

# **FLEXX<sup>®</sup>**

## **Repair & Warranty**

*Reference Manual*

**Version 7.0L0**

**Databyte**



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# Table of Contents

<b>1.0 Introduction.....</b>	<b>1</b>
1.1 About Repair & Warranty.....	1
1.2 About this Manual .....	2
1.3 Repair & Warranty Sequence of Operations .....	4
<b>2.0 Starting Repair &amp; Warranty.....</b>	<b>6</b>
<b>3.0 RW Equipment Tables.....</b>	<b>9</b>
3.1 Equipment Model Table .....	10
3.2 Manufacturer Table.....	12
3.3 Equipment Make Table.....	14
3.4 Equipment Maintenance Table .....	16
3.5 Warranty Plan Detail .....	18
3.6 Customer Equipment Maintenance.....	21
3.7 Customer Equipment Warranty Maintenance.....	24
3.8 Equipment Auxiliary Plans Maintenance .....	27
<b>4.0 Working with R/W Transactions.....</b>	<b>29</b>
4.1 RW Work Order Procedures Chart .....	30
4.2 Repair Entry/Maintenance .....	31
4.3 Work Order Text.....	38
4.4 Work Order (Parts) Detail.....	40
4.5 Serial Number List.....	47
4.6 Work Order Labor Table .....	49
4.7 Activate/Close Repair Order.....	55
4.8 Replace RW Equipment.....	56
4.9 RW Text or RW Detail/Labor Text .....	61

- 4.10 Repair Warranty Invoice Generation..... 63
- 4.11 Repair Warranty Vendor Invoice Generation ..... 66
- 4.12 Generate GL Transactions from Repair Warranty..... 68
- 4.13 Work Order Print Status Update ..... 70
- 4.14 Repair Warranty Expiration Process..... 72
  
- 5.0 OP Integration..... 74**
  - 5.1 OP Order Entry ..... 75
  - 5.2 Order Entry Cancel/Delete Processing ..... 78
  - 5.3 Repair Warranty Order Returns ..... 78
  - 5.4 Repair Warranty Equipment SKU Definition..... 80
  - 5.5 Extended Warranty SKU Description..... 83
  
- 6.0 Quotation Manager Integration ..... 85**
  - 6.1 Quote Entry ..... 86
  - 6.2 Quote Detail Entry ..... 87
  
- 7.0 Extracting Information ..... 90**
  - 7.1 Customer Equipment Maintenance..... 90
  - 7.2 Customer Equipment Warranty Maintenance..... 91
  - 7.3 Repair & Warranty Summary ..... 92
  - 7.4 Repair Warranty Equipment Customer History..... 93
  - 7.5 Search Work Order Text..... 95
  - 7.6 Printing Standard Repair & Warranty Reports ..... 97
  
- 8.0 Credit Management ..... 100**

# 1.0 Introduction

## 1.1 *About Repair & Warranty*

The Repair & Warranty module (RW) streamlines the operations of entering Repair Orders, tagging equipment, customers and warranty plans together, issuing Time Billings and generating invoices for them. Using RW you can;

- Δ Create a Repair Work Order to capture overall information as to the customer, the equipment to be repaired and any applicable warranties, with the ability to detail estimates and actual charges for parts and labor.
- Δ Have multiple billing options such as Billed on Estimate, Billed as Incurred, Billed on Completion and Not Billable.
- Δ Seamlessly create invoices in FLEXX Accounts Receivable from each Repair Work Order. Invoices can be created for both customers and the warranty manufacturer.

In summary, Repair & Warranty allows you to open a Repair Order for one customer and one piece of equipment. A warranty plan is defined and attached to the customer/equipment. Estimate and actual Work Orders can then be created to track the repair. Once the job is complete, invoices can be created for the customer keeping in mind the effect of any warranties. Invoices can also be created to bill the Warranty vendor if needed.

### **Notes**

Warranty Vendors must be set up as customers and their customer code tagged to the Vendor Master table to make use of the Invoice Warranty Vendor routine.

***RW and FLEXX***

FLEXX Repair & Warranty module (RW) is fully integrated with these FLEXX modules:

- Δ Accounts Receivable (AR) - RW uses the same Customer listings as AR to prevent double entry. Once a Time Billing is ready to be billed, an invoice is automatically created in AR.
- Δ Inventory Control (IC) - The Time Billing created from the Repair Order uses all of the SKU items defined in IC. Additional SKU's can be set up such as gen-labor to track labor units needed on each Time Billing.
- Δ Job Costing (JC) - If a Repair Order is related to a job defined in FLEXX Job Costing, the Repair Order can be “stamped” with the Job Code.
- Δ Time Billing (TB) - Once a Repair Order has been created, Repair Warranty shares many of the same screens and functionality as FLEXX Time Billing.

## **1.2 About This Manual**

***Content***

This manual describes the screens and functions in RW. It contains the following sections:

- Δ Starting RW; describes how to get into the RW module.
- Δ Working with Customer Tables; describes the screens in FLEXX Accounts Receivable used by RW to find, update and delete AR customer master tables.
- Δ Working with RW Transactions; describes the screens you use to add, find and modify RW transactions, including RW Entry, RW Text, activating a Repair Order and RW invoicing.
- Δ Extracting RW Information; describes how to print RW reports and how to perform on-screen analysis.

**Manual Conventions**

- Δ We use an asterisk (\*) to indicate wildcards. However, different database systems use different symbols for wildcards. See the table below. Ask your System Administrator which symbol to use.

Database	To Match All	To Match One
MS SQL Server	%	_ (underscore)
Oracle	%	_ (underscore)
Sybase	%	_(underscore)

- Δ Information that you enter and information that appears on the screen appears in bold type. Example: Enter **Y** in the **Begin Process?** field.
- Δ References to other sections are italicized. Example: *(See 2.0 Starting RW)*.

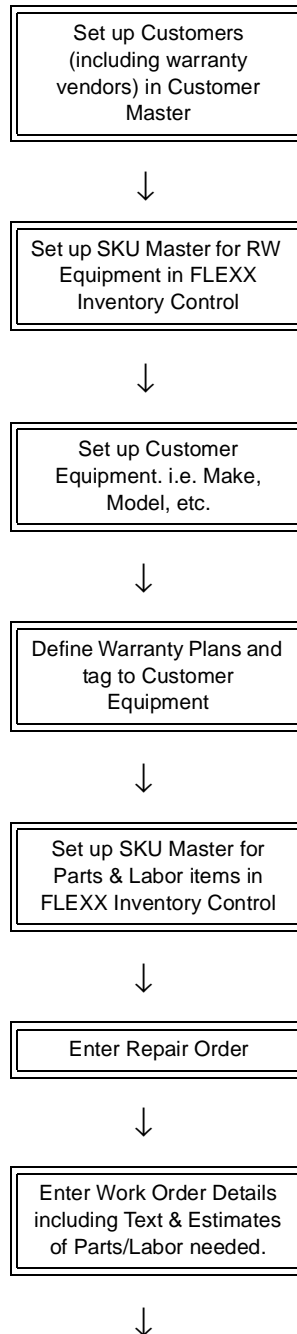
**Other FLEXX Tables Needed**

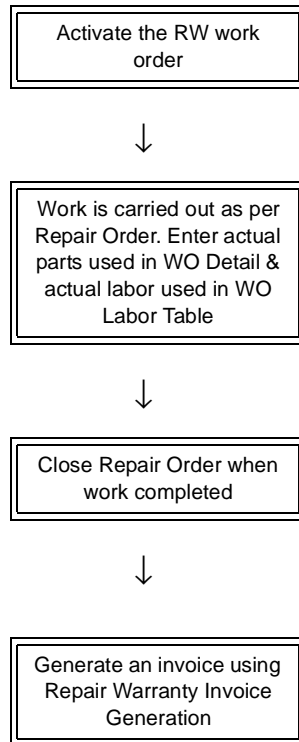
The following tables may also be needed to fully use all of the capabilities of Repair Warranty.

- Δ Company Table \*
- Δ Division Table \*
- Δ Warehouse Table \*
- Δ Salesperson Table \*
- Δ SKU Table
- Δ Employee Master \*
- Δ Tax Table \*
- Δ Vendor Master

\* See FLEXX Getting Started Manual

### 1.3 *Repair & Warranty Sequence of Operations*





*Please refer to Sec. 4.1 for the R/W Work Order Procedures sequence chart for work order procedures.*




## 2.0 Starting Repair & Warranty

### To start Repair & Warranty

Log on to FLEXX. The Session defaults screen appears.



The screenshot shows the 'Flex Control Panel' window. The title bar reads 'Flex Control Panel' and the menu bar includes 'Form', 'Edit', 'Database', 'Record', 'Field', and 'Help'. The main content area displays 'FLEXX® Client by Databyte' and 'Tucker Tape Supply, Inc.' with a date of '07/05/01' and time of '10:44'. Below this is a form with the following fields: 'Company' (tucker), 'Division' (tape), 'Date' (07/05/01), 'Period' (200107), and 'Function' (blank). There is a 'Use Batch' checkbox which is unchecked. At the bottom of the form are 'Main Menu' and 'Quit' buttons. At the very bottom of the window, it says 'PERIOD ENDING 07/31/01' and 'harry PWD'.



The screenshot shows the 'Flex Information' window. The title bar reads 'Flex Information'. The menu bar includes 'Online Data' and 'Data Warehouse'. The main content area contains a table with the following data:

Click on the Button to Display Main Flex Menu	update	not stored	record 1	of 1

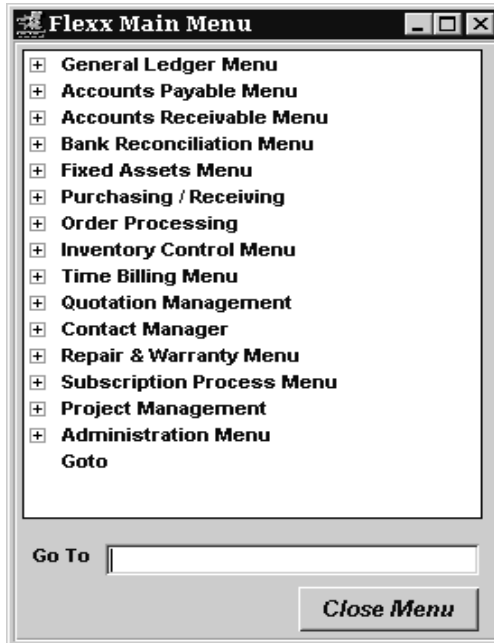
This screen lets you set up the defaults for the session. For example, if you plan to work with accounts in one company/division during a session, enter the company and division codes here. During the session, these codes appear automatically in the **Company** and **Division** fields whenever you have a blank screen or new record. You can overwrite the session defaults any time they appear on a screen.

**Fields**

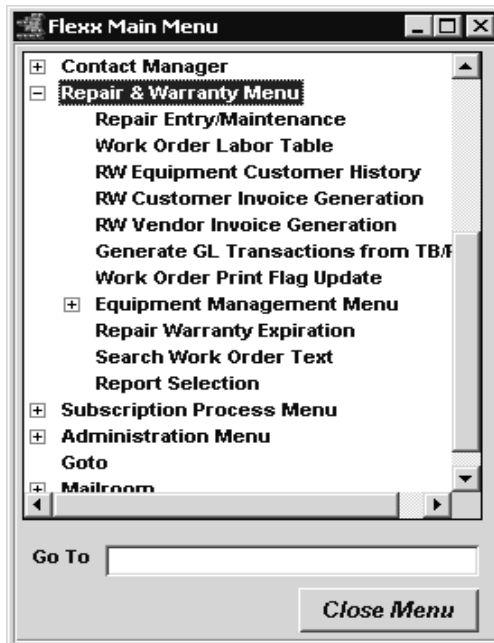
Enter the following information.

Field	Entry	Default	Reqd
Company	The default company code. Use Zoom to select from a list of companies.	Set by System Administrator	Y
Division	The default division code. Use Zoom to select from a list of divisions.	Set by System Administrator	Y
Date	The default date.	System Date	Y
Period	The default period number.	GL Period Table	Y
Use Batch	Select this option by clicking the box.  Batch control lets you group similar Contact Manager transactions together and enter, edit and post them as a whole using a unique batch number. Each Contact Manager transaction in the batch still has a transaction number.  If you selected B/C, the Batch Control screen appears when you first go to add a transaction.		Y
Function	To quickly access a specific FLEXX module, enter the code for the module, then <<press Main Menu>>.  Example: To go straight to Repair Warranty and bypass the Main Menu, type rw in this field and <<press Enter>> Twice.  See the Session Defaults section of your <i>Getting Started</i> manual for more information.		N
<b>Buttons</b>			
<b>Main Menu</b>	Access the FLEXX main menu		
<b>Quit</b>	Terminate the FLEXX session.		
<b>PWD</b>	Press this button to change both the user's Logon password and the FLEXX Authorization password (See <i>Administration Manual, User Master description</i> ).		

Press **Main Menu**. The FLEXX Main Menu appears.



Select Repair & Warranty Menu. The RW Main Menu appears.



## 3.0 RW Equipment Tables

This section describes:

- Δ The tables required to define the customers' equipment that will be serviced by your company.
- Δ The forms used to create, find, update and delete equipment and warranty records.

### **Application Control Parameters**

Repair & Warranty functionality can be optimized with the following Application Control settings. Please refer to the *FLEXX Implementation Guide* for more information on the Application Control Table.

The 'reghrs' parameter is used to define the typical length of a full work-day of an employee. This is used in the Labor Table time entry process.

Application	Type	Description	Value	Company	Parameter
wo	labor	Default Daily Hours	8 (default)	default	reghrs

Parameter 'source' is used to specify which SKU User Attribute field is to be used to define the Labor Type value on the Labor detail entry (can be 'sku\_attr2', 'sku\_attr3', 'sku\_attr4', 'sku\_attr5', 'sku\_attr6').

Application	Type	Description	Value	Company	Parameter
wo	labor	Labor Source Type from SKU	sku_attr2	default	source

Parameter 'burden' is used to define an Overhead cost (in percent) to be added to the labor cost on a work order entry

Application	Type	Description	Value	Company	Parameter
wo	labor	Labor Overhead Burden %	30 (default)	default	burden

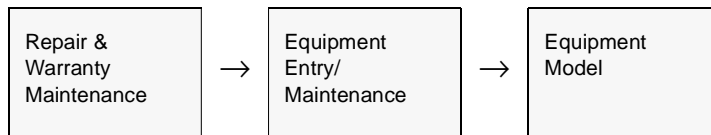
### 3.1 Equipment Model Table

**Description**

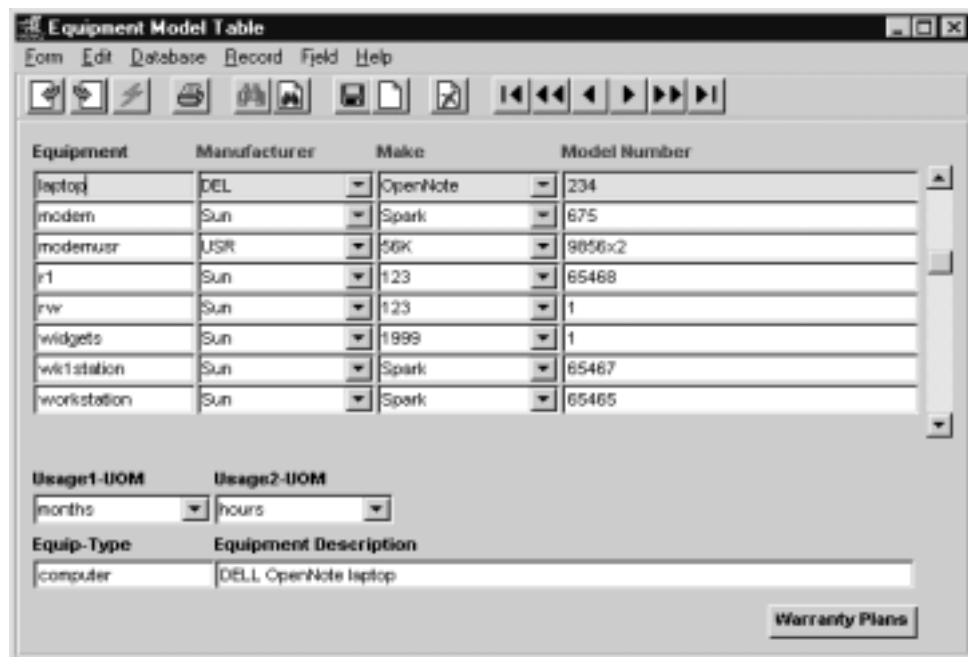
The Equipment Model Table is used to define all the customers' equipment that your company will provide services for. The equipment item is defined with the Manufacturer name and Make and Model numbers.

The corresponding Manufacturer code and Make code must first be defined in the associated Master Types Tables (*see the following sections for detailed descriptions*).

**Select**



The Equipment Model Table appears in Update mode.



**Fields**

The following fields appear on the screen.

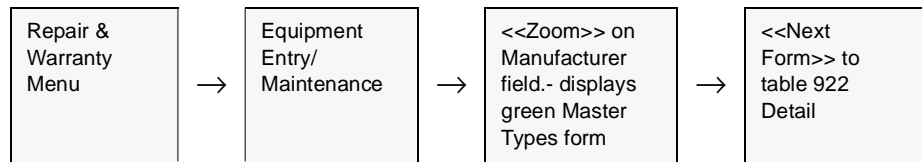
Field	Entry	Default	Reqd
Equipment	A user defined code to identify the customer equipment. If the equipment is also sold to the customer using FLEXX Order Processing, it will be the FLEXX SKU code defined in Inventory Control SKU Master.		Y
Manufacturer	The manufacturer of the customers' equipment. Should the manufacturer defined here not already exist as a manufacturer within FLEXX Repair & Warranty a message prompt will appear "Invalid manufacturer code. Do you want to add to existing list? Y/N" If Yes is selected the new manufacturer will be added to the Manufacturer Type Master Table.		Y
Make	The make of the equipment to be repaired. If this is a new make, when <<Add/Update>> is selected an error message will appear "Invalid Make code. Do you want to add to existing list? Y/N" Select Yes to add the Make to the Make Type Master Table.		Y
Model Number	The particular model number of the equipment to be maintained.		Y
Usage 1 UOM	Unit of measure to track how much usage the equipment has had; e.g. "miles" for an automobile tracked based on miles driven.		N
Usage 2 UOM	Secondary unit of measure to track usage from another aspect; e.g. "months" for an automobile also tracked based on months used.		N
Equipment Type	An additional field to further classify and group the type of equipment to be repaired. This is a user-defined field only.		N
Equipment Description	A further description of the equipment to be repaired.		N
Warranty Plans button	Press this button to display the Warranty Plan Detail table (See Sec. 3.4)		

### 3.2 Manufacturer Table

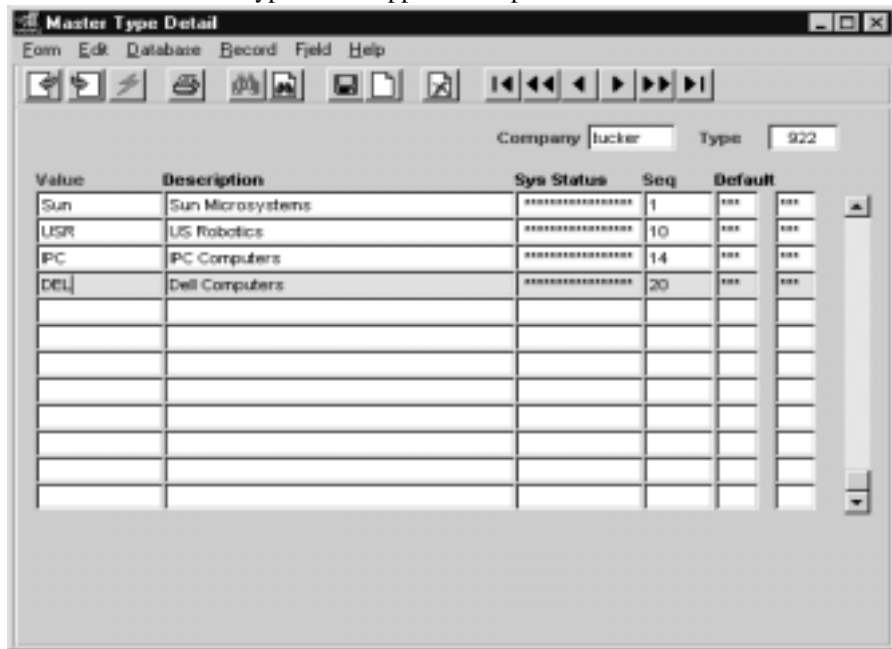
**Description**

The Manufacturer Table is a Master Type table (Type code 922) (See *Getting Started manual, Sec. 1.5*). This table needs to be predefined or updated with the Manufacturer code before that manufacturer can be used in RW.

