# Sirtawn Systems

Features and Functions: Service Module

Overview

* The Service Module is based on Repair Orders (ROs) with automatically generated Order numbers. The ROs are initially set up with multiple "Problems" which are designated as "Customer Pays", "Internal" or "Warranty". Each problem may have Inventory, Labour and Sublet assigned to it. The Inventory, Labour and Sublet can be attached by referencing a predetermined "Procedure" or manually enter to build an Estimate (if required). Actual Inventory, Labour and Sublet are added to the RO as they occur or added later.
* The Service Units (Maximum of 6 per RO) are set up in an "Ownership" database for continuous access and history purposes. A Unit may be copied to a new Owner.
* The completed ROs are invoiced and directly update the Accounts Receivable.

Features

* Specialized Menus for "Service Writer", Mechanic (Technician), Seasonal and Full Module.
* Module provides lookups to Existing Repair Orders, Customers, Service Units, Service History, Procedures, Major Unit Inventory (Pending Contracts for PDI) and Standard Inventory.
* RO Function includes "Quick Input" for faster initial Customer thorough put, Quick Customer (Owner) setup, Customer Problems Listing, Detailed Parts, Labour and Sublet input, Mechanic Scheduling, Full access to Repair History, Complete Repair Order Summary attached to each Repair Order. Multiple "Warranty" Vendors are allowed on one Repair Order.
* Seasonal Customer Requirements provide a "check list" approach to acquiring the specific "Winterizing" and "New Season" repairs requested by the Customer. The Seasonal "Check List" is then used to create a Repair Order.
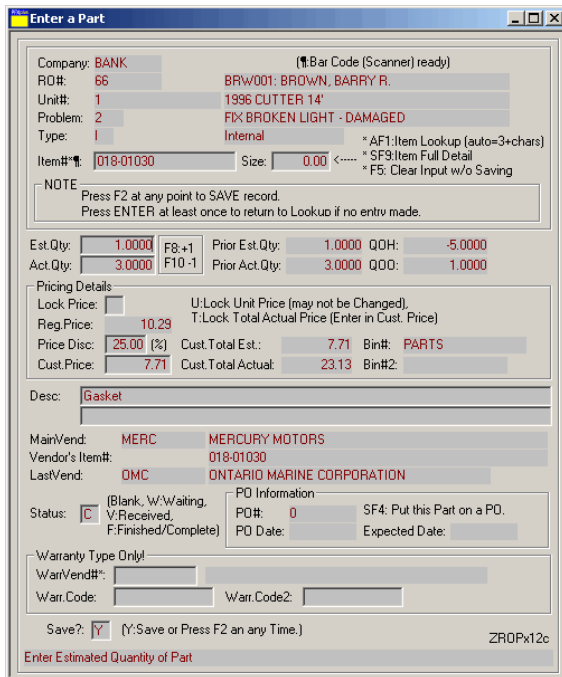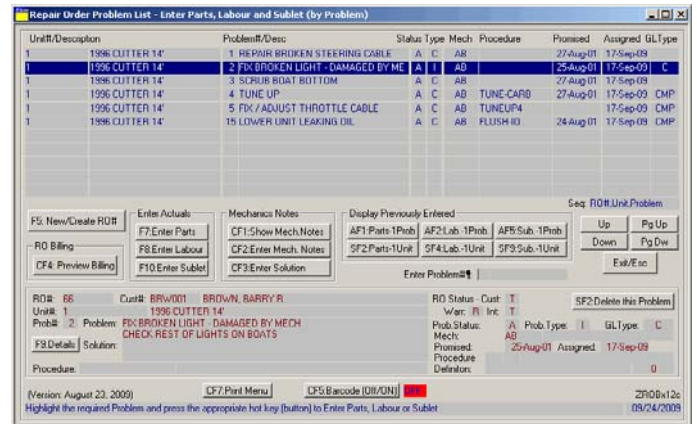
Mechanic's Function

* Mechanic's Menu includes "Login/Logout", ability to print the Repair Order, Included Procedures, Parts Lists, Missing Costs and Labour, and other specific reports.
* Mechanic Control and Scheduling - Available Timetable, Warranty / Non-Warranty Rates, Book Vs Actual Hours – Complete Mechanic Schedule, Assigned Work and Daily Schedule.
* Detailed Mechanic Notes may be recorded against any Repair Order and/or any problem. These notes are available to be printed on the Customer's RO Invoice Summary.

