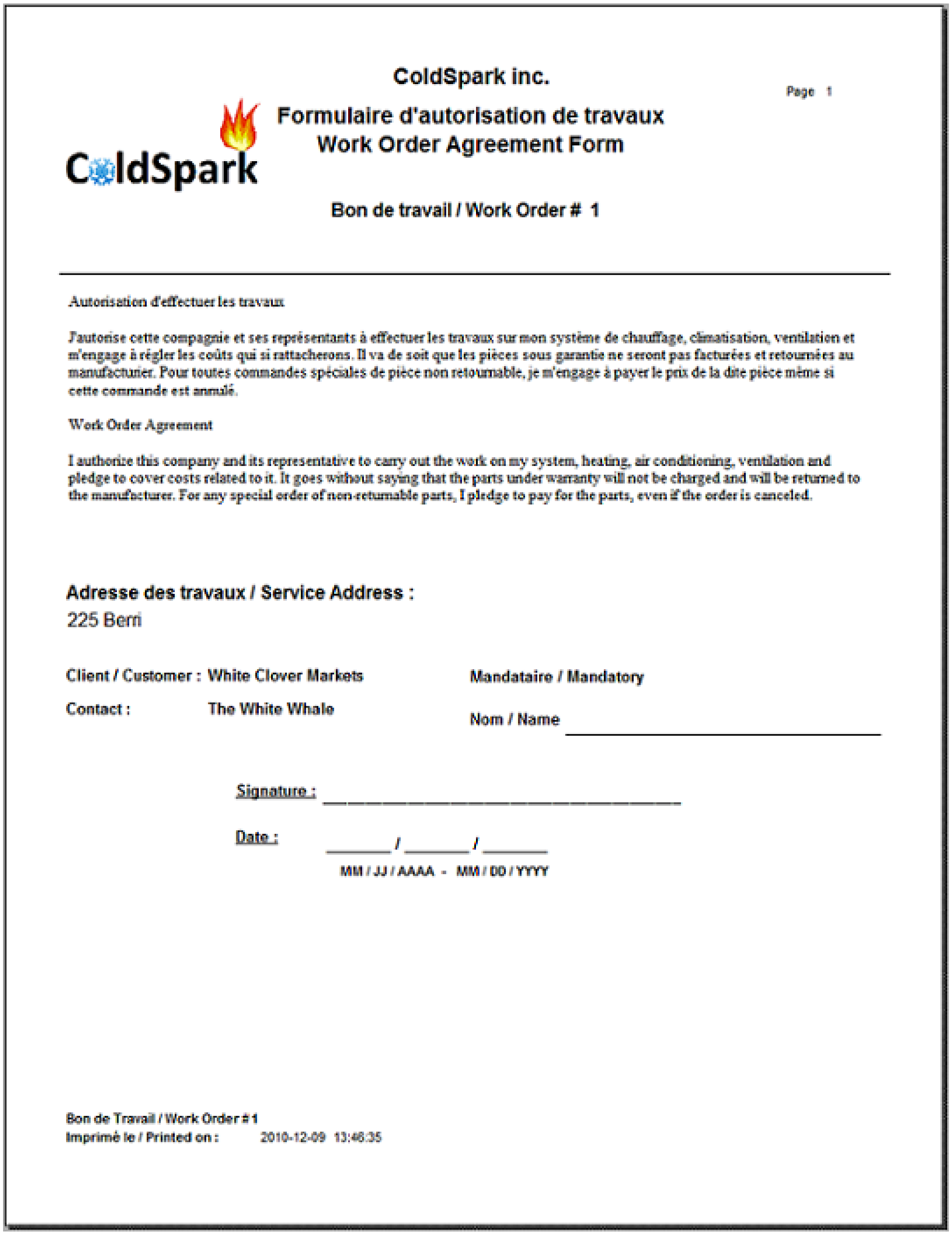
Reports

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.



ColdSpark inc.

