

Suburban Software Systems

Sales and Service

Prepared For:_____

Sales and Service Contents:

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Sales and Service



The Sales and Service Module is Operated from the Sales and Service button and the order in which the steps are preformed go from the top button to the bottom button. The bottom button transfers the work to the end of day process for Posting to accounts.

Enter/Modify Service Orders

Update Order

Company Identification Code	DEM
Branch Number	01
Account Number	
Order Type	S - Service Order
Order Number	763827

Exit

Continue

Enter in Account Number and select Service order on Order Type, enter in order number and click on Continue

Customer Inquiry:

Suburban Software Systems Workstation Id: B8 C:\RPG\

Styer Propane, LLC As of: 04/05/2011 4969/2011

Customer Info Account 01-04984 Type Loaned Tank Status A *Memos* Name ABBOTT, FRANK Address 5 TRAYLOR DRIVE City, State WEST CHESTER PA 19382- Phone (610) 793-9375 C - Cell (484) 354-9110		Codes Credit 1 - Good credit Delivery A - Automatic Tax PA - PA, . Use 3 - Heat and daily Finance Chgs Y - Compute Statement S - Stmt but no	Balance Current 0.00 Over 30 0.00 Over 60 0.00 Over 90 0.00 Over 120 0.00 Total \$0.00
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Driver/Route/Sequence 2 NW 0095 Last Delivery Date 02/14/2011 Forecast 30% Delivery Percent 07/29/2011 Forecast Runout Delivery 11/22/2011	EmailAddress dapruzzese1@mac.com Billing Cycle 3 V - Variable JFMAMJJASOND Monthly Credit Record 000*00000000 Delinquent Letter Number Start Date 09/2003 Gas Check Date 10/2007 Last Payment Date 10/18/2010 Last Payment Amount -2,820.00 Refundable Deposit 0.00 Budget Rate (Recommended) -299.00 Budget Balance 0.00 Credit Limit 0 Product: CG - CG PROPANE UN1075 Price: K-CONTRA GL
---	---

Percent Tank Filled to 85% Current Inventory Percent 48% Current Inventory Gallons 480 Tank Water Capacity 1000 Year-to-Date Deliveries 3 Year-to-Date Gallons 1,397.4 Last Year's Gallons 1,500.0
--

Main Memos Ledger Tank Info Budget Contracts Delivery Info Delivery History Timed Deliveries Orders Open Item Open Item History Meter

Counter Sale Gas Order Service Order Payment Update Gas Check View Map DocStore Write Ledger

Exit Previous Account New Search Next Account Forward

An alternate way is to enter a Service Order by clicking on Customer Inquiry at the bottom of the screen. This is the recommended and simple way to Create Service Orders.

Note: Service Orders can be created and entered in through Customer Inquiry by clicking on the service order button within the customer's account, but they can **ONLY** be **closed** and **transferred** in the S&S Options Menu.

Creating the Service Order:

Suburban Software Systems Workstation Id: KM I:\RPG\

Your Company Name

Account 01 12345 Order Type S Order Number 763820

Cash / Charge **2 - Charge** Date Scheduled 07/02/2015 Ship To

Tax Code Ordered 07/02/2015 (HH:MM) Ship to

Salesman KELLY Printed Shipped City

Ship Via State, Zip

Purchase Order # Invoiced

Service Order:

Work Performed:

Quantity	PCode	Model #	Description	UI	Price	Total
					Discount %	

#	Quantity	PCode	Part/Model #	Description	Discount	UI	Price	Total
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Delete Order Freight 0 Sales Tax 0.00 Edit OrderTotal 0.00

Cancel Mark Shipped Tax Code Address Print & Save Save

Note: Click on the Cash/Charge drop down menu and choose #2-Charge.

******DO NOT CHOOSE #1- CASH******

Fill in the Fields required:

DEMO Propane, LLC

Account 01 12345 Order Type S Order Number 000001 Service Order

Cash / Charge 2 - Charge Scheduled 08/31/2015 Ship to

Tax Code Ordered 08/31/2015 (HH:MM) Name (Last, First)

Salesman KELLY Printed Street Address

Ship Via Shipped City

Purchase Order # Invoiced State, Zip

Service Order: Work to be performed

Work Performed:

Quantity	PCode	Model #	Description	UI	Price	Total
1.0	L -		LABOR	GL	58.0000	58.00
			PLACEMENT OF TANK	Discount %	0	

Quantity	PC	Part/Model #	Description	Discount	UI	Unit Cost	Cost Total	Price	Total

Delete Order Freight 0 Sales Tax 0.00 OrderTotal 0.00

Cancel Mark Shipped Tax Code Address Print & Save Save

Service Order: Work to be performed

PCode: Product Code of Work to be performed

Description

1. Top line describes the PCode
2. Bottom line describes the work to be done

Price Price of service Order

Note: 1. Click on Save to save the Service Order

List Sales and Service Orders:

