

Ostendo[®] _____

8

Service Orders

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1. Introduction

The Service function covers a wide-range of functionality from initial sale of a Serviced Item, through attaching a Preventive Maintenance schedule then carrying out Maintenance Events, to finally analysing Service History, Warranty Claims, etc

The following will be covered in this document:

- Warranty Definitions
- Service Plans
- Customer Asset creation
- Customer Service Scheduling
- Preventive Maintenance Jobs
- Breakdown Jobs
- Servicing History

2. Preparation

In preparation for using the Service function you should ensure that the following have been addressed.

2.1. Job Types

Whenever a Service Order is created it is given a Job Type. This allows Ostendo to focus on what the Order is intended to achieve and how it is to be invoiced. If you go into **Jobs>Settings>Job Types** you will see that a couple of Job Types relating to Service Orders have already been created. You should note that the specific options that relate to a Service Style Order are:

Job Style defines if the Order covers

Customer Asset (normally for Warranty and/or Servicing)

Company Asset (for Plant Maintenance or "In-house work")

Invoice Style relates to how this Job is to be Invoiced. The options are:

Scheduled: Based on agreed Price. Invoice(s) can optionally be pre-defined in an Invoicing Schedule

Actual: Based on Actual Usage incurred. This usage may be charged at Sell Price or Cost-Plus.

No Invoice: No Invoice required (Example - 'Company Plant' Maintenance)

Create your own Job Type if you want to use it in later exercises.

2.2. Templates

A Template is a pre-defined sequence of Tasks and Resources required to carry out each Task. If you go into **Jobs>Templates** you will see that a couple of Templates have already been created. For more info on Templates refer to the **Job Order Training guide**. A Template is linked to a Service Plan (see next paragraph) and is applied whenever the Service event is initiated. Create your own Template for use in subsequent exercises (or use the existing **AirConService**)

2.3. Service Plans

A Service Plan is a collection of regular Service Events that would apply to a Customer Asset. For example: the Asset may have a simple 3-monthly Service in addition to a more complex Annual Service. Go into **Service>Service Plans** where you will see a Service Plan

(**STDAIRCONPLAN**) currently exists. Create your own Service Plan containing multiple future planned events; each containing:

Service Frequency: Days or Months

Length of Service Frequency: an entered number

Job Type: Use the above Job Type

Job Template: Use your generated Template or the current **STDAIRCONPLAN**

2.4. Warranty Definitions

Warranty Codes and their conditions can be maintained in Ostendo. The relevant Warranty Code(s) are applied to a Customer Asset. Each Warranty Code comprises of the following:

Warranty Code Identity: User defined

Term: Duration of Warranty

Coverage: Labour, Material, Labour and Material, or Special Details

Special Details: Identifying specific cover conditions

Exclusion: stating any exclusions

Extended Notes

Go into **Service>Warranty Codes** and view the Codes that have already been created. You may wish to create your own for use later in this Exercise

2.5. Asset Types

Asset Types are used to segregate Customer Assets for analysis purposes. Customer Asset Types are User-defined and can include such types as:

- Switchgear
- Vehicles
- Air Conditioning

If you go to **Service>Settings>Customer Asset Types** you will see that there are 3 Types currently in the system. Add another Type called '**Vehicles**'. We will use this later

3. Customer Asset creation

There are two types of Customer Assets:

- Pre-existing Asset against which you carry out Service Events. For example you may define a Customer's Building as the Asset against which you carry out regular service events such as Roof Cleaning, Checking Safety Equipment, etc.
- An Asset created when you sold the product. That Asset can have an after-sale Service Schedule linked to it. For example: Vehicle, Air Conditioning Unit, etc

3.1. Create Asset upon sale of an Item

Go to **Inventory>Items** and create a new Item (say) '**AC0001**' with Unit of '**Each**' and description of '**Air Conditioning Unit**'. On the Item's '**Detail**' screen carry out the following actions that are required for Items which convert into Customer Assets.

- 'Check' the '**Serial No**' checkbox to denote that it is Serial Controlled
- 'Check' the '**Create Customer Asset**' checkbox
- Click on the '**Customer Asset Options**' button and, on the displayed panel you should select the '**Asset Type**' that you created or viewed in 2.5. above. Also 'check' the '**Create Service Schedule**' checkbox and select Service Plan that you created or viewed in 2.3. above

- We will also identify this Item as being covered by a Warranty therefore 'check' the '**Sales Warranty Applies**' checkbox and select the specific Warranty Definition that you created or viewed in 2.4. above

The next step is to create Inventory records for this Item, therefore go to **Inventory>Inventory Adjustments** and create a new batch. On the '**Lines**' tab click the '**Add**' button then:

- Click on the '**Item Code**' field and select the Item you created above.
- Amend the '**Adjustment Type**' to '**Receipt**'
- Enter an '**Adjustment Qty**' of **1**
- Go to the '**Serial Number**' field and enter a unique Serial Number for the Item

Repeat this and '**Add**' another line for a different Serial Number of the same Item.