**Select**



The Manufacturer ‘Type’ Table appears in Update mode.



**Fields**

The following fields appear on the Manufacturer Table.

Field	Entry	Default	Reqd
Company	The company code.	Session Default	Y
Type	The Master Type Table code value - will be '922'.	922	Y
Manufacturer	The manufacturer code of the equipment. Should the manufacturer entered here not already exist, an error message will appear "Invalid manufacturer code. Do you want to add to existing list? Y/N". Select Yes to have the new manufacturer automatically added to the table.		Y
Description	Description field to provide additional information about the make of equipment.		N
Sys Status	Not Used		
Seq	Any numerical value that FLEXX will then use to sequence the entries when being displayed.	0	N
Default	If an entry is to be the default on future entries of the Equipment Model Table, set this to Y.		N

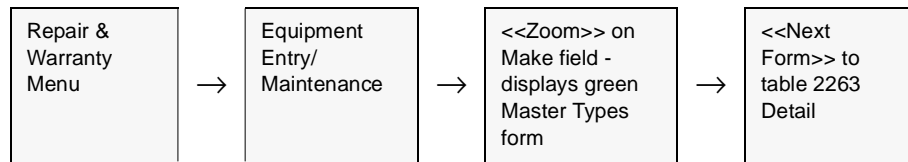


### 3.3 Equipment Make Table

#### Description

The Equipment Make Table is a Master Type table (Type code 2263) (See *Getting Started manual, Sec. 1.5*). This table needs to be predefined or updated with the Make code before that make can be used in RW.

#### Select



The Equipment Make Table appears in Update mode.



**Fields**

The following fields appear on the Equipment Make Screen.

Field	Entry	Default	Reqd
Company	The company code.	Session Default	Y
Type	The Master Type Table code value - will be '2263'.	2263	Y
Make	The user-defined Make code of the equipment.		Y
Description	Description field to provide additional information about the make of equipment.		N
Sys Status	Not Used		
Seq	Any numerical value that FLEXX will then use to sequence the entries when being displayed.	0	N
Default	If an entry is to be the default on future entries of the Equipment Model Table, set this to Y.		N

### 3.4 Equipment Maintenance Table

**Description**

The Equipment Maintenance form is used to enter maintenance details on customer equipment maintained by your company. It links the equipment with its serial number to the customer code, as well as various other parameters.

You can manually enter the detail records as required. FLEXX will also automatically create detail entries as RW equipment is sold through FLEXX Order Processing or quoted through FLEXX Quotation Manager.

**Select**



The Equipment Maintenance Table appears in Update mode.

The screenshot shows the 'Equipment Maintenance' window with a menu bar (Form, Edit, Database, Record, Field, Help) and a toolbar. Below the toolbar, there are radio buttons for 'Source' (Quote, Order, Manual) and a 'Company' field set to 'hucker'. The main area contains a table with the following data:

Equipment	Equipment-Serial-Number	Current Customer	Purch-dt	Status	Text
modemusr	Ord2904-1-2	remco	08/25/00	c	N
modemusr	Ord2904-1-1	remco	08/25/00	c	N
modemusr	9912345	remco	01/01/00	f	N
modemusr	9856x2	remco	08/29/98	a	N
modemusr	33333	remco	08/21/00	a	N
modemusr	33332	remco	08/21/00	f	N
modemusr	33331	remco	08/21/00	a	N
modemusr	33330	remco	12/09/98	a	N
modemusr	2000102710	remco	10/27/00	f	N
modemusr	2000102709	remco	10/27/00	f	N

Below the table is the 'Equipment Description' field containing '56k X2V 90 modem'. Further down are fields for 'Equipment ID #', 'Tag #', 'Unit ID', and 'Not In Use'. At the bottom, there are 'Primary-Usage' and 'Secondary-Usage' sections with input fields for hours and months, and a 'Customer Equipment' button.

**Fields**

The following fields appear on the screen

Field	Entry	Default	Reqd
Company	The Company Code	Session Default	Y
Source	These flags will indicate how the record was initially entered. <ul style="list-style-type: none"> <li>• Quote - entered from a Quote order (Quotation Manager).</li> <li>• Order - entered from a Sales order (Order Processing)</li> <li>• Manual - record entered manually.</li> </ul>	System Generated	Y
Equipment	Equipment code as defined in Equipment Model Table.		Y
Equipment Serial Number	The serial number of each item. This will either be manually entered, or will be copied from either the Quote or Sales order.		Y
Current Customer	The customer code ( <i>See Getting Started Manual</i> ) for the customer who owns this item. The customer code must be predefined before it can be entered here.		Y
Purch Dt	The purchase date of this equipment.	OP order	Y
Status	The equipment maintenance status may be <ul style="list-style-type: none"> <li>• <b>a</b> - Active - this maintenance plan is active/.</li> <li>• <b>c</b> - Commit - on Open order, not yet Released/Shipped.</li> <li>• <b>e</b> - Expired - warranty has expired.</li> <li>• <b>r</b> - Returned - returned via OP Order Return</li> <li>• <b>p</b> - Replaced - replaced via RW Replacement process.</li> <li>• <b>q</b> - Quotes - on Open quote order.</li> <li>• <b>x</b> - Cancelled</li> </ul>	a	Y
Text	This field indicates (Y/N) if there is underlying text for this record. <<Zoom>> on the field to add or display text in the Text table ( <i>See Sec. 4.9</i> ).		
Equipment Description	Full description of the equipment defined in the Equipment field.	Equipment Model Table	N
Equipment ID# Unit ID Tag # Not in Use	These are 4 user-definable fields, and any desired value can be entered. The labels of each field can be defined as desired by accessing the specific Master Type table and changing the Heading field value ( <i>See Getting Started manual, Sec. 1.5</i> ).		N
Primary Usage	Unit of measure to track the amount of usage the piece of equipment has had.	Equipment Model Table	N
Secondary Usage	Secondary unit of measure of usage.	Equipment Model Table	N
<b>Customer Equipment</b>	Press this button to display the Customer Equipment Maintenance form ( <i>See Sec. 3.6</i> ) used to link the actual piece of equipment to the customer.		

### 3.5 Warranty Plan

**Description**

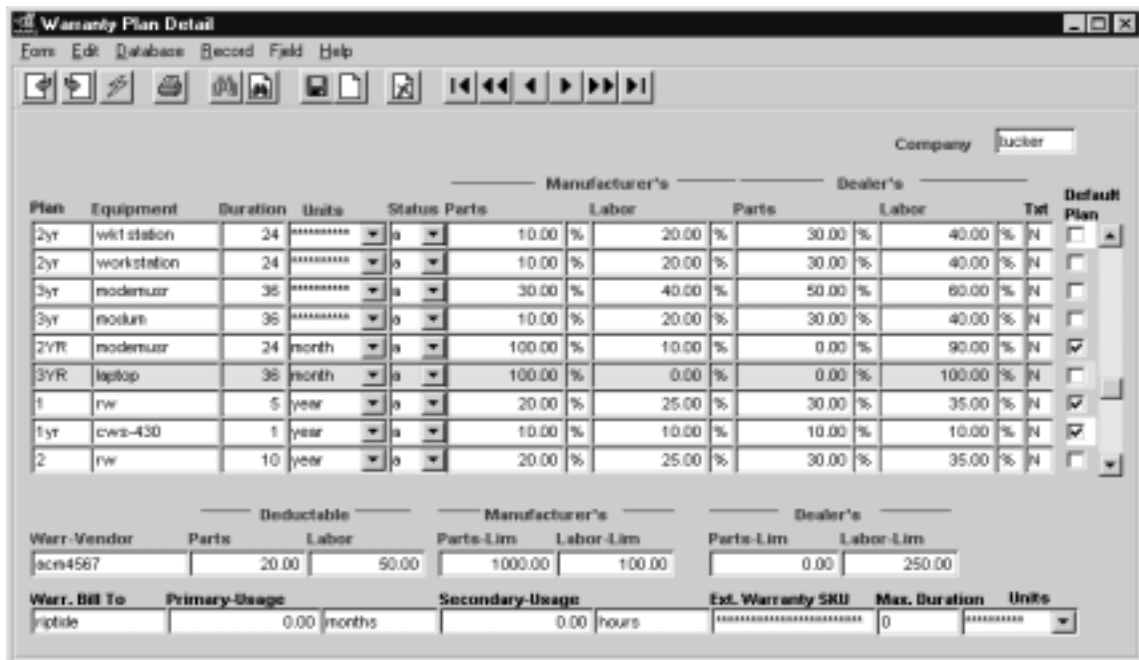
Use the Warranty Plan Detail screen to:

- Δ Add new warranty plans and tag them to specific equipment.
- Δ Review all warranty plans and the respective equipment to which they relate.
- Δ Change the values and status of a warranty plan.

**Select**



The Warranty Plan Detail screen appears in Update mode.



The amount of the Manufacturer/Dealer warranty that has been applied to a specific piece of equipment is tracked on the Customer Equipment Warranty Maintenance form (See Sec. 3.7). Once the maximum amount of the warranty has been used, no further warranty coverage will be extended.

**Fields**

The following fields appear on the screen.

Field	Entry	Default	Reqd
Company	The Company Code.	Session Default	Y
Plan	User defined code to identify each Warranty Plan.		Y
Equipment	The equipment to be "tagged" to the Warranty Plan.		Y
Duration	The duration of the Warranty Plan in the unit of measure defined in the Units field.		Y
Units	The Duration units of the plan; i.e. day, month, year, manual, etc.		Y
Status	The status of the Warranty Plan can be <ul style="list-style-type: none"> <li>• a - Active.</li> <li>• e - Expired.</li> <li>• x - Cancelled.</li> </ul>	a	Y
Manufacturer's Parts & Labor	Percentages used by RW Invoice Generation to determine what portion of the parts and labor is to be billed to the customer and what portion is to be billed to the manufacturer.		N
Dealer's Parts & Labor	Percentages used by RW Invoice Generation to determine what portion of the parts and labor is to be billed to the customer and what portion is covered by the dealer.		N
Text	This field indicates (Y/N) if there is underlying text for this record. <<Zoom>> on the field to add or display text in the Text table (See Sec. 4.9).		N
Default Plan	Mark this flag if this is the default warranty plan for this equipment item. On entry of the equipment on the Customer Maintenance Table (See Sec. 3.6) or sales order (via OP), this will then be the plan selected for that item, and can be changed if desired.		N
Warranty Vendor	The code defined for the vendor (See <i>Getting Started Manual - Vendor Master</i> ) providing the manufacturer's warranty. There exists functionality in FLEXX Repair & Warranty to create an invoice to the Warranty Vendor. This invoice is billing him for the warranty component of any services provided to a warranty customer. For this functionality to work the warranty vendor code is entered here. The Vendor is then also set up as a customer (See <i>Getting Started Manual - Customer Master</i> ). It is then necessary to link the two through the use of the AR Customer Code field on the Vendor Master. If this A/R Customer Code has not been defined, an error "Vendor customer code is blank or null" will appear.		Y
Deductible Parts & Labor	The <u>Manufacturer's</u> warranty deductible for Parts & Labor. This amount will be used on each repair order.		N
Manufacturer's Coverage Limits	The limit of coverage provided by the manufacturer's warranty for parts and labor. Each is defined and used separately. Once the usage (recorded on the Customer Equipment Warranty Maintenance table - Sec. 3.7) has reached the limit, no further charges will be billed to the vendor.		N

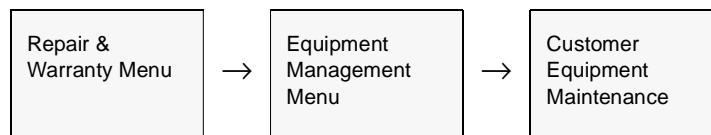
Field	Entry	Default	Reqd
Dealer's Limited Coverage	The limit of coverage provided by the dealer's warranty for parts & labor.		N
Warranty Bill To	The A/R Customer Code representing the warranty vendor. This represents the company that will be invoiced as a result of running the RW Vendor Invoice Generation Routine (See Sec. 4.11).	Vendor Master	Y
Primary & Secondary Usage	Unit of measure to track the usage of the equipment. User defined field, not used by FLEXX.		N
Ext Warranty SKU	The SKU code for extended warranty. This code needs to be predefined in the SKU Master as non-logical, non-inventory, non-tangible.		N
Max. Duration	The maximum duration of the extended warranty in the unit of measure of the Units field.		N
Units	The units of the max. duration; i.e. month, year, etc.		N

### 3.6 Customer Equipment Maintenance

**Description**

The Customer Equipment Maintenance table is used to link the customer and equipment to a predefined warranty plan (See Sec.3.5). All previously described tables need to have been defined before the equipment can be entered here.

**Select**



The Customer Equipment Maintenance table appears in Update mode.



**Fields**

The following fields appear on the screen.

Field	Entry	Default	Reqd
Source Quote/Order/ Manual	These flags will indicate how the record was initially entered. <ul style="list-style-type: none"> <li>• Quote - automatically entered from a Quote order (Quotation Manager).</li> <li>• Order - automatically entered from a Sales order (Order Processing)</li> <li>• Manual - record entered manually.</li> </ul>	System Generated	Y
Company	The Company Code.	Session Default	Y
Customer	The code and name of the customer for which maintenance record is entered.		Y
Equipment	The Equipment code of the equipment to be repaired.		Y
Equipment Serial Number	The serial number of each item. This will either be manually entered, or will be copied from either the Quote or Sales order.		Y
Warranty Contract	The Warranty number of the warranty plan applicable to this piece of equipment.		N
Plan	The Warranty plan applicable to the equipment to be repaired. (See Sec.3.4)		Y
Purchase Date	The date of purchase of the equipment.	Repair Entry Header	Y
Order No.	The Order or Quote number that created this entry. If manually entered, this will be 0 (zero). You can <<zoom>> on this field to access the sales order in OP.	0	Y
Equip. Ph #	The telephone number for the location where this equipment is housed.		N
Status	The status of this maintenance record. The status may be <ul style="list-style-type: none"> <li>• <b>a</b> - Active - this maintenance plan is active/.</li> <li>• <b>c</b> - Commit - on Open order, not yet Released/Shipped.</li> <li>• <b>e</b> - Expired - the item warranty is expired.</li> <li>• <b>r</b> - Returned - returned via OP Order Return</li> <li>• <b>p</b> - Replaced - replaced via RW Replacement process.</li> <li>• <b>q</b> - Quotes - on Open quote order.</li> </ul>	a	Y
Text	This field indicates (Y/N) if there is underlying text for this record. <<Zoom>> on the field to add or display text in the Text table.	N	N
<b>Equipment Descriptor</b>			
Type	User defined code identifying the equipment type.	Equipment Model	N
Manufacturer	User defined manufacturer code of the equipment.	Equipment Model	N

Field	Entry	Default	Reqd
Make	The make of the equipment.	Equipment Model	N
Model	The model of the equipment.	Equipment Model	N
Elec.Serial # Unit ID Tag # Not in Use	User defined fields as defined on the Equipment Maintenance Table (Sec. 3.4).	Equipment Maintenance Table	N
Description	Equipment description.	Equipment Maintenance	
<b>User Defined Fields</b>			
Phone Plan Dispatch Plan Promo Field 1 SVC Ref. Dispatch ID Talk Group Field 2	These are user-definable fields that can have any user-desired values. All values to be entered will need to be predefined in the Master Type table.  The labels of each field can be re-defined as desired by accessing the specific Master Type table and changing the Heading field value (See <i>Getting Started manual, Sec. 1.5</i> ).		N
<b>Buttons</b>			
Open W.O.	Press this button to either create a new RW Work Order for this item, or display the WO if one is already open for this equipment.		
AUX Plan	Press this button to display the Equipment Auxiliary Plans Maintenance form (See Sec. 3.8)		
Customer Wrtly Plan	Press this button to display the Customer Equipment Warranty Maintenance screen for the specific warranty plan for this equipment (See Sec. 3.7).		

## 3.7 Customer Equipment Warranty Maintenance

### Description

The Customer Equipment Warranty Maintenance screen summarizes the Warranty information applicable to each piece of equipment for a specific customer. This screen tracks:

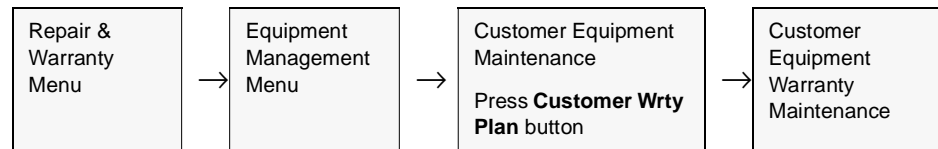
- Δ The piece of equipment by serial number.
- Δ Effective dates for the warranty.
- Δ Any manufacturer/dealer warranty that has already been utilized.

Once the maximum amount of the warranty has been applied to a specific piece of equipment, no further warranty coverage will be extended.

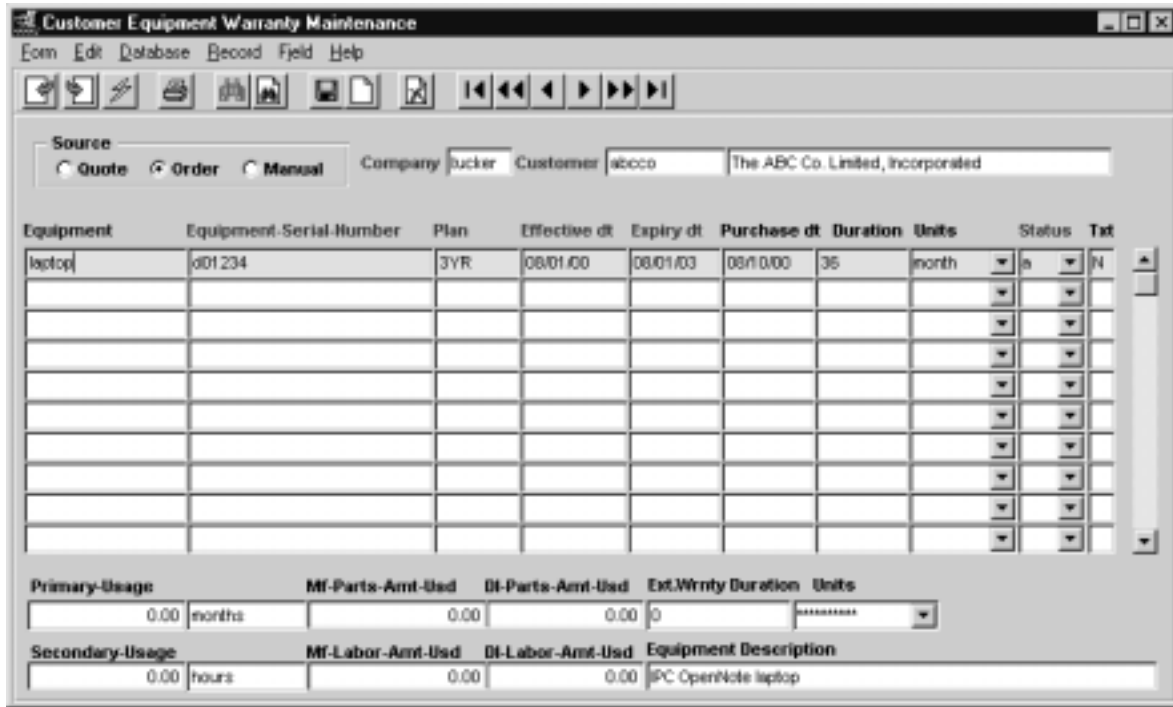
### Notes

FLEXX will create entries to the Customer Equipment Warranty Maintenance table as the Customer Equipment Maintenance table (*See Sec. 3.3*) is entered. You can make changes to the records as required.

