



# Service & Warranty Management

Version 3.71

## Product Release Notification

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## Overview

This document has been created to provide our Best reseller partners and customers with an overview of the enhancements that are included in Service & Warranty Management, version 3.71.

This release of the software is significant in that it keeps S&W current with the most recent release of MAS 90 and MAS 200 accounting software and we have added a host of new features to improve the functionality of the software.

At Business Computer Systems we are committed to providing continuous value to our customers. We pledge to continue investing in the system in order to keep S&W on the leading edge of technology. Most of the enhancements included in this release are the direct result of feedback from our partners. We hope you will let us know what you think of this release and give us feedback on other features you would like to see in the software in the future.

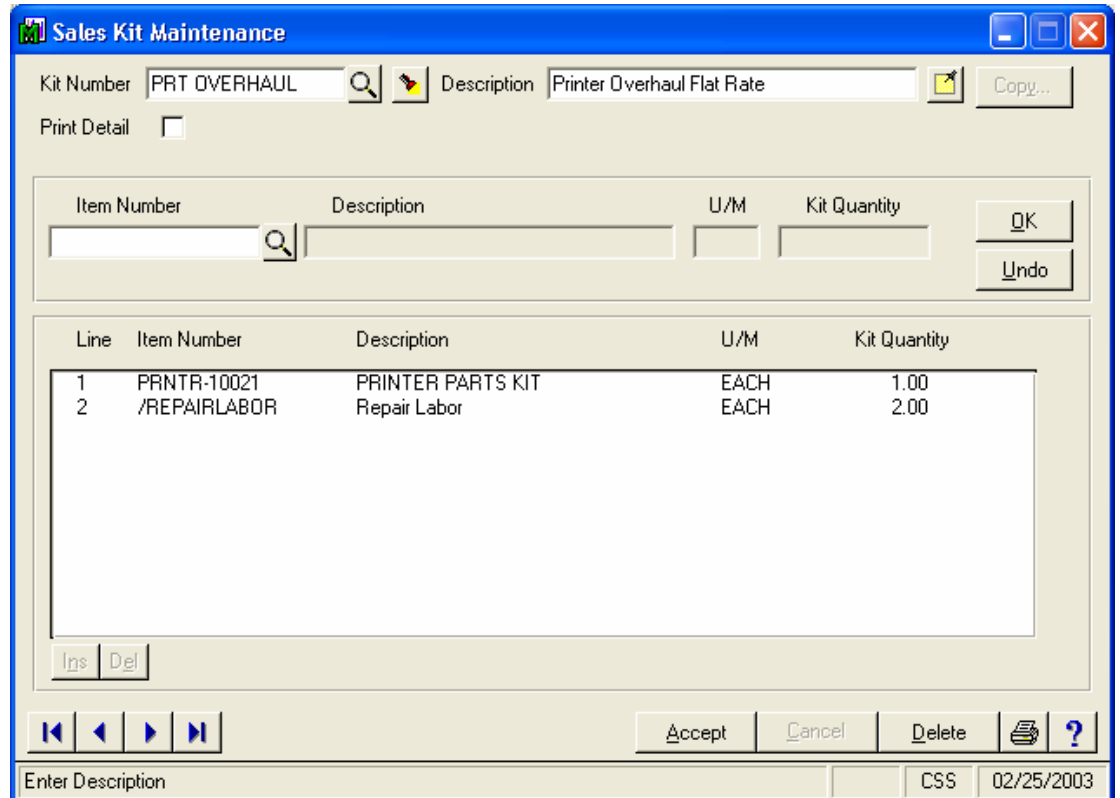


## Summary of Enhancements

1. Flat Rate Pricing has been added allowing companies that need the ability to give a customer a fixed fee price for repairs the ability to do so easily as part of the service module.
2. Service Order data entry has been enhanced to allow parts to automatically assume a quantity of 1, simplifying data entry and reducing the time it takes to enter parts to a service order.
3. Automatic Serial Assignment has been added for customers that do not wish to sell serialized items. This enhancement will allow you to create a service item the first time the item is serviced and automatically create a serial number (unique tracking number) for the item.
4. You may now override the "End User" information for a service item without having to set up a new customer in Accounts Receivable.
5. Quick Invoice Creation has been added to the Service Order Header screen allowing ability to quickly create an invoice for a Service Order.
6. Order Number Prefixes can be set up allowing a more flexible order numbering and invoice number scheme.

