Solution-IV™ Accounting
Service Contract

Version 8.81

46 Vreeland Drive, Suite 1 • Skillman, NJ 08558-2638
Telephone: 732-560-1377 • Outside NJ 800-524-0430 • Fax: 732-560-1594

Internet address: **http://www.tbred.com**

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1 Introduction

This chapter explains how the manual is organized and how the manual should be used. It also provides you with an overall view of the Solution-IV Reprographics Service Contract features.

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Thoroughbred Solutions

Thoroughbred Software develops and internationally markets software products for small through Fortune 500 sized businesses. Thoroughbred products are true multi-user solutions and are installed at thousands of worldwide sites.

Solving everyday accounting problems has never been a simple task. Thoroughbred Solution-IV Reprographics modules are Object-based providing the quality and versatility you need to bring your business accounting needs into the new millennium. Thoroughbred software is always at the forefront of our industry's rapidly changing technology. Thoroughbred Solution-IV Reprographics sets the pace for Object-based applications and is a result of more than 25 years of application development and design experience. This product was built using one of the most powerful 4GL-application development environments available today – Thoroughbred OPENworkshop.

OPENworkshop provides a comprehensive set of productivity tools designed to be easy to understand and use. Solution-IV Reprographics is built on top of this robust development platform, which provides the perfect foundation for construction of a feature rich solution to your accounting problems. The Thoroughbred OPENworkshop development environment makes it easy and practical to customize complex applications.

Thoroughbred Solution-IV Reprographics is a completely integrated accounting solution. Each module provides a seamless integration and sharing of common data with each of the other modules.

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Thoroughbred Solution-IV Reprographics: Service Contract

The Solution-IV Reprographics Service Contract module helps manage service contract customers and equipment information. Equipment details, service and maintenance billings and calls, dispatch and technician scheduling are supported by the Solution-IV Reprographics Service Contract Module.

The proper management of service contracts is a necessary element in supporting your customers and maintaining maximum up-time of their equipment. Detailed customer and equipment history including preventative maintenance calls, upgrades, consumables and their timely management will lead to improved customer satisfaction, and higher profits. Detailed service call information provides time, materials and service technician information that can determine the profitability of the service call, and the pre and post warranty reliability of the equipment.

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Service Contract Features

Contract Information

- Customer Information
- Machine Detail
- Warranty Dates
- Meter Reading
- Recurring Invoicing
- Start/End Date

Service Calls

- View Open Calls
- Track Start/Ending Time
- How long a job took
- Invoicing from parts
- Detail service notes
- Technician
- Schedule

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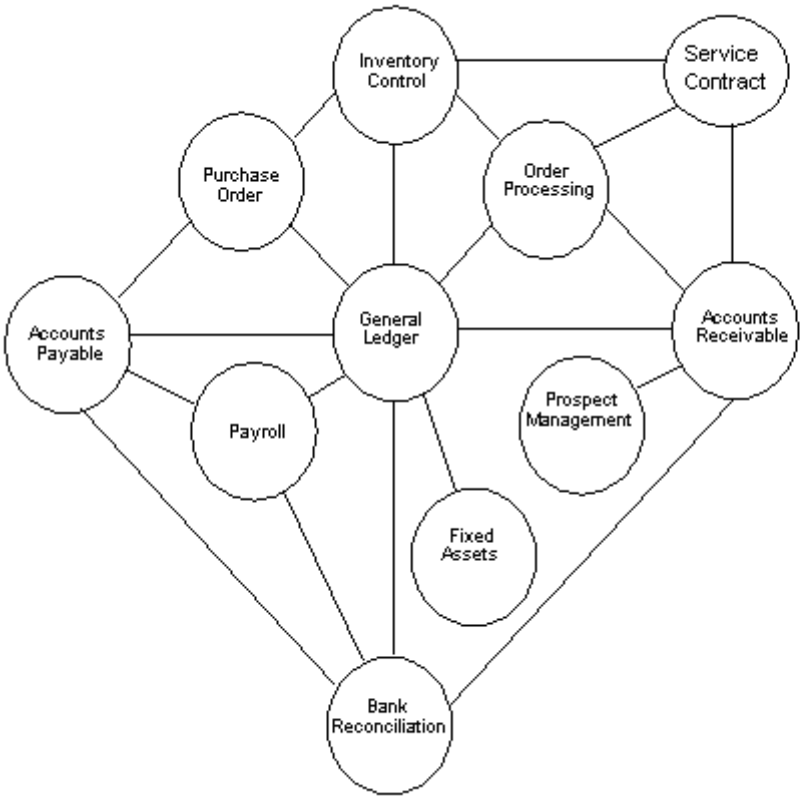
Thoroughbred Solution-IV Accounting Flowchart

This chart is showing how Service Contract interacts with the Solution-IV accounting modules.



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How to Make the Greatest use of this Manual

Introduction

With this manual we have created reference material that is easy to read, yet contains all of the information needed to set up and run the Thoroughbred Solution-IV Reprographics Service Contract system.

This manual introduces you to the capabilities of Solution-IV Reprographics Service Contract, gives you ideas to help you get started with the initial setup, provides complete processing instructions, and also serves as a reference guide once you are up and running.

Suggested Steps

In order to make the greatest use of this manual and to provide the easiest transition to your new system, we suggest you complete the following before actually entering your own data into the system.

- **Know how your computer works.** Users who are familiar with the functions of their computer will have an easier time using the system.
- **Read, or at least browse, the entire manual.** Become familiar with the options and capabilities before starting to use the software.
- **Install the system.** Make sure both the programs and demonstration data have been installed on your computer so you can begin looking at the system.
- **Use the demonstration data**. Demonstration data has been provided to allow you to get a look and feel of the operations of the system and reports without using your company's information.
- **Begin using the system.** Use this manual to begin entering and/or converting your information into the Solution-IV Accounting system.
- **Keep the manual handy**. Once you are up and running, you will find the manual helpful as a reference guide. A complete Table of Contents has been provided for your assistance.

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How this Manual is Organized

This manual has been organized to take you through normal Service Contract activity.

Chapter 1
Introduction-Explains how the manual is organized and how the manual should be used. It also provides you with an overall view of the Solution-IV Service Contract features.

Chapter 2
Service Contract Menus-Describes the options available on the Service Contract Main Menu, Code File Maintenance Menu, and Monthly Reports Menu.

Chapter 3
Service Contract Setup-Explains how to get started with your Service Contract system. This chapter contains all of the options on the Code File Maintenance Menu.

Chapter 4
Transactions- Describes the options that are available when processing transactions. They include Equipment Entry, Meter Reading, Service Call Entry/Billing, and Dispatching,

Chapter 5
Inquiry – Discusses all the inquiry functions, include Equipment, Service Call, and Meter Reading History

Chapter 6
Reports – Describes how to execute the Solution-IV Service Contract reports.

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2 Service Contract Menus

Thoroughbred Solution-IV Reprographics Service Contract uses options that can be selected from the following menus:

- Transactions Menu
- Inquiry Menu
- Code File Maintenance Menu
- Reports Menu

This section gives an overview of each of the individual menu options. A detailed explanation of how to use each option appears in later chapters.

