



The purpose of the Service Module is to support the generation and execution of service jobs. The principal components of the Service Module are

Service Ticket

The *Service Ticket* is a document that lists the service work to be accomplished, the personnel, equipment and material required to perform the work, the results of the service, the resources expended, and the billing information.

Three user-defined miscellaneous fields are available.

Each service ticket may be scheduled for next available time directly from the ticket using date, time, day of week, service territory, or employee dispatch criteria.

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Header	Resources	Results	Transactions	Release	Activity	GL Posting
Service Ticket <input type="text" value="9"/> <input type="text" value="Accepted"/>						Priority <input type="text" value="Normal"/>

Billing Location		Service Location		Contact	Phone	Ext
BWB01	ST1	BWB01	ST1	George Rutledge	610-678-1258	
Big Wheel Bikes						
5959 Railroad Rd						
Germansville		PA	18053	US		

Date	Purchase Order	Sales Rep	Contract	Misc02	Misc03	<input type="checkbox"/> Tax Exempt	
10/19/2018		CHRIS				<input type="checkbox"/> GST Exempt	
Terms ID	Due Date	Tax District	Taxes	Inv Locn	Cust Grp	Start Time	<input type="checkbox"/> Send Email
NET30	11/18/2018	PA	6.0000	LOC1	INT	//	<input checked="" type="checkbox"/> Auto Done

Units being serviced

Line	Unit ID	Description	Service Type	Need By	Base Rate	Added Cost	Discount %	Ext Price
1	CABOOSE	Caboose	HYDROTEST	11/18/2018	100.00	0.00	0.000	100.00
2	BALDWIN452	1 1/2 " scale Baldwin locomotive	HYDROTEST	11/18/2018	100.00	0.00	0.000	100.00

Exit
 Save F9
 Del
 Bwd
 Get F8
 Fwd
 Add F7
 Copy
 Accept
 Print

SubTotal:	200.00
Sales Tax:	12.00
Total:	212.00

Service Ticket

Scheduled tickets are booked on *the Dispatch Board* and *Service View* and may be edited as necessary.

Transactions are used to document the labor expended, the material consumed, and equipment usage.

The results of inspections and tests are recorded separately for reporting purposes and retained for later analysis.

Service Catalog

A *Service Catalog* library is created and maintained that describes the variety and type of service work that can be performed.

Jobs are selected from the service catalog and specified on service tickets when the tickets are created.

Personnel / Equipment					Material				
Step	Class	Qty	Time	Charge	Step	Item	Quantity	Units	Charge
10	TECH1	1	1.5	INCLUDED	10	MBTT01	2.000	EACH	INCLUDED

Service Catalog

Service jobs are identified by a unique ID and given an inventory item number.

Each job in the catalog consists of the service steps, detailed instructions, service activities and tests, and lists of the personnel, equipment, and material required.

Document management links for instructions, activities and tests may be inserted for pictures, instructional videos, correspondence, internet addresses, etc.

Personnel resource classes may be specified by step along with estimated times and how charges are applied.

Equipment may be specified by step including quantities, estimated usage times, and how charges are applied.

Material items may be specified by step including quantities and how charges are applied.

Charges may be applied as included on cost of service, additional charges, no charge, or no charge under warranty.

Site Information

A *Site Information* file is built for each customer.

Included in the file is the customer location and territory, a description of each item (unit) requiring service, associated warranty and serial number information for each item, scheduled services required for the item, and site notes.

Eight user-defined miscellaneous fields are available.

Up to three scheduled services may be defined for each item at that customer's location, along with the frequency of each service and the last service date.

Site Information

Site Info Image Activity

Co ID	Loc ID	Company		Territory	Warranty Start	Warranty Period	Warranty End
BWB01	ST1	Big Wheel Bikes			//	0 Days	//

Unit ID	Description	Active	Serial Number	Invoice	Ship Date
BALDWIN452	1 1/2 " scale Baldwin locomotive	<input checked="" type="checkbox"/>	45209	598745	11/07/2017

Fuel	Misc02	Misc03	Misc04	Misc05	Misc06	Misc07	Misc08
OIL						Yes	

Scheduled Service			
Service ID	HYDROTEST		
Frequency	Monthly	Annual	Annual
Last Service	10/07/2018	//	//

Site Notes	
Test to 300 PSI	

Unit ID	Description	Next Service Date	Next Service Type	Last Service Date
BALDWIN452	1 1/2 " scale Baldwin locomotive	//		//
CABOOSE	Caboose	//		//

Exit Save F9 Del Bwd Unit Get F8 Unit Fwd Add F7 Insert Remove

Site Information

An image of each serviceable item may be included together with a description which can include document management links for pictures, correspondence, internet addresses, etc.

A cumulative list of past activities, with drill down, is maintained for each serviceable item.

Resource Class

Resource Class provides the ability to assign personnel and equipment to classes. Classes are used in the Service Catalog to define the resources required for a particular service.

Each resource class may have a billing rate associated with it.

Service personnel may be members of any number of "Personnel" classes.

In a like manner, specific pieces of equipment can be assigned membership in multiple "Equipment" classes.

Inventory item numbers, which are non-stock, are used to identify classes of personnel and equipment that will be used on the sales invoice to bill the client for additional service labor or equipment usage.

Service personnel are separately identified as such in your company, a badge or license number may be given to them, and they can be assigned to a territory. Their pictures and personal information may be added to InTouch CRM along with document management links for pictures, diplomas, certificates, correspondence, etc.

Equipment is also marked as such by placing it in company location designated for equipment.

Document management links can be added under their inventory item number for operation and maintenance manuals, training videos, certificates of use, etc.

Resource Class
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Resource Class ID ResourceType

Billing Reference

Item Number Billing Rate

Description

Resource ID	Resource Name	Badge / License
TIW01C	Jamie	JAMIE
TIW02	Freddie	FREDDIE
TIW03	Lee	LEE
TIW04	Tracy	TRACY
TIW05	Morgan	MORGAN
TIW06	Kerry	KERRY

Exit
 Save F9
 Del
 Bwd
 Get F8
 Fwd
 Add F7

Resource Class