### Select



The Customer Equipment Warranty Maintenance screen appears in Update mode.



**Fields**

The following fields appear on the screen.

Field	Entry	Default	Reqd
Source Quote/Order/ Manual	These flags will indicate how the record was initially entered. <ul style="list-style-type: none"> <li>• Quote - entered from a Quote order (Quotation Manager).</li> <li>• Order - entered from a Sales order (Order Processing)</li> <li>• Manual - record entered manually.</li> </ul>	Customer Equipment Maintenance	Y
Company	The Company Code.		Y
Customer	The customer code and name for whom the warranty maintenance is provided.		Y
Equipment	Equipment code as defined in Equipment Model Table.		Y
Equipment Serial Number	The serial number of the item. This will either be manually entered, or will be copied from either the Quote or Sales order.		Y
Plan	The warranty plan that applies to the equipment.		Y
Effective Date	The starting date the warranty is effective.	System Generated	Y

Field	Entry	Default	Reqd
Expiry Date	The expiry date of the warranty plan. This is based on the duration of the Warranty Plan as defined in the Warranty Plan Detail (See Sec 3.4), plus any Extended Warranty, and the date of purchase as defined on the Equipment Maintenance (See Sec 3.3)	System Generated	Y
Purchase Date	The date of original purchase of the equipment.	Equipment Maintenance	N
Duration	The effective duration for the warranty in the unit of measure defined in the Units field.	Equipment Maintenance	N
Units	The Duration units of the plan; i.e. day, month, year, manual, etc.	Equipment Maintenance	
Status	The Status can be <ul style="list-style-type: none"> <li>• a - Active.</li> <li>• e - Expired - the item warranty is expired.</li> <li>• x - Cancelled - the item has been cancelled.</li> </ul>	a	Y
Text	This field indicates (Y/N) if there is underlying text for this record. <<Zoom>> on the field to add or display text in the Text table (See Sec. 4.9).	N	N
Primary Usage	Unit of Measure to track the Primary usage limit of the piece of equipment.	Customer Equipment Maintenance	N
Mf - Parts - Amt - Usd	The amount of the manufacturer's parts warranty used so far. This field is updated as a result of running the Invoice Generation routine (See Sec. 4.10).	System Generated	N
DI - Parts - Amt - Usd	The amount of the dealer's parts warranty used so far. This field is updated as a result of running the Invoice Generation routine (See Sec. 4.10).	System Generated	N
Ext.Wrnty Duration	The duration of any extended warranty in the unit of measure defined in the Units field; must be manually entered.		N
Units	The Duration units of any extended warranty; must be manually entered; i.e. day, month, year, manual, etc.		N
Secondary Usage	Unit of Measure to track the Secondary usage limit of the piece of equipment.	Customer Equipment Maintenance	N
Mf - Labor - Amt - Usd	The amount of the manufacturer's labor warranty used so far. This field is updated as a result of running the RW Invoice Generation routine (See Sec. 4.10).	System Generated	N
DL - Labor - Amt - Usd	The amount of the dealer's labor warranty used so far. This field is updated as a result of running the RW Invoice Generation routine (See Sec. 4.10).	System Generated	N
Equipment Description	The full description of the equipment.	Equipment Maintenance	N

### 3.8 Equipment Auxiliary Plans Maintenance

**Description**

Use the Equipment Auxiliary Plans Maintenance form to record additional service plans for a piece of equipment.

**Notes**

This data is not used by FLEXX but is only provided as supplementary service information applicable to this equipment.

**Select**



Customer	Equipment	Equipment-Serial-Number	Aux.Plan	Txt
rencq	inodemusr	9912345	AUXPLAN1	Y

**Fields**

The following fields appear on the screen.

Field	Entry	Default	Reqd
Company	The Company Code	Session Default	Y
Customer	Customer code owing equipment for this plan.	Customer Equipment Maint.	Y
Equipment	The equipment this plan is for.	Customer Equipment Maintenance	Y
Equipment Serial Number	The Serial Number of the piece of equipment.	Customer Equipment Maint.	Y
Aux. Plan	The Auxiliary service plan code as pre defined on the Auxiliary Plans master type table (Table Code 2279)		Y
Text	This field indicates (Y/N) if there is underlying text. Zoom on the field to view/add any text data.	N	N

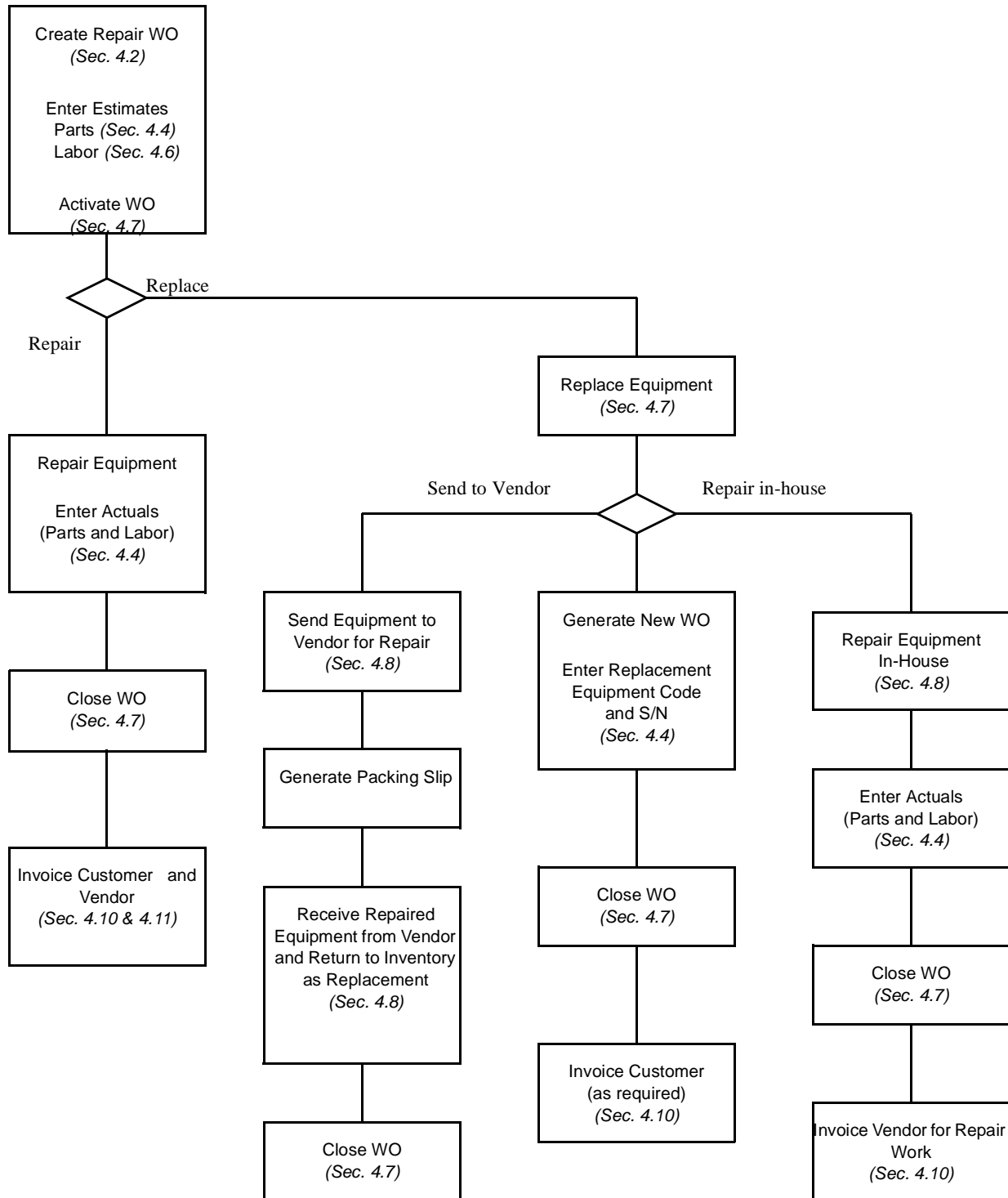
## 4.0 Working with R/W Transactions

This section describes:

- Δ The screens used to add, find, update and delete R/W work order (also called Repair Order) transactions.
- Δ How to activate, close and invoice a Repair Order.
- Δ How to enter estimates and actual expenses for parts & labor.
- Δ The use of different kinds of billing types.
- Δ The procedure to Replace R/W equipment.
- Δ The procedure to Return to Vendor R/W equipment.
- Δ The procedure to Repair-in-House the R/W equipment.



### 4.1 R/W Work Order Procedures Chart



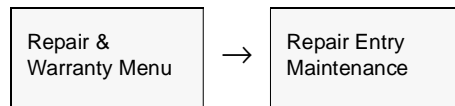
## 4.2 Repair Entry/Maintenance

### Description

Use the Repair Entry/Maintenance screen to:

- Δ Add, modify, delete Repair work orders. For each Repair order undertaken, a Repair Entry/Maintenance header screen is created with such information as the customer, the equipment to be repaired and any applicable warranty plans. Once this information has been created, further details are entered, estimates and actuals, through the use of Work Order Detail (Parts) and Labor screens.
- Δ Find Repair Entry transactions by entering selection criteria.

### Select



The Repair Entry/Maintenance screen appears in FIND Mode. To add a new transaction press <<Clear to Add>>.

**Fields**

Enter the following fields appear on the Repair Entry/Maintenance Screen.

Field	Entry	Default	Reqd
Company	The Company Code	Session Default	Y
Division	The Division Code	Session Default	Y
WO #	The number of the resulting work order created to perform the repair work. When adding a new repair order, press Enter to let the system autogenerate a number.	System Generated	Y
Order Date	The date the Repair Order was opened.	Session Default	Y
Customer	The customer code and name that the repair order is created for.		Y
Equipment	The code and description of the equipment to be repaired (See Sec.3.1)		Y
Equipment Serial #	The serial number of the equipment to be repaired (See Sec. 3.4). This serial number may be from equipment originally tracked by the serialized inventory in FLEXX Inventory Control. If the serial number is a new one not tracked by FLEXX Inventory Control, a message prompt will be displayed "Invalid entry - equipment code not found", and will first need to be entered into the Equipment Maintenance screen (See Sec. 3.4).		Y
Customer P/O #	The customer's Purchase Order number (if applicable). It is possible through the use of FLEXX Application Control to make this a required field (See FLEXX Implementation Guide for more information).		N
<b>Text</b>	Press the Text button to add or display text in the Text table (See Sec. 4.9). If there is underlying text, the button will be lit.		
Bill To Location	Address to which the resulting invoice will be sent.	Customer Master Table	Y
Ship To Location	Location to which the item(s) worked on will be sent.	Customer Master Table	Y
<b>Buttons</b>			
<b>Activate Repair Order</b>	Press this button to activate the RW work order. Once it is active, the button will be labelled "Close Repair Order". Pressing it will close the order (change status to "c")		
<b>Replace Equipment</b>	This button will be active only when the order has been activated. Press the button to initiate the Replace Equipment process (See Sec. 4.8).		
<b>Send to Vendor For Repair</b>	If the "Replace Equipment" button has been pressed, the "Close Repair Order" button will relabelled "Send to Vendor for Repair". Press the button to initiate the Send to Vendor process (See Sec. 4.8).		
<b>Complete In-House Repair</b>	If the "Replace Equipment" button has been pressed, the button "Send to Vendor for Repair" button will relabelled "Complete In-House Repair". Press the button to initiate the Repair In-House process (See Sec. 4.8).		
<b>Credit</b>	Press the Credit button to release the order from Credit Hold. Only a "credrels" authorized person can release the credit hold. See the FLEXX Administration Guide for further information.		
Printed?	This box is checked when the repair order has been printed. If it is necessary to reprint a Repair Order use the Print Status Update routine. (See Sec. 4.13)	N	Y

Field	Entry	Default	Reqd
Print	Press the Print button to print the Repair Order. If the order has been printed, the button will be inactive. This is not the WO Proposal. If the Proposal is needed, you will need to select it from the RW Report Selection screen.		

Select the Financial Tab to view/enter the following. Note that the Repair Order has been activated.

Bill Type	<p>The Repair Warranty Order may have the following Bill Types:</p> <ul style="list-style-type: none"> <li>• <b>bc</b> - Billed on Completion. The RW detail lines will not be invoiced until the Repair Order has a status of "c" - Complete.</li> <li>• <b>be</b> - Billed on Estimate. To be used where a fixed price quote (estimate) is needed. The WO details can be invoiced for the estimated parts and labor items after the RO has a status of "c" - Complete.</li> <li>• <b>bi</b> - Billed as Incurred. The WO detail lines can be invoiced on a periodic basis as selected using the RW Invoice Generation Routine (See Sec 4.10).</li> <li>• <b>nb</b> - Not Billable. Work Orders with this status are ignored by the WO Invoice Generation routine.</li> <li>• <b>rp</b> - Equipment Replaced. Result of pressing "Replace Equipment" button.</li> <li>• <b>bv</b> - Repair In-House and Bill Vendor. The equipment will be repaired in-house and the Vendor will be invoiced for all repairs (parts and labor).</li> <li>• <b>sv</b> - Send To Vendor for Repair. WO status after pressing "Send to Vendor" button.</li> <li>• <b>rc</b> - Received from Vendor after Repair. Result of pressing the "Receive from Vendor" button. WO will also be marked Complete (status "c").</li> </ul> <p><b>Note: It is possible to have an initial status of one billing type, i.e. bc and change it to be.</b></p>	bc	Y
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Field	Entry	Default	Reqd
Invoiceable	End user marking routine to be used during the Repair Order Invoice Generation routine. If this field is selected this Repair Order will be included as part of the Invoice Generation procedure and will be invoiced. (See Sec. 4.10).	SKU Master Attributes	
P/ST Payable	Select this field if the Repair Order is subject to Provincial/State taxation.  This flag acts as a setting to be carried down to each detail line in Work Order Detail (See Sec.4.4) and Labor (See Sec.4.6). If the Repair Order is subject to taxation, FLEXX looks to the tax jurisdictions and rates as defined on the customer ship to location (See Getting Started Manual) The resulting tax is calculated when the RW Invoice Generation routine (See Sec.4.10) is used and displayed on the invoice in FLEXX Accounts Receivable.	Customer Master Table	
Price Type	Code for the type of pricing that the customer is eligible for as defined on the FLEXX Inventory Control SKU Price Table.	Customer Master Table	N
Discount	Works in conjunction with the Customer Discount Table (See Getting Started Manual) and the Discount Code assigned to the SKU on the SKU Master (See FLEXX Inventory Control Manual). Used to assign discounts based on SKU Types, SKU Codes and Customers.	Customer Master Table	N
COD	Click this box if the Repair Order is COD.		N
VAT Type	• Y - Yes, if the Repair Order is subject to VAT/GST.	Customer Master Table	
Currency	The currency the customer does business in and the resulting invoice will be denominated in.	Customer Master Table	Y
Sales Rep	Code for the salesperson responsible for the sale. This information is eventually transferred to the resulting invoice in FLEXX Accounts Receivable where it is used as part of sales analysis queries.	Customer Master Table	Y
Order Total	The total cost of the Repair Order excluding all taxes. This total displayed is dependent upon whether the Repair Order has a billing type of "be" - Billed on Estimate or not. If the Repair Order has a "be" status the amount displayed equals the total of the <u>estimated</u> parts and labor. For all other billing types the amount displayed is the total of the <u>actual</u> parts and labor.	System Generated	N
Status	The Repair Order may have the following status:  • o - Open. All RO's initially start with this status code. With the RO in this status, only estimate parts and labor items can be entered. Once the RO has been activated the status changes to "a" active. End users can manually change an "o" -open Repair Order to one of the following; "ch" - customer hold or "cn" - cancelled.  • a - Active - Repair Order Released. A Repair Order is activated by pressing the Activate Repair Order button on the Repair Order header record. Once a Repair Order has been activated it can not be reset to an "o" - open status again and no further estimates can be entered. After a Repair Order has been activated, actual parts and labor can be entered. End user can manually change an "a" - active Repair Order to one of the following; "ch" - customer hold or "cn" cancelled.		

Field	Entry	Default	Reqd
Repair Order Status (Contd)	<ul style="list-style-type: none"> <li>• <b>c</b> - Complete. A Repair Order is marked complete by pressing the close Repair Order button on the Repair Order header record once all of the detail lines have been invoiced. A completed Repair Order cannot be changed to any other status.</li> <li>• <b>in</b> - Invoiced. A Repair Order is marked as invoiced only after all of the Repair Order detail lines have been invoiced through the use of the RW Invoice Generation routine (See Sec.4.10). No end-user access.</li> <li>• <b>cr</b> - Credit Hold. When a Repair Order is created, FLEXX compares the amount of the credit limit set for the customer (See <i>Getting Started Manual</i>) and the current outstanding balance. If there is no credit or insufficient credit available, a message will appear "Customer has \$'s 30 days, \$'s 60 days overdue. OK" Press OK and the Repair Order is marked with a status of "cr" and only Estimate parts or labor can be entered. No Actuals can be entered. To release a "cr" - credit hold status, press the Credit button. FLEXX will display the Credit Hold Release screen where an authorized user can enter his id and password and the Repair Order will be released from credit hold. Any subsequent entry in the Detail or Labor forms will again result in the order going into "cr" status.</li> <li>• <b>ch</b> - Customer Hold. This is a status to manually put a Repair Order on hold at the request of the customer. A Repair Order with this status will not allow any further entry of parts and labor. A Repair Order with a "ch" status can be manually returned to an "o" - open status if there are no "a" - active records. A Repair Order with active records can be manually reset to a status of "a" - active.</li> <li>• <b>cn</b> - Cancelled. This is an end-user status that can be manually applied to any Repair Order's that are not complete or have not been invoiced. This status can be changed at anytime. A Repair Order with a cancelled status will not have any further parts or labor assigned to it. To assign a "cn" - cancelled status to a Repair Order header, all of the Repair Order detail lines must also have a status of "cn" - cancelled.</li> <li>• <b>rh</b> - RMA Hold. This is the status of the Repair Order when it has been created by an RMA, and the return item has not yet been received. After receiving the item on the RMA form, the status will be changed to "o".</li> </ul>		
Payment	The payment Type (cash, visa, etc.) and Number that the customer will normally use. These fields are copied from the Customer Master Financial form and can be changed as desired.	Customer Master Table	N
Entered by	The ID of the user creating the Repair order, and the date it was created. This is the system date, not the order date.	System Generated	

Field	Entry	Default	Reqd
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The Tracking Tab may be selected to view/enter the following:

Warranty Plan	The Warranty Plan assigned to the equipment to be repaired. If the warranty plan entered has not been set up with the equipment designated, a message prompt will appear "No active warranty plan for this equipment". It will then be necessary to update the Customer Equipment Maintenance records with this information (See Sec.3.6).	Customer Equipment Maintenance	Y
Status	The status of the equipment warranty plan. This will be the status set on the Customer Equipment Warranty Maintenance form.	Customer Equipment Warranty Maintenance	Y
Expires	The warranty plan expiry date.	Customer Equipment Warranty Maintenance	Y
Usage	The Primary and Secondary usage Unit of measure to track how much usage the piece of equipment has had.	Equipment Maintenance	N
Vendor's RMA #	The warranty vendor's RMA (Return Material Authorization) number assigned to the equipment being returned to the vendor. This field is only available after Replace Equipment has been completed.		N
Dates: Required	The date the Repair Order should be completed.	Session Default	Y
Activated	Date the Repair Order has been activated (by pressing the Activate Repair Order button), updated automatically by FLEXX.	System Generated	
Source: Manual	The Repair Order has been manually entered.	Y	

Field	Entry	Default	Reqd
Replace	The Repair Order is the result of a Replacement operation from another Repair Order. The Document field will display the original order number.		
RMA	The Repair Order is the result of a customer return via an RMA. The Document field will display the RMA number.		
Document	The source document number if not Manual.		
Whse	Default warehouse which is also carried over to the repair order detail lines. If any parts are needed for the repair order, the inventory will be relieved from this warehouse. (See Sec. 4.0)	Company Division Table	Y
Shipment Carrier	The preferred carrier used to ship the repaired item(s).	Customer Ship To	N
Job Code	The related Job Code set up in FLEXX Project Management (formerly Job Costing).		N
Priority	The priority of the Repair Order. This is a user defined setting and has no effect on FLEXX processing.		N
Comment	End-user comment field to give an overall description of the repair order. When the RW Invoice Generation routine is used (See Sec. 4.10) it checks this comment field. If any text is found, that text is used on the resulting invoice detail in FLEXX Accounts Receivable. If no text is found, then the repair Work Order Text (See Sec. 4.1) is checked. If there is text present, the text on the first line of the Work Requested field is used.		N

Press <<Add/Update>> to enter the resulting Repair/Warranty details.