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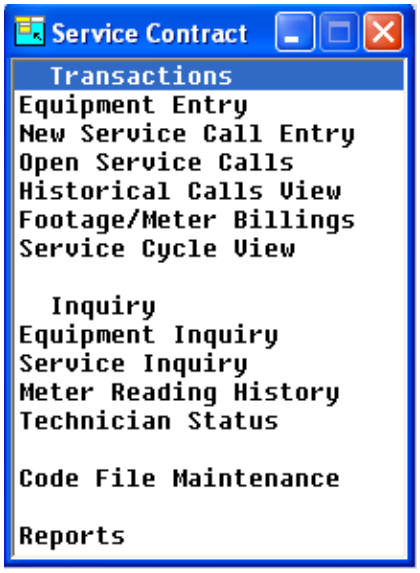
Service Contract Main Menu

Introduction
The Service Contract Main Menu allows you to perform lookups, maintenance and print reports

How to Execute
From the Solution-IV Master Menu, select **Service Contract** and you will get the following menu.



Transactions

Equipment Entry
This option is used to maintain detailed records for each piece of equipment.

New Service Call Entry
Allows the entry of new service call information, which includes time of call, Issue Code, Technician, Comments, Contract person.

Open Service Calls
This option is used to view and dispatch all open and pending service calls.

Historical Calls View
This option is used to view all services calls sorted by date.

Footage/Meter Billings
This option is used to build the work file, entry of new meter readings, and building the invoice for the readings as well as the associated contract.

Service Cycle View
This option will display all the contracts with the service cycle.

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Inquiry

Equipment
This option allows quick access to view information about a piece of equipment. The information shown includes Equipment, Warranty, Contract Information, Meter Reading History, and Service Calls. New calls can also be entered from the menu.

Service Inquiry
This option allows quick access to viewing/changing information about a service call. The information that can be access includes Status, Start/End Time, Travel Miles/Time, Purchase Order, Parts, and Notes. If Parts are added, invoicing of those parts may also be done from this menu option.

Meter Reading History
This option displays all of the meter readings that have been billed.

Technician Status
This option provides you with a view of all technicians and some of the information associated with those technicians.

Code File Maintenance

Parameters
The parameters allow you to customize the Service Contract package to meet the specific needs of your company. Here you will be able to define your next contract number, ticket report, dispatchers email address, etc.

Issue Code File
This option is used to create the issue codes. These codes are used during the Service Call Entry to define what the problem is.

Technician File
This function maintains the technician codes. These codes contain the name, email address, warehouse, and status for each technician.

Contract Type File
This function maintains the contract types. These codes contain the description, and item code used when billing a contract.

Delete Equipment
This option is used to delete a piece of equipment. This will remove the Equipment record as well as any service calls.

Remove Invoice
This option removes the invoice number, from the Service Call, used to bill the parts.

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Reports

Service Ticket
This option prints selected Service Call Tickets.

Open Service Contract
This option prints selected Service Contracts, based on Expiration Date.

Open Service Calls
This option prints a list of all open calls and their status.

Equipment Listing
This option prints a list of selected Equipment.

Equipment Listing (All)
This option prints all Equipment.

Equipment/Calls
This option prints Equipment information as well as all Service Calls.

Equipment Calls Summary
This option prints a summarized list of service calls, select by Customer and Date range.

Contract Renewal
This option prints a list of Contracts that will be up for renewal.

Last Meter Reading
This option prints the Last Meter reading for selected contract.

Technical Analysis
This option prints call details for Technician and Date range entered. Report all contains summarized information for Number of Calls, Cal Backs, Call Back Percentage, Average Response and Service Times, and Part totals.

Customer Analysis
This option prints call details for Customer and Date range entered. Report All contains summarized information for Number of Calls, Call Backs, Call Back Percentage, Average Response and Service Times, and Part totals.

Profit Report
This option prints profit numbers for all service calls including Invoice details.

Expiration Report
This option prints all the contracts and provides you with information pertaining to the expiration and renewal of those contracts.

Paper Usage Report
This option prints all the detail for invoice lines that contain paper items. This shows what was ordered as well as how many square feet are in a roll.

Preventative Maintenance
This option prints all active contracts sorted by the Service Cycle field. This field contains how often preventative maintenance should be performed.

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3 Service Contract Setup

This chapter explains how to design and set up your Service Contract module.

It also explains how to perform code file maintenance setup parameters that should help you decide what information you need to gather and how you should enter it into your new system.

You will want to modify these parameters to fit your particular company.

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Service Contract Parameters Maintenance

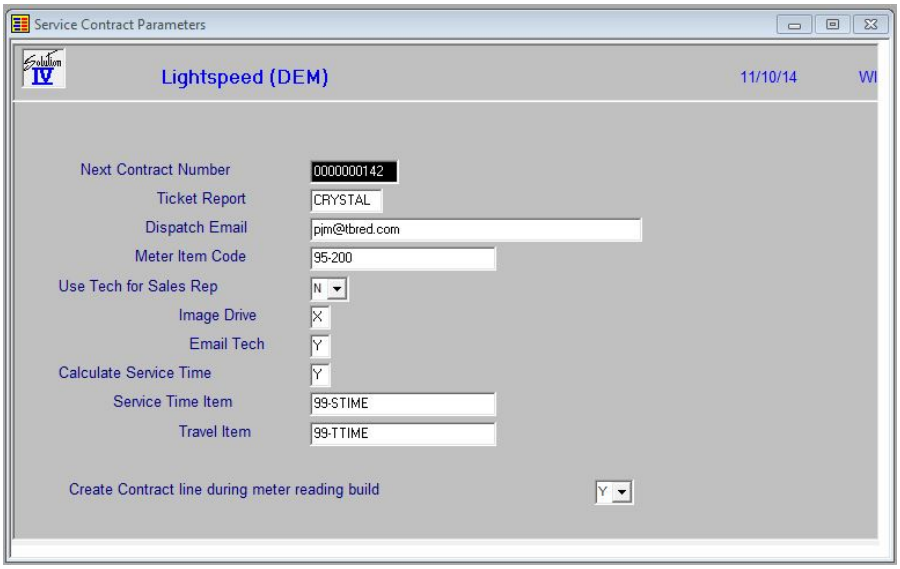
Introduction

The parameters allow you to customize the Service Contract package to meet the specific needs of your company.

Note: The parameters must be set up before entering anything else into the system.

How to Execute

From the Code File Maintenance Menu, select **Parameters**.



Description of Fields

Next Contract Number

Type up to 10 alphanumeric characters for the service contract number format you wish to use.

Ticket Report

Contains the name of the report used to print Service Tickets.

Dispatch Email

An email will be sent to this address when a tech is assign.

Meter Item Code

This item is used by the Meter Reading Invoice for the item on the Invoice. Press **F2** for lookup.

Use Tech for Sales Rep

This option will use the Service Tech ID for the Sales Rep when building an invoice from the Service Call.

Image Drive

This field contains the Windows drive letter where the images are stored.

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Email Tech
This field is used to identify if the technician should be emailed a notification when calls are assigned to them.

