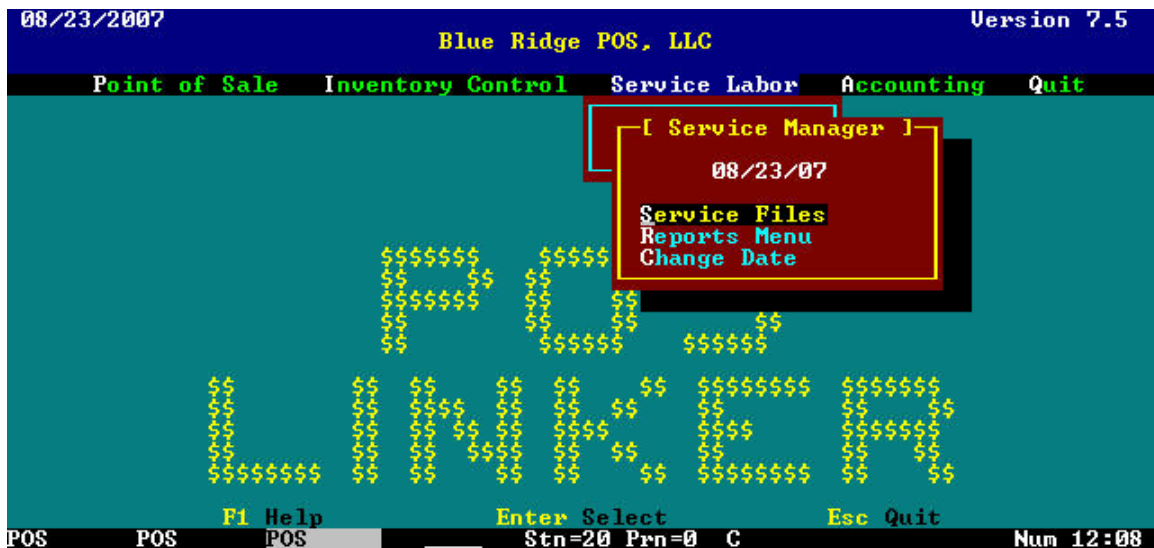


7. Service Labor



In the above example of the POS LINKER Main Menu Screen, the highlight bar is on Service Labor and the corresponding subtopic - Shop Control.




When Shop Control is selected from Service Labor, the Service Manager Selection Screen appears.

Service Code File

This selection allows the user to setup time-saving codes to be entered on repair tickets for service work. Enter as complete a description as possible for each, as well as the number of hours to complete the task and the price. Codes can be created for the following categories:

- **S** - symptom reported
- **R** - requested work
- **P** - performed work

When entering information on the service order screen the user may press  to display the code list for assistance. See the following sample screen.

```
08/30/2007          <<<<< Service Order Writer System >>>>>
                                < Codes on File >
Type P Performed service C
Descr _____
Price _____
Hours _____

Include all?  _
Service special?  _

Please

Esc Quit  F1 Help
End Save  F2 Delete
F3 Fwd   F4 Bwd
F6 Clear F7 Lookup

ADI Adjusted drive interlock
ASP Adjusted self-propelled clutch
CAC Cleaned and serviced air cleaner
CAP Cleaned and adjusted points
CAR Cleaned and adjusted carb.
CBC Cleaned block & cooling fins
CEP Cleaned exhaust ports
CFI Cleaned out fuel tank
CHP Cleaned carbon from head & piston
CO  Changed oil
CR  Complete rebuild
CSS Cleaned solid state mounting ground
CUD Cleaned under deck
GUC Ground valves & clearances
ID  Inspection- disassemble
IDR Inspection- disassemble/reassemble
IPC Installed new fuel cap
IL  INSTALL LOADER
IND Inspection- no disassembly
IPC Installed new points/condenser
Enter Select PgUp / PgDn

POS      POS      POS      COPILOT  Stn=20 Prn=0  C      Caps Num 12:28
```

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Service Order reports will give a listing of service orders by status and either customer name, date received, or date promised. This report is useful in monitoring how long work orders have been in the system.