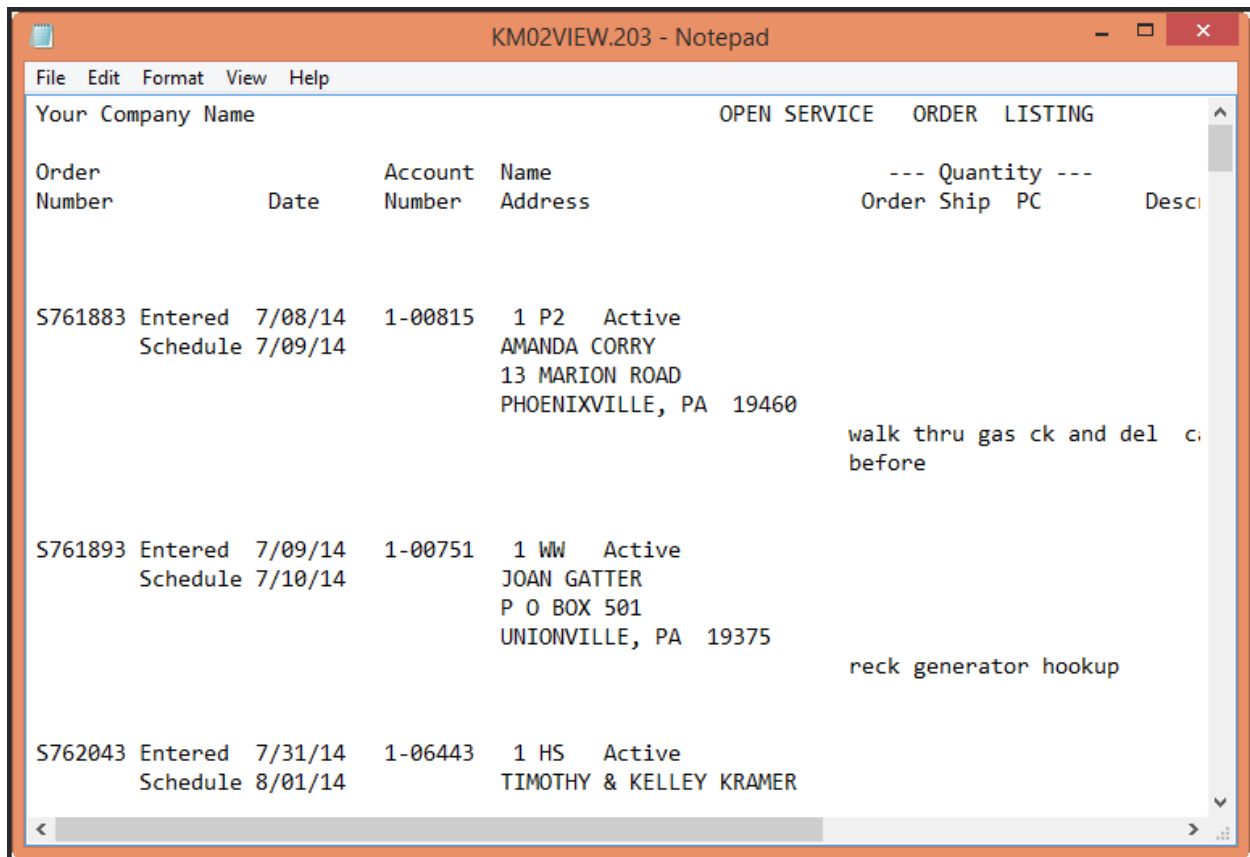
Print Sales & Service Order Listing

Company Identification Code	DEM
Branch Name -or- ALL Branches	01 - DEMO Propane
Type of Order (Appliance, Gas, Service, Backorder or All) ?	S - Service Order
List Orders Through What Schedule Date (or blank for all) ?	
Which Orders Should Be Listed?	Open
Ship Via (Driver & Route or Blank for All) ?	
Output Option	Print
Form Name	0001
Printer Type	P1 - Oki Data Dot Mat

Exit Continue

Purpose: Clicking on List Sales & Service Orders will give you an option list All, Open, Printed, Orders ETC.

Example of Report:



File Edit Format View Help

OPEN SERVICE ORDER LISTING

Order Number	Date	Account Number	Name Address	--- Quantity --- Order Ship PC	Desci
S761883	Entered 7/08/14 Schedule 7/09/14	1-00815	1 P2 Active AMANDA CORRY 13 MARION ROAD PHOENIXVILLE, PA 19460		walk thru gas ck and del c before
S761893	Entered 7/09/14 Schedule 7/10/14	1-00751	1 WW Active JOAN GATTER P O BOX 501 UNIONVILLE, PA 19375		reck generator hookup
S762043	Entered 7/31/14 Schedule 8/01/14	1-06443	1 HS Active TIMOTHY & KELLEY KRAMER		

Print Sales and Service Orders:

Print Sales & Service Orders

Company Identification Code	DEM
Branch Name -or- ALL Branches	01 - DEMO Propane
Type of Order (Appliance, Gas, Service, or Map Service Orders?)	Service
Print Service Orders for Scheduled dates (from/to) - or blank for all	
Which Orders Should Be Printed (Unprinted, Printed but not shipped or All)?	Unprinted
Ship Via (Driver & Route or Blank for All) ?	
Form Name	0001
Printer Type	P1 - Oki Data Dot Mat

Exit Continue

Purpose: Allows the operator to print a list of orders based on entered information.

Mark Completed Orders Shipped:

Update Order

Company Identification Code

DEM

Branch Number

01

Account Number

Order Type

S - Service Order

Order Number

000002

Exit

Continue

Purpose: Gives orders a shipped date to get ready for posting.

Print Completed Sales & Service Orders:

Print Edit Listing of Counter Sales

Company Identification Code DEM ▾

Branch Name -or- ALL Branches 01 - DEMO Propa ▾

Printer Type P5 ▾

Exit Continue

Purpose: Allows the operator to print a list of all shipped orders to show what will be posted.

Invoice Completed Service Orders:

Print Invoices for Sales and Service Orders

Company Identification Code	DEM
Form Name	INVC
Number of Copies	1
Printer Type	P1 - Oki Data Dot Mat

Exit Continue

Purpose: Allows the operator to invoice and print completed service orders.

Transfer Completed Orders to Posting:

Transfer Completed Orders to Posting

Company Identification Code DEM ▾

Enter the Sales Page Number to Assign to the Data

Form Name 0001 ▾

Printer Type P5 ▾

Purpose: Moves processed orders into posting file.