

Service Department

Service Department Set Up

- Miscellaneous Machine
- Labor rates
- Rental Rates
- Machines set as item type Machine and SN/Service checked (Implications for Order Desk)
- Ref Parts
- Service Reps

Service Labor Analysis

1. Billed Labor

Billed Labor = Labor hours billed (from invoice history) times the labor rate for the Service Rep assigned to the service order

2. Department Labor

Department Labor = Hours worked (not billed) on service department related tasks (red headers in Service Labor Analysis) times the labor rate for the Service Rep. These hours are entered through the Service Rep time card. Most of our customers are including benefits in the rate paid to service rep.

3. Department Net

Department Net = Gross Profit – Billed Labor – Department Labor

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Service Dept

Overview Service Depts Service Reps Pending Service Orders Warranty Claims Machine Service History Items Reference Parts Service Vans Task

Pending Service Orders Summary

	Estimate	Wait/Aprvl	Approved	Wait/Parts	On Bench	Finished	Will Call	Deliver	Pickup	CreditHold	Other	Total
Number Pending:	1	0	0	0	0	1	0	1	0	0	0	3

In-House Repair Service Levels (Turn Around times in days)

	Start Date	End Date	# Repair Orders	From Order	After Approval	After Parts-In
Week:	8-May-2013	14-May-2013	0	0.0	0.0	0.0
Month:	15-Apr-2013	14-May-2013	0	0.0	0.0	0.0
Quarter:	13-Feb-2013	14-May-2013	2	0.0	0.0	0.0
Year:	15-May-2012	14-May-2013	6	248.0	248.0	246.0

Promised Service Orders

Promised Today	Past Promised
0	0

Last SD Stats Calc Date: 14-May-2013 11:48pm

Service Dept Sales and Profit

	Since	Orders	Sales	Gross Profit	GP Pct	Billed Labor	Dept Labor	Dept Net	Dept Pct	Total Labor	Total Net	Tot Pct
Week:	8-May	0	\$0	\$0	0.0%	\$0	\$0	\$0	0.0%	\$0	\$0	0.0%
MTD:	1-Aug	0	\$0	\$0	0.0%	\$0	\$0	\$0	0.0%	\$0	\$0	0.0%
QTD:	1-Jul	0	\$0	\$0	0.0%	\$0	\$0	\$0	0.0%	\$0	\$0	0.0%
YTD:	1-Jan	0	\$0	\$0	0.0%	\$0	\$0	\$0	0.0%	\$0	\$0	0.0%

Service Labor Analysis

	Total	Billed	Warranty	Demo Prep	Prev Maint	Travel	SD Admin	RentalPrep	Internal	Other	(unused)	(unused)
Week:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
MTD:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
QTD:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
YTD:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

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The red and blue headings are system options that can be customized as you want.

WARRANTY CLAIMS

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Service Dept

Overview | Service Depts | Service Reps | Pending Service Orders | **Warranty Claims** | Machine Service History | Items | Reference Parts | Service Vans | Task

Service Order	Invoice Date	Customer Name	Submitted?	Submit Date	Claim Mfgr	Claim Tracking Number	Claim Items
113528	8-Feb-2013	Aircraft Supply	Y		ALTO1100	.	3
113304	8-Feb-2013	Donnelly & Company	Y	25-Feb-2013	ALTO1100	8976587645	4
113051	8-Feb-2013	Bronson Health Care	Y	8-Feb-2013	NOBLE100	098235098	2

View Warranty Claim

Modify Warranty Claim

Print Warranty Claim

View Service Order

Show Resolved Claims?

Only Show Claims for highlighted Claim Mfgr?

Print/SaveToFile

3 Warranty Claims

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Modify Warranty Claim Information

Donnelly & Company .DONNEL100 Customer Status Check Save Cancel

5400 24" Walk Behind Scrubber S/N: 123456789ABC View Machine Info

Claim Info Claim Notes

Tracking Number: 8976587645

Manufacturer: Alto Inc.

Date Submitted: 25-Feb-2013 Submitted By: CMS

Claim Amt Due: \$268.80 Date Expected: 25-Mar-2013

Claim Amt Paid: \$150.00

All Claim Items Resolved?

Date Resolved: Resolved By:

Service Order Information

Service Order#: 113304
 Invoice Date: 8-Feb-2013 Machine Sale Date: 1-Nov-2012
 Service Rep: JOHN
 Customer: Donnelly & Company

Warranty Information

3 Years Parts/1 Year Labor Expires
3 Years Parts 1-Nov-2015
1 Year Labor 1-Nov-2013

To Resolve a Claim Item, click on the Claim Status value, and select the appropriate status. View Service Order

Line	T	Warranty?	Claim Status	Resolved?	Qty	Unit Cost	Item Code	Description
2	L	<input checked="" type="checkbox"/>	Credit	<input checked="" type="checkbox"/>	2	0.00	LABOR	Labor
3	L	<input checked="" type="checkbox"/>	Credit	<input checked="" type="checkbox"/>	1	0.00	SS	Shop Supplies
4	P	<input checked="" type="checkbox"/>	Pending	<input type="checkbox"/>	3	39.60	160185	3/8 x 15' Solution Hose
5	P	<input checked="" type="checkbox"/>	Pending	<input type="checkbox"/>	1	0.00	NS0294331	(N/A) MOTOR SEAL GASKET

How to do a cash checkout in SD

The screenshot shows the 'Service Desk * V737Demo Supply Co.' window. The main area displays a table of orders with the following data:

ServiceRep	OrderNum	Customer Name	Order Date	Approved	Date Promised	SC	Status
	115640	Aircraft Supply	26-Jan-2016			RO	Estimate
	115643	All Night Vet	2-Mar-2016				New Order
	115565	Bronson Health Care	16-Jul-2015	16-Jul-2015	20-Jul-2015	RI	Approved

The right-hand sidebar contains the following elements:

- Buttons: View Order, **Modify Order**, Print Picking Ticket, Issue Invoice
- Filter section:
 - Show ALL Orders OR
 - Only Show these Orders:
 - Estimate Needed
 - Wait for Approval
 - Approved
 - Waiting for Parts
 - On Bench
 - Finished/Not Billed
 - Prev. Maintenance
 - Deliver/Pickup
 - Credit Hold
 - Parts Orders
- Rep selection:
 - Show ALL Reps
 - Show Only One Rep
 - Rep: [Dropdown menu]
- Buttons: Void Service Order, Sort by Rep/DatePromised, Print/SaveToFile
- Summary: **3 Service Orders**

At the bottom of the window, the status bar shows: Connected to Server | STEP1 Software v7.3751 | SanAntonio | CMS

Tracking machines from receipt of PO