**Note:**

FLEXX will automatically enter a message in the Text table (See Sec. 4.9):

- Δ at Repair Order creation,
- Δ when it is Activated,
- Δ when the Priority code is changed,
- Δ and when it is Closed.



### 4.3 Work Order Text

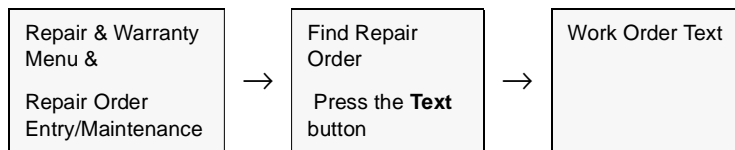
#### Description

For a Repair Order selected on the Repair Order Entry/Maintenance screen, use the Work Order Text form to:

- Δ Add text describing the nature of the work requested, the results of completing the Repair Order and any other comments.
- Δ View entered Text.

The Search Work Order Text form can be used to perform searches on the data entered on this form (See Sec.7.5).

#### Select



The Work Order Text screen appears in Update mode.



**Fields**

The following fields appear on the screen.

Field	Entry	Default	Reqd
Work Requested	Enter free form text describing the nature of the Repair Order. Press <<Enter>> at the end of each line to <<Add/Update>>		N
Work Results	Enter free form text describing the results of completing the Repair Order.		N
Comments	Enter any additional comments.		N

When the Repair/Warranty Invoice Generation routine is used, (*See Sec. 4.10*) it checks the Repair Order Entry Header (*See Sec. 4.2*) Comment field for any text. If any text is found, that text is used on the resulting invoice detail in FLEXX Accounts Receivable. If no text is found, then this Work Order Text form is checked. If there is text present, the text on the first line of the Work Requested field is used on the resulting invoice detail record.

## 4.4 Work Order (Parts) Detail

### Description

The Work Order Detail form is used to enter the estimate and actual parts needed to complete the Repair Order. Actual parts can only be entered after a Repair Order has been activated (*See Sec. 4.7*) and the Work Order detail record(s) have a status of “a” - Active.

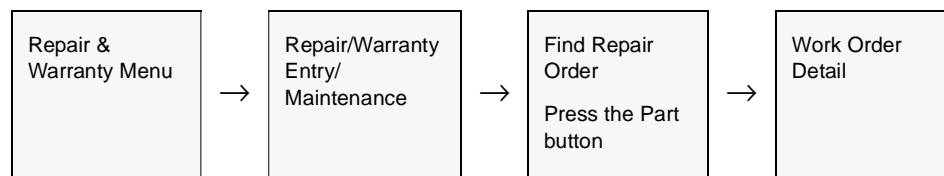
Use the Work Order Detail screen to:

- Δ Enter Repair Order details for actual and estimated parts.
- Δ Modify estimates and actuals as needed.
- Δ Zoom to the resulting invoice(s) if invoices have been generated.
- Δ Change detail line statuses to hold, cancelled, etc.

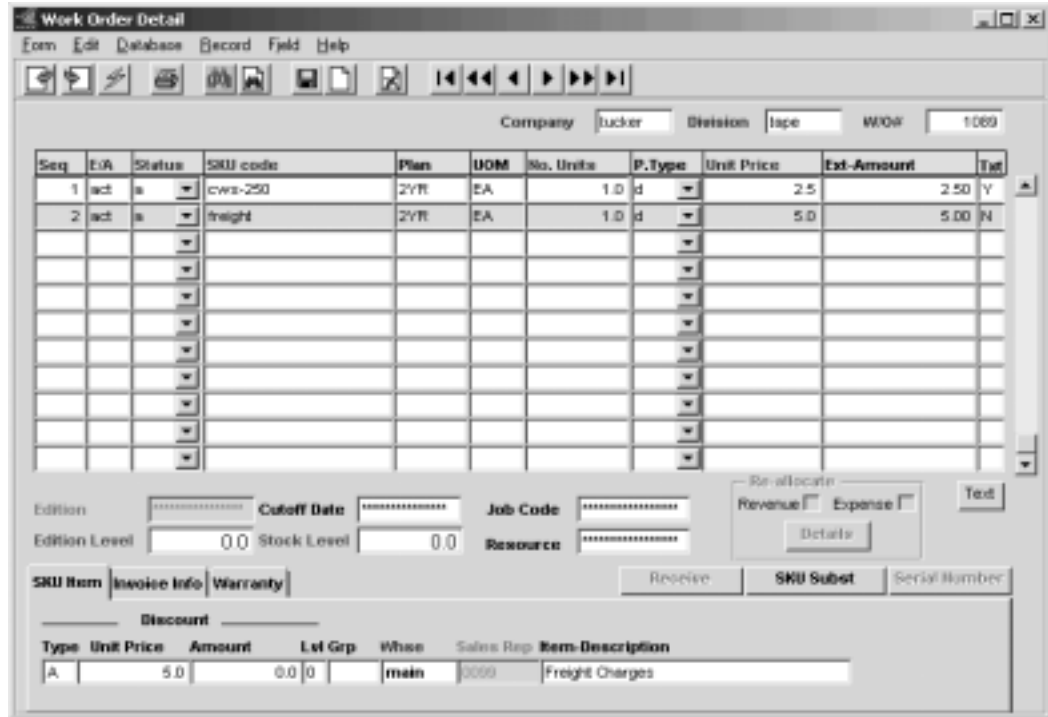
Estimate parts entered here can be used to create actual parts if so desired. To create an actual part from an estimate, activate the Repair Order (*See Sec. 4.7*), select the Work Order detail line containing the estimate parts and change the E/A flag from “est” - estimate to “act” - actual. FLEXX will then prompt with the following message “Do you want to create an actual item?” Press YES and another Work Order detail line will be created that mirrors the Estimate, but is an Actual part entry. The entry of estimate SKU items does not affect the SKU Inventory Table of inventoried SKU’s. The creation of actual parts from estimates and/or the entry of actual parts will increase the quantity committed amount on the SKU Inventory Table for inventoried SKU’s.

Estimate and actual labor must be entered in the Work Order Labor Table (*See Sec. 4.6*).

### Select



The Work Order Detail Screen appears in Update mode



**Note**

A Serialized SKU (has the Serialize flag set on SKU Attributes form) can be entered as both an Estimate and Actual item. However, a serial number can only be entered for an Actual item entry. To select the serial number, press the **Serial Number** button to get a list of available Serial Numbers (See Sec.4.5) for the particular SKU, and make the selection of the serial number desired.

A SKU defined as a RWEquipment item is not allowed as a repair order detail item. It can only be ordered (sold) through OP sales order.

**Fields**

The following fields appear on the screen.

Field	Entry	Default	Reqd
Company	The Company Code	WO Header	Y
Division	The Division Code	WO Header	Y
WO #	The Work Order Number	WO Header	Y
Sequence	The order the WO details appear		Y

Field	Entry	Default	Reqd
E/A	<ul style="list-style-type: none"> <li>• <b>e</b> - est. Estimates for parts can be entered as long as the status of the Work Order is "o" - open. Once a Work Order has been activated, estimates can no longer be entered.</li> <li>• <b>a</b> - act. Actual parts are entered only after the Work Order has a status of "a" - active, no more estimates can be entered.</li> </ul>	est	Y
Status	<p>The Work Order detail line status can be:</p> <ul style="list-style-type: none"> <li>• <b>o - Open.</b> With the work order Open only (not Active) all detail entries will be in "o" - open status only. When the WO is activated, the status changes to "a" - active for all entries (Estimate and Actual). End-user can manually change an "o" - open status to "cn" - cancelled and delete the entry if needed.</li> <li>• <b>a - Active - Work Order Released.</b> Work Order detail has been activated by pressing the Activate Work Order button on the WO header record. Once a WO detail line has a status of "a" - active it can not be reset to "o" - open status again, thus preventing any further estimates to be entered. To cancel an actual part or labor, the WO detail line status must be manually changed from "a" - active to "cn" - cancelled. The delete icon is then pressed and the actual part/labor removed from the WO and inventory updated accordingly.</li> <li>• <b>bo - Back Order.</b> The item ordered has insufficient On Hand quantity and has been put on back order. Once there is adequate quantity to satisfy the order, press the Receive button and the status will be updated to "a".</li> <li>• <b>in - Invoiced.</b> Work Order detail lines are marked as invoiced as a result of using the RW Invoice Generation routine. (See Sec 4.10). No End-user access.</li> <li>• <b>cn - Cancelled.</b> An end-user status to be manually applied as needed to cancel WO detail lines. Can be used on any detail lines that don't have a status of "in" - invoiced. After the detail line status has been changed and updated to "cn" - cancelled, the Delete Icon can be pressed to remove the line. If the WO detail was for an inventoried item, the SKU Master Inventory table is updated accordingly.</li> <li>• <b>nb - Not Billed.</b> To be used for Work Order detail lines that will not be billed to the customer. Detail lines with this status appear on the resulting invoice in FLEXX Accounts Receivable with a charge of zero dollars. No end user access.</li> </ul>	o	Y
SKU Code.	<p>The Parts SKU items required to fulfill the needs of the Work Order. These items can be used for either estimate or actual entries. Labor items are entered on WO Labor Table (Sec. 4.6).</p> <p>If actual parts are being entered (i.e. the Work Order has been activated) and the SKU is serialized (i.e. the serialized flag on the SKU Attributes is checked), FLEXX will prompt you to enter a valid serial number. Press the Serial Number button to display the Serial List Table and select the desired serial number from the list and &lt;&lt;Previous Form&gt;&gt; to return it to the Work Order Detail. If more than one unit of the SKU part is needed to satisfy the Work Order, each unit must be entered and a serial number assigned to it.</p> <p>The process of entering an actual inventoried SKU part and &lt;&lt;Add/Updating&gt;&gt; has the effect of increasing the Quantity Committed for that SKU on the SKU Inventory table in FLEXX Inventory Control.</p>		Y
Plan	<p>This field is used to track the specific warranty plans. The plan marked as the default will be automatically entered, and can be changed to some other predefined plan if desired (See Sec. 3.5).</p>		N

Field	Entry	Default	Reqd
No. Units	The quantity of the item needed to complete the Work Order. Currently do not enter a negative value.	1.00	Y
Price Type	Customer price type. Used in conjunction with FLEXX Inventory Control - SKU Price Master to determine what pricing matrix to use.	WO Header	N
Unit Price	Price for the specific item entered based on the pricing matrix defined by the SKU Price Master. This is a default price only and can be modified if needed. The price displayed here is the price before any discounts are calculated.	SKU Price Master	Y
Ext Amount	The extended amount for the part entered	System Generated	Y
Edition	Not used in R/W.	Current Edition	N
Cutoff Date	Not used in R/W		N
Job Code	This field is only used for <b>Job Costing</b> purposes ( <i>See Flexx Project Management Manual for more details</i> ). Enter the job code that will be used to track the COGS and revenue by specific Job (used by FLEXX Project Management if installed.)	Order Header	N
Edition Level	Not used in R/W	Editions Table	N
Stock Level	The Stock Level of the part SKU entered, taken from the SKU Master	SKU Master	
Resource	Enter the Job Costing Resource code to be used with the specified job (used by FLEXX Project Management (Job Costing) if installed.). Required codes must be defined in the Resource Table (zoom on resource Code).		N
Re-allocate	These fields are only used for <b>Job Costing</b> purposes to reallocate the revenue or costs of the defined item to other SKU's.		
<b>Buttons</b>			
<b>Text</b>	Press the Text button to view existing text or add new text. This button will be lit when there is underlying text already entered ( <i>See Sec. 4.9</i> ).		
<b>Receive</b>	This button is only lit when the detail entry is back ordered (status "bo"). See the description below ( <i>WO Back Orders</i> ) for details on its function.		
<b>SKU Subst.</b>	Press this button if a substitute SKU is desired. This can be for reasons of insufficient stock of ordered SKU, or replacing SKU with an Alternate or Updated item, or selecting the SKU to be ordered from another warehouse.		
<b>Serial Number</b>	Press this button to select the serial number(s) of the part to be used on the Work Order if the SKU is serialized ("serialize" flag is checked on the SKU Attributes record in FLEXX Inventory Control).  If the SKU Item is serialized and more than one unit is needed to meet the needs of the Work Order, each serialized SKU item needs to be selected. ( <i>See Sec. 4.4</i> )		
<b>The SKU Item tab will display additional SKU information:</b>			
Discount Type	Works in conjunction with the Customer Discount Table (See Getting Started Manual) and the Discount Code assigned to the SKU on the SKU Master (See FLEXX Inventory Control Manual). Used to assign discounts based on SKU Types, SKU Codes and Customers.	Work Order Header	N

Field	Entry	Default	Reqd
Discount Unit Price	This is the price that will be charged to this specific customer based on the pricing matrix as defined in the FLEXX SKU Price Master and any additional discounts taken as defined in the Discount type field.		
Discount Amount	The amount of discount on this particular item.		
Lvl	Used by FLEXX BOM, to show the SKU level.		
Grp	Used by FLEXX BOM, to show the BOM grouping.		
Whse	Source warehouse for items to be used on the Work Order.	Work Order Header	Y
Sales Rep	Display only field showing the salesperson specified on the WO header. If Multiple salespersons per customer is used, then this field will be updateable.		N
Item Description	The user defined description of the item used on the Work Order. This is the SKU Description from the SKU Master.	SKU Master	N
<b>Select the Invoice Info Tab to review accounting/tax information:</b>			
VAT Type	If the WO detail item is subject to VAT tax set the Payable flag to Y -Yes. If not, set to N - No.	Work Order Header	Y
Code	If the VAT flag is set to N - No, No VAT will be charged even if there is a VAT code specified. If the VAT flag is set to Y -Yes, select the appropriate VAT code to have tax calculated and displayed on the resulting invoice. On the SKU Master there is a VAT code which will default. This code is only used if the VAT flag is set to Y.		N
Amount	The applicable VAT calculated as per above settings.		
Invoiceable	This flag is used in conjunction with the Repair Warranty Invoice Generation Routine (See Sec. 4.10) to determine which Work Order Detail lines are to be included in the next Invoice Generation Routine. So this field is not selected until the detail line is to be invoiced. If a detail line will ever be invoiceable, the invoiceable flag on the Work Order Header must be selected.	Work Order Header	
Billable	If this Work Order Detail item is to be billed to the customer then it should be selected. This flag is set as a default from the SKU Master in FLEXX Inventory Control. On the SKU Master Attributes form is a field "invoice" which if selected sets this billable flag to "yes" (bill it). If the "invoice" field is not checked then the billable field is also not selected. This is just a default and can be overridden if needed. If the Work Order Header form has a status of "nb" - not billed, this status overrides any billable setting on the Work Order detail. If the Work Order header form has a status other than "nb", then the billable setting on the Work Order detail takes precedence.	SKU Master	
P/ST Type	If this WO detail item is subject to Provincial/State taxation, the flag should be set to "Y" - Yes. FLEXX then looks to the tax jurisdictions as defined on the customer ship to location (See Getting Started Manual), The resulting tax is calculated when the Repair Warranty Invoice Generation routine (See Sec.4.10) is used and entered on the generated invoice in FLEXX Accounts Receivable.  <b>Note: This taxable default setting is overridden by the tax setting on the SKU Master.</b>	Work Order Header	

Field	Entry	Default	Reqd
Invoice No.	After the RW Invoice Generation routine is run (See Sec. 4.10) an invoice is created in FLEXX Accounts Receivable and its number is shown here.	System Generated	
GL Period	Used by the Generate GL Transaction routine to determine which GL period will be used to record the costs associated with the work order.	Session Default	
Bill By Date	Used by the Repair Warranty Invoice Generation routine (See Sec. 4.10) as selection criteria to determine which Work Orders will be invoiced. For a Work Order detail line to be invoiced both the billable and Invoiceable flags must also be selected.	WO Header	Y
Post	System generated once the Generate GL Transactions from RW routine has been used. (See Sec. 4.12). If a journal entry has been generated for this line item the flag goes to "P" - posted.	N	Y
GL Trans	System generated GL Transaction number resulting from using the Generate GL Transactions from Repair/Time Billing routine (See Sec. 4.12).	System Generated	
<b>Select the Warranty Tab to view the following information:</b>			
Warranty Billing Invoice No.	If the equipment Vendor is to be billed for repairs, and the RW Vendor Invoice Generation routine has been run (See Sec. 4.11), an invoice to the Warranty Vendor is created and the resulting invoice number is displayed here.	System Generated	
Warranty Price	The per unit price being charged for the SKU item.	SKU Master	Y
Warranty Mfr. Bill Amount	The amount of the manufacturer's warranty that will be applied against the cost of the repair for the selected SKU item.	System Generated	
Warranty Dealer Amount	The amount of the dealer's warranty that will be applied against the cost of the repair for the selected SKU item.	System Generated	
Deductible Amount	The amount of deductible to be paid by the customer.	System Generated	
Billing Status	Billing Status can be; <ul style="list-style-type: none"> <li>• <b>m</b> - Marked for Warranty Invoice Generation. A Work Order detail line will have this status if a Manufacturer's Warranty applies to it and the Vendor Invoice Generation routine (See Sec. 4.11) has not yet been run.</li> <li>• <b>d</b> - Covered by Dealer Warranty. Not currently used by FLEXX.</li> <li>• <b>mb</b> - Invoice Generated already. Work Order detail will have this status if a Manufacturer's Warranty applies and the Vendor Invoice Generation routine (See Sec. 4.11) has been run.</li> <li>• <b>nb</b> - Not Billable. The Work Order detail entry is not billable.</li> </ul>		



**WO Back Orders**

FLEXX allows for Detail (Parts) entries to be back ordered if not in stock. This function is active only with the following Application Control setting:

Application	Type	Description	Value	Company
wo	wo_allowbo	Allow Back Order on Work Order	Y (N default)	default

With this setting, and the WO in Active status, when the SKU ordered is out of stock (On Hand is below order quantity), FLEXX will display prompt "Insufficient Quantity, do you wish to backorder the item? Y/N". Responding Yes will put the detail entry into "bo" status. With this status, it is not possible to close and invoice the WO.