Finally go to the '**Detail**' tab and click the '**Post All Adjustments**' button to receive the two Serial Numbers into stock.

Now let's sell the Item.

Go to **Sales>Sales Orders** and select an existing Order that has a '**Type**' of '**Counter Sales**'. Go to the '**Lines**' tab and click the '**Add**' button. The cursor will be positioned in the '**Code**' field where you should select the Item you created above then '**Save**' the record.

You should now issue one of the serial numbers that you have created by clicking on the '**Picked Lines**' tab in the lower part of the screen and clicking the '**Add**' button to create a new pick record in the lower part of the screen.

Place the cursor in the '**Qty**' field in this record then click the '**spyglass**' icon that is within this field to display the current stock. Enter qty of **1** in the '**Issue Qty**' field against one of the lines and then click the '**Save**' button. Click the '**OK**' button to exit the screen. The Item has now been issued so close out of the Sales Order

If you now go to **Service>Customer Asset** you will see that an Asset has been generated to cover this Issue. We will come back to this screen later.

3.2. Create Asset directly

Go to **Service>Customer Asset** and click the '**Add**' button. Add a Customer Asset (say) vehicle registration **XYZ123** then click the '**Create**' button

On the presented screen select Asset Type = '**Vehicles**' and then select a Customer from the drop-down list under '**Customer**' then '**Save**' the record.

4. Other Asset information

4.1. Location at Customer Site

This allows you to denote where - at the Customer premises - the Asset is located. You should first define and set up the location as follows:

Create a Customer's Warehouse by going into **Inventory>Warehouses** and clicking the '**Add**' button. Enter the following:

Warehouse Code: enter the new Warehouse Code

Description: enter a short description of the Warehouse

Company: Select 'Customer'

Name: Select the Customer who owns the Asset from the drop-down list

Next you should create the physical location within the above Warehouse by going to **Inventory>Locations** and clicking the **'Add'** button. Add the Location to the above Warehouse.

Go back **Service>Customer Asset** and select the above Customer Asset. Click on the drop-down against field **'Location at Customer Site'** button and select the Location that you have just created.

4.2. Asset Tracking

This allows you to maintain a date and time-stamped history of where the Asset has been, and is currently, located

While you are still in **Service>Customer Asset** click on the **'Asset Tracking'** button. Click on the **'Add'** button and add a record defining where it is currently located.

4.3. Asset Additional Fields

There are two levels where Additional fields could be required against Assets:

- Global Fields that apply to ALL Assets (Example:- Service Level)
- Properties that apply to some Assets (Example:- Customer Ref No)

4.3.1. Global Additional Fields

Go into **File>System Configuration>Additional Fields** and click on the **'Add'** button. On the displayed line enter the following:

Module: Select **'Customer Assets'**

Caption: Enter the Additional Field name (Example **'Service Level'**)

Field Type: From the drop-down list select the format of the field. Let us say that this is **'Text'**

Value List: This allows you to define any specific entries to which a drop-down list - during data entry - is restricted. In our exercise let's put two entries **Normal** and **Super**

'Save' the entry and **'Close'** the screen when done

If you now go to the Customer Asset screen (**Service>Customer Assets**) and click on the detail tab you will see a 'tab' (**Additional Fields**) to the left of the screen. Click on this tab and select the Service Level from the drop-down list then **'Save'** the record.

You can view the entries in the Customer Asset List screen if required by going into the List screen and 'right mouse' in the centre panel. Select **'Customize List Fields'** from the displayed panel. (Note: If that option is not visible then go to **File>System Configuration>User Security** and Options and go to the **'User Options'** tab for the current User. 'Check' both the **'Save Grid Layouts'** and **'List Customising'** checkboxes.) On the displayed panel 'check' **Additional Field1** and give it a **'Display Name'** of **'Service Level'** and 'check' the **'Show Field'** checkbox. **'Save'** the entry. The field will now display on the List screen where you can sort and filter as necessary.

4.3.2. Customer Asset Properties

This feature allows you to define a 'Property' (Example: Customer Ref No) and then link that property to selected Customer Assets with a value that is specific to each Asset.