### Flat Rate Pricing

The Inventory Kit Maintenance program has been enhanced to allow the inclusion of labor charges (Miscellaneous Charge Codes) to the kit. When the kit explodes on the Service Order, you can add or remove parts and Miscellaneous Item lines, as well as change the number of labor hours or change the technician without affecting the flat price (kit price). The cost will be affected by the parts and/or labor costs associated with the kit. Labor cost and other miscellaneous item costs are booked to their normal G/L accounts and the technician records are properly updated for reporting purposes.



**Sales Kit Maintenance**

Kit Number: PRT OVERHAUL    Description: Printer Overhaul Flat Rate

Print Detail:

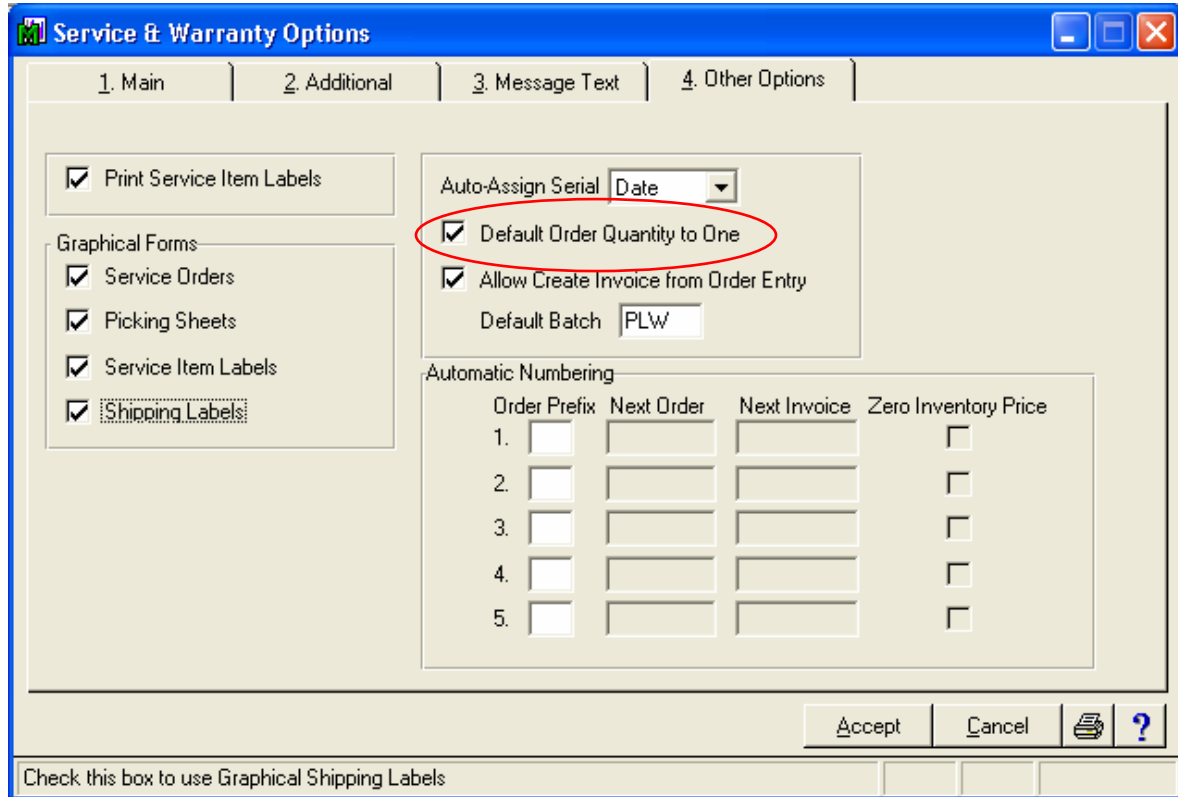
Item Number	Description	U/M	Kit Quantity
1	PRNTR-10021	EACH	1.00
2	/REPAIRLABOR	EACH	2.00

Buttons: Accept, Cancel, Delete, Print, Help

Status: Enter Description    CSS    02/25/2003

### Automatic Quantity of 1 in Service Order Entry

The setup parameters have been modified to automatically assume a quantity of 1 when a new part is added in the Service Order Lines screen. To enable this new feature access the Service Order Options program and go to the Other Options tab. Select "Default Order Quantity to One" and click Accept.



