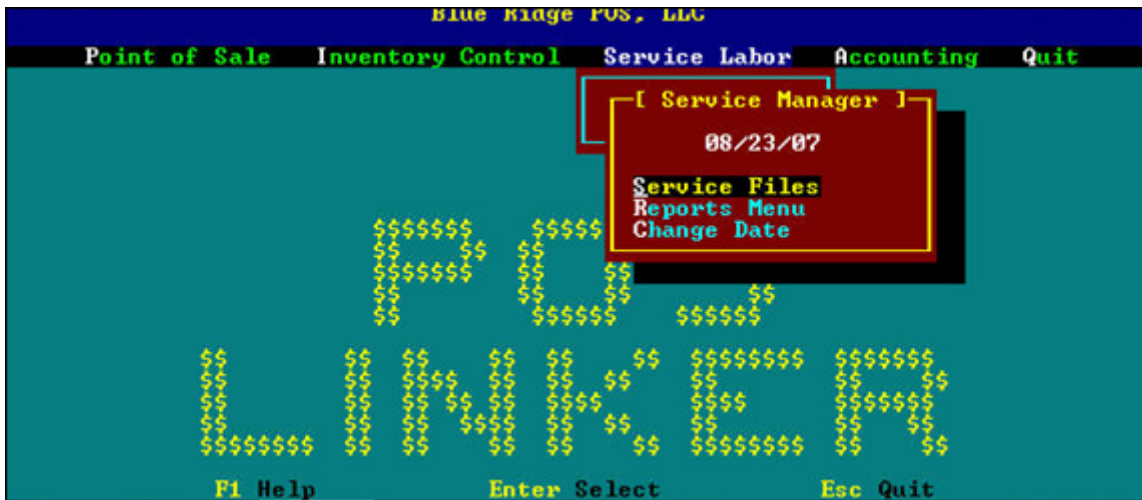


# 7. Service Labor



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.

```
<<<< Service Order Writer System >>>>
05/19/2015
-----[ Topic ]-----
Type P Performed service C
Descr _____
Price _____
Hours _____

Include all? _
Service special? _

Please type a code . . .

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

101 SHARPENED & BALANCED BLADE(S)
102 SHARPENED CHAIN(S) OFF SAW
103 SHARPENED CHAIN(S) ON SAW
104 INSTALLED TUBE
105 REPAIRED RECOIL STARTER
106 SHARPENED MULCHING BLADE(S)
107 POWER WASH WALK MOWER
109 POWER WASH RIDING MOWER
110 POWER WASH HAND HELD PRODUCT
111 INSTALL TIRE
113 SHARPENED 20"+ CHAIN(S) OFF SAW
114 SHARPENED 20+ CHAIN(S) ON SAW
115 PICK UP AND DELIVERY
116 TEST COIL
117 TEST SOLENOID
118 CHARGE BATTERY
119 REPLACE STARTER DRIVE NO R&R
121 SHARPENED BLADE(S) ON MOWER
122 INSTALL TUBE R&R TIRE
123 REPLACE BATTERY & CHECK ALTERNATOR

Enter Select PgUp / PgDn
```

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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


```
REPORTS
$ (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
Status Code _ All except? N (blank values = all)
Heading _____ Order number Begin End
Employee _____ 1 9999999Z
Reason Code _____
Completed date / / / /
STATUS: Select . . .
Esc F1 F5 F7 Ctrl + C
Quit Help Print Lookup Halt Printing
```

## 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.

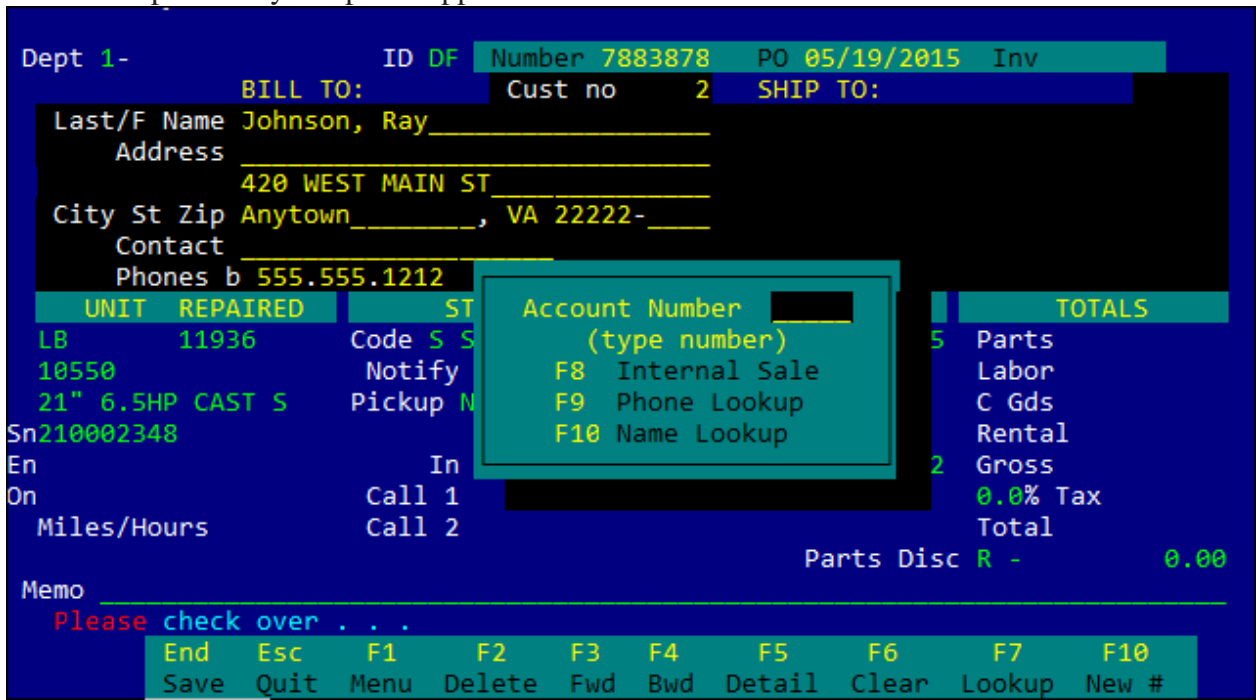
- b) Under the POS menu, choose POS Setup. Select Forms/GL Linkage.
- c) On the right hand side of the screen, under "General Ledger Accounts", indicate the GL account for which your Warranty Receivables will be posted - hit  to save.