When sufficient quantity of the SKU part is received (using FLEXX Purchasing) and the order quantity can be filled, press the **Receive** button. This will result in FLEXX again checking inventory and if sufficient to fill the order, will change the status to "a" - Active. If the On Hand quantity is still below ordered, the status will remain "bo".

Once the details are all in "a" status, the WO can be closed and invoiced as required.

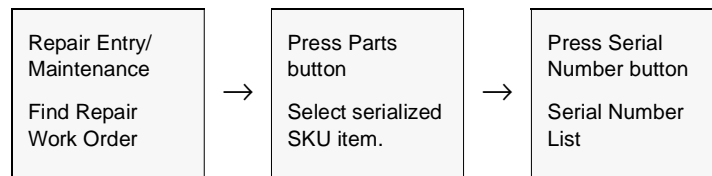
Note that SKU inventory levels are updated at WO invoice generation.

## 4.5 Serial Number List

### Description

The Serial Number List is a list of all available Serial Numbers defined for that SKU in the SKU Master Serial Number Information Table (*See Inventory Control manual, Sec. 3.7*). When the Serial Number button is pressed, FLEXX will display the Serial Number List table. The desired serial number(s) for the Serialized detail SKU items can be selected from this list.

### Select



The Serial Number List form appears on the screen.

Selected	Serial Number
<input type="checkbox"/>	cc1
<input type="checkbox"/>	cc10
<input type="checkbox"/>	cc11
<input type="checkbox"/>	cc12
<input type="checkbox"/>	cc13
<input type="checkbox"/>	cc14
<input type="checkbox"/>	cc15
<input type="checkbox"/>	cc16
<input type="checkbox"/>	cc17

Total of Selected: 0

Desc: [Barcode]

PO No: 1398    Purchase Date: [Barcode]

**Fields**

The following fields appear on the screen.

Field	Entry	Default	Reqd
Company	The Company Code.	Shipment Maintenance	Y
SKU Code	The SKU Code as entered on the Order Detail line.	Order Detail Entry	Y
Selected	Check to select the serial number, unchecked to deselect the serial number.		
Serial Number	The Serial Number for the specific SKU as defined on the Serial Number Information Table (see <i>Inventory Control Sec. 3.6</i> ).	SKU Master Serial Number Information Table	Y
Total of Selected	This field will contain the total number of serial numbers that have been selected.	System Generated	
Description	The Description defined in the Serial Number Information Table.		N
PO Number	The Number of the PO when the particular serialized SKU was purchased.		N
Purchase Date	Date the SKU was purchased.	PO Date	

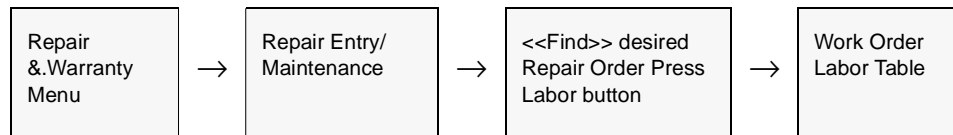
When closing the Repair Order and not all serial numbers have been entered, a message appears: ‘This order is missing some serial numbers.’ You will then need to select the required number of Serial Numbers to allow the RO to be closed, and then Invoiced.

## 4.6 Repair Warranty Labor Table

### Description

The Work Order Labor Table is used to enter and track the Estimate and Actual labor costs incurred on the Repair Order. Actual labor can only be entered once the Repair Order has been activated (See Sec.4.7).

### Select



The Work Order Labor Table appears in Find mode. To enter new labor items press <<Clear to Add>>.

E/A	Employee	Begin Dt	Start	Act-Hrs	Chrg Hrs	Rate	Charge Amt
<input type="radio"/> Est <input checked="" type="radio"/> Act	harry	08/16/00	08:30	1.62	1.62	150.00	97.20
	labor	08/16/00	10:07				
<input type="radio"/> Est <input checked="" type="radio"/> Act	mark	08/16/00	00:00	5.00	5.00	150.00	422.50
	labor	08/16/00	00:00				

Job Code: [ ] Resource: [ ] Total Estimated Hours: 5.00 Total Actual Hours: 1.62  
 Total Estimated Hours: 5.00 Total Actual Hours: 1.62  Rapid Data Entry

Employee Name: Harry deMann Item Description: Labor Hours Test: N  
 Earn-Cd: reg Pay Status: [ ] Status: [ ] Detail Line Pay Date: [ ] Sales Rep: [ ]

**Fields**

The following fields appear on the screen.

Field	Entry	Default	Reqd
Company	The Company Code.	WO Header	Y
Division	The Division Code.	WO Header	Y
WO No.	The number assigned to the Work Order.	WO Header	Y
E/A	Estimate/Actual flags will indicate whether the detail entry is an Estimate or Actual. On entry of the W/O item, before the W/O is activated, the line item will be an Estimate. Once the W/O has been activated, any new entries will be Actual and no more estimate entries can be made.		Y
Employee	The Employee code for the employee who actually performed the work. Needs to be defined in the Employee Table (See <i>Getting Started manual</i> ) to be valid.		Y
Labor Item	<p>The SKU code for the labor item used. FLEXX Repair Warranty treats labor the same way it treats a part with no inventory implications. Each labor item is set up in FLEXX Inventory Control as a SKU. To be treated as labor for WO purposes, the following flags on the SKU Attributes form must not be selected.</p> <p>LOGICAL TANGIBLE INVENTORY</p> <p>If these flags are not set as specified, FLEXX Work Order will assume you are trying to enter a part as a labor item and will prompt with the following message "Invalid labor item".</p> <p>FLEXX Repair Warranty uses the pricing matrix set up in FLEXX Inventory Control - SKU Price table to determine the rate to be charged for labor. So, if there are different labor rates charged for each type of labor used, each labor type must be set up as a specific SKU in FLEXX Inventory Control. In the SKU Price Matrix, different chargeable rates can be defined based on effective dates and quantity break points (See <i>Inventory Control manual for more detail on the Price definitions</i>). <b>However, there MUST be one entry for a 0 (zero) order quantity for the labor item to be properly priced for Repair/Warranty entry.</b></p> <p>Should the Work Order labor time entered cross over an effective date of a chargeable rate, error message "9983 - Multiple rates defined for date range. Earliest rate used. Continue"? appears. If Yes is selected, the chargeable rate in effect on the WO labor start date is used for the entire time period covered by the WO labor. If No is selected, the WO labor detail line is not saved and you can now enter the labor on two separate lines to take advantage of the break point of the chargeable labor rate.</p> <p>FLEXX Repair Warranty uses the <b>Standard Cost</b> value defined on the SKU Master to determine the costs of the labor item. (See <i>FLEXX Inventory Control Manual</i>)</p>	Last entry if rapid entry is active.	
Begin Dt	The date the actual labor work was started.	Session Default	Y
End Dt	The date the actual labor work was completed.	Session Default	Y

Field	Entry	Default	Reqd
Start & End Time	Note: If the begin and end dates are the same (i.e. the work was performed on the same day) RW uses the internal time clock of your PC to fill in the start and end times. These can be modified as needed. Repair Warranty then calculates the number of hours this represents and updates the Chargeable Hours field. If the begin and end dates are different (i.e. the work was performed over a number of days) Repair Warranty will default the start and end time as described earlier but will update the Chargeable Hours field to 0.00. It will then be up to the user to fill in the correct number of chargeable hours. This end date is also used by the RW Invoice Generation routine (Sec. 4.10) as selection criteria to determine what to invoice. For a Work Order labor line to be invoiced, both the Billable and Invoiceable flags must also be set.		
Actual Hours	Actual hours worked by the specified employee for the specified labor item. This field is automatically calculated by FLEXX Repair Warranty based on the start and end times, where the start and end dates are the same (i.e. the work was performed in one day). In the case where the start and end dates are not the same (i.e. the work took place over more than one day) the actual hours are defaulted to 0.00. The end user is then expected to enter the correct number of actual hours worked.	1.00	Y
Chargeable Hours	The chargeable hours to be billed to the customer based on the actual hours multiplied by the chargeable percentage.		Y
Rate	The billable rate per hour used for the specified labor item. This rate is defined based on the pricing matrix set up in FLEXX Inventory Control - SKU Price Master, and can be changed as desired.	SKU Price Master	Y
Charge Amount	The amount charged to the customer for this labor item. The amount charged is based on the chargeable hours multiplied by the rate.	System Generated	Y
Type	User defined Labor Type to further classify the type of labor used on the Work Order. A default can be set by placing a 'Y' in the Default column of the Master Type table for the line to be the default value. When rapid entry is set on, this field defaults to the previous Active record	Master Type Table entry type 1585.	Y
Job Code	This field is only used for <b>Job Costing</b> purposes (See <i>Flexx Project Management Manual</i> for more details). Enter the job code that will be used to track the COGS and revenue by specific Job (used by FLEXX Project Management if installed.)	WO Header	N
Resource	Enter the Job Costing Resource code to be used with the specified job (used by FLEXX Project Management (Job Costing) if installed.). Required codes must be defined in the Resource Table (zoom on resource Code).		N
Rapid Data Entry	Select this box to have FLEXX use the Employee Code, Labor Item (SKU) and Labor Type entered previously (where there is one) to serve as a default for all subsequently entered labor charges. This is useful where an employee is entering multiple labor charges to a work order. The screen will auto save once the actual hours field is entered.		
Reallocate	These fields are only used for <b>Job Costing</b> purposes to reallocate the revenue or costs of the defined item to other SKU's.		

Select the Employee Information Tab to view further information such as:

Field	Entry	Default	Reqd
Employee Name	The employee name as defined by the Employee Master (See <i>FLEXX Getting Started</i> ).	Employee Code	
Item Description	The user defined Labor item description as set out on the FLEXX SKU Master.	SKU Master Description	
Text	<ul style="list-style-type: none"> <li>• Y - Yes if there is underlying RW Labor Detail text.</li> <li>• N - No if there is not. (See Sec. 4.9)</li> </ul>	N	N
Earn-Cd	Employees's Earning Code. Currently not used.		N
Resource	The resource as defined by FLEXX Job Costing for grouping the various labor items.		N
Pay Status	Not currently used by FLEXX.		N
Status	<p>The Time Billing labor detail line status can be:</p> <ul style="list-style-type: none"> <li>• <b>a</b> - active - Work Order Released. Work Order labor detail has been activated by pressing the Activate Work Order button on the WO header record. To cancel an actual labor item, the WO detail labor line status must be manually changed from "a" - active to "cn" - cancelled. The delete icon is then pressed and the actual labor item is removed from the Work Order.</li> <li>• <b>in</b> - Invoiced. Work Order detail labor lines are marked as invoiced as a result of using the RW Invoice Generation routine. (See Sec. 4.10). No End-user access.</li> <li>• <b>cn</b> - Cancelled. An end-user status to be manually applied as needed to cancel WO detail labor lines. Can be used on any detail lines that don't have a status of "in" - invoiced. After the detail line status has been changed and updated to "cn" - cancelled, the Delete Icon can be pressed to remove the line together. If the WO detail was for an inventoriable item, the inventory table is updated accordingly.</li> <li>• <b>nb</b> - Not Billed. To be used for Work Order detail labor lines that are not going to be billed to the customer. Detail lines with this status are ignored by the RW Invoice Generation routine.</li> </ul>		
Detail Line	The WO Detail screen not only serves to record the estimated labor and estimated/actual parts used on the Work Order but also summarizes the information entered on the WO Labor Table. This summation is done on the employee, the labor item and the labor rate. The WO Detail line sequence number is the cross reference between the line item on the WO labor table and where it appears in WO Detail.	System Generated	Y
Pay Date	The date the employee was paid through FLEXX Payroll. Not currently used by FLEXX.		N

Select the Invoice Information Tab to view further information such as:

Field	Entry	Default	Reqd
Invoiceable	This flag is used in conjunction with the RW Invoice Generation routine (See Sec. 4.10) to determine which Time Billing Labor lines are to be included in the next Invoice Generation routine. So this field is not selected until the detail line is to be invoiced.	Work Order Header	Y

Field	Entry	Default	Reqd
Billable	If this Work Order Labor item is to be billed to the customer then it should be selected.		Y
Invoice Number	After the RW Invoice Generation routine is used (See Sec 4.10) an invoice is created in FLEXX Accounts Receivable and its number is shown here.	System Generated	Y
Post	Once the Generate GL Transactions routine has been used (See Sec 4.12) the post flag is updated to a "P" - Posted status.	n	Y
GL Trans	System generated GL transaction number resulting from using the Generate GL Transactions routine (See Sec 4.12).	System Generated	Y
Chrg %	The billable percentage. In other words are all of the labor hours entered billable?	100	Y
P/ST Type	Set this field to "Y" - Yes if this labor detail line is subject to taxation. If this is set to "Yes", FLEXX looks to the tax jurisdictions and rates as defined on the customer ship to location (See Getting Started Manual). The resulting tax is calculated when the RW Invoice Generation routine is used. (See Sec. 4.10).	Time Billing Header	N
GL Period	The GL Period used to record the Work Order transaction.	Session Default	Y
VAT Type	If the Work Order Labor item attracts the Goods and Services tax set the VAT flag to "Y" - Yes. If not, leave the default set to "N" - No.	Work Order Header	Y
Code	Both of these fields are defaulted from the SKU Master. If the VAT flag is set to Y-Yes, FLEXX R/W will use the rate defined by the VAT code specified to calculate the VAT applicable to the labor item.	SKU Master	
Amount	The applicable VAT calculated as per above settings.	System Generated	
Discount Code	Works in conjunction with the Customer Discount Table (See Getting Started Manual) and the Discount Code assigned to the SKU on the SKU Master (See FLEXX Inventory Control Manual). Used to assign discounts based on SKU Types, SKU Codes and Customers.	Work Order Header	N
Unit Price	This is the price that will be charged to this specific customer based on the pricing matrix as defined in the FLEXX SKU Price Master and any additional discounts taken as defined in the Discount Type field.		
Amount	The discount amount for this detail entry.		

Select the Warranty Tab to view additional information such as:

Field	Entry	Default	Reqd
Warranty Billing Invoice No.	Once the RW Vendor Invoice Generation (See Sec. 4.11) has been run, an invoice to the Warranty Vendor is created and the resulting invoice number is displayed here.	System Generated	
Warranty Price	The per unit price being charged for the SKU labor item.	SKU Master	Y



Field	Entry	Default	Reqd
Billing Status	Billing Status can be; <ul style="list-style-type: none"> <li>• <b>m</b> - Marked for Warranty Invoice Generation. A Work Order detail line will have this status if a Manufacturer's Warranty applies to it and the Vendor Invoice Generation routine (See Sec. 4.11) has not been run yet.</li> <li>• <b>d</b> - Covered by Dealer Warranty. Not currently used by FLEXX.</li> <li>• <b>mb</b> - Invoice Generated already. Work Order detail will have this status if a Manufacturer's Warranty applies and the Vendor Invoice Generation routine (See Sec. 4.11) has been run.</li> <li>• <b>nb</b> - Not Billable.</li> </ul>		
Warranty Manf. Bill Amount	The amount of the manufacturer's warranty that will be applied against the labor cost of the repair for the selected labor SKU item.	System Generated	
Warranty Dealer Amount	The amount of the dealer's warranty that will be applied against the labor cost of the repair for the selected labor SKU item.	System Generated	
Deductible Amount	The amount of the deductible to be paid by the customer.	System Generated	

## 4.7 **Activate/Close Repair Order**

### **Description**

When a Repair Order is first created the Repair Order Header and Detail Records have a status of “o” - Open.

### **Activate**

While in Open status, only estimate parts and labor items can be entered. When it comes time to actually start work on a Repair Order for a customer, the Repair Order must be “activated” to allow actual parts and labor to be entered. To activate a Repair Order, press the <<**Activate Repair Order**>> button on the Repair Order Header Record. This button will only be lit on Open orders. As a result of activating the order, the status is changed from “o” to “a” - Activated. Estimate parts and labor items can no longer be entered. All subsequent entries made to either the Detail (Parts) or Labor table will be actual items.

### **Close**

When the Repair order has been activated and is in “a” status, the Activate button will change to say **Close Repair Order**. Once all actual item entries are complete, the Repair order can be closed by pressing this button. It is not possible to close a Repair order before it has been activated. If it is desired to cancel/delete an Open repair order, the header status can be changed to “cn” - Cancel. The order can also be deleted by pressing the <<Delete>> icon and the order header along with all detail entries will be deleted.

Note that a Repair work order with detail lines in “bo” status cannot be closed. All entries must first be “a” (Active) status before it can be closed. *Please refer to the WO Back Orders topic at the end of Sec. 4.4 for more details on handling back orders.*

## 4.8 Replace RW Equipment

### Description

This section describes the process whereby R/W equipment is replaced to the Repair Order customer (i.e. unrepairable, too costly to repair, etc.). The original Repair order form created for the repair work of the equipment is used to generate the “Replacement” order.

Repair Entry/Maintenance

Form Edit Database Record Field Help

Company: lucker Division: cspc Active (released) W/O# 246 Order Date: 07/26/00

Customer: remco Remco Supply Company  
Equipment: cws-430 Sun Microsystem computer  
Equip. Serial #: hubect2 Customer P/O #: 12345 Text: N

Address Financial Tracking Part Labor Text Summary

Bill To: billing Ship To: main

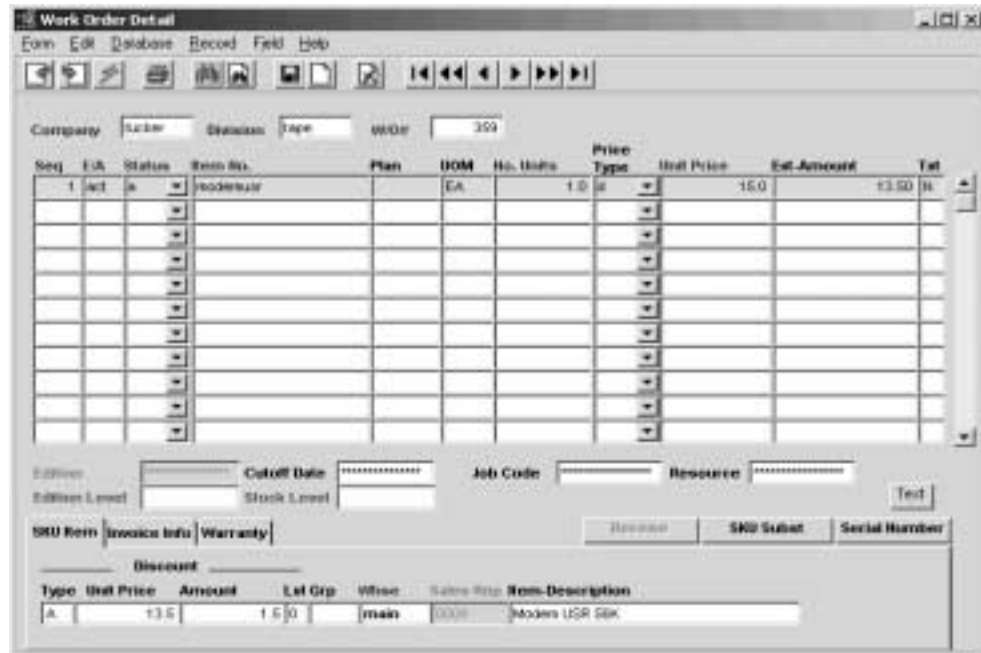
Remco Supply Company2 Remco Supply Co. Warehouse  
56 Charles Ave 898 Boxcar Lane  
PO BOX 9876 Bldg. 1, Door 5  
TACOMA WA 98745 USA TACOMA WA 98745 USA

P.O. Box  Residential  P.O. Box  Residential

Charley Francis Contact: Mr George

Close Repair Order Replace Equipment Credit Printed  Print

Press the **Replace Equipment** button and FLEXX will prompt “Are you sure you want to create new replacement workorder for this workorder?” Select Yes and FLEXX will automatically create a new Repair Order and display that order’s Detail form.