**Service & Warranty Options**

1. Main | 2. Additional | 3. Message Text | 4. Other Options

Print Service Item Labels

Auto-Assign Serial:  [v]

**Default Order Quantity to One**

Allow Create Invoice from Order Entry

Default Batch:

Graphical Forms

- Service Orders
- Picking Sheets
- Service Item Labels
- Shipping Labels

Automatic Numbering

	Order Prefix	Next Order	Next Invoice	Zero Inventory Price
1.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
2.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
3.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
4.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
5.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

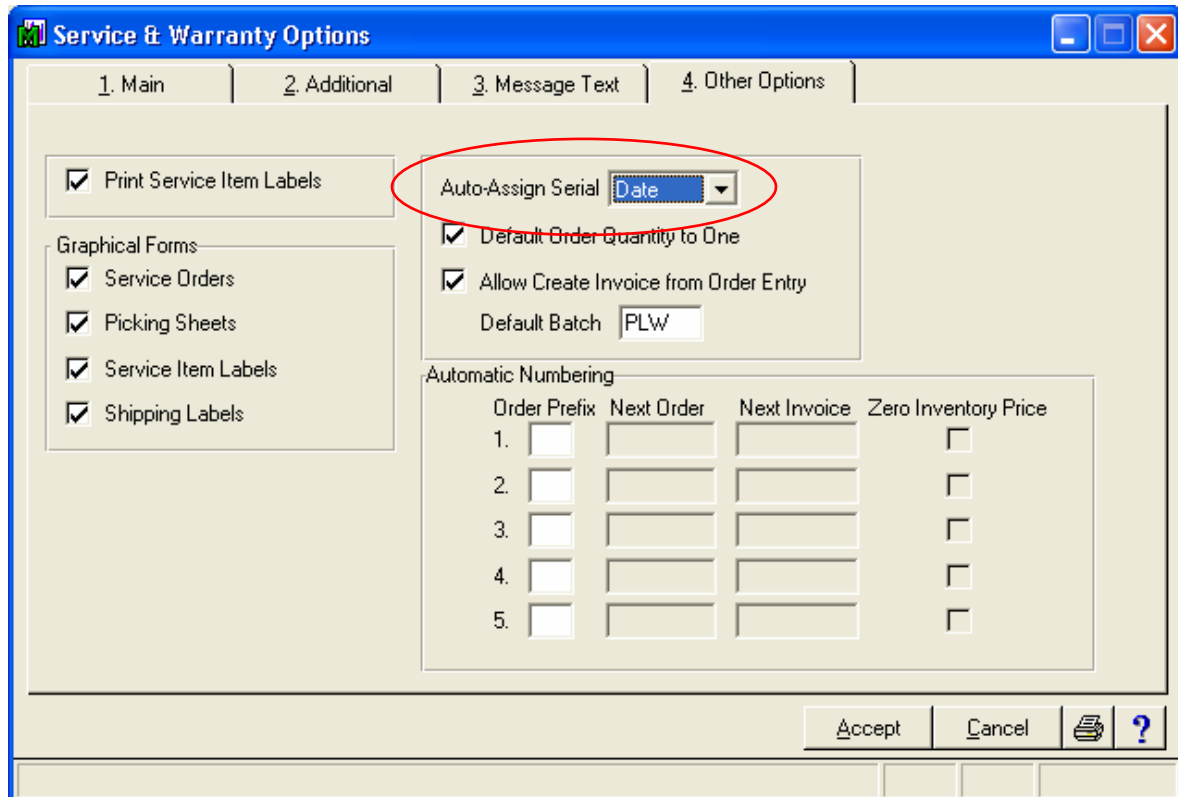
Accept | Cancel | [Print] | [Help]

Check this box to use Graphical Shipping Labels

## Automatic Serial Number Assignment

Many companies opt not to track service items from the time they are sold. Rather, they prefer to begin tracking a service item when a customer calls in for the first time with a problem. Service & Warranty Management has always allowed you to add a Serial Number (Unique Tracking Number) to a non-serialized service item. This new modification makes the assignment of a serial number to a new service item much simpler.