Page 1

Formulaire d'autorisation de travaux
Work Order Agreement Form

Bon de travail / Work Order # 1

Autorisation d'effectuer les travaux

J'autorise cette compagnie et ses représentants à effectuer les travaux sur mon système de chauffage, climatisation, ventilation et m'engage à régler les coûts qui si rattacherons. Il va de soit que les pièces sous garantie ne seront pas facturées et retournées au manufacturier. Pour toutes commandes spéciales de pièce non retournable, je m'engage à payer le prix de la dite pièce même si cette commande est annulé.

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.

Adresse des travaux / Service Address :
225 Berri

Client / Customer :	White Clover Markets	Mandataire / Mandatory	
Contact :	The White Whale	Nom / Name	______________________

Signature : ______________________________

Date : ______ / ______ / ______
MM / JJ / AAAA - MM / DD / YYYY

Bon de Travail / Work Order # 1
Imprimé le / Printed on : 2010-12-09 13:46:35

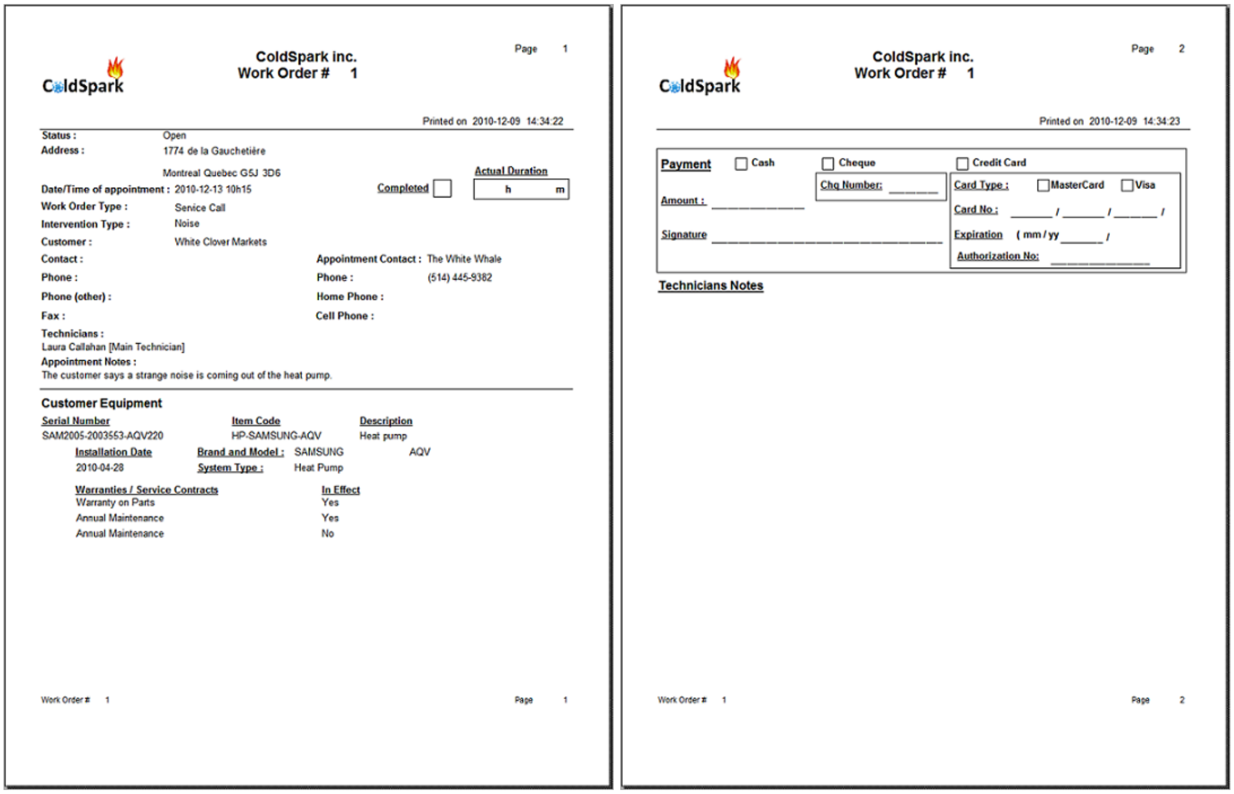
It shows the company name, the work order number, the work order authorization text (as defined in the *Configuration* screen) and some basic information about the customer.