Status selections:

- R Ready
- H on Hold
- P in Progress
- S Scheduled
- C Closed

Select Y in the “All except”? Field to print all but Closed service orders

```
08/20/2007 <<<<< Service Order Management System >>>>> Vers 7.5
                R E P O R T S

$ <R>egular or <S>hort form
1  by status + customer name
2  by status + date received
3  by status + date promised
4  Labor summary by employee

1 < enter choice

                <blank values = all>
Status Code _      All except? N
Heading _____ Order number 1_ 9999999Z
                Employee      _
                Reason Code   _
STATUS: Select . . . Completed date _/_/_

Esc  F1  F5  F7  Ctrl + C
Quit Help Print Lookup Halt Printing

POS      POS      Stn=20 Prn=0 C      Num 14:38
```

Warranty Accounts:


Many service orders are completed through manufacturer warranties. POS Linker allows you to set up warranty accounts to better track your receivables and service orders. This feature is only available if you license the service order module.

Setting Up Warranty Accounts:

- a) The Warranty Accounts screen appears similar to the customer file screen - setup account information, name, address, etc. Terms = Invoice, and Service Charges = NO.

```

08/23/2007          <<<<< POS Linker >>>>>          Version 7.5
                    Blue Ridge POS, LLC
                    Warranty Accounts
-----
Demographic          Financial
Number              SSN          Credit limit
First name          Balance
Last name          Last pay date
Contact            Last pur date
Street             Customer since
PO adrs            Life purchases
City,St            High credit
Phones             Terms
Codes              Service charges   Net ___ days
Territory          Slsmn          Parts Discounts   PO required
Industry          Source          Counter           Tax table
Shop
-----
- Memo -
Please type number . . .
End   Esc   F1   F2   F3   F4   F5   F6   F7   F10
Save Quit Help Delete Fwd Bwd Menu Clear Lookup New
POS   POS   POS
Stn=20 Prn=0 C Num 12:40
  
```

- b) Under the POS menu, choose POS Setup. Select Forms/GL Linkage.
- c) On the right hand side of the screen, under "General Ledger Accounts", indicate the GL account for which your Warranty Receivables will be posted - hit  to save.

```

Thu 23 Aug 2007    <<<<< P O S Linker >>>>>    Version 7.5
                    Blue Ridge POS, LLC - POS Setup
                    Screen 2
-----
[ FORMS ]
Statements:
Lines 42 (6 per inch)
Pre-printed? (Y/N/P) N

Numbering System warning
Parts 14315 POS
Service 61615 invoicing
Compl Gds 381 locked?

Current GL Period 4
GL Posting Period 4
CG used tag begin 50,001

[ GENERAL LEDGER ACCOUNTS ]
Cash on Hand ..... 10100
Accounts Receivable 10400
Notes Receivable .. 11100
Sales Tax ..... 23000
Rent ..... 61500
Internal Parts .... 3699820
Parts Freight ..... 3750020
Warranty Parts .... 3699920
Warranty Receivable 10500
After Sales Expense 7300110
Service Charges ... 66900
Merchandise Discnts
Prompt Pay Discount 75802
CG Disc & OverAllow 3510010
Credit Card Sales . 10100
POS Parts Deposits 23900

End Save F1 Menu F2 Display F5 Print F6 Clear F7 Next Scrn
POS   POS   POS
Stn=20 Prn=0 C Num 12:44
  
```

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Processing Service Orders Under Warranty:

- a) Under POS menu - select Invoicing, enter operator initials.
- b) Choose Lookup/Install Customer - lookup customer information or enter customer number.
- c) Menu selection appears - select Service Orders, Service Order screen appears with customer information.
- d) Enter the Order Number, or hit **F10** for the system to assign a new number.
- e) Enter PO# if one is used.
- f) At Last/F Name, select **F7** and choose Change Customer - you will now have another lookup screen.
- g) Select **F8** - Internal Sale, then select Warranty. A list of Warranty Accounts you previously setup will appear.