To enable this feature, access the Other Options tab in Service Order Options.



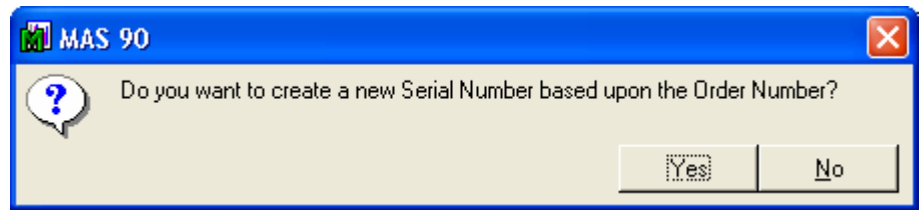
Change the "Auto-Assign Serial" option from No to:

Select Date to use the date as a portion of a unique serial number that is created. For example, if today were January 12, 2010, the first serial number created on this date would be 2010011200001.

Select Order Number to use the order number as a portion of a unique serial number that is created. For example, if the order number were 010006, the first serial number created on this date would be 010006000001.

To use this feature, start a Service Order as you would normally and proceed to the Service Items tab. Click on Add to add a service item to this order. At the Item Number field add a valid item number from the inventory management

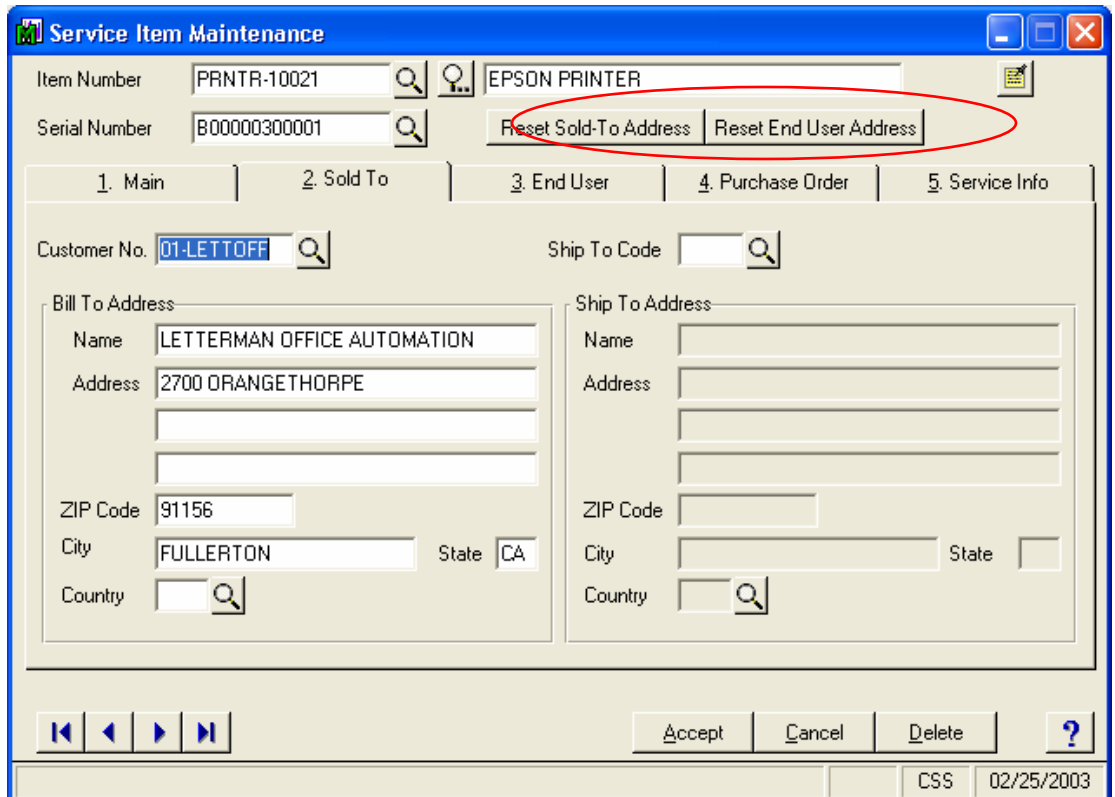
files. At the Serial Number field, simply press ENTER or hit the TAB button to bypass the field. The following prompt will be displayed:



Select Yes if you would like the system to automatically create a new service item for you and assign the serial number according to the setup option chosen. You will be prompted to enter specific information about the service item like, for example the Invoice Date, Warranty Information, etc.