To demonstrate this go into **General>Settings>General Properties** and add **Customer Ref No** with Property Type of **Text**. Click on **Save** and then **Close**

Now go to **Service>Customer Assets** and select **XYZ123**. Click on the **Related** Button on the right of the screen and select **Customer Asset Properties**. Click the **Add** button and:

- Add a line using the above property
- Select **Customer Ref No** from the drop-down list under **Property**
- Enter the Customer's Reference Number that relates to this Asset
- 'Check' the **Copy to Jobs** checkbox

The selected property and value will accompany the Customer Asset whenever it is used in a Service Order. To demonstrate this, go into **Jobs>Job Orders** and click the **Add** button.

On the presented panel select the following:

- Select **Service** under Job Type
- Select the Customer of the above Asset under **Customer**
- Select the above Asset from the drop-down under **Customer Asset**
- Click on the **Create Order** button to create the Service Order.

If you now click on the **Related** button down the right-hand side of the screen and select **Customer Asset Properties** you will see that the Asset Properties have been copied through to the Service Job.

4.4. Customer Asset Images

You can add multiple images (pictures, drawings, maps, plans, etc) to a Customer Asset. These can be printed on all documents where the Asset is used. Go to **Service>Customer Assets** and select the Asset you created above. Click on the **Related** Button on the right of the screen and select **Customer Asset Images**. Click the **Add/Edit** button and:

- Give the Image a short Name
- Point the program to where the image is located on your computer network

This image is now available for printing on any document referencing this Asset

4.5. Customer Asset Documents

You can add multiple documents to a Customer Asset. These can be printed along with all documents where the Item is used. Go to **Service>Customer Assets** and select the Asset you created above. Click on the **Related** Button on the right of the screen and select **Customer Asset Documents**. Click the **Add/Edit** button and:

- Give the Document a short Name
- Point the program to where the document is located on your computer network

This image is now available for printing on any document referencing this Asset

4.6. Customer Asset History Notes

This function allows you to link multiple time-stamped notes to a Customer Asset record. Against selected History Notes you can also add a dated reminder so that Ostendo will prompt you of the reminder once the date is reached. Go to **Service>Customer Assets** and select the Customer Asset that you created above. Click on the **Related** Button on the right of the screen and select **Customer Asset History Notes**. Click the **Add** button and:

- Enter some history notes
- 'check' the **Follow-Up** required checkbox and select a date from the adjacent drop-down calendar. **Save** the History Note and exit the screen
- To see the 'Follow Up' in action you should first change the company by clicking on **File>Change Company** and selecting another company then sign in as

ADMIN/pass. Repeat this and go back to this company. Upon sign-in as **ADMIN/pass** the alert should present itself if the Follow-Up date is current

4.7. Customer Asset Hierarchy

The Customer Asset Hierarchy function allows you to link one or more 'Child' assets to a parent 'Asset' and view the Parent/Child relationships as required. To see how this is achieved go into **Service>Customer Assets>Customer Asset Hierarchy**.

1. Select a parent Asset and then click on the '**Detail**' tab. Click the '**Add**' button and select the Child Asset that is used on the Parent. Note: You can add many Child Assets to a single Parent.
2. For one of the Child Assets that you have added go back to the '**List**' view and select it. Now return to the '**Detail**' screen and add Child Assets to this, thus creating a multi-level hierarchy of Customer Assets.
3. Finally, go back to the '**List**' screen and select the Parent Asset used in 1 (above) and then click on the '**Hierarchy Tree**' tab to see the multi-level Customer Assets.

5. Customer Asset Service Scheduling

Go to **Service>Customer Asset** and select the Customer Asset that was generated from sale of an Item (in Exercise 3.1). If you click on the '**Planning and History**' tab you will see that the Service Schedule attached to the Item record has been converted into a Servicing Schedule against this Asset and each service event has a planned date taken from the delivery date of the Item using the periods defined in the Service Plan. We will be using this schedule in the following exercises.

5.1. Preparation

In the above Customer Asset click on the '**Detail**' tab. On that screen you will see the following:

Checkbox '**Customer Requires confirmation of Planned Servicing**': The Customer may want reminders that the Service is scheduled so that they can confirm that the Service Date is acceptable. For our exercise you should 'check' this checkbox. This will open up the following fields, which support the Reminder function.

Days Notice Required: This is prefilled with the number of days prior to the Planned Service Date that the Customer requires to be notified. A system-wide default of **30** days is used but this can be amended and made specific to this Asset

Reminder Style: From the drop-down list select the style of reminder that will be used. The options are Phone, Email, or Letter. For our exercise select '**Email**'

Reminder Contact: From the drop-down list select the Contact at the Customer's premises. If you cannot see any contact against this Customer then they can be created on one of two ways:

- Go to **Sales>Customers** and select the Customer then click on the '**Related**' button down the right-hand side of the screen. In the drop-down list select '**Contacts**'. In the presented screen enter the Contact's details
- Go to **CRM>Contacts** and click the '**Add**' button and enter the Contact's details

Confirmation Text: The 'Confirmation Text' converts user-defined text (including specific Customer Data) into a meaningful text when output to an email. You will see that one Confirmation Text currently exists.