Reporting

* Management Reports include Promised Lists by Date and by RO#, Assigned List by Date, Volume Analysis, Profit Report and Mechanic's Efficiency.
* Most reports are available by Repair Order# with additional filters (such as Repair Order Date, Customer#, RO Status and Mechanic.).
* Over 30 Reports include RO Parts Lists, Parts Used Report, Labour Report, Sublet Report, Missing Costs Report, Missing Warranty Vendors Report, Invoice Summary Report plus many more.

Interface to Other Modules

* Integrated to Inventory Control Module, Purchasing/Receiving Module and Major Unit Inventory.
* Updates to General Ledger, Inventory Control and Accounts Receivable Modules.

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Sample: Service Repair Order Input

Repair Order#

Customer# (Includes a "Quick Customer" set up.

Repair Order Quick Input

Company: BANK   RO#:@++:   247 Cust#@*: BRW001   CC: 1
RO Date: 02/24/2006   Entered By*: BRB

Customer
Chg: N   Name*: BROWN, BARRY R
(Y/N/X**) Addr1: 25 INDUSTRIAL RD. WEST
(C:Restore) Addr2: UNIT #29B
City*: BARRIE   Pv*: ON   PC: L4M 1Z5
Phone1*: M : 111-111-1111999
Phone2*: P : 222-222-2222
Phone3*: C : 333-333-3333
Phone4*: B : 555-555-5566
Email: BARRY.DELORES.BROWN@SYMPATICO.CA

New
(Chg: X**: New Owners Name, Temporary for this RO. Name*: AF1 to Lookup the Contract and Load Name, Addr. & Stock#. C:Restore Customer.)

*AF1:Lookup
@AF2:Lookup
F9:Menu
F1:Help
CF1:Notes

++F10: L/Up RO#
by Cust. Name

SF4: Change Cust# on existing RO (Must be in `RO Date' or `Entered By' fields.

Unit#s to Service
        Make,Model,Desc   InterCompany
1* 1003138   YAMAHA,F200TXRC,2004
2* A251341   SHORELANDER,TRAILER 03,20   BANK
3*
4*
5*
6*

Date In: 02/24/2006
Rep: BRB
Promised: 06/01/2006
Time: 0 : 0   HHMMpm
RoughEst: 250.00 Est.Required: Y
Authorized: Y   By: BARRY
Auth Date: 02/24/2006

ZROHs
02/24/2006

Customer's Information from Master Database may be updated directly by changing the data here.

Quick Reference to Function keys

Promised Date, Rough Estimate (if used) and Authorization

Select from Customer's Service Units ("Quick" set up is available (Maximum of 6 units).

Problem Definition Details

Repair Order Problems (Quick Entry)

Company: BANK   RO#: 247   Cust#: BRW001   BROWN, BARRY R
Unit#*: 1003138
Problem#: 1   Type: C (C/W/I)   GL Type*: CMP
Desc#1: NEEDS TUNEUP
   #2:
RoughEst: 0.00   Select a Procedure?:

Help
*AF1:Lookup
CF1:Notes

Unit#   Problem#   Description of Problem
1003138   1   NEEDS TUNEUP

Enter C:Customer Charge, W:Warranty, I:Internal

SF9:Next Problem# F9:Menu   Last Problem#: 1   ZROBs

Select Unit, Problem Type (Customer Pays, Warranty or Internal) with matching GL Link.

Define what Service is required (Problem).

Assign Standard Procedure (if available) which includes normal parts, labour and sublet

Problem List for all Units