### Override End-User Address for a Service Item

This new feature allows you associate an end user with a service item without having to set up the end user as an Accounts Receivable customer. To change the Sold To or End User information, access the item via Service Item Maintenance from the Service Order Setup menu.

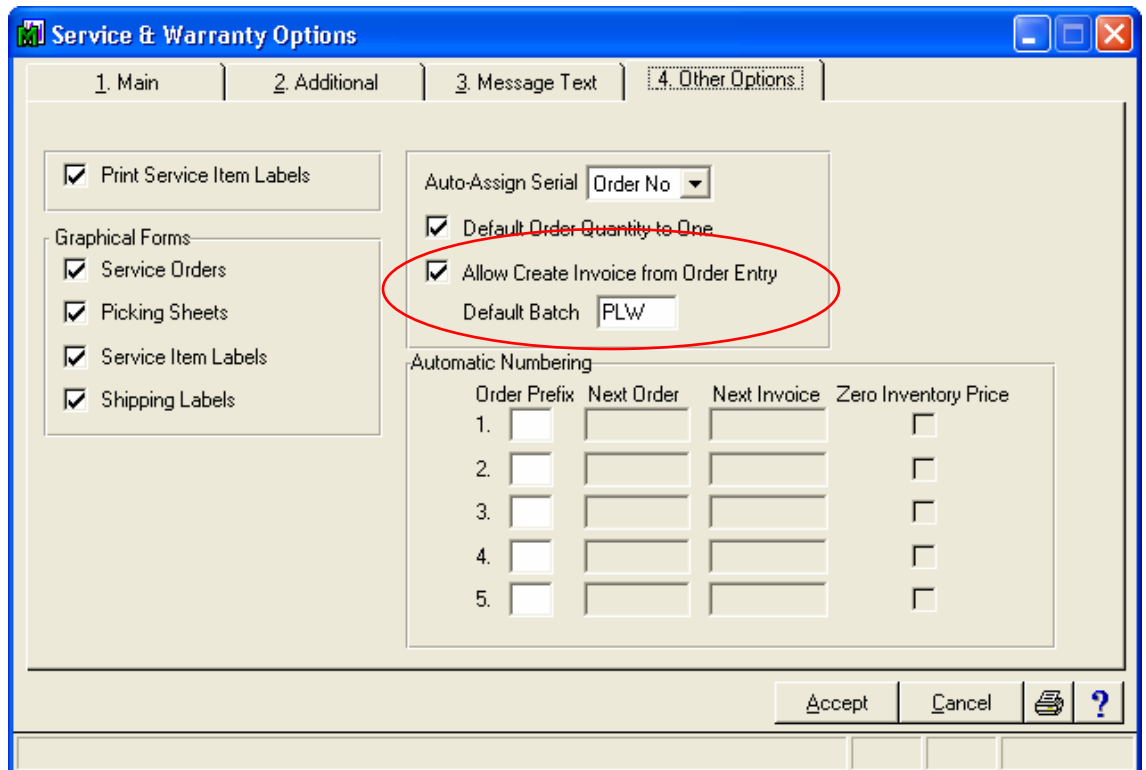


From either the Sold To tab or the End User tab, enter the Bill To Address Information that you want associated with this service item. You may optionally blank out the Customer Number field, however, if you leave a customer number in the field, the system will compare the address information for the customer on file against the Bill To information that has been manually changed and display a reset button to change the Bill To Address back to the information that is on file for the customer.

