

## Basic *SERVICE MANAGER* Workshop

Notes:

### Entering *The SERVICE MANAGER*

- ☞☞ User sign-on screen
- ☞☞ Familiarity with the Top Level Menu

### Work Order Entry

- ☞☞ Familiarity with the Work Order screen
- ☞☞ Familiarity with the Lines screen
- ☞☞ <F1> Line Help
- ☞☞ <F2> Screen Help
- ☞☞ <F3> Table Lookup
- ☞☞ <F4> Notepad
- ☞☞ <END> Save & Quit
- ☞☞ <ESC> Quit & No Save
- ☞☞ <F5> - <F10> Screen Defined
- ☞☞ New Work Orders
- ☞☞ Changing existing orders
- ☞☞ Deleting orders

### Invoicing

- ☞☞ Invoice Processing
- ☞☞ Un-Invoicing Functions
- ☞☞ Creating Credit Invoices
- ☞☞ Creating Re-bill Invoices

### Proposals

- ☞☞ Adding new proposals
- ☞☞ Tracking open proposals
- ☞☞ Automatically converting proposals to work orders
- ☞☞ Pricing options for salesman

### Customer Setup

- ☞☞ Adding Customers
- ☞☞ Creating Bill To Links for Customers
- ☞☞ Temporary Customer Number Assignment
- ☞☞ Customer Notepad
- ☞☞ Automatic PO Requirements
- ☞☞ Special Pricing Assignment for Customer
- ☞☞ Quick Customer/Bill To Creation through Order Entry

## Basic *SERVICE MANAGER* Workshop cont'd

Notes:

### Inspections

- ☒☒ Adding/Changing Customer Schedules
- ☒☒ Pricing Customer Schedules
- ☒☒ Automatic PO Assignments
- ☒☒ Basic Inspection Reports
- ☒☒ Work Order Generation
- ☒☒ Invoicing

### Item/Part Management

- ☒☒ Adding Item Parts
- ☒☒ Units of Measure and List Prices
- ☒☒ Note Pad Usage

### Basic Policy Table Maintenance

- ☒☒ Product Line Table
- ☒☒ Type of Work Table
- ☒☒ Service Category Table
- ☒☒ Tax Rules Table
- ☒☒ Salesman Table
- ☒☒ Comments Tables
- ☒☒ Company Table
- ☒☒ Branch Table
- ☒☒ User Sign-on Table

### Basic System Configuration

- ☒☒ Resetting Users
- ☒☒ Backing up the Database
- ☒☒ Basic Printing Configuration

### End of Period Processing

- ☒☒ Procedures
- ☒☒ Reports

### Reports

- ☒☒ Item Reports
- ☒☒ Sales Reports
- ☒☒ Inspection Reports
- ☒☒ Customer Reports
- ☒☒ Order Reports

2/22/01

