



Suburban Software Systems

SALES AND SERVICE

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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

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** Scheduled 07/02/2015 Ship to

Tax Code Ordered 07/02/2015 (HH:MM) Name (Last, First)

Salesman KELLY Printed Shipped Street Address

Ship Via Shipped City

Purchase Order # Invoiced State, Zip

Service Order:

Work Performed:

Quantity	PCode	Model #	Description	UI	Price	Total
					Discount %	

#	Quantity	PCode	Part/Model #	Description	Discount	UI	Price	Total
---	----------	-------	--------------	-------------	----------	----	-------	-------

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 Date 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 [24hr] 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 Order Total 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 Mal	▼

Exit Continue

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

Example of Report:

The screenshot shows a Notepad window with the following content:

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

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 Mal ▾

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 Mal	▼

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.