Enter the replacement equipment SKU code and make changes to any other fields as required (i.e. Unit Price, etc.). You will also need to specify the serial number of the replacement equipment SKU. Press the **Serial Number** button and select the desired serial number from the displayed list by marking the “Selected” field. If the serial number has not been specified, on pressing <<Previous Form>>, FLEXX will prompt with message “Warning! Replacement equipment not specified”. Once the equipment and serial number have been successfully entered, FLEXX will then transfer all warranty information from the original equipment to the replacement item (see Sec. 3.7) so that it will now have the same plan and expiry date as the original.

### R/W Interface

Once this data has been saved, FLEXX will automatically update the following R/W tables with details of that item:

- △ Equipment Maintenance (See Sec. 3.4)
- △ Customer Equipment Maintenance (See Sec. 3.6)
- △ Customer Equipment Warranty Maintenance (See Sec. 3.7)

If necessary, values can be changed from those generated, and other user - defined fields and tables will need to be entered (i.e. Equipment Auxiliary Plans - See Sec. 3.8).

This new Repair order can then be closed and invoiced as needed.

The original Repair Order opened for this equipment can now be processed in several different ways:

- Δ Send the equipment to vendor (for repair or replacement) - *See sec. 4.8.*
- Δ Perform in-house repairs - *See Sec. 4.8*

Access (<<Find>>) the original repair order.

The buttons “Send to Vendor For Repair” and “Complete In-House Repair” will be lit.

### Send to Vendor

If the item is to be returned to the Warranty Vendor, enter the vendor’s RMA number on the Tracking page and press the “Send to Vendor for Repair” button. If the RMA# field has not been entered, FLEXX will prompt with message “Must enter Vendor’s RMA # in Tracking Page”. Once the RMA number has been entered, FLEXX will mark the Repair order as sent to vendor (Bill Type set to “sv”) and automatically allow printing of a Packing slip to be used when shipping the item. The order will remain in Active status.

The button previously labelled “Send to Vendor” will now show “Receive from Vendor”. Once the item is returned from the vendor, press this button and FLEXX

will automatically receive the item into inventory (increase On Hand by 1 and mark serial number “ra” - Replaced/Available), mark the item as a “replacement” item (set “RWreplacement” flag on SKU Master Attributes), set the Bill Type to “rc” (Received), and close the repair order. It will also generate an ‘adjustment’ (type “ad”) Inventory Movement record which is used to post the cost of the returned item to the GL. Run the Generate GL Transactions (Inventory Movement) from Inventory Control to post this record. The equipment item will then be available for future sales order or replacement Repair Order entry.

### Repair In-House

Alternatively, if the repair equipment will not be returned to the vendor but be repaired in-house, press the “**Complete In-house Repair**” button. This function requires a “Repair Equipment Fee” price entry to be defined in the SKU Master Price Table for the equipment item as follows.

<<Find>> the SKU Master for the equipment SKU and go to the Price table.

The screenshot shows the 'SKU Master' window with the 'Pricing' tab selected. The top section displays the SKU 'moderuzr' (Modem USR 56K) and company 'lucker'. Below this, the Stock Level is 19.0, Standard Cost is 0.0, Margin is 0.0, and Average Cost is 40.0. The Pricing table contains the following data:

Eff. Date	Expiry Date	Type	Whse	Customer	Qty	Price	UOM	Min. Price	Allow Disc
00/01/00	*****	id	*****	*****	1.0	75.0	EA	0.0	<input checked="" type="checkbox"/>
00/18/00	*****	r	*****	*****	1.0	50.0	EA	0.0	<input checked="" type="checkbox"/>
									<input type="checkbox"/>
									<input type="checkbox"/>
									<input type="checkbox"/>
									<input type="checkbox"/>
									<input type="checkbox"/>
									<input type="checkbox"/>
									<input type="checkbox"/>
									<input type="checkbox"/>

At the bottom of the window, the Currency is set to 'CDN', UOM Category is 'RW', Order Updated is '08/18/00', and Order Type is 'R'.

The Price Type must be “r”, and a Price value must be entered.

FLEXX will then automatically create an entry in the Repair Order detail form for the repair charges with a status of “a” (Active) and a Unit Price of the value defined on the SKU Price Table for Price Type “r”, and also set the status of any other detail entries (both parts and labor) to “nb” (Not Billable). The warranty status (*on Customer*

*Equipment Warranty table - Sec. 3.7*) will also be changed to “r” - returned. The Repair Order header will also be set to Bill Type “bv” - Bill Vendor which will cause FLEXX to only produce a Vendor invoice.

The Repair order can then be closed, and an invoice to the vendor can be generated. Since the order detail entry for the equipment repair charges is in status “a”, FLEXX will invoice that amount. Use the RW Vendor Invoice Generation process to generate the invoice which will be made out to the vendor defined on the Warranty Plan Detail table “Warr. Bill to” field (*See Sec. 3.5*).

Once the order has been closed, the item will automatically be received into inventory (increase On Hand by 1 and mark serial number “ra” - Replaced/ Available) and marked as a “replacement” item (set “RWreplacement” flag on SKU Master Attributes). It will also generate an ‘adjustment’ (type “ad”) Inventory Movement record which is used to post the cost of the returned item to the GL. Run the Generate GL Transactions (Inventory Movement) from Inventory Control to post this record. The equipment item will then be available for future sales order or replacement Repair Order entry.

This completes the process of replacing a R/W equipment item.

## 4.9 Repair Entry Text or RW Detail/Labor Text

### Description

For a transaction selected using the Repair Entry/Maintenance screen, use the Repair Entry Text or RO Detail/Labor Text to:

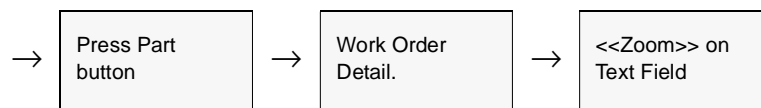
- Δ Add unlimited comments about the Repair Order. For example, the text could be used to keep a historical record of changes made to the Repair Order. Enter as many lines as you want, then Press <<Add/Update>>.
- Δ View text messages.
- Δ Update comments. Change as many lines as you want, then Press <<Add/Update>>.
- Δ Delete Comments.

### Select

#### WO Header Text



#### Parts Detail Text

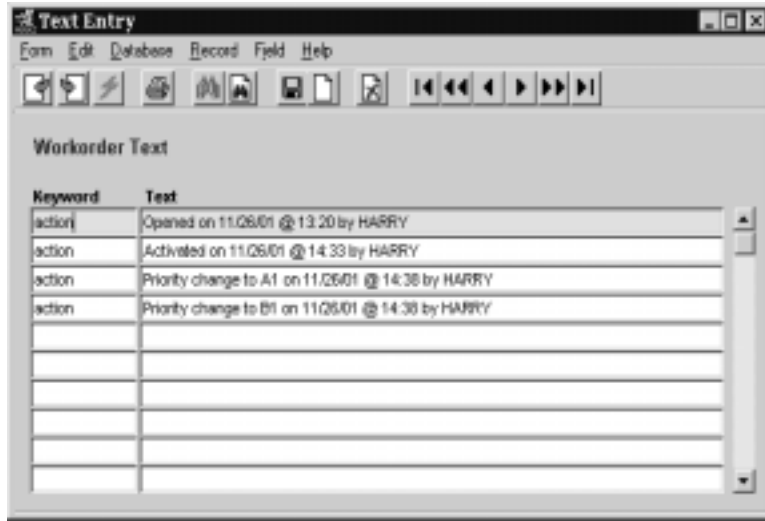


#### Labor Detail Text





The Work Order Text screen appears in Find mode.



**Fields**

The following fields appear on the screen.

Field	Entry	Default	Reqd
Keyword	A word indicating the type of comment. Example: <b>notes</b> or <b>info</b> .		Y
Text	The comment.		N

**Note:**

The Header text table will contain “action” text indicating when the RO was created, activated, Priority changed, and closed. This can be used for tracking purposes, but is not used by FLEXX.

## 4.10 Repair Warranty Invoice Generation

### Description

The Repair Warranty Invoice Generation routine is used to seamlessly create customer invoices in FLEXX Accounts Receivable based on Repair Order Header and Detail information. This process eliminates the need to enter the same information twice in Repair Warranty and Accounts Receivable. This invoice generation routine will allow you to:

- △ Create Customer invoices in FLEXX Accounts Receivable.
- △ Allow selection of Repair Orders to be invoiced based on Customer, Cutoff date, Repair Order Number and Billable Flag.
- △ Combine Repair Orders for the same customer together on one invoice.
- △ Create invoices for specific RW Detail Lines through the use of the Invoiceable Flag.

The Invoice generation routine will invoice all Repair Orders that meet the selection criteria that also have a Repair Order header status of “c” - complete and are of Bill type “bc” - Billed on Completion. For Bill type “be” - Billed on Estimate, the Invoice generation routine looks to the Detail and Labor table to see if the Invoiceable flag has been selected. If it has and the invoiceable flag on the Repair Order Header has also been selected, an invoice will be generated.

This process will only invoice that portion of the Repair Order that is not covered by warranty. If the repair item is out of warranty or no warranty has been defined, the full amount will be invoiced to the customer. See the RW Vendor Invoice Generation description (*Sec. 4.11*) for information on warranty invoicing.

**It is the Invoice generation routine that also results in reducing the stock level (Quantity on Hand) of inventoried SKU items on the Inventory table.** Before it has been run, the SKU items used will be Committed (status “c”).

### Notes

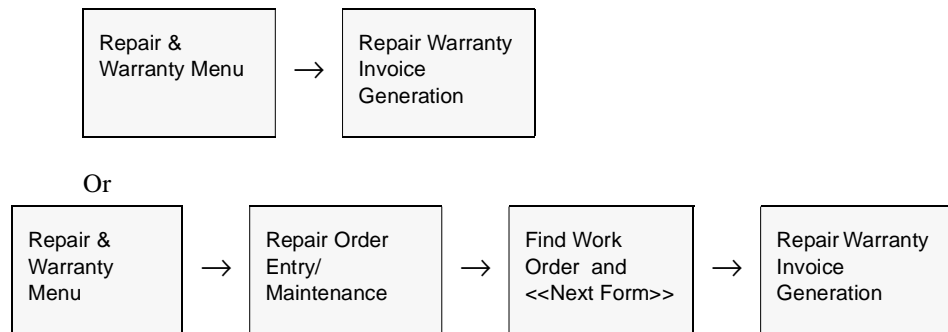
It is possible through the use of Application Control setting to have the invoice number be generated the same as the WO number with a prefix.

Application	Type	Description	Value	Company
rw	matchinvno	Invoice Number matching RW	Y (N default)	default

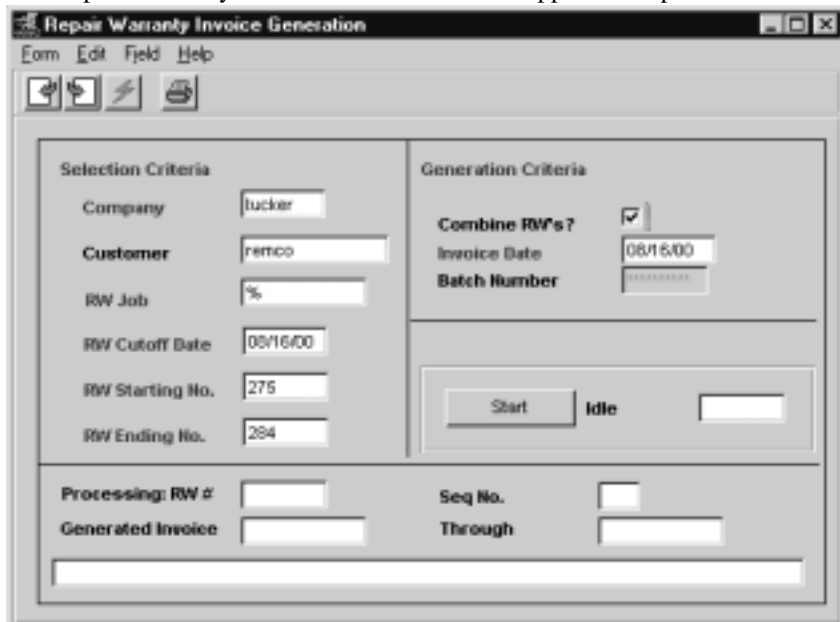
The 'Customer' invoice will be generated with a number the same as the Repair Order but prefixed with "C". Any associated Warranty Vendor invoice would have the same number but prefixed with "V".

The Repair Warranty Invoice Generation routine must be run before using the Generate GL Transactions from TB/RW (See Sec. 4.12). It is the process of running the Invoice Generation routine that sets up the billing & costing information that is used by the Generate GL Transaction routine.

**Select**



The Repair Warranty Invoice Generation screen appears in Update Mode.



**Fields**

Enter the following information to generate customer invoices.

Field	Entry	Default	Reqd
<b>Selection Criteria</b>			
Company	The Company Code.	Session Default	Y
Customer	The Code for the specific customer to be selected or leave blank to select all customers.		
RW Job	An overall job contract used only in the FLEXX Time Billing module. Not used by Repair Warranty so default value must always be accepted.	%	Y
RW Cutoff Date	This date corresponds to the Repair Order Bill by date on the Work Order detail and the End Date when the labor was completed on the Labor table. FLEXX Repair Warranty Invoice Generation will select all Repair Orders with a Bill by date up to and including this date. The invoiceable flags on the RW Detail and Labor records must also be selected to be included in the Invoice Generation routine.	Session Default	Y
RW Starting & Ending No.	Range of Repair Orders to be selected. The Invoiceable flags on the RO header and Detail records must also be selected to be included in the Invoice Generation routine.	0 999999	Y
<b>Generation Criteria</b>			
Combine RW's?	If this option is selected, Repair Orders for the same customer will be combined and only one invoice generated. If this option is not selected, each Repair Order selected will produce one invoice.		
Invoice Date	The date to appear on the invoices created in FLEXX Accounts Receivable. FLEXX Repair/Warranty also uses this date in conjunction with the GL Period Table ( <i>See FLEXX Getting Started Manual</i> ) to determine what GL Period to appear on the resulting AR Invoices.	Session Default	Y
Batch Number	If the Use Batch flag is selected on the Session Defaults screen ( <i>See Sec. 2.0 Starting Repair &amp; Warranty</i> ) a batch # can be assigned to the resulting invoices created in FLEXX. Each invoice will still be assigned a unique invoice number.		N
<b>Start</b>	Press the Start button to start the Repair Warranty Invoice Generation process.		
Processing: RW #	No end-user access. A display screen to monitor the progress of the invoice generation routine.	System Generated	
Generated Invoice Through	The number(s) of the invoice(s) generated. <<Zoom>> on either field to access the invoice. The invoice(s) can be printed by pressing the Print button on the selected invoice(s).	System Generated	

## 4.11 RW Vendor Invoice Generation

### Description

The RW Vendor Invoice Generation process is used to seamlessly create Warranty Vendor Invoices in FLEXX Accounts Receivable. For this functionality to work, the Warranty Vendor must be set up as a customer on the Customer Master form (*See Getting Started Manual*). Once this has been done, it will then be necessary to call up the Vendor Master table for the warranty vendor and update the AR Customer Code field with the new customer code assigned to the Warranty Vendor. This way FLEXX knows the two are related.

This routine should only be used for Repair Orders that have already had all of the customer portion of the invoicing performed (*See Sec. 4.10*). If only a portion of the Repair Order has been invoiced to the customer, and an attempt is made to use the RW Vendor Invoice Generation, no Vendor invoice will be created. If there is no warranty eligibility on the repair item, there will be no Vendor invoice generated.

### Select



The RW Vendor Invoice Generation screen appears in Update mode.

**Fields**

The following fields appear on the screen.

Field	Entry	Default	Reqd
<b>Selection Criteria</b>			
Company	The Company Code.	Session Default	Y
Warranty Plan	The code for the specific warranty plan to be selected.	%	Y
WO Starting & Ending No.	Range of Repair Orders to be selected. The invoiceable flags on the RO header and Detail records must also be selected to be included in the Invoice Generation routine.	0 999999	Y
Warranty Vendor	The Code representing the Warranty Vendor as defined on the Vendor Master.		Y
<b>Generation Criteria</b>			
Combine Work Orders	If this option is selected, Repair Orders for the same vendor will be combined and only one invoice generated. Otherwise, each Repair Order selected will produce one invoice.	Checked	N
Invoice Date	The date to appear on the invoices created in FLEXX Accounts Receivable. The corresponding GL Period will also be entered on the invoice	Session Default	Y
Batch Number	If the use Batch flag is selected on the Session Default screen ( <i>See Sec. 2.0 Starting Repair &amp; Warranty</i> ) a batch # can be assigned to the resulting invoices created in FLEXX. Each invoice will still be assigned a unique invoice number.		N
<b>Start</b>	Press Start to start the RW Vendor Invoice Generation Routine.		
Processing Work Order	No end user access. A display screen to monitor the progress of the invoice generation routine.	Session Generated	
Generated Invoice	The number(s) of the invoice(s) generated. <<Zoom>> on either field to access the invoice. The invoice(s) can be printed by pressing the Print button on the selected invoice(s).	System Generated	

**Notes:**

The RW Vendor Invoice Generation process will honor the warranty definitions specified on the Warranty Plan Detail table (*See Sec. 3.5*). A Warranty Vendor invoice will not be generated if:

- Δ the Manufacturer’s Limits have been reached or exceeded, or
- Δ the Deductible is larger than the billed amount, or
- Δ the Warranty is expired (status “e”) on the equipment.

## 4.12 Generate GL Transactions from Repair/Warranty

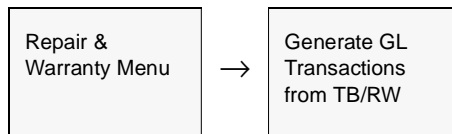
### Description

The Generate GL Transactions from TB/RW routine uses the RW detail and labor table information to generate a summary journal entry in FLEXX General Ledger. This journal entry is generated using the GL SKU Account code information as defined for each SKU in FLEXX Inventory Control SKU GL Table.

For non-inventory SKU items, FLEXX Time Billing debits the Cost of Goods Sold (COGS) Division/Account Number and credits the Expense Division/Account Number. Costs are determined by multiplying the number of SKU Items used by the standard cost defined on the SKU Master.

For inventoried SKU items, FLEXX Time Billing debits the Cost of Goods Sold (COGS) Division/Account Number and credits the Inventory Division/Account Number. Costs are determined by multiplying the number of SKU Items used by the costing method of the SKU (i.e. Average, LIFO or FIFO).

### Select



The Generate GL Transactions from TB/RW Screen appears in Update mode.



**Fields**

The following fields appear on the screen.

Field	Entry	Default	Reqd
<b>Selection Criteria</b>			
Workorder Repair/ Warranty	These two buttons allow selection of either WO's or Repair Orders to be generated.	Repair/Warranty	Y
Company	The Company Code of the Work Orders for which a journal entry and costs will be generated.	Session Default	Y
Division	The Division Code of the Work Orders for which a journal entry and costs will be generated.	Session Default	Y
GL Period	The GL Period that will be used on the resulting journal entry in FLEXX General Ledger. This period field is also used as selection criteria to determine which Work Order Detail and Labor lines will be selected.	Session Default	Y
<b>Generation Criteria</b>			
GL Trans Date	The date that will appear on the resulting journal entry in FLEXX General Ledger.	Session Default	Y
Batch #	If using batch control, the batch number to appear on the resulting journal entry in FLEXX General Ledger.		N
GL Trans Desc	End-user description to appear on the resulting journal entry in FLEXX General Ledger.		N
<b>Start</b>	Press this button to start the GL transaction generation.		
GL Transaction	The FLEXX General Ledger transaction number generated as a result of running this process.	System Generated	

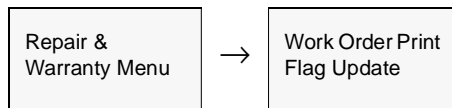


## 4.13 Work Order Print Flag Update

### Description

Once a Repair Order has been printed (See Sec 7.6), the Printed box will be checked on the Repair Order header record. If it is required to reprint a Repair Order, the print status must be changed to “N” before another printing can be accomplished. This procedure will do this.