Calculate Service Time
This field is used to indicate that a parts line should be added to the call if the Service Time and/or Travel Time are populated.

Service Time Item
Enter the Item Code used for billing time worked on service calls.

Travel Item
Enter the Item Code used for billing the technicians travel time.

Create Contract line during meter reading build
Will allow the Invoice build for Meter Reading to also build a line for the Contract billing.

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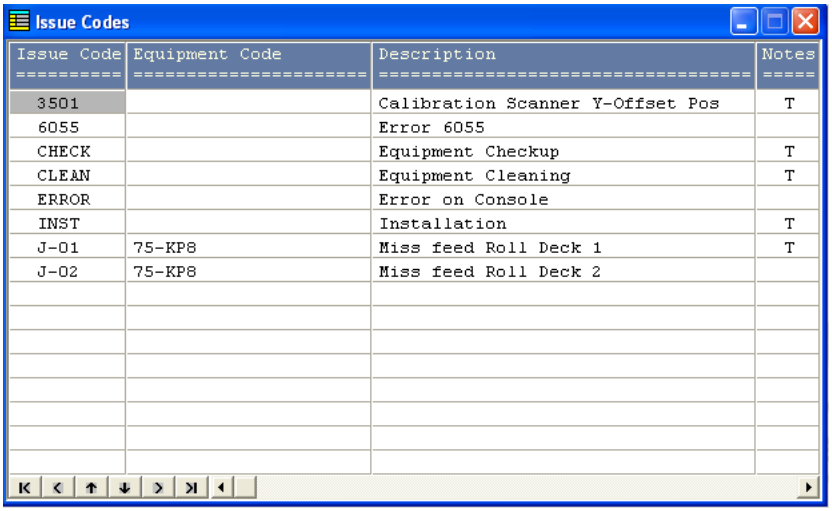
Issue Code File

Introduction

The Issue Code File allows you to define and describe codes to be used when entering Service Calls.

How to Execute

From the Code File Maintenance Menu, select **Issue Code File**.



Description of Fields

Issue Code

Enter up to 6 alphanumeric characters for the Contract Type.

Examples: ERROR - Error on Console

000061 - Error code 61

Description

Enter up to 35 characters for the description of the issue.

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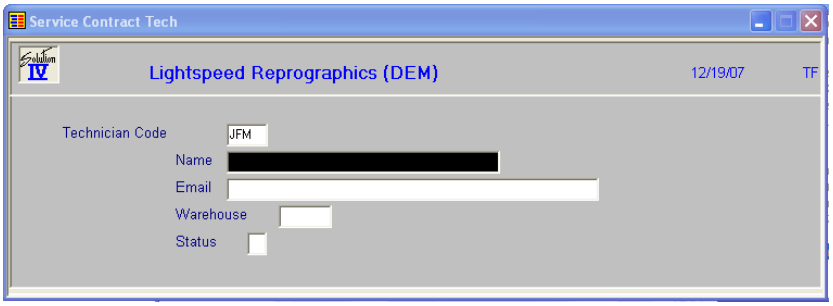
Technician Code File

Introduction

The Technician Code File allows you to define technicians that will be assigned to server calls.

How to Execute

From the Code File Maintenance Menu select **Technician File**.



Description of Fields

Technician Code

Enter up to 3 alphanumeric characters for the Operator Code.

Name

Enter up to 35 characters for the full name of the technician.

Email

Enter email address used to notify the technician that a call has been assigned to him.

Warehouse

Enter the warehouse code used when creating the invoice lines from part billing. Press **F2** for lookup.

Status

Enter the current status of the technician, in, out, sick, vacation, etc.

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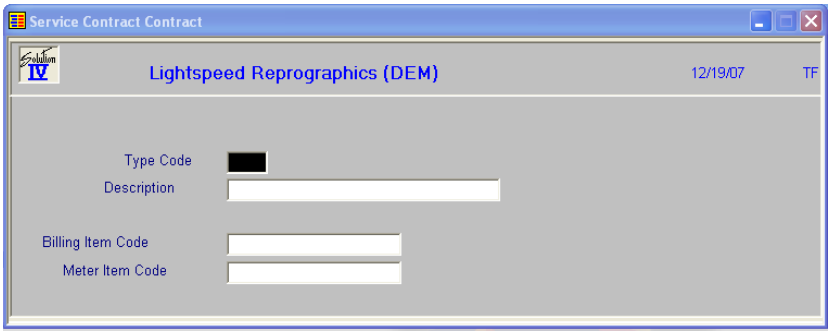
Contract Type File

Introduction

The Service Contract Type allows you to define a contract type and associate it with an inventory control item.

How to Execute

From the Code File Maintenance Menu, select **Contract Type File**. You will see a Mode window to the upper right. Here you can elect to add, change, delete or just perform an inquiry on the Service Contract Type.



Description of Fields

Type Code

Enter up to 3 alphanumeric characters for the Contract Type.

Examples: PPC - Plain Paper Copier Maintenance

PMA - Preventative Maintenance Agreement

Description

Enter up to 35 characters for the description of the contract.

Billing Item Code

Enter up to 22 characters representing the Inventory Control item code or **F2** for lookup.

Meter Item Code

Enter up to 22 characters for the meter item code.

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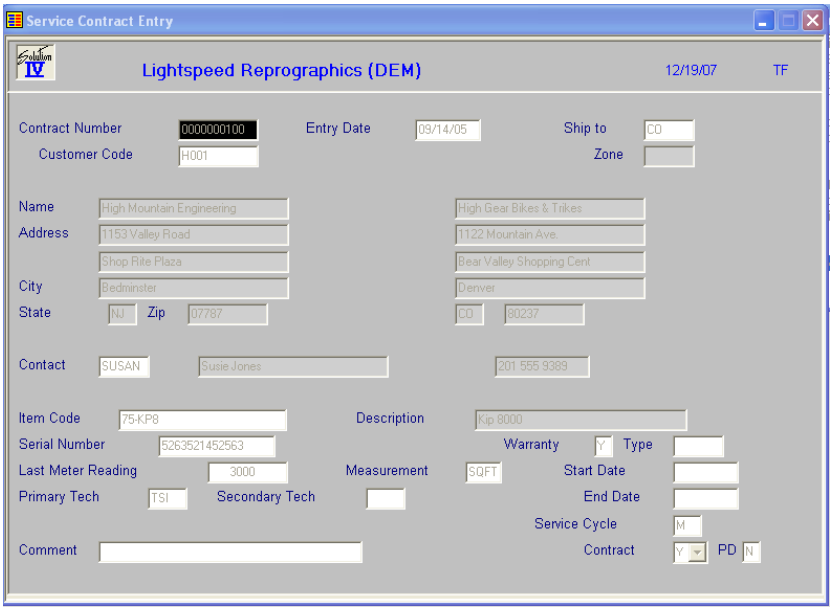
Delete Equipment

Introduction
Delete Equipment allows you to delete a contract.

How to Execute
From the Code File Maintenance Menu, select **Delete Equipment**.



Description of Fields
Contract Number
Enter contract number to be deleted or **F2** for lookup.