### Processing Service Orders Under Warranty:

- a) Under POS menu - select Invoicing, enter operator initials.

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- 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.



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.

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Customer		Phone	Balances				
lbr	1	Name BRIGGS & STRATTON, WARRANTY	800.955.0123	5.27			
O P E N I N V O I C E S				5.27			
Number	Date	SC	Total	Tax	Payment	Balance	PO Number
578272	08/11/2008	N	200.89		0	200.89	07/18/2008
146893	08/16/2008	N	164.70		164.70	-200.89	Payment Ck# 22651
578612	05/19/2015	N	5.27	.00	0	5.27	05/19/2015



Esc Quit Enter Select Any Key Position PgUp/PgDn New Page

1245

- h) 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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Demo

---

**Warranty Accounts**

<b>Demographic</b>		<b>Financial</b>	
Number	1 SSN _____	Credit limit	__3000
First name	WARRANTY _____	Balance	__5.27
Last name	BRIGGS & STRATTON _____	Last pay date	09/02/2008
Contact	_____	Last pur date	05/19/2015
Street	_____	Customer since	01/20/1998
PO adrs	P O BOX 702_	Life purchases	26721.67
City,St	MILWAUKEE_	High credit	2742.76
Phones	_ 800.955.01	Terms	Invoice
Category	_ Codes _____	ervice charges	No Net __ days
Territory	_ Slsmn _____	PO required	No
Industry	_ Source _____	Tax table	4 0.0% tax
eMail	_____	Tax exempt	
Memo:	Default pmt types: Invoice _ Credit card	ROA	_ Cash
	WARRANTY ID 235229		Disp Y

Payments

Overview

Beg. balance

pUrge paid invcs

Parts Discounts

Counter Retail - \_\_

Shop Retail - \_\_

Please

End	Esc	F1	F2	F3	F4	F5	F6	F7	F10
Save	Quit	Help	Delete	Fwd	Bwd	Menu	Clear	Lookup	New

e)

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- f) 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.
- g) Enter reference information ex: Check #
- h) 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
- i) Enter through to pop-up menu, choose “Lookup Invoices” - this will display a listing of open invoices under this warranty account.

[ **Warranty Receipts** ]

Transaction 148515 Paid from **WARRANTY BRIGGS & STRATTON**  
Date 05/19/2015 Ck# 1245 Cust #  
PO Ref Payment Ck# 1245 1 P O BOX 702  
Amount 5.27 Disc 5.27 MILWAUKEE WI 53201-9935  
Applied Payment type 5.27 balance  
To apply 10.54 by Invoice Total receipts \$

Invoice	Date	Reference	Amount	Org	Amount
578272	08/11/2008	07/18/2008	200.89		200.89
146893	08/16/2008	Payment Ck# 2265108	-200.89		164.70
578612	05/19/2015	05/19/2015	5.27		5.27

Esc=quit Enter=select PgUp PgDn

Esc Quit F1 Help F4 Pay All F6 Clear F7 Lookup F10 Process

- j) 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.
- k) 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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[ warranty receipts ]

Transaction	148515	Paid from	WARRANTY BRIGGS & STRATTON
Date	05/19/2015	Ck#	1245
PO Ref	Payment Ck#	1245	1
Amount	5.27	Disc	5.27
Applied	5.27	Payment type	5.27 balance
To apply	5.27	by Invoice	Total receipts \$

Invoice	Date	R	Payment type?	Amount	Org	Amount
578612	05/19/2015	05	Cash	5.27		5.27

Payment type?  
Cash  
cCheck  
cCredit Card  
Note  
A/P Clearing





Esc Quit F1 Help F4 Pay All F6 Clear F7 Lookup F10 Process

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

## To take deposits on a Service Order:

Open the service order as usual, put the parts on as usual or just put YOUR deposit code.  
 If there is no code for customer deposits you will need to create one.  
 Type the code into the control number space using a negative one quantity (-1).



The service order cannot be in the Ready or Closed status+

Press F1 to print the receipt and a copy of the Service Order

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Choose method of payment