- h) Highlight/select the warranty company the service order is being run under. The customer information will now include the warranty company's name and address.



- i) Process your service order as normal.

Invoices run through the warranty accounts will post to the Warranty Receivables account you selected for your GL linkage (if one) and to the Warranty Account itself. You can review the invoices on the overview screen of each Warranty Account.

Receiving payments on Warranty Account

- a) Select Warranty Accounts menu selection under Service Labor.
- b) Enter customer account number or  to lookup.
- c) Select  for menu.
- d) Enter “P” or highlight “Payments”, payment screen will appear.



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- e) System will default to current date, you must use the "Change Date" option in the Accounts Receivable sub-menu, to alter the date if you wish to post another date.
- f) Enter reference information ex: Check #
- g) Enter payment & discount amounts - the system will default to the account balance as the payment amount. Your payment amount is **ALWAYS** going to be the amount of the check/credit in your hand. If the invoice amount is different than the check/credit amount, the difference is the discount amount.
For example:
 - a) Invoice: \$100.00 Check: \$95.00 Discount would be \$ 5.00
or
 - b) Invoice: \$100.00 Check: \$105.00 Discount would be \$-5.00
- h) Enter through to pop-up menu, choose "Lookup Invoices" - this will display a listing of open invoices under this warranty account.

[Warranty Receipts]

Transaction 79784 Paid from HUSQUARNA WARRANTY
 Date 08/30/2007 Ck# 1245 Cust #
 PO Ref Payment Ck# 1245 6 7349 STATESVILLE ROAD
 Amount 100.96 Disc 0.00 CHARLOTTE NC 28269-
 Applied Payment type 1214.09 balance
 To apply 100.96 by Invoice Total receipts \$

Invoice	Date	Reference	Amount	Org	Amount
531734	05/18/2007	05/05/2007	22.49		22.49
531797	05/21/2007	05/21/2007	0		77.16
531813	05/23/2007	05/11/2007	0		81.34
531846	05/25/2007	05/03/2007	42.99		42.99
531858	05/25/2007	04/25/2007	0		477.88
531872	05/26/2007	05/05/2007	153.13		153.13
531993	06/06/2007	05/21/2007	0		97.92
532008	06/07/2007	05/29/2007	0		61.81
532018	06/08/2007	06/05/2007	0		26.16
532093	06/18/2007	06/11/2007	0		24.35
532120	06/20/2007	06/16/2007	0		8.40
532227	06/29/2007	06/08/2007	0		100.96

Esc=quit Enter=select PgUp PgDn

Esc Quit F1 Help F4 Pay All F6 Clear F7 Lookup F10 Process
 POS POS COPILLOT Stn=20 Prn=0 C Caps Num 12:41

- i) Use arrow keys to select the invoice or invoices you wish to pay. Making sure that the amount of invoices matches the amount of the payment. You may verify this in the upper portion of the screen in the "Applied" field.
- j) Enter through to pop-up screen, or press F10 and choose "Process Payment" - select payment type:
 - Cash
 - Check
 - Credit Card
 - Note - Customer is paying off account with finance note (very seldom used)
 - A/P Clearing

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Once payment type is selected, the system will ask if you are ready to post the payment. Answer “yes” if everything looks correct.

Using POS Linker as a Time Clock

1. Setup your POS Linker system to use it as a time clock for payroll:



A. Start at the "black screen menu" with "Multiuser Business Solutions" in yellow print

-  2 times (POS Setup)
- Internal Departments
- 
- Type "TIME"
- Type "*Time Sheet - Internal"
- Type  under Tax
- Type a GL Account if you are using the POS Linker General Ledger
-  to save

B. Setup employees for time clock.







Note: Each employee that will use the time clock for payroll should be added into the system in a unique way from how you bill labor for them.