After you answer Yes or No to the **Delete Equipment Contract** question, you will be returned to the Code File Maintenance Menu.

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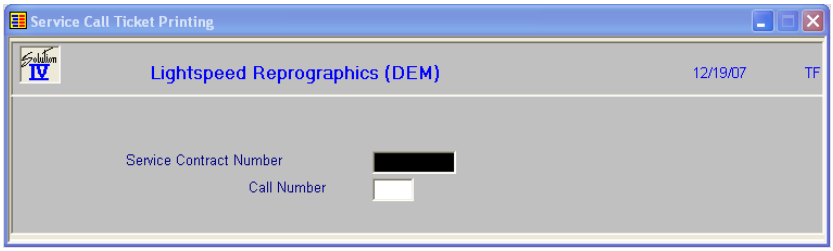
Remove Invoice

Introduction

Remove Invoice allows you to remove the invoice number, generated during the parts billing process, from a service call.

How to Execute

From the Code File Maintenance Menu, select **Remove Invoice**.



Description of Fields

Service Contract Number

Enter the Contract Number or **F2** for lookup.

Call Number

Enter Call Number for which you want the invoice number removed or **F2** for lookup.

After you answer the **Remove Invoice from this Call** question, you will be returned to the Code File Maintenance Menu.

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4 Transactions

This chapter describes the options that are available from the Transactions Menu. The Transactions options include:

- Equipment Entry
- New Service Call Entry
- Open Service Calls
- Historical Calls View
- Footage/Meter Billings
- Service Cycle View

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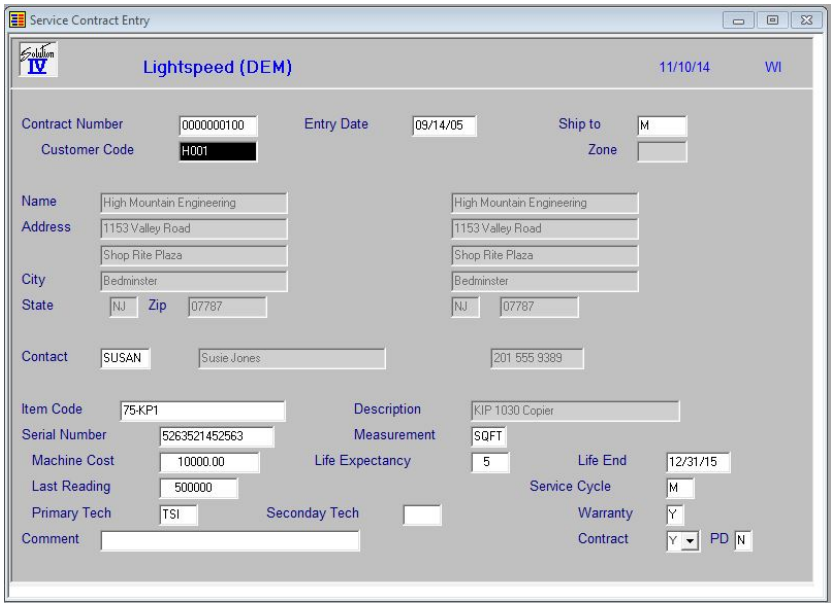
Equipment Entry

Introduction
Equipment Entry allows you to add or change equipment information.

How to Execute
From the Service Contract menu select **Equipment Entry**.



Description of Fields
Contract Number
Enter a 10-digit number that is automatically assigned, from the Parameters file, when **Enter** is pressed.

Customer Code
Enter up to 10 alphanumeric characters for the customer code. The customer code will be used throughout the system when referring to a particular customer.

Entry Date
Enter the contract date or the date on which this contract was made with this customer. This field is for reference only and is different than the contract start date.

Ship to
Enter up to 6 alphanumeric characters for the ship-to address code for this customer. You may enter as many ship-to addresses as you need. Ship-to addresses are used in AR Invoice Entry and by the Order Processing system.

Zone
The zone will be display for this customer, and will be skipped by the cursor.

Name, Address, City, State, Zip
The main address and will be display for this customer as well, and will be skipped by the cursor.

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Contact
Enter up to 6 alphanumeric characters for the contact code. Contacts are used for your own use to keep track of the representatives at your customer location with whom you normally do business.

Item Code
Enter up to 22 characters representing the Inventory Control item code.

Description
The item description will be display for this item as well, and will be skipped by the cursor.

Serial Number
Enter up to 15 characters for the serial number.

Measurement
This field indicates the UOM used when reading the meter.

Machine Cost
Enter the full cost of the machine. This cost will be used in reports to calculate profit for the selected period based on the Machine Life.

Life Expectancy
Enter the total number of months this machine is estimated to have in service.

Life End
Enter the date this machine will reach its end of life.

Last Meter Reading
The last meter reading will be updated automatically by the Footage/Meter Billing process. This reading can also be entered when the contract is created.

Primary Tech
Enter up to 3 alphanumeric characters of the initials of the primary technician.

Secondary Tech
Enter up to 3 alphanumeric characters of the initials of the secondary technician.

Comment
This field may be used to enter up to a 35-character comment, which pertains to this order or invoice.

Service Cycle
Enter up to 2 characters to designate the service cycle.

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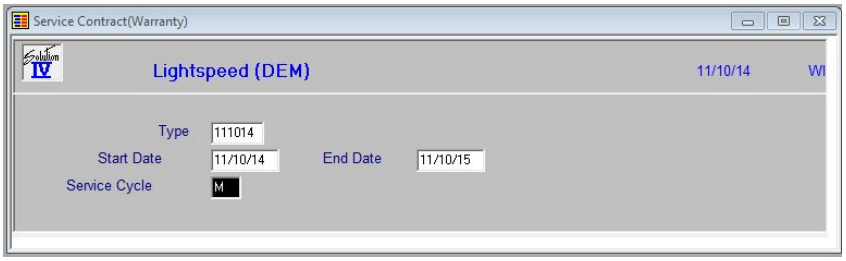
Warranty
Indicates whether this piece of equipment is still under Warranty.

If the Warranty field indicates a **Y** the following screen will display:



Description of Fields
Warranty Type
Enter up to 6 characters for the warranty type.

Start Date
Enter the date on which this warranty takes effect. This warranty will not apply to orders prior to this date.

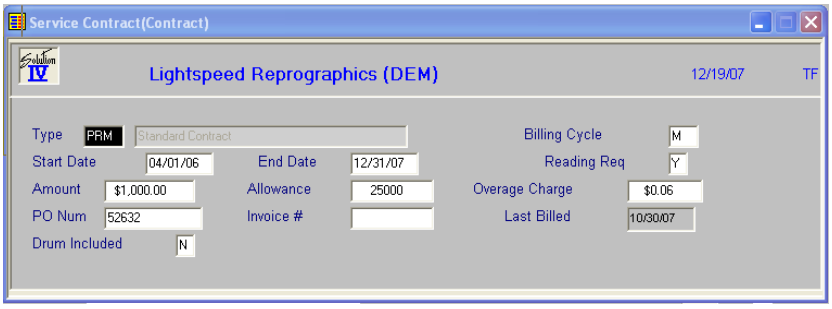
End Date
Enter the date on which this warranty expires.