### Quick Invoice Creation

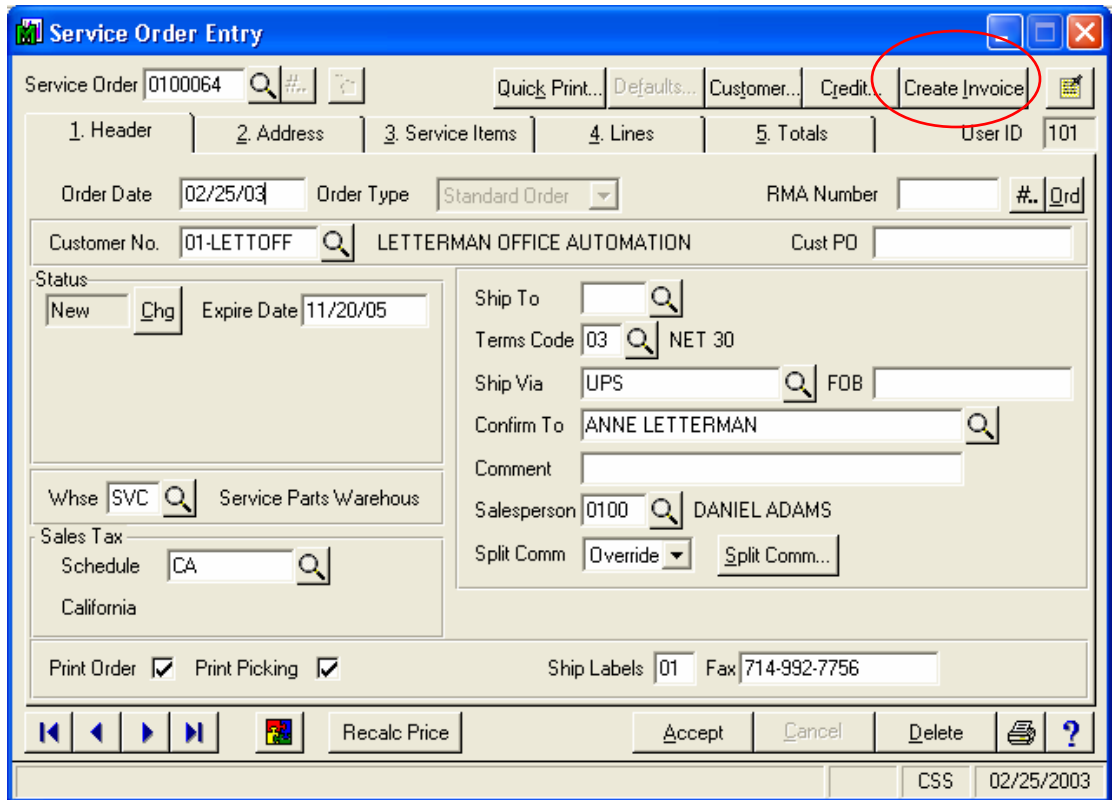
A new button has been added to the Service Order Header called Create Invoice that will close the invoice, create an invoice immediately and you will be taken to Invoice Data Entry with the invoice already loaded so that you can make any necessary changes, distribute serial/lot numbers, and/or print the invoice. When you close the invoice you will be returned to Service Order data entry.

You must first enable this feature in the Service Order Setup Options. The option is located on the Other Options tab.

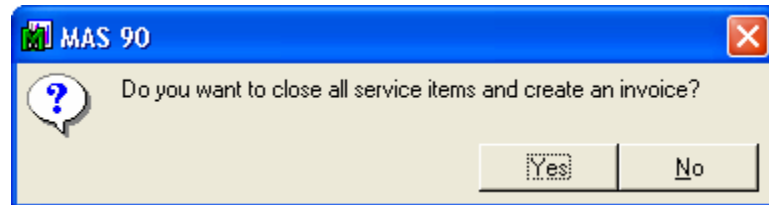


Select the Allow Create Invoice from Order Entry option to turn this function on. If you have enabled Batch Processing in Sales Order Processing, you will have to enter the Default Batch to post to.

With this option enabled, the Create Invoice button will be enabled on the Service Order Header panel.