### Select



The Print Status update screen appears in Update mode.



**Fields**

The following fields appear on the screen.

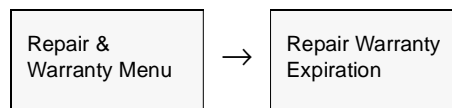
Field	Entry	Default	Reqd
Work Repair/Warranty Order	This print routine is also shared by the FLEXX Time/Billing module. As a result it is necessary to designate whether the print status update applies to work orders or repair orders.	Repair Warranty Order	Y
Company	The Company code.	Session Default	Y
Division	The Division code or accept the wild card to select all divisions.	*	Y
Start Work Order Number	The number of the first work order to be reprinted.	First Work Order/Repair Order Number	Y
End Work Order Number	The number of the last work order to be reprinted.	Last Work Order/Repair Order Number	Y
Starting Work Order Date	The Work Order date used to determine the range of work orders to select from.	Session Default	Y
Ending Work Order Date	The work order date used to determine the range of work orders to select from.	12/31/99	Y
Change Print Status From	The update/selection criteria as required.	Y	Y
Change Print Status To	The update/selection criteria as required.	N	Y
<b>Start</b>	Press the button to start the print status update routine.		

## 4.14 Repair Warranty Expiration

### Description

The Repair Warranty Expiration process is used to review the warranty status of all R/W equipment defined in FLEXX, and if the expiry date is past, set the warranty status to Expired.

### Select



The Repair Warranty Expiration screen appears in Update mode.

Warranty Expiration

Form Edit Field Help

Selection Criteria

Company: lucker

Customer: remco

Equipment: %

Serial #: %

Plan: %

RW Cutoff Date: 12/31/01

Start Idle

The process accesses the Customer Equipment Warranty Maintenance table (*See Sec. 3.7*) and checks the Expiry Date value. It compares this value with the specified Cutoff Date value and if equal or earlier, will set the corresponding equipment warranty record to Expired (status “e”).

It will also change the Equipment Maintenance Table and the Customer Equipment Maintenance Table status to “e”.

**Fields**

The following fields appear on the screen.

Field	Entry	Default	Reqd
Company	The Company code.	Session Default	Y
Customer	The customer code to be used to select equipment. Use the wild card (%) if all customers are to be selected.	%	N
Equipment	The specific equipment code to be selected.	%	N
Serial #	The specific serial number to be selected.	%	N
Plan	The specific Warranty Plan code to be selected.	%	N
RW Cutoff Date	The date to be used as the cutoff for the warranty expiry date.	Session Default	Y
<b>Start</b>	Press start to run the process.		

## 5.0 Order Processing Integration

### ***Description***

This section describes the Order Processing functions that are integrated with Repair & Warranty processing. The following processes are described:

- Δ Sales Order Entry of R/W equipment
- Δ Serial Number selection
- Δ Warranty Plan selection, including extended warranty plans
- Δ Cancelling and/or Deleting detail entries
- Δ Order Return processing of R/W equipment

### ***Note***

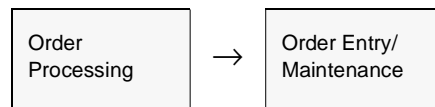
**Refer to the Order Processing manual for complete details on all OP functions.**

## 5.1 OP Order Entry

### Description

The OP Order Entry/Maintenance form is used to generate a RW Equipment sales order.

### Select



The Order Entry/Maintenance screen appears in Find mode.

Please refer to the Order Processing manual, sec. 3.1 for more detail on the Order Entry screen.

**R/W SKU Entry**

After saving the header screen, the Order Detail screen is displayed (in Update mode).

The screenshot shows the 'Order Detail' window with a menu bar (Form, Edit, Database, Record, Field, Help) and a toolbar. The main area contains a table with the following data:

Part Number	Sell UOM	Quantity	Description	Sell Unit Price	Extended Price	Status	Tax	Sell Price
modemusr	EA	1.0	Modem USB 56K	67.5	67.50	In	N	
warranty1	EA	1.0	Extended Warranty 1	90.0	90.00	o	N	

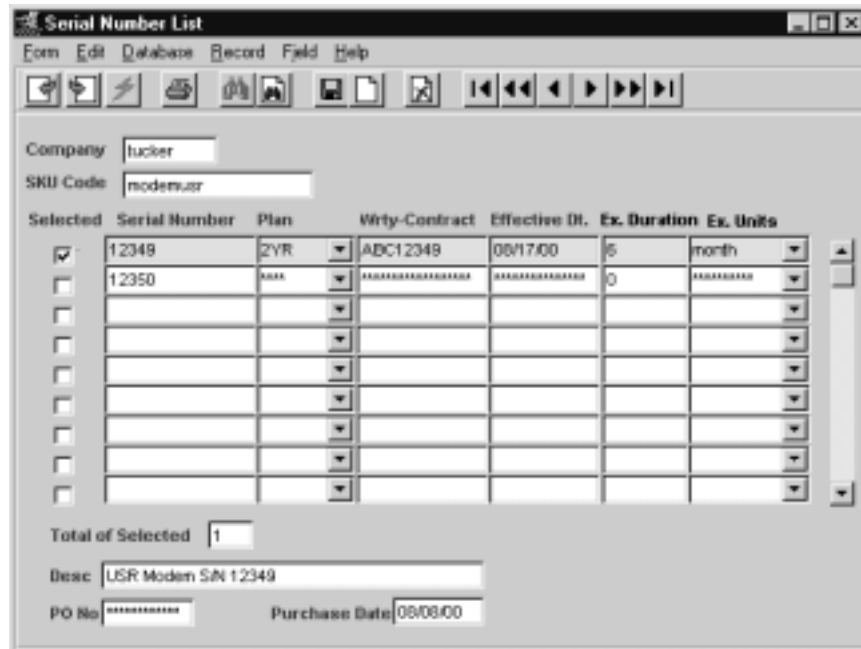
Below the table are several control panels:

- Order Summary:** Edition, Cutoff Date, Job Code, Order Discount (0.0), Stock Level (4.0), Edition Level (0.0), Resource, Total Weight (0.0), and a Total of 157.5.
- Shipping/Pricing:** Price Type (d), Discounts (A), Whole Order (V), Stocking Qty. (1.0), Stock UOM (EA), Tax (Y), Currency (USD), Invoice (P2663), and Original Order (0).
- Summary Table:**

Seq	Group	Level	Sell List Price	Net Unit Price	Net Est. Price
1		0	75.0	67.5	67.5
Container Charge			0.0	Total	0.0
Environmental Charge			0.0	Total	0.0
- Buttons:** Rapid Entry (checked), Equip Wnty, Override, Price Order, Return, View Return.

Enter the SKU code of the R/W equipment item being ordered. Since the item is defined as a Serialized SKU (Serialize flag checked - See Sec. 5.4), a serial number will need to be specified for each item ordered. To select a serial number, highlight the equipment item detail line and press the **Serial Number** button. This will display the Serial Number List screen.

### Serial Number Select



Select the desired Serial Number from the displayed list by marking the “Selected” box. You will also need to enter the warranty plan and contract codes as required. Press Add/Update and FLEXX will prompt with message “Add extended warranty?” Answer No if not, and proceed with order entry. If Yes, FLEXX will automatically generate an additional detail entry for the extended warranty. This requires a definition in the SKU Master (Inventory Control) for the Extended Warranty SKU (*See Sec 5.5 for more information*).

### R/W Interface

Once the detail data has been saved (<<Add/Update>>), FLEXX will automatically update the following R/W tables with details of that item:

- Δ Equipment Maintenance (*See Sec. 3.4*)
- Δ Customer Equipment Maintenance (*See Sec. 3.6*)
- Δ Customer Equipment Warranty Maintenance (*See Sec. 3.7*)

If necessary, values can be changed from those generated, and other user-defined fields and tables will need to be entered (i.e. Equipment Auxiliary Plans - *see sec. 3.8*).

The order is now processed as per normal OP procedures as described in the *Order Processing manual, Sec. 3.0*.



## 5.2 Order Entry Cancel/Delete Processing

### **R/W SKU Cancel/Delete**

A R/W Equipment SKU entry can be cancelled and deleted if it is in open (“o”) status. On changing the status to “cn” (cancel) and saving the entry, FLEXX will automatically delete the extended warranty entry, as well as all previously generated R/W table entries for this item. The item can now be deleted from the order if desired, and the order can be cancelled and/or deleted, or new entries made.

### **Extended Warranty SKU Cancel/Delete**

The extended warranty SKU entry can be cancelled and deleted if it is in open (“o”) status. Access the Serial Number List table (press the Serial Number button on Order Detail) and set the Ex. Duration field to 0 (zero). On Saving (<<Add/Update>>) this entry, FLEXX will automatically update the Customer Equipment Warranty Maintenance table with the new Expiry Date (*See Sec. 3.7*). This date will be the re-calculated value of the initial warranty duration less the extended duration of the cancelled extended SKU.

### **Serial Number Cancel**

FLEXX will allow the user to either cancel or change the Serial Number selection. To accomplish this, access the Serial Number List table (click on the Serial Number button from Order Detail) and un-check the “Selected” field on the desired entry. On saving this entry, FLEXX will automatically delete the extended warranty detail entry if one was entered, and delete the R/W table entries for this item (*Customer Equipment Warranty Maintenance table - See Sec. 3.7*).

## 5.3 R/W Order Returns

### **Description**

This section describes the process used to return a R/W item, either the R/W equipment or the associated Extended Warranty SKU. Normal Order Return processing as described in the OP manual sec. 7.0 is used.

This section will discuss only those items that are unique to the R/W order return process.

### **R/W Equipment**

As described in the OP manual, only Invoiced items (status “in”) can be returned.

On the Order Detail screen, highlight the entry that is to be returned, and press the Return button. The following screen will be displayed in Update mode:



Mark the “Return Selected” field for the specific Serial Number desired, enter the Return Stock Quantity value and press the OK button. FLEXX will generate a new “Return” order with the Detail entries for the returned R/W equipment SKU as well as any Extended Warranty associated with it. This order will then need to be processed as per normal return processing (See *OP manual, Sec 7.0*). Once the Return order has been released/shipped (shipping is automatic on release of a return order), FLEXX will automatically update the R/W tables by deleting the returned equipment SKU.

**Extended  
Warranty  
Return**

It is also possible to return only the Extended Warranty SKU. This follows the standard return process as described in the *Order Processing manual (See OP Sec. 7.2 “Processing Returns from Original Order”)*, where a new return order is generated for the item. Invoice Generation will then create a credit memo for the returned value.

Additionally on release./ship of the Return order, FLEXX will automatically update the Repair/Warranty tables by deleting the Extended Warranty entry and re-calculating the warranty Expiry Date (See *Sec. 3.7*).

## 5.4 Repair Warranty Equipment SKU Definition

### Description

This section describes the parameters required to be defined on the Inventory Control SKU Master for a Repair Warranty equipment item. A R/W equipment item is considered to be a SKU item that when sold, will also be maintained by the “company” using the FLEXX Repair & Warranty module.

### Definition

Only those definitions that are unique to the R/W equipment item will be discussed. Refer to the Inventory Control manual, Sec 3.0 for complete details on all fields.



Required Settings:

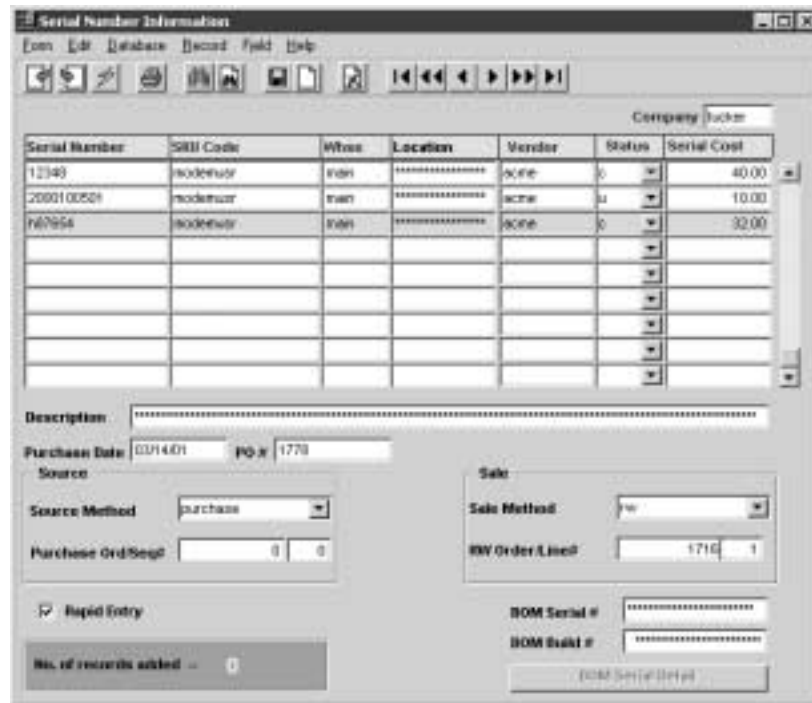
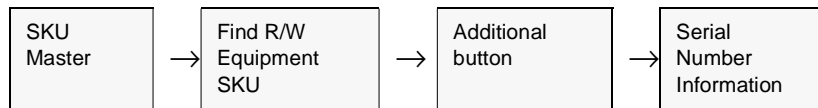
- Δ Inventory - On
- Δ Serialize - On, with
- Δ Serial Type “se”
- Δ RWEquipment - On

Δ RWReplacement - On if this SKU can also be used as a replacement item. Note that even if this flag is not set, and the SKU is used as a replacement, FLEXX will prompt with a message and allow its use.

All other flags can be set as desired.

### Serial Numbers

The R/W equipment SKU must also be defined with a serial number for each item in stock (On Hand). This is done using the Serial Number Table.



The Serial Number entries can be made as required, including the warehouse where the item is located as well as the cost price of the particular item.

**Pricing**

The Equipment SKU must also be defined with an effective price:

- Δ Effective Date
- Δ Price Type
- Δ Warehouse (null for all)
- Δ Customer (null for all customers)
- Δ Quantity
- Δ Discount Table

*See the Inventory Control manual, Sec. 3.4 for more details on entering these values.*

## 5.5 Extended Warranty SKU Description

### Description

This section describes the parameters required to define the Extended Warranty SKU item. This SKU is considered to be an additional optional warranty plan, sold along with a R/W equipment SKU, and shown on the order and invoice as a separate entry.

### Definition

Only those definitions that are unique to the Extended Warranty item will be discussed. Refer to the Inventory Control manual, Sec. 3.0 for complete details on all fields.

The screenshot shows the 'SKU Master' application window. The 'Attributes' tab is active, displaying a grid of checkboxes for various attributes. The 'Required Settings' section below the screenshot lists the following configurations:

- Logical - ON
- Tangible - OFF
- Inventory - OFF
- Invoice - ON

#### Required Settings

- Δ Logical - ON
- Δ Tangible - OFF
- Δ Inventory - OFF
- Δ Invoice - ON

Δ Serialize - **OFF**

Δ RWEquipment - **OFF**

All other flags can be set as desired.

### **Pricing**

The Extended Warranty SKU must also be defined with an effective price:

Δ Effective Date

Δ Price Type

Δ Warehouse (null for all)

Δ Customer (null for all)

Δ Quantity

Δ Discountable

*See the Inventory Control manual, Sec. 3.4 for more details on entering these values.*

## 6.0 Quotation Manager Integration

### ***Description***

This section describes the Quotation Manager functions that are integrated with Repair & Warranty processing. The following processes are described:

- Δ Quote entry of R/W equipment
- Δ Warranty Plan assignment
- Δ Sales Order creation

### ***Note***

**All the normal Quotation Management functions are available to the Repair & Warranty function. Refer to the Quotation Manager manual for complete details on all Quotation functions.**



## 6.1 Quote Entry

### Description

The Quotation Master form is used to generate a RW Equipment quote order.

### Select



The Quotation Master screen appears in Find mode. Press <<Clear to Add>> to enter a new quote, or <<Find>> to find an existing quote.

Please refer to the Quotation Manager manual for more detail on the Quotation Master screen.

## 6.2 Quote Detail Entry

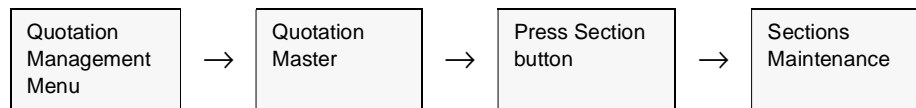
### Description

Quote Detail entries are performed in a two-step process:

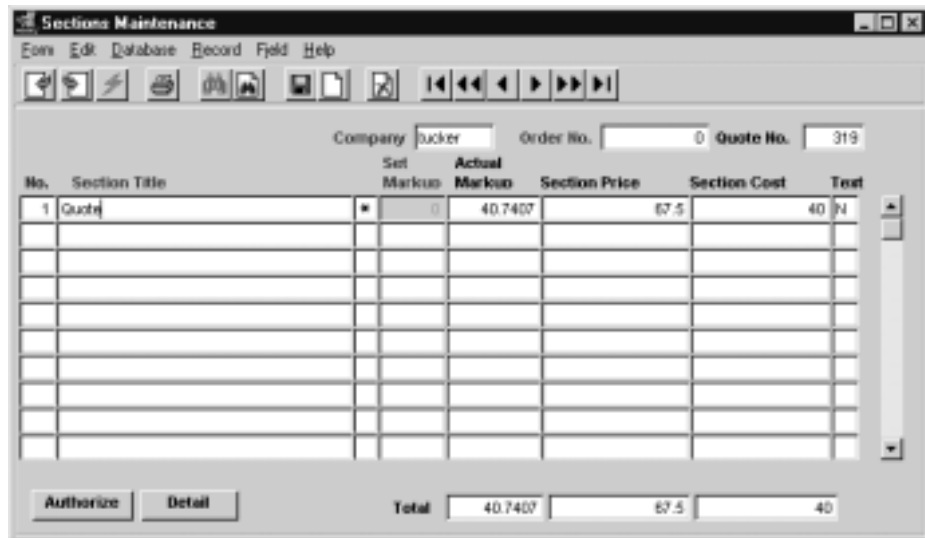
- Δ Sections Maintenance entry
- Δ Quotation Detail entry

This section will describe the process from a R/W Equipment entry perspective only. Please refer to the Quotation Manager manual for complete details on all the fields.

### Sections Maintenance Entry



The Sections Maintenance screen appears in Update mode...