Service Cycle
Enter up to 2 characters to designate the service cycle.

Contract
This field indicates if there is a contract for this equipment.

PD
This field indicates if the contract has been paid.

If the Contract field indicates a **Y** the following screen will display:



Description of Fields
Contract Type
Enter up to 3 alphanumeric characters for the Contract Type.
Examples: PPC – Plain Paper Copier Maintenance
PMA – Preventative Maintenance Agreement

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Cycle
Enter up to 2 characters to designate the billing cycle. This field is used by the Footage/Meter reading process to indicate if the contract should be billed or not.

Start Date
Enter the date on which this contract takes effect. This contract will not apply to orders prior to this date.

End Date
Enter the date on which this contract expires. This contract will not apply to orders after this date.

Reading Req.
Enter Y if the machine requires a meter reading. If it is set to Y, the Footage/Meter Reading build process will add this machine to the work file.

Amount
Enter the amount to be charged for each billing cycle.

Allowance
This field contains the number of clicks that are included in the contract.

Overage Charge
This field indicates the per click charge for over contract allowance.

PO Num
Enter up to 15 characters for the customer's purchase order number.

Invoice #
This field is updated by the system when the meter readings are complete.

Last Billed
This field updated by the meter reading process.

Drum Included
Enter **Y** if the drum is included in the contract.

Is the displayed information correct (Y/N)?

You are then returned to the Service Contract Entry Screen.

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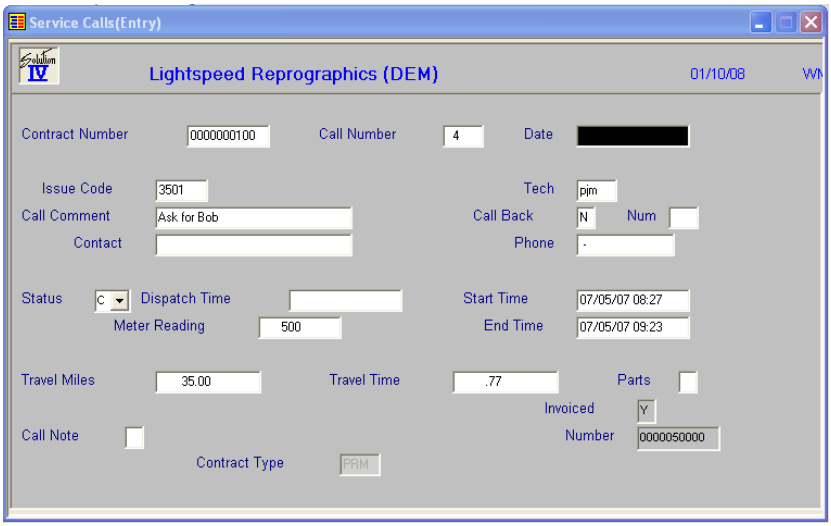
New Service Call Entry

Introduction
Enter new service calls.

How to Execute
From the Service Contract menu select **New Service Call Entry**.



Description of Fields
Contract Number
Enter the 10-digit contract number.

Call Number
The call number will be automatically assigned.

Date
Enter the date and time that this call was phoned in. Use the form MMDDYY HHMM. Pressing enter will use current date and time.

Issue Code
Enter up to 6 alphanumeric characters for the Contract Type.

Tech
Enter the Technician code for the technician assigned to this call.

Call Comment
This field may be used to enter up to a 35-character comment, which pertains to this order or invoice.

Call Back
Indicates that this call is a call back from another call.

Num
If the Call Back field is set to a **Y**, then this field will contain the Service Call the customer is calling back on.

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Status
The status field is used to hold the current status of a call.

The status may be set as follows:
O – Open
D – Dispatched
P – Pending
C - Closed

Dispatch
Enter the time the call was assigned to a technician.

Start Time
Enter the date and time on which the work for this call started. **F7** will use current date and time.

End Time
Enter the date and time on which the work for this call was completed. **F7** will use current date and time.

Meter Reading
Enter the equipment meter reading at time of call.

Travel Miles
Enter the number of miles traveled to the customer.

Travel Time
Enter the number of miles traveled to the customer.

Parts
This field is used to allow the entry of part and invoicing of those parts.
F2 - Allows the entry of parts
F3 - Generate the invoice for the pars

Invoiced
This field indicates if the parts for this service call have been invoiced.

Call Note
This text field contains the detail of the call.

Number
This field contains the Invoice Number for the parts billed.

Contract Type
Enter up to 3 alphanumeric characters for the Contract Type.

Examples: PPC - Plain Paper Copier Maintenance
PMA - Preventative Maintenance Agreement

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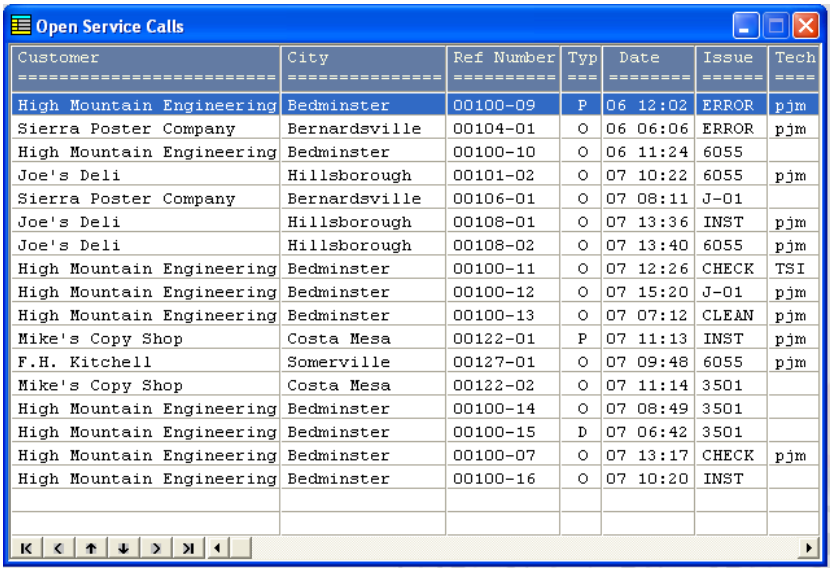
Open Service Calls

Introduction

Open Service Calls will display a view table containing all the calls that have not been closed. Scroll to the call and pressing **Enter** displays the Service Call screen allowing changes to be made.

How to Execute

From the Service Contract menu select **Open Service Calls**.