This report is available from the *Work Orders* screen.

Work Orders

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.


ColdSpark inc.
Work Order # 1

Page 1

Printed on 2010-12-09 14:34:22

Status : Open
Address : 1774 de la Gauchetière
Montreal Quebec G5J 3D6

Completed
Actual Duration
h m

Date/Time of appointment : 2010-12-13 10h15
Work Order Type : Service Call
Intervention Type : Noise
Customer : White Clover Markets
Contact :
Appointment Contact : The White Whale
Phone :
Phone : (514) 445-9382
Phone (other) :
Home Phone :
Fax :
Cell Phone :
Technicians :
Laura Callahan [Main Technician]
Appointment Notes :
The customer says a strange noise is coming out of the heat pump.

Customer Equipment

Serial Number	Item Code	Description
SAM2005-2003553-AQV220	HP-SAMSUNG-AQV	Heat pump

Installation Date	Brand and Model :		
2010-04-28		SAMSUNG	AQV
	System Type :	Heat Pump	

Warranties / Service Contracts	In Effect
Warranty on Parts	Yes
Annual Maintenance	Yes
Annual Maintenance	No

Work Order # 1 Page 1

ColdSpark inc.
Work Order # 1

Page 2

Printed on 2010-12-09 14:34:23

Payment
Cash
Cheque
Credit Card
Chq Number: ______
Card Type : MasterCard Visa
Amount : ____________
Card No : ______ / ______ / ______ /
Signature ______________________________
Expiration (mm / yy ______ /
Authorization No: ____________

Technicians Notes

Work Order # 1 Page 2

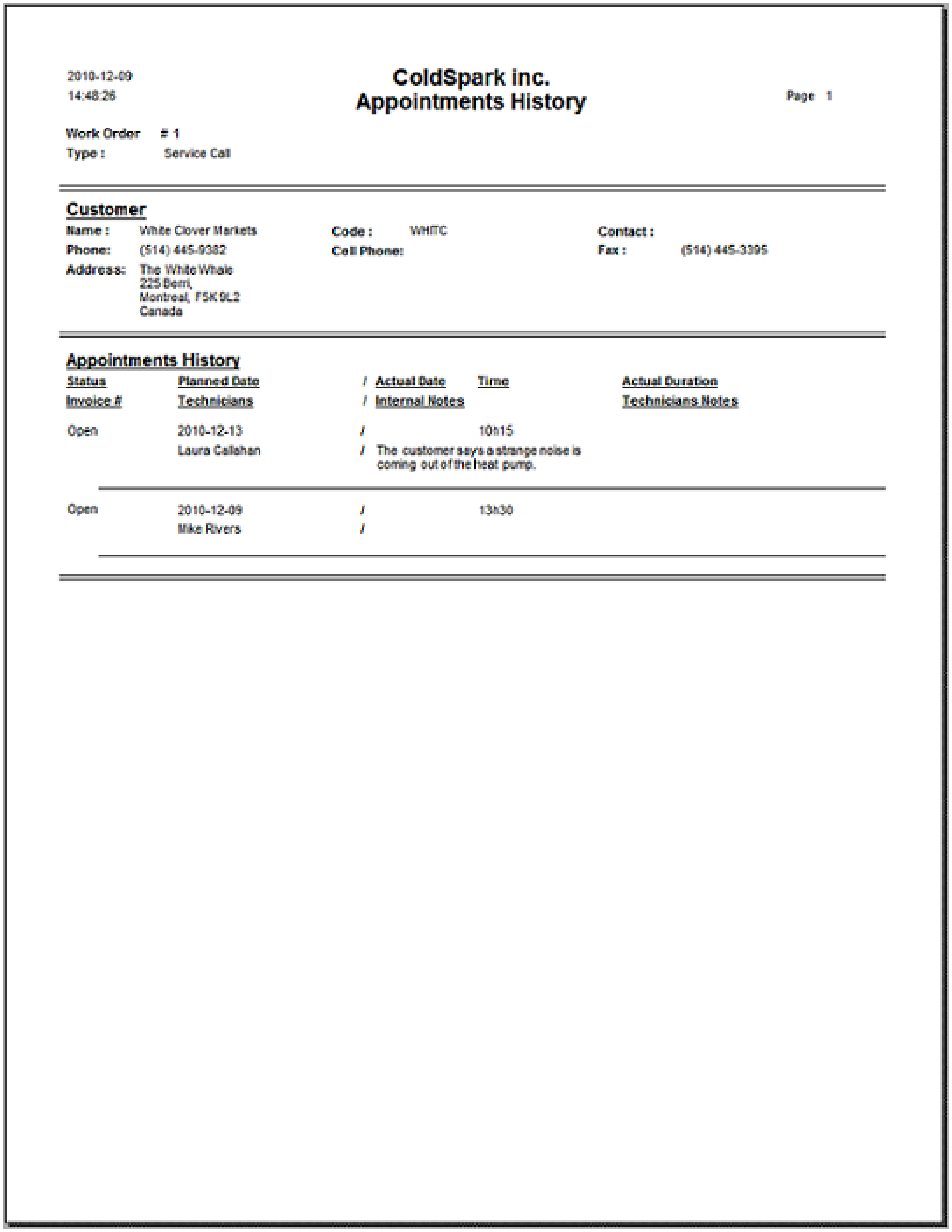
It shows the technicians assigned to the appointment, the location and time of the appointment, the customer contact information, the work order type, the appointment notes and the customer equipment list.