• Start at the "black screen menu" with "Multiuser Business Solutions" in Yellow print

-  2 times
- POS Setup
- Employee File
- Initials
- Name
-  to save

















C. Setup SO calendar assignments

• Start at the "black screen menu" with "Multiuser Business Solutions" in Yellow print



-  2 times
- Service Labor
- Shop Control
- Service Files
-  Service Codes
- 
- Hold Reason
- 
-  + <First Initial> <Last Initial> + "Assigned"
- 

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2. Set up a new SO (Service Order) for a pay week or pay period:

- Start at the "black screen menu" with "Multiuser Business Solutions" in Yellow print
-  3 times
- Type your initials
- Select "Service Orders"
- Press  for a new SO number
- 
- 
- 
- 
- Change Customer...
-  (Internal)
- 
-  - Arrow down to "TIME" for Sheet
- 
- 
- Unit Info
-  4 times
- Enter SO# including the T (1332T)
-  4 times
-  "In Progress"
-  to add to SO calendar an assignment of responsibility
-  6 times
- Enter first day of payroll week or period in the "Order Started On" field
- Estimated or Promised for: Use date that you want the SO to display on the Service Calendar & Service Order Report by Promise Date for completion











Note: Date fields shortcuts +  in this field will add 8 days to today's date.  will type in today's date.

- Order Finished On: Use date which is the last day of your payroll week or period
-  5 times
-  to save



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3. Prepare for next payroll period and close the previous one.








NOTE: At or near the end of your payroll period, you will start a new "T" Service Order. After everyone has punched off the clock for the last pay period day, change the old "T" SO status to "D" status.

- Start at the "black screen menu" with "Multiuser Business Solutions" in Yellow print
-  3 times
- Type your initials
- Select "Service Orders"
- 
- *
-  2 times
-  (In Progress)
- Select the time SO you want to change
-  4 times
- 
- 
- Mgmt Review
- Type password if you have one or continue...
- 
- 
- Change Status
- 


To review time punches for accuracy, run the SO report described below on another channel first and then come back to this channel to review. After making any necessary adjustments, Close the SO.

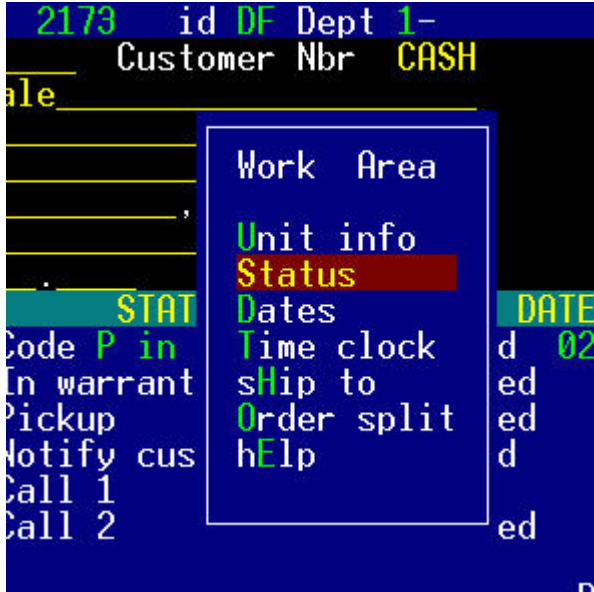
- 
- **
- Type Date, initials + "Reviewed" (i.e. 1.17.06 jpb Reviewed)
- 
- Process Only

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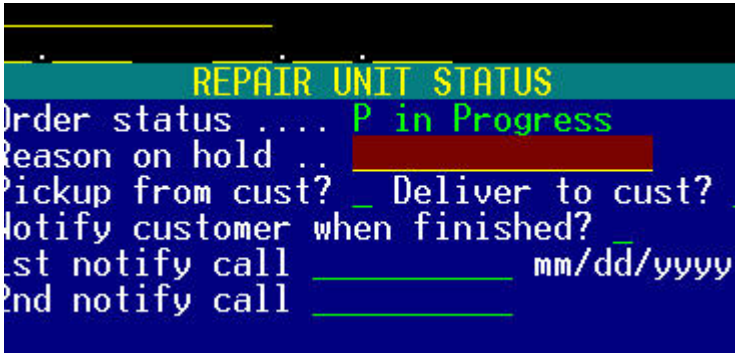
4. Run the payroll period end report to obtain accumulated time clock punches.
 - Start at the "black screen menu" with "Multiuser Business Solutions" in Yellow print
 -  2 times
 - Shop Control
 - Reports Menu
 - 
 -  (or current status of SO that you want to see)
 - 
 -  3 times
 - Range of initials that you want the report for
 - 
 - Type correct date for the SO payroll period
 - 
 - Completed Date
 - Choose "Screen" or the printer you want


