



ALERE Business Applications

White Paper

Field Service Guidelines

May 24, 2017

ALERE Service Implementation

This process uses the current ALERE modules and has the advantages of complete native integration, remote data entry using single purpose apps, access to the material planning resources, documentation of all costs including overhead, documentation of site conditions and work done, and inventory control.

Required modules

- Manager
- General Ledger
- Inventory
- Machine
- Schedule
- Order
- Route
- Cost

Preparation Steps

Follow these steps to configure ALERE for service use:

1. Establish a *Work Center* for each service or technical person.
2. Set up a *Group Definition* made up of the service work centers.
3. Add a *Labor Grade* for each service or technical person.
4. Add at least one *Master Route* with a minimum of one operation step for service work. The work center on the route should be one of the service work centers. Use the setup time for a fixed duration service call or cycle time for a variable duration. The Grade should match the work center.
5. Add one or more *Inventory Items* for service work.

Making an Appointment

To find an available date and time for an Appointment:

1. Go to *Logistics > Review > View Schedule*.
2. Set range of dates if desired.
3. Enter the service Work Center Group
4. Select Refresh.

Operating Notes

All service personal with an appointment will be listed in the Work Center column.

Their jobs and date/times available are shown on the schedule board.

Drill down can be used to show the orders.

Make appointment based on availability.

Maximize the screen and use MDI to create work orders while simultaneously viewing schedule.

Creating Work Orders for Appointments

Creating an Appointment which invoices material used and a variable labor cost:

1. Go to *Sales > Sales Order*.
2. Select the *Add* button to create a Sales Order.
3. Enter the customer ID in the *Bill To* address.
4. Add a line item with the generic Service item assigned to it.
5. Assign quantity based on the estimated number of hours required to complete the job.
6. Accept the sales order.
7. Go to *Production > Standard*.
8. Select *Add* to create a work order form the open sales order.
9. Choose the associated route if not automatically assigned.
10. Change the *Need By Date* to the date of the appointment.
11. *Save* the work order.
12. On the now active *Route* tab assign a technician as the work center.
13. Enter the appointment date & time in the *Start* time and date fields.
14. *Save* the order.
15. FPO the order on the *Status* tab.
16. Run the *Trial Schedule* and use *View schedule* to confirm appointment was properly added.
17. When the service work is complete post complete the work order by recording the *Labor Cycle* and post only the labor as a finished good.
18. Open the sales order used to generate the work order and adjust the quantity of hours for the technician and add in line items used to complete the work order.
19. On the *Status* tab *Ship and Invoice* the sales order.

Creating a "Flat Labor" appointments which have inclusive BOMS and also bill for non-inclusive material

1. Go to *Sales > Sales Order*.
2. Select the *Add* button to create a Sales Order.
3. Enter the customer ID in the *Bill To* address.
4. Add a line item with a defined service job. (eg: Service Oil Heater: Price 199.95)
5. Accept the sales order.
6. Go to *Production > Standard*.
7. Select *Add* to create a work order form the open sales order.
8. Choose the associated route if not automatically assigned.
9. Change the *Need By Date* to the date of the appointment.
10. *Save* the work order.
11. On the now active *Route* tab assign a technician as the work center.
12. Enter the appointment date & time in the *Start* time and date fields.
13. *Save* the order.
14. FPO the order on the *Status* tab.
15. Run the *Trial Schedule* and use *View schedule* to confirm appointment was properly added.
16. When the service work is complete post complete the work order by recording the *Labor Cycle* and in this instance you may also issue material **included** with the service.
17. Open the sales order used to generate the work order and ensure the correct service was entered (eg: Service Furnace) and record any items **not included** in the service (eg: Replacement Blower.)
18. On the *Status* tab *Ship and Invoice* the sales order.

Operating Notes

The start quantity can be either:

- Quantity one and the setup time on the route modified to reflect the estimated length of required time.
- A number estimating the amount of time required with route having a preset cycle time that the quantity multiplies.

A list of material may be pre-assigned by creating a BOM and attaching it the work order.

A kit with variable components may be useful for selecting items and quantities upon work order creation.

Items may be added or edited to the *Material* tab after the work order is created.

Estimating Time and Distance between Appointments

Time and distance between existing jobs and potential jobs may be found by:

1. Drilling down on a job
2. Opening the Company
3. Select the *Locate* button
4. Choosing the *Get directions to this company from another company* option
5. Enter the next company or zip and clicking on the *Continue* button.
6. A Google map will show directions and estimated travel time.

Operating Notes

Use location function to help decide which service person to assign and the amount of travel time to allow between appointments.

Use the Google *Send directions to your phone* option to email, text, or send to the service persons phone.