Customer	City	Ref Number	Typ	Date	Issue	Tech
High Mountain Engineering	Bedminster	00100-09	P	06 12:02	ERROR	pjm
Sierra Poster Company	Bernardsville	00104-01	O	06 06:06	ERROR	pjm
High Mountain Engineering	Bedminster	00100-10	O	06 11:24	6055	
Joe's Deli	Hillsborough	00101-02	O	07 10:22	6055	pjm
Sierra Poster Company	Bernardsville	00106-01	O	07 08:11	J-01	
Joe's Deli	Hillsborough	00108-01	O	07 13:36	INST	pjm
Joe's Deli	Hillsborough	00108-02	O	07 13:40	6055	pjm
High Mountain Engineering	Bedminster	00100-11	O	07 12:26	CHECK	TSI
High Mountain Engineering	Bedminster	00100-12	O	07 15:20	J-01	pjm
High Mountain Engineering	Bedminster	00100-13	O	07 07:12	CLEAN	pjm
Mike's Copy Shop	Costa Mesa	00122-01	P	07 11:13	INST	pjm
F.H. Kitchell	Somerville	00127-01	O	07 09:48	6055	pjm
Mike's Copy Shop	Costa Mesa	00122-02	O	07 11:14	3501	
High Mountain Engineering	Bedminster	00100-14	O	07 08:49	3501	
High Mountain Engineering	Bedminster	00100-15	D	07 06:42	3501	
High Mountain Engineering	Bedminster	00100-07	O	07 13:17	CHECK	pjm
High Mountain Engineering	Bedminster	00100-16	O	07 10:20	INST	

Description of Fields

Customer

This field displays the customer's name.

City

This field displays the customer's city.

Ref Number

This field contains the Contract Number and Calls number.

Type

The type field is used to hold the current status of a call.

The type may be set as follows:

O – Open
D – Dispatched
P – Pending
C - Closed

Date

This is the date the call was entered.

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Issue
This field contains the issue code assigned to the call.

Examples: ERROR - Error on Console

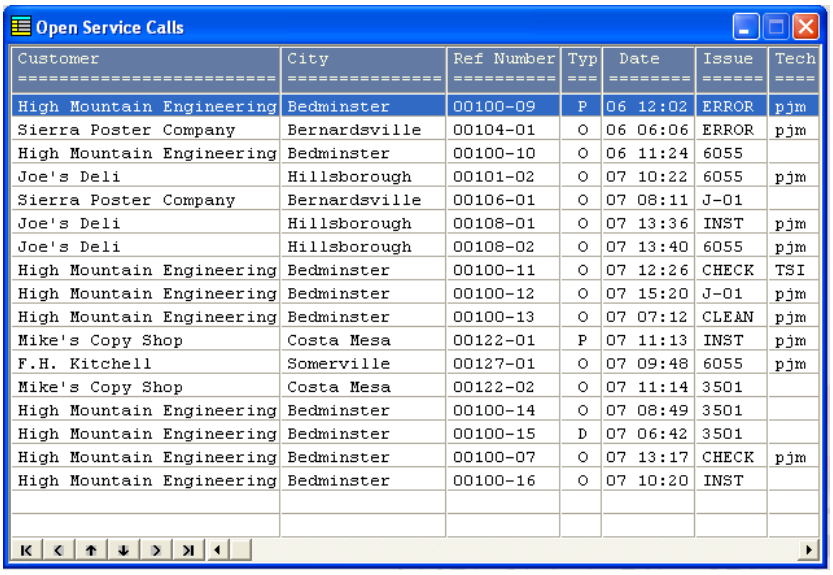
000061 - Error code 61

Tech
This field displays the Technician code that is assigned to this call.

Historical Calls View

Introduction
This view table displays all call sorts by contract number and call number.

How to Execute
From the Service Contract menu select **Historical Calls View**.



Customer	City	Ref Number	Typ	Date	Issue	Tech
High Mountain Engineering	Bedminster	00100-09	P	06 12:02	ERROR	pjm
Sierra Poster Company	Bernardsville	00104-01	O	06 06:06	ERROR	pjm
High Mountain Engineering	Bedminster	00100-10	O	06 11:24	6055	
Joe's Deli	Hillsborough	00101-02	O	07 10:22	6055	pjm
Sierra Poster Company	Bernardsville	00106-01	O	07 08:11	J-01	
Joe's Deli	Hillsborough	00108-01	O	07 13:36	INST	pjm
Joe's Deli	Hillsborough	00108-02	O	07 13:40	6055	pjm
High Mountain Engineering	Bedminster	00100-11	O	07 12:26	CHECK	TSI
High Mountain Engineering	Bedminster	00100-12	O	07 15:20	J-01	pjm
High Mountain Engineering	Bedminster	00100-13	O	07 07:12	CLEAN	pjm
Mike's Copy Shop	Costa Mesa	00122-01	P	07 11:13	INST	pjm
F.H. Kitchell	Somerville	00127-01	O	07 09:48	6055	pjm
Mike's Copy Shop	Costa Mesa	00122-02	O	07 11:14	3501	
High Mountain Engineering	Bedminster	00100-14	O	07 08:49	3501	
High Mountain Engineering	Bedminster	00100-15	D	07 06:42	3501	
High Mountain Engineering	Bedminster	00100-07	O	07 13:17	CHECK	pjm
High Mountain Engineering	Bedminster	00100-16	O	07 10:20	INST	

Description of Fields
Customer
This field displays the customer's name.

City
This field displays the customer's city.

Ref Number
This field contains the Contract Number and Calls number.

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Type
The status field is used to hold the current status of a call.

The status may be set as follows:

O – Open
D – Dispatched
P – Pending
C - Closed

Date
This is the date the call was entered.

Issue
This field contains the issue code assigned to the call.

Examples: ERROR - Error on Console

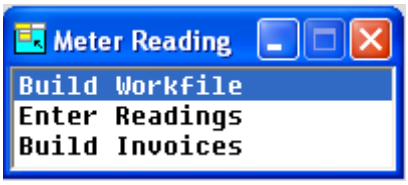
000061 - Error code 61

Tech
This field displays the Technician code that will be assigned to this call.

Footage/Meter Billings

Introduction
This menu allows you to build work files, enter readings and build invoices.

How to Execute
From the Service Contract menu select **Footage/Meter Billings**.



Description of Fields
Build Workfile
This option will read through the Contract file to find all contracts that require a meter reading and post them to the work file.

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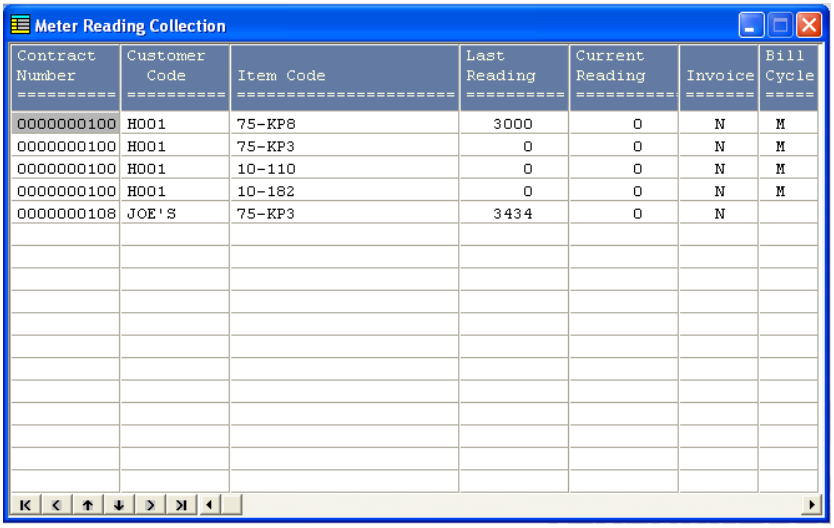
Enter Readings

This option allows the entry of current meter readings. There is also an invoice flag that is used by Build Invoices process to tell which reading should be billed.