Assign a work order

From the Service order press the  key to look at status,




Press arrow down  to get to the “Reason on Hold”



Press  to bring up the menu and choose the reason it's on hold



To set up the reason on hold file go to Service Labor, Shop Control, Service Files.
Press  for service Files, Press “H” for reason on hold.

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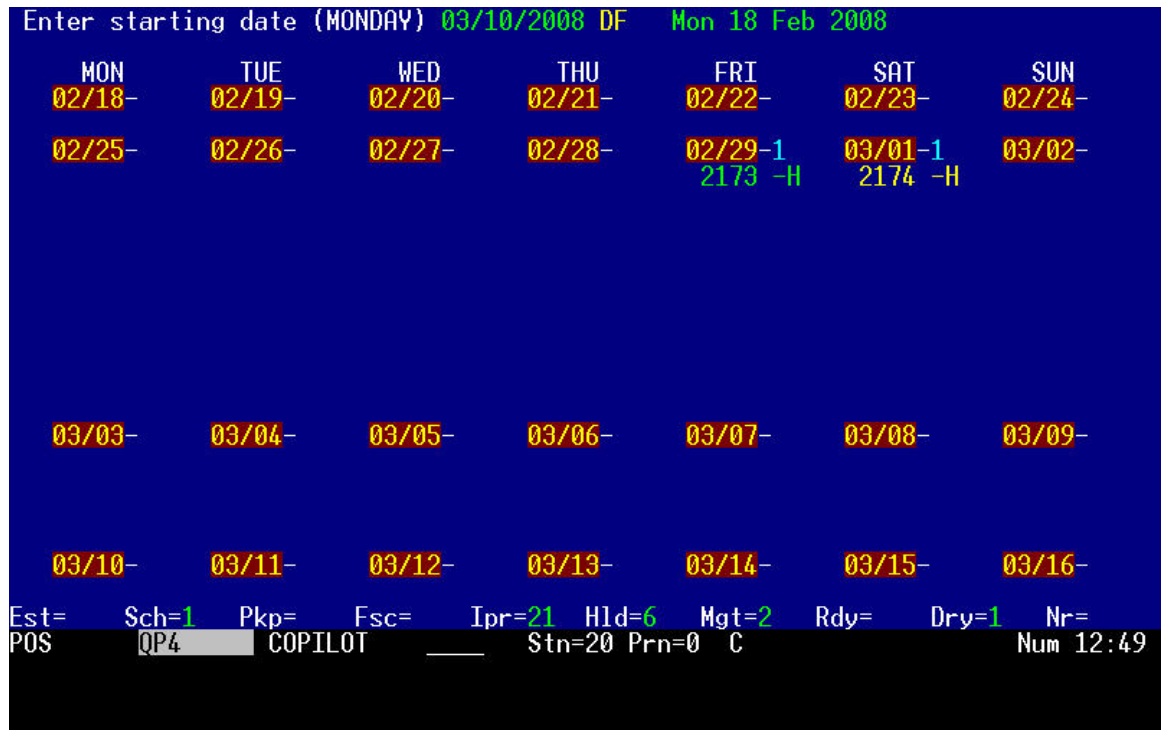
Press **F7** to add or modify the reason on hold file



To look at these items on the optional Service Calendar

From the Black screen type **U** **A** and choose Service Calendar
Jobs that are on hold with promise dates will show on this calendar.

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Control “C” will take you to a menu that allows you to start over to check another technician or escape