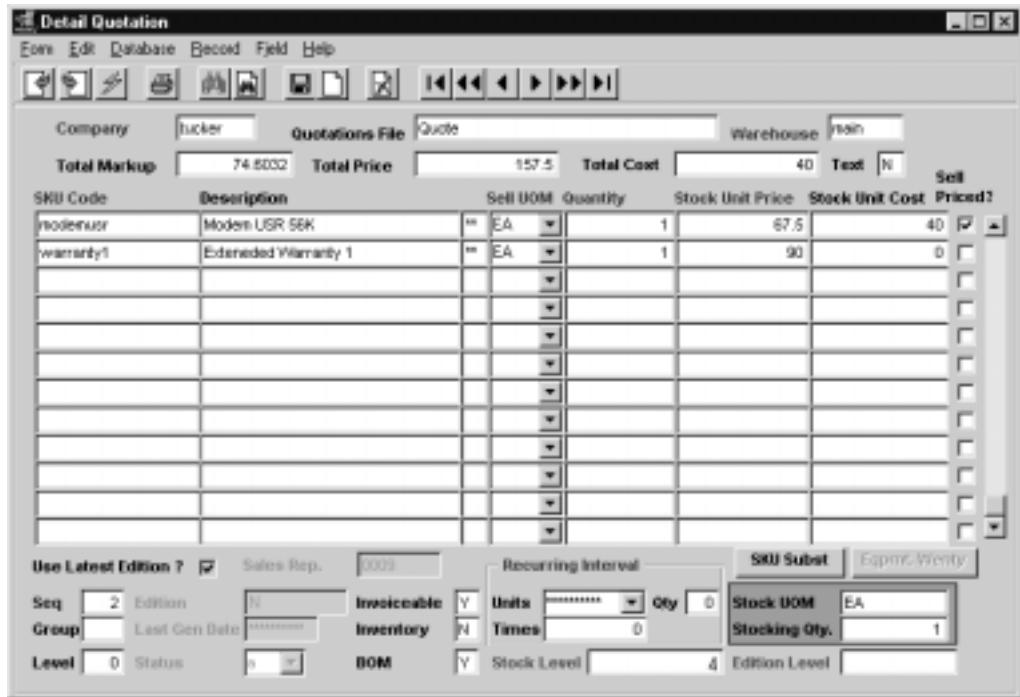


Enter the Section Title and press Enter (or Add/Update). FLEXX will then display the Detail screen.

**Quote Detail Entry**



The Quotation Detail screen appears in Update mode...



Enter the RW equipment code into the SKU Code field with the desired quantity (See Sec. 5.4 for Equipment SKU definition). Make any other changes as desired (Price, Sell UOM, etc.) and save (Add/Update) the entry.

It is also possible at this time to specify Extended Warranty to be added to the quote. To accomplish this, press the **Eqmnt Wrnty** button, and the R/W Equipment Maintenance form (See Sec. 3.4) is displayed. Add or change any entries as desired (i.e. user fields), and press the **Customer Equipment** button to access the Customer Equipment Maintenance form (See Sec. 3.6). Again, changes and/or additions can be made to this form as desired. Press the **Customer Wrty Plan** button and the Customer Equipment Warranty Maintenance form will be displayed (See Sec. 3.7). Enter the desired extended warranty plan in the **Ext. Wrnty Duration** and **Units** fields, Add/Update the entry, and return (Previous Form) to the Quotation Detail screen. This process will result in the extended warranty SKU to be automatically entered into the quote at the price defined in the SKU Price table (See Sec. 5.5 for Warranty SKU definition).

**Sales Order  
Creation**

Once this Quote is accepted by the customer, it will need to be transferred to a Sales Order in OP. This is accomplished by pressing the **Create Order** button on the Quotation Master (header) form.

As per normal quote entry procedures, the quote may require authorization if the user entering the quote is not defined with the necessary user authority level (*See Getting Started manual, User Authorization "slsmarkup" description*). To authorize the quote, press the **Authorize** button on the Sections form, and enter the 'authority' user ID and password. Once authorized, the quote can be transferred to OP.

Note that an actual Serial Number will only be selected when the sales order is released (*OP Order Release process*). FLEXX will automatically select the next available number from the Serial Number List defined for the quote/ordered Equipment SKU.

## 7.0 Extracting Information

### **Description**

This Section describes:

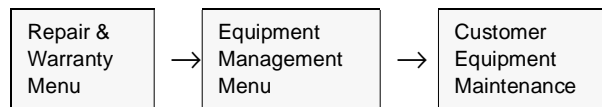
- Δ How to do on-screen inquiries with regards to the status of Repair Orders, Customer Equipment history and Repair & Warranty Summaries.
- Δ Printing standard reports.

### 7.1 **Customer Equipment Maintenance**

#### **Description**

Use the Customer Equipment Maintenance screen as described in *Sec.3.6* to review equipment maintenance information and the equipment they relate to.

#### **Select**



By entering different search criteria in the various fields, the following values can be displayed:

- Δ Customer's equipment complete with Serial Numbers and Warranty Plans,
- Δ Purchase order number and date
- Δ Detailed equipment description

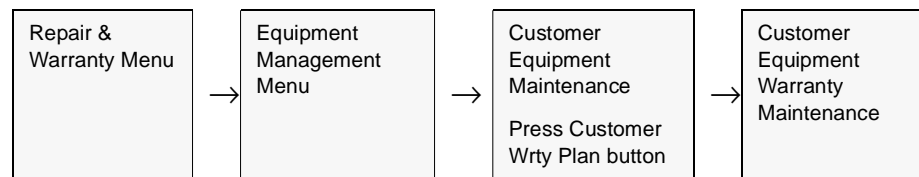
This screen is also used to access the Customer Equipment Warranty screen (*See Sec. 7.2*).

## 7.2 Customer Equipment Warranty Maintenance

### Description

Use the Customer Equipment Warranty Maintenance screen as described in *Sec.3.7* to review equipment warranty plan information and the equipment they relate to.

### Select



By entering different search criteria in the various fields, the following values can be displayed:

- △ Warranty Plans
- △ Warranty expiry date
- △ Warranty Parts and Labor amounts already used

### 7.3 Repair & Warranty Summary

**Description**

This is a query only screen, no update of Repair transactions are allowed. The Work Order Summary screen shows a summary of the charges that have been generated as a result of performing work on the order. The form summarizes both estimates and actuals, as well as showing the impact of any warranty work.

**Select**



The Repair & Warranty Summary screen appears in Update mode.

	PARTS	LABOR	TOTAL
Estimate	0.00	0.00	0.00
Less Warranty	0.00	0.00	0.00
Deductible	0.00	0.00	0.00
<b>Net Estimate</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
Actual	602.82	900.00	1,502.82
Less Warranty	0.00	0.00	0.00
Deductible	0.00	0.00	0.00
<b>Net Actual</b>	<b>602.82</b>	<b>900.00</b>	<b>1,502.82</b>
Plus Tax	150.11	224.40	374.51
<b>Total Actual</b>	<b>752.93</b>	<b>1,124.40</b>	<b>1,877.33</b>

The displayed fields are self-explanatory.





**Fields**

Use the following fields to select the history needed.

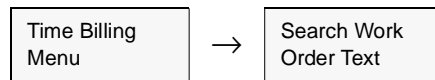
Field	Entry	Default	Reqd
Company	The Company Code of the company appearing on the Repair Order Header or leave blank to view all companies.	RW Header	
Division	The Division Code of the division appearing on the Repair Order Header or leave blank to view all divisions.	RW Header	
Customer	The Customer Code to retrieve the customer history or leave blank to see all customer history records.		N
RW#	The Repair Order number or leave blank to see all RW orders.	RW Header	N
Equipment	The Equipment Code to retrieve the history of or leave blank to see all equipment history records.	RW Header	N
Equip Serial Number	The Equipment serial number to retrieve the history of or leave blank to see all equipment history records.	RW Header	
Customer PO	The Customer PO number appearing on the Repair Order Header.	RW Header	N
Received Date	The order date of the Repair Order.	N	
Act. Date	The date the Repair Order was activated.	RW Header	
Status	The status of the Repair Order. Can be: <ul style="list-style-type: none"> <li>• <b>o</b> - Open</li> <li>• <b>a</b> - Active</li> <li>• <b>c</b> - Complete</li> <li>• <b>in</b> - Invoiced</li> <li>• <b>cr</b> - Credit Hold</li> <li>• <b>ch</b> - Customer Hold</li> <li>• <b>cn</b> - Cancelled</li> </ul> <i>See Sec. 4.2 for more detail.</i>		
Amount	The amount of the selected Repair Order.		
Job Code	The Job Code associated with the Repair Order if FLEXX Project Management is being used.	RW Header	N
Ship To	The ship to code identifying where the completed Repair Order can be shipped.		
Ship Via	The shipping method used.		
Comment	The comment field from the RW header.	RW Header	
Total	The Total amount of all listed Repair Orders.		

## 7.5 Search Work Order Text

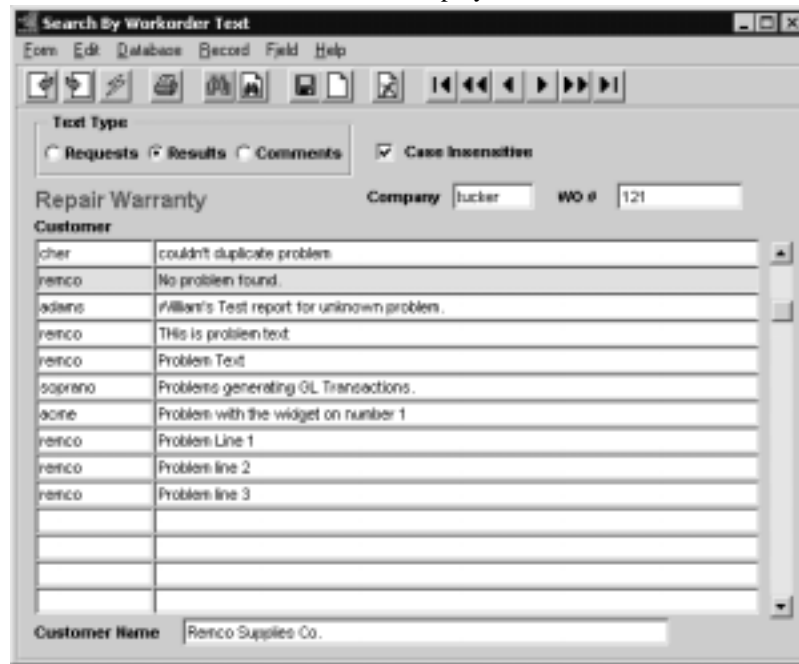
### Description

The Search Work Order Text form is used to perform searches on the data entered into the WO Text Table (See Sec. 4.3).

### Select



The Search Work Order Text form is displayed in Find mode.



### Fields

Enter the following information to view Work Order Transactions

Field	Entry
Text Type	These 'buttons' are used to specify the WO Text type to be searched. If any one is selected, FLEXX will search only that section of the Text table. If they are all left blank, FLEXX will search all Text table sections for the text. These buttons will then show which section the 'found' text is recorded in.
Case Insensitive	This flag is used to indicate whether or not the search is to be case insensitive.

Field	Entry
Company	The Company code.
WO #	Will display the WO number where the 'found' text data was entered.
Customer	To perform a search of text for a particular customer, enter the Customer code. Otherwise leave blank. When the requested text is found, this field will contain the Customer code of the WO where the 'found' text data was entered.
Text	<p>To perform a search, enter the search argument (the value to be located) in this field. As many or as few characters can be entered as desired. However, they must then all be in the string as entered. Also, the use of wildcards will need to be used to find the imbedded text.</p> <p>E.g. To search for the word "problem" imbedded in the text data, enter %problem%. This will find all representations of "problem" in all sections of the Text Table.</p> <p>E.g. To search the text where the entry begins with the word "problem", the leading % is not required; enter problem%. This will find all text where the entry starts with "problem" in any case.</p>

## 7.6 Printing Standard Repair & Warranty Reports

### Description

Reporting with Repair & Warranty is the same as in all FLEXX Modules.

The following table lists the standard RW Reports.

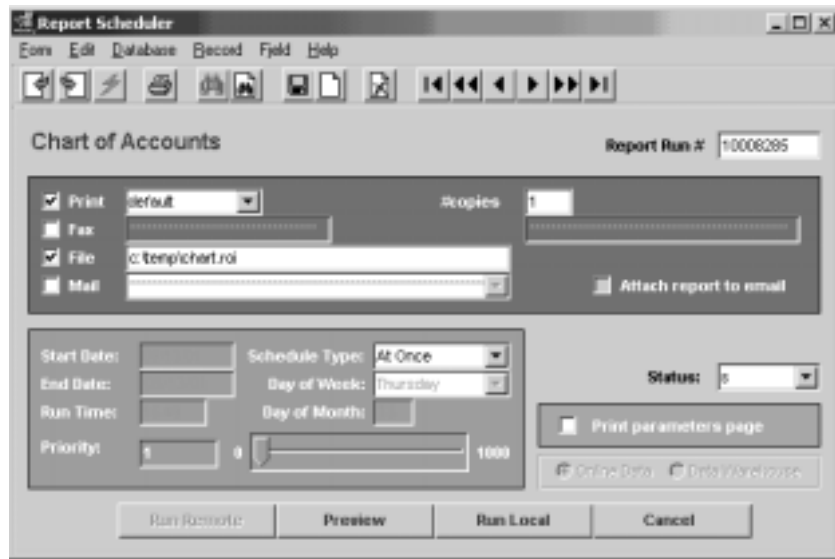
Report Code	Report Title	Description
rwedit	Repair Warranty Invoice Edit Report	Acts like a pre-invoice report. Totals parts, labor and applicable taxes to display the complete charge to the customer.
rwlabor	Repair Warranty Labor Report	Report showing number of hours worked by each employee by month.
rworder	Repair Warranty Order Report	Prints the actual Repair Work Order.
rwpack	Repair Warranty Packing Slip	The Packing slip of the selected Repair Order(s).
rwprop	Repair/Warranty Proposal	A proposal report for the selected RW repair orders. It will default to only the "est" (Estimate) items, but can be selected for Actuals as well.

### Procedure

#### To Print a Repair & Warranty Report:

- △ Select **Report Selection** from the Repair & Warranty Menu.
- △ Position your cursor on the report you want to print.
- △ <<Press Select Report>>. The report selection criteria appears along with the report title and control number.
- △ Enter the selection criteria. The following table indicates which fields you must enter criteria into to select the report.

Δ <<Press Run Report>> to display the following printing options.



**Fields**

Enter the following information to print the report.

Field	Entry	Default	Reqd
Print	Select the print box to send the report output to a printer.		Y
Print Device	The printer name. This will be the printer specified as the Default on the User Master for this user.	default	Y
# Copies	Enter the number of copies of the report desired.	1	Y
Fax	Select the fax box to fax the report. This functionality only works if fax software has been installed and configured to FLEXX specifications.		Y
Fax Number	Enter the fax telephone number.		Y
File	Select the file box to send the report output to a file, otherwise leave blank. This file can be used to reprint the report at any time.		Y
File Name	The user-defined name of the file to send the output to. Your System Administrator sets up this field.	System Generated	
Mail	Select the Mail box to have the report server send you an e-mail on print completion. This functionality only works when reports are being "scheduled".	User Master	N
Mail Address	The e-mail address to be used.	User Master	
Attach report to email	Select this box to have the report "rox" file sent to the designated e-mail address as an attachment. If Actuate is loaded the report can then be viewed or printed.		

Field	Entry	Default	Reqd
The following fields are only active (lit) if the FLEXX Report Server is installed and active.			
Start Date	The date to start the printing schedule for this report.	Session Default	Y
End Date	The date when the print schedule is to end.	Session Default	Y
Run Time	The time of day when the print schedule is to be started.	Internal Time Clock	Y
Priority	The scheduling priority. Once the report scheduler has determined which reports are eligible to be run for the specified date or time, they are then prioritized with 1000 being the highest and 0 the lowest priority.	1	
Schedule Type	The type of schedule to use; can be: <ul style="list-style-type: none"> <li>• At Once – to be run immediately. This is the only option for Preview or Run Local.</li> <li>• Run Once – run only once (no repeats).</li> <li>• Daily – run schedule each day for the period entered.</li> <li>• Weekly – run the schedule once a week.</li> <li>• Monthly – run the schedule once a month</li> </ul>	At Once	
Day of Week	The day of the week the report is to be scheduled.	Session Default	
Day of Month	The month date the report is to be scheduled.  Note that when defining the Day of Week or Day of Month settings, only one or the other can be set. FLEXX will enter the other corresponding value to match.	Session Default	
Status		s	
Print Parameters Page	Select this box to have a cover sheet printed with the report, displaying the selection criteria used to produce the report. This can be controlled with the Application Control variable <i>parampage</i> setting.	marked	
<b>Buttons</b>			
Run Remote	Press this button to send the report to the Report Scheduler to be printed.		
Preview	Press this button to preview the report only. It can be printed from the preview screen.		
Run Local	Press this button to print the report on the local printer (i.e. not schedule the printing)		
Cancel	Press Cancel to cancel the operation. This is the same as pressing <<Previous Form>>. It will not cancel printing if the report has already been sent to the printer or scheduler.		

## 8.0 Credit Management

### **Description**

FLEXX Order Processing, Time Billing and Repair/Warranty make use of customer credit checking. Credit checking can be set up to check a customer's credit limit and prompt when the limit is about to be exceeded. Customers can also be made inactive, put on credit hold with override and put on full credit hold with no override. Status settings can be changed at any time if needed.

### **Setting Customer Status**

To set a customer status, find the desired customer in FLEXX Customer Master (See Getting Started Manual) and depending upon the severity of the credit problem you can do the following:

### **Notes**

The default Credit Flag status of '0' signifies a customer with a normal credit. FLEXX does not check the customer credit flag status when entering transactions directly into Accounts Receivable.

If there is to be no credit checking done for a customer, set the Credit Flag to '3' and all normal credit checking will be bypassed at order entry.

### **Setting Customer Credit Limit**

To set a Customer Credit Limit, find the desired customer in FLEXX Customer Master (See Getting Started Manual) and select the Financial Tab. In the field, Credit Limit, enter the appropriate credit limit. The default setting is 0.00 which implies unlimited credit. When a transaction is entered in FLEXX Order Processing, Time Billing and/or Repair/Warranty, FLEXX checks the amount of the transaction being entered, adds the amount to the Customer Balance figure and checks the total against the figure entered in the Credit Limit field.

△ Make the customer inactive. A customer with an inactive status can not have any transactions entered for him at all. The only exception to this would be in FLEXX Accounts Receivable. If a customer has a status of inactive and has several invoices outstanding, it is still possible to enter any subsequent receipts. If an attempt is made the following error message will appear "Customer is inactive".

△ Assign the customer a Credit Flag status of "1" - Credit Hold - No Override. A customer with this status can not have any transactions entered in FLEXX Order Processing, Time Billing or Repair/Warranty. If an attempt is made the following error message will appear "Warning! This customer has a credit hold with NO override status".

- △ Assign a customer a Credit Flag status of “2” - Credit Hold with override. A customer with this status can have transactions entered in FLEXX Order Processing, Time Billing or Repair/Warranty. However, when these transactions are entered, a message appears stating that the customer is subject to “Credit Hold with override”. Press okay and you can continue to enter the transaction. This status serves only as a prompt in the FLEXX Time Billing and Repair Warranty modules. In FLEXX Order Processing a status of Credit Hold with Override will allow you to enter the order but the order header will have a status of “cr” - credit hold. No further processing of the order will be allowed until it has been authorized and the header status changed to “o” - open.

### ***Credit Approval***

There exists in the FLEXX Order Processing module a credit approval routine. This routine applies to sales orders with a status of “cr” - credit hold only. An order with a status of “cr” can be created and its’ details entered but no further processing can take place (i.e. the Product Release Process ignores it). For a sales order on credit hold to be processed it must first be approved. Only a person with the appropriate authorization rights (granted as part of user setup - See FLEXX Administration Guide for further information) can approve a sales order on credit hold.

As a result of this approval, the status of the order header goes from “cr” - credit hold to “o” - open. The order can now be processed as normal. To approve a credit hold sales order, find the order and press the “Credit” button. A Credit Hold Release form will appear with the default values identifying the person who is logged in. A password is required to be entered. As long as the person who is logged in has been granted the appropriate authorization rights, has a sufficient dollar limit assigned and a correct password, the order header status will be updated from “cr” - credit hold to “o” - open.