Contract Number	Customer Code	Item Code	Last Reading	Current Reading	Invoice	Bill Cycle
0000000100	HOO1	75-KP8	3000	0	N	M
0000000100	HOO1	75-KP3	0	0	N	M
0000000100	HOO1	10-110	0	0	N	M
0000000100	HOO1	10-182	0	0	N	M
0000000108	JOE'S	75-KP3	3434	0	N	

Build Invoices

This option will read through the work file for all contracts that have a current reading and are flagged for invoicing. The invoices will be built and put into the Invoice Entry file. These invoices then are updated as normal invoices.

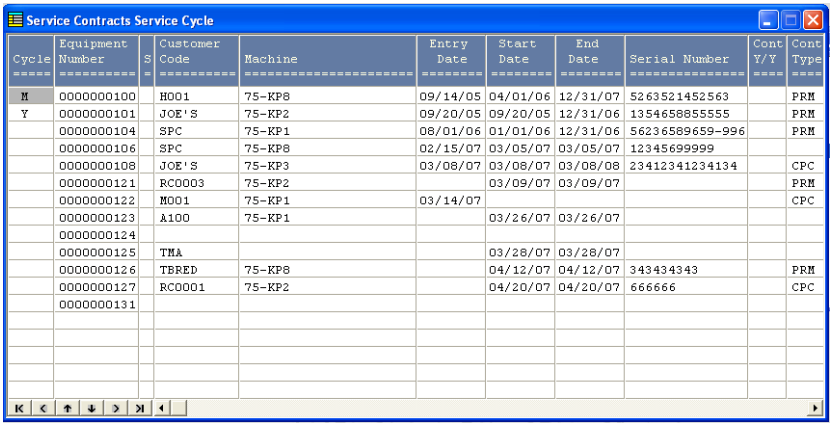
Service Cycle View

Introduction

This option will display all contracts sorted by the Service Cycle. This file will be used to create a preventative maintenance schedule.

How to Execute

From the Service Contract menu select **Service Cycle View**.



Cycle	Equipment Number	S	Customer Code	Machine	Entry Date	Start Date	End Date	Serial Number	Cont Y/Y	Cont Type
M	0000000100		HOO1	75-KP8	09/14/05	04/01/06	12/31/07	5263521452563		PRM
Y	0000000101		JOE'S	75-KP2	09/20/05	09/20/05	12/31/06	1354658855555		PRM
	0000000104		SPC	75-KP1	08/01/06	01/01/06	12/31/06	56236589659-996		PRM
	0000000106		SPC	75-KP8	02/15/07	03/05/07	03/05/07	12345699999		
	0000000108		JOE'S	75-KP3	03/08/07	03/08/07	03/08/08	23412341234134		CPC
	0000000121		RC0003	75-KP2		03/09/07	03/09/07			PRM
	0000000122		MOO1	75-KP1	03/14/07					CPC
	0000000123		A100	75-KP1		03/26/07	03/26/07			
	0000000124									
	0000000125		TMA			03/28/07	03/28/07			
	0000000126		TBRED	75-KP8		04/12/07	04/12/07	343434343		PRM
	0000000127		RC0001	75-KP2		04/20/07	04/20/07	666666		CPC
	0000000131									

For information about the description of fields, please refer to **Equipment Entry**.

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5 Inquiry

This chapter explains how to perform the following:

- Equipment Inquiry
- Service Inquiry
- Meter Reading History

You will be spending the bulk of your time in this section of the manual because this is the core of the Solution-IV Service Contract system.

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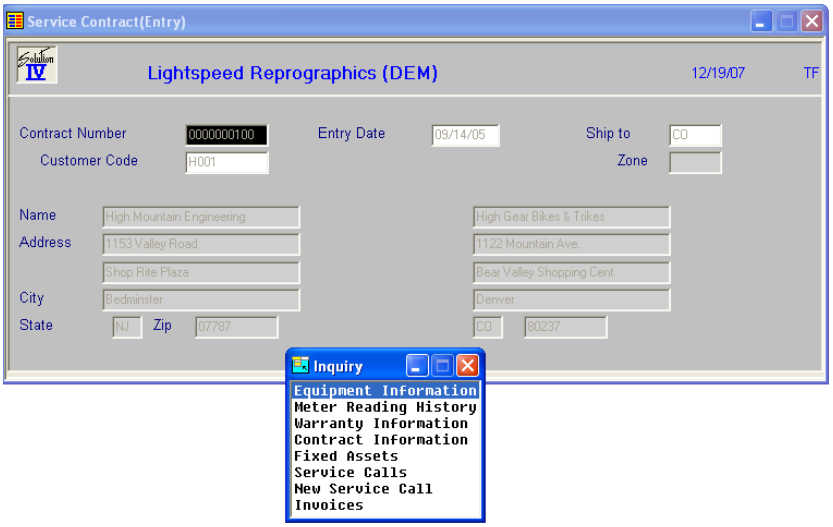
Equipment Inquiry

Introduction
This option allows quick access to the view information about the equipment.

How to Execute
From the Service Contract menu, select **Equipment Inquiry**. The Service Inquiry screen will display in the Customer Code file. Press **F2** to lookup by Contract Number, **F3** to lookup by Customer Name



Description of Options
Equipment Information
This option allows you to view the Serial Number, Last Meter Reading, and Meter Reading Required flag associated with this piece of equipment.

Meter Reading History
This option will display a view containing the date and amount for all meter reading associated with this piece of equipment.

Warranty Information
This option will display the type of warranty, starting and ending date, and the service cycle associated with this piece of equipment.

Contract Information
This option will display the detail information about the contract associated with this piece of equipment.

Fixed Assets
This option will display the detail information for Fixed Assets associated with this piece of equipment.

Service Calls
This option allows you to view all of the service calls that have been enter for this piece of equipment.

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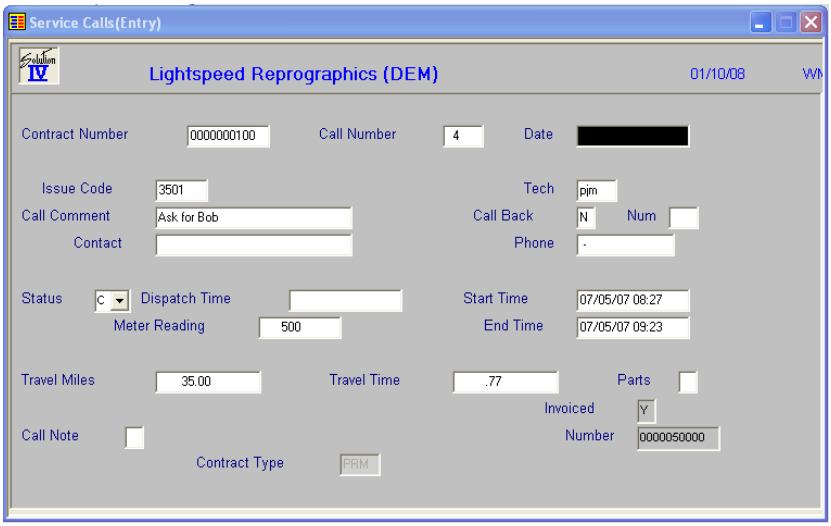
New Service Call
This option will allow the entry of a new service call for this piece of equipment.