Click the Create Invoice button to start the process. The following prompt will be displayed:

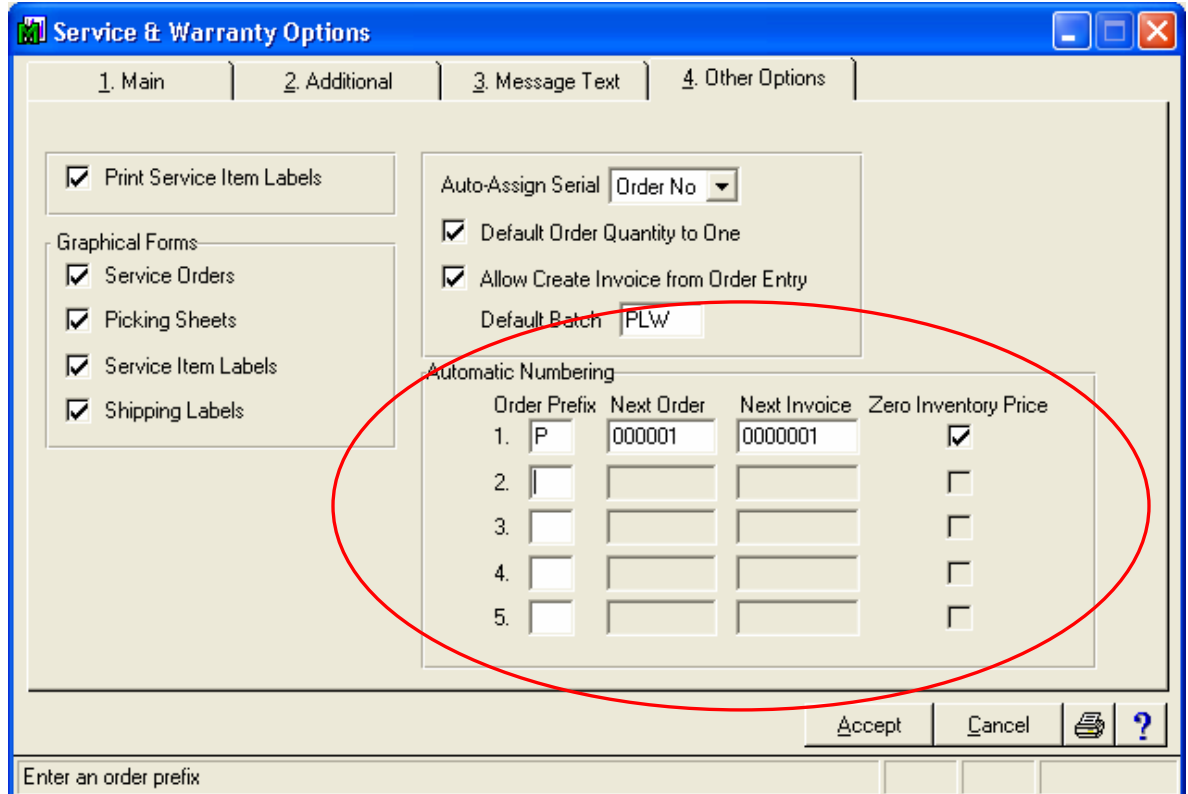


Select Yes to continue or No to cancel the process and return to the Service Order. If Batch Processing is turned on you will be prompted to accept the default batch number or to assign a new batch number and then the new invoice will be displayed for you to review, modify, and/or print.

## Order Number Prefixes

This new option allows you to set up one-letter prefixes (up to five) that will control Order and Invoice numbering as well as optionally zero out the sales price for invoices. This option allows you to distinguish different types of service, not only by Service Order Number, but also by Invoice Number.

To enable this option, you must first access the Other Options tab in Service & Warranty Options.



	Order Prefix	Next Order	Next Invoice	Zero Inventory Price
1.	P	000001	000001	<input checked="" type="checkbox"/>
2.				<input type="checkbox"/>
3.				<input type="checkbox"/>
4.				<input type="checkbox"/>
5.				<input type="checkbox"/>

In the Order Prefix field, enter a one character (alpha) prefix to be appended to the front of the order number and invoice number. Next, enter the Next Order number that will be used for the Order Number and the Next Invoice number that will be used for the invoice. Finally, select the Zero Inventory Price field if you wish any invoices generated for this Order type to have a zero price associated with them.

To use the numbering feature, from within Service Order Entry, type the prefix associated with the order type you would like to generate and press TAB or ENTER. The order number will be generated for you according to the rules defined in the Setup Options. When this Service Order is invoiced, the invoice number will begin with the same prefix and include the next Invoice number, again, according to the setup parameters defined.