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

Appointments History

Use

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


2010-12-09
14:48:26

ColdSpark inc.
Appointments History

Page 1

Work Order # 1
Type : Service Call

Customer

Name : White Clover Markets **Code :** WHITC **Contact :**
Phone: (514) 445-9382 **Cell Phone:** **Fax :** (514) 445-3395
Address: The White Whale
225 Berri,
Montreal, F5K 9L2
Canada

Appointments History

Status / Invoice #	Planned Date / Technicians	/ Actual Date / Internal Notes	Time	Actual Duration / Technicians Notes
Open	2010-12-13 Laura Callahan	/ / The customer says a strange noise is coming out of the heat pump.	10h15	
Open	2010-12-09 Mike Rivers	/ /	13h30	

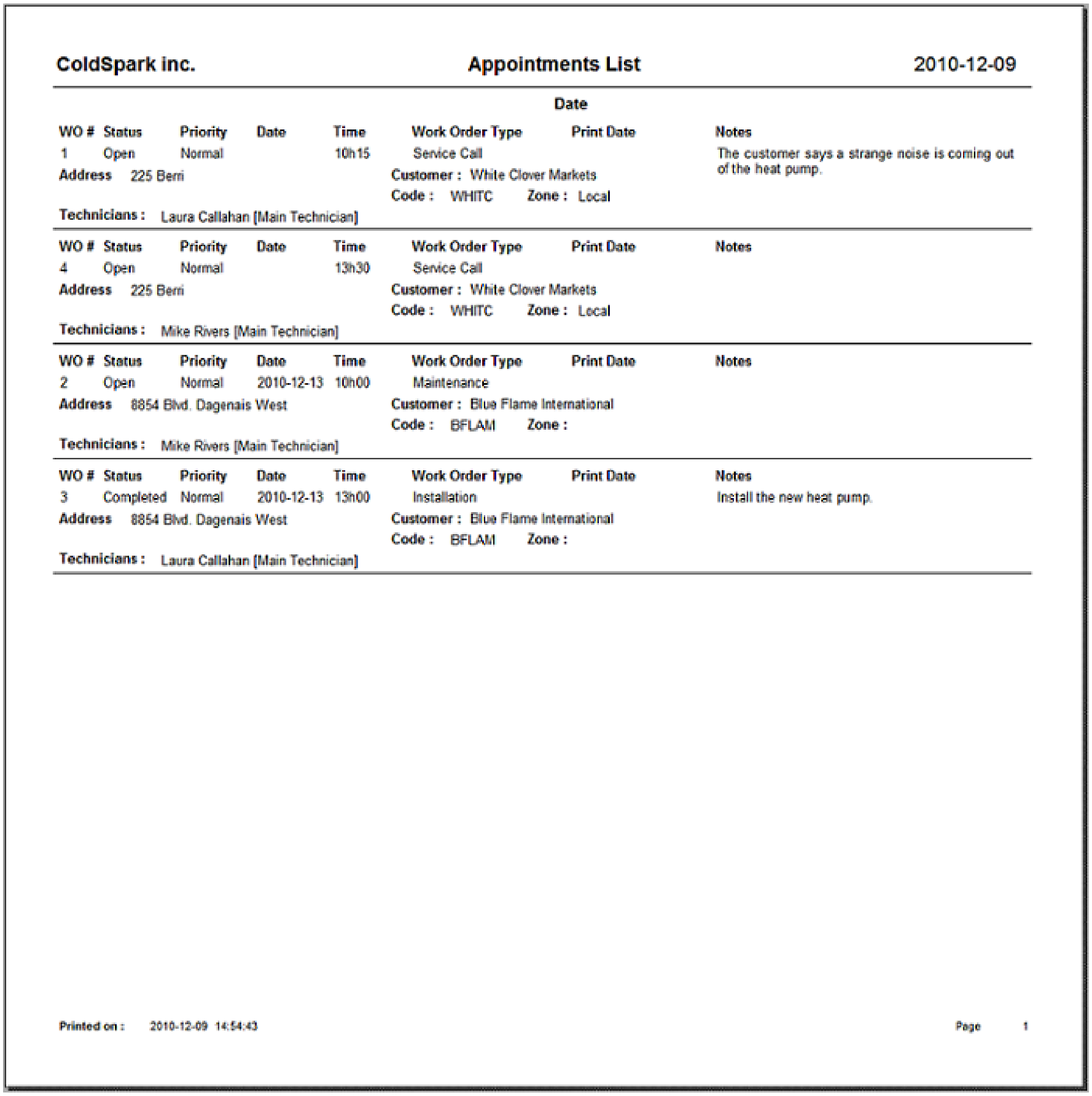
It shows the basic customer information and, for every appointment, the status, main technician, planned and confirmed date, the time and the real duration, the technicians' notes and the appointment notes.

This report is available from the *Customers* screen.

Appointments List

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	Work Order Type	Print Date	Notes
1	Open	Normal		10h15	Service Call		The customer says a strange noise is coming out of the heat pump.

Address 225 Berri — Customer : White Clover Markets — Code : WHITC Zone : Local

Technicians : Laura Callahan [Main Technician]

WO #	Status	Priority	Date	Time	Work Order Type	Print Date	Notes
4	Open	Normal		13h30	Service Call		

Address 225 Berri — Customer : White Clover Markets — Code : WHITC Zone : Local

Technicians : Mike Rivers [Main Technician]

WO #	Status	Priority	Date	Time	Work Order Type	Print Date	Notes
2	Open	Normal	2010-12-13	10h00	Maintenance		

Address 8854 Blvd. Dagenais West — Customer : Blue Flame International — Code : BFLAM Zone :

Technicians : Mike Rivers [Main Technician]

WO #	Status	Priority	Date	Time	Work Order Type	Print Date	Notes
3	Completed	Normal	2010-12-13	13h00	Installation		Install the new heat pump.

Address 8854 Blvd. Dagenais West — Customer : Blue Flame International — Code : BFLAM Zone :

Technicians : Laura Callahan [Main Technician]

Printed on : 2010-12-09 14:54:43 — Page 1

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.