Invoices
This option displays all invoices billed for this contract.

Service Inquiry

Introduction
This option allows quick access to information about a service call. This option allows information about the call to be modified by the technician.

How to Execute
From the Service Contract menu select **Service Inquiry**. The Service Call Inquiry screen will display in the Contract Number field.



Description of Fields
Contract Number
Enter up to 10 characters for the contract code, press **F2** for lookup, press **F3** to lookup by customer name.

Call Number
Enter the call number, or press **F2** for lookup.

Date
Date the call was entered, and will be skipped by the cursor.

Issue Code
Enter the issue code for the call, press **F2** for lookup.

Tech
Enter the Technician code that will be assigned to this call.

This field may be used to enter up to a 35-character comment, which pertains to this order or invoice.

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Call Comment
This field may be used to enter up to a 35-character comment which pertains to this order or invoice.

Call Back
Indicates that this call is a call back from another call.

Num
If the Call Back field is set to a 'Y', then this field will contain the Service Call the customer is calling back on.

Status
The status field is used to hold the current status of a call.

The status may be set as follows:

O – Open
D – Dispatched
P – Pending
C - Closed

Dispatch Time
Enter the time the call was assigned to a technician.

Start Time
Enter the date and time on which the work for this call started. **F7** will use current date and time.

End Time
Enter the date and time on which the work for this call was completed. F7 will use current date and time.

Meter Reading
Enter the equipment meter reading at time of call.

Travel Miles
Enter the number of miles traveled to the customer.

Travel Time
Enter the number of miles traveled to the customer.

Parts
This field is used to allow the entry of part and invoicing of those parts.

F2 - Allows the entry of parts

F3 - Generate the invoice for the pars

Invoiced
This field indicates if the parts for this service call have been invoiced.

Call Note
This text field contains the detail of the call.

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Number
This field contains the Invoice Number for the parts billed.

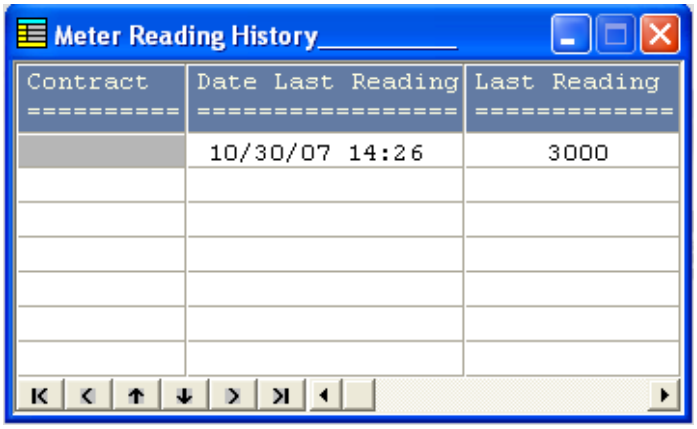
Contract Type
Enter up to 3 alphanumeric characters for the Contract Type.

Examples: PPC - Plain Paper Copier Maintenance
PMA - Preventative Maintenance Agreement

Meter Reading History

This option provides you with a view of all contracts and meter readings that are on your system..

How to Execute
From the Service Contract Main menu, select **Meter Reading History**.



From this view, press **F4** to return to the Service Contract main menu.

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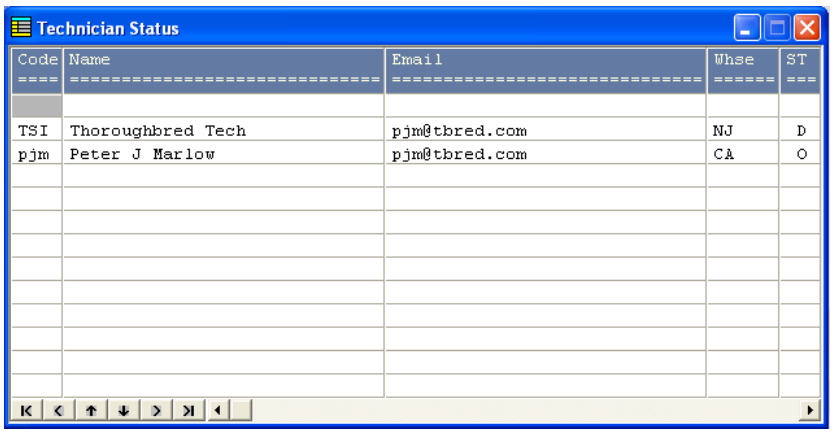
Technician Status

Introduction

This option provides you with a view of all technicians and some of the information associated with those technicians.

How to Execute

From the Service Contract Main Menu, select **Technician Status**.



From this view, press **F4** to return to the Service Contract main menu.

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6 Service Contract Reports

This chapter explains how to print the Service Contract reports. The following reports are included:

- **Service Ticket**

  The Service Ticket report will print service tickets for your technicians.

- **Open Service Contract**

  The Open Service Contract report will list by customer the open contracts that are on your system.

- **Open Service Calls**

  The Open Service Calls report provides you with a listing of all open calls and their current status.

- **Equipment Listing**

  The Equipment Listing report provides you with a list of equipment that has been assigned to your selected customer.

- **Equipment Listing (All)**

  The Equipment Listing (All) report will provide you with a listing of all equipment that has been assigned in your system.

- **Equipment/Calls**

  The Equipment/Calls report provides you with a listing of the calls that are in you system sorted by the equipment.

- **Equipment Calls Summary**

  The Equipment/Calls report provides you with a list of the calls that are in your system sorted by equipment.

- **Contract Renewal**

  The Contract Renewal report prints all of the contracts and provides you with information pertaining to the expiration and renewal of those contracts.

- **Last Meter Reading**

  The Last Meter Reading report will show you the last reading for the contracts on your system.

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- **Technical Analysis**

  The Technical Analysis report prints call details for Technician and Date range entered. Report all contains summarized information for Number of Calls, Call Backs, Call Back Percentage, Average Response and Service Times, and Part Totals.

- **Customer Analysis**

  The Customer Analysis report prints call details for Customer and Date range entered. Report all contains summarized information for Number of Calls, Call Backs, Call Back Percentage, Average Response and Service Times, and Part Totals.

- **Profit Report**

  The Profit Report prints profit numbers for all service calls including Invoice details.

- **Expiration Report**

  The Expiration Report prints all the contracts and provides you with information pertaining to the expiration and renewal of those contracts.

- **Paper Usage Report**

  The Paper Usage Report prints all the detail for invoice lines that contain paper items. This shows what was ordered as well as how many square feet are in a roll.

- **Preventative Maintenance**

  The Preventative Maintenance report prints all active contracts sorted by the Service Cycle field. This field contains how often preventative maintenance should be performed.