We are confirming the planned service of your [MD_."CUSTASSETDESCRIPTION"] ([MD_."CUSTASSETNUMBER"]) due on the [MD_."PLANNEDDATE"]. [MD_."CONTACTFIRSTNAME"] this service is for [MD_."TEMPLATEDescription"], please feel free to contact us if this time is not suitable.

Where the entries in [MD_.....] are fields that take data from the actual record being printed. The available fields are:

[MD_."CUSTASSETTYPE"] - Customer Asset Type
[MD_."CUSTASSETNAME"] - Name of Customer's Asset
[MD_."CUSTASSETNUMBER"] - Asset Identity
[MD_."CUSTASSETDESCRIPTION"] - Description of the Asset
[MD_."CUSTOMER"] - Customer Name
[MD_."PLANNEDDATE"] - Planned Service Date
[MD_."JOBTYPE"] - Type of Job required to complete the Service
[MD_."TEMPLATECODE"] Job Template that will be used to carry out the service
[MD_."TEMPLATEDescription"] - Description of the Job Template
[MD_."REMINDERCONTACTNAME"] - Contact Name held against the Asset record
[MD_."CONTACTFIRSTNAME"] - First Name of Contact (from the Customer record)
[MD_."CONTACTLASTNAME"] - Last Name of Contact (from the Customer record)

You may wish to amend the above text or create your own text by going into

Service>Settings>Confirmation Text

5.2. Service Confirmations

The next step is to review the Service Schedules against all Assets and, where the Customer requires confirmation, create the necessary reminder record.

Go into **Service>Service Confirmations** where Ostendo will show all Service Confirmations required up to the system date. Most probably the Asset that you created in 3.1. will not be in this list because the first Service Event is not due for another 3 months.

If you amend the date to include your Asset's first Service Event (i.e. Planned Service Date less the Reminder days) then you should see first scheduled Event. Select this event and click the '**Generate Reminders for selected confirmations**' button.

Whenever this button is selected then the following will happen for the various Reminder Styles

- **Email:** An email will be generated using the '**Confirmation Text**' identified against the Customer Asset.
- **Phone:** A report will be generated showing a list of all the Customers, Assets and contact details so that a telephone activity can be carried out. The Report List format is held under **File>Reporting Configuration>Report and View Developer** as '**Reminder List**'
- **Letter:** Each Customer will have a letter generated. The Letter format itself is held under **File>Reporting Configuration>Report and View Developer** as '**Reminder Letter**'

You can use the **Service>Service Confirmations** screen to monitor the status of Responses. To confirm a response and update the record select the Reminder record and click on the '**Detail**' tab. You update the Confirmation Status field and amend the confirmed

Service Date. Therefore, for your Service Reminder that you have just sent go to the 'Detail' tab and amend the following fields:

Confirmation Status: Confirmed
Confirmed Service Date: Amend to **Today's** date

5.3. Service Order Generation

The next step is to convert the Planned Service Events into Job Orders.

Go into **Service>Service Order Required** where Ostendo will show the following records whose scheduled 'Service Date' is equal to or earlier than the date selected in field **Display Service Due By**:

- Service Events that do not require Customer Confirmation
- Service Events that have been confirmed
- Service Events that have not been confirmed

You can click on the checkbox at the top of the screen to exclude the third option

You should see the Service Event that you confirmed above. If you now **Select** this and click the **Generate Job Orders for the selected Services** button then a Job Order will be generated. Go into **Jobs>Job Orders** and view the generated **Service** order which uses the 'Template' that was attached to the Service Plan schedule

5.4. Customer Asset Record update

Go back to **Service>Customer Asset** and select the Asset against which the Job Order was created. If you go to the **Planning and History** tab you will see that the generated Job Order appears in the upper part of the screen

6. Breakdown / Repair Jobs

A Breakdown and/or Repair Job can be created as a standard Job Order using a Job Type whose Job Style is **Customer Asset**. Whenever this Job Type is used the program will ask for a Customer Asset to be entered. Having created the Breakdown or Repair Order you will find that the Customer Asset's **Planning and History** screen has been updated to record this Order.

7. Warranties

If you go to **Service>Warranty List** you will also see that a Warranty record has been generated to cover the Customer Asset you created in 3.1. using the Warranty Definition that you previously viewed or created 2.3.

This Warranty record links it directly to the Sales of the Asset in addition to defining the start and end date of the Warranty coverage