

# Suburban Software Systems

# **SALES AND SERVICE**

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# Sales and Service

8	Suburban Sc	oftware Systems	Workstation Id: KM	I:\RPG\	- • ×
		Sales A S&S Options Enter/Modify Sal List Sales & Print Sales & Mark Complete	nd Service es & Service Orders Service Orders & Service Orders ed Orders Shipped		SS Propane.Net (v1.3) 6/30/2015 9:15:26 AM SQL Indexes Enabled
		Invoice Comple	ales & Service Orders ted Service Orders eted Orders to A\R		
Gas	Dispatch	Billing	Management Rpts	Mapping	Banking & CCards
Daily	Utility	Month End	Delinquency Control	Tank and Meter	Sales & Service
Daily	Ounty	MONULEIG	Definquency Control	rank and meter	Sales & Service
Exit		?	Web Services	Order Inquiry	Customer Inquiry

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 v
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 Loaned Tank   Account 01-04984 Type Loaned Tank   Status A *Memos*   Name ABBOTT, FRANK *Memos*   Address 5 TRAYLOR DRIVE    City, State WEST CHESTER PA   Phone (610) 793-9375 C - Cell (484) 354-9110	CodesBalanceCredit1 - Good creditDeliveryA - AutomaticTaxPA - PAUse3 - Heat and dailyFinance ChgsY - ComputeStatementS - Stmt but no
Driver/Route/Sequence	EmailAddress dapruzzese1@mac.com
Last Delivery Date	Billing Cycle 3 V - Variable JFMAMJJASOND
Forecast 30% Delivery Percent 07/29/2011	Monthly Credit Record
Forecast Runout Delivery	Delinquent Letter Number
	Start Date
	Gas Check Date
Percent Tank Filled to	Last Payment Date
Current Inventory Percent	Last Payment Amount
Current Inventory Gallons	Refundable Deposit
Tank Water Capacity	Budget Rate
Year-to-Date Deliveries	Budget Balance
Year-to-Date Gallons	Credit Limit
Last Year's Gallons	Product: CG - CG PROPANE UN1075 Price: K-CONTRA GL
	ery History Timed Deliveries Orders Open Item Open Item History Meter date Gas Check View Map DocStore Write Ledger
Exit Previous Account New S	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:

8	Suburban Software	e Systems	Workstation Id: KM	I:\RPG\	- 🗆 🗙
Your Company Name					
Account 01 12345 0	order Type S Order Nur	nber 763820			
	Date		ShipTo		
Cash / Charge 2 - Char	rge v Scheduled	07/02/2015 _:	Ship to		
Tax Code		07/02/2015 (HH:MM [24hr]	) Name (Last, First)		
Salesman KELLY	Printed	[2-111]	Street Address		
Ship Via 🗸 🗸	✓ Shipped		City		
Purchase Order #	Invoiced		State, Zip		✓
Service Order:				0	
Work Performed:				<b>^</b>	
Quantity PC	ode Model#	De	scription	UI	Price Total
	v				
				7	Discount %
# Quantity PCode	Part/Model #	Desci	ription	Discount UI	Price Total
<					>
Delete Order		Freight	0 Sales Tax	0.00 Edit	OrderTotal 0.00
Cancel		Mark Shipped	Tax Code A	ddress Prin	t & 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, LL	_C						
Account 01 12	345 Order Type	S Order Nur Date	mber 000001	ShipTo	Service Ord	ler ∨	
Cash / Charge Tax Code Salesman Ship Via Purchase Order # Service Order: Work Performed:	KELLY	Printed Shipped Invoiced	08/31/2015 08/31/2015 (HH:M [24hr	Ship to M) Name (Last, Firs Street Address. City State, Zip	it)	×	
Quanti 1 Subltem Record	ty PCode M .0 L - v		E ABOR PLACEMENT OF 1	Description	Discount		Total 00 58.00
Quantity PC	C Part/Model #	D	escription	Discount UI	Unit Cost	Cost Total Pric	
C Delete Order			Freight Sa 0	lles 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 v
List Orders Through What Schedule Date (or blank for all)?	
Which Orders Should Be Listed?	Open v
Ship Via (Driver & Route or Blank for All) ?	v v
Output Option	Print v
Form Name	0001 v
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:

	KM02VIEW.203 - Notepad – 🗖 🗙	
File Edit Format View Help		
Your Company Name	OPEN SERVICE ORDER LISTING	^
Order Number Date	Account Name Quantity Number Address Order Ship PC Desc	
5761883 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	
5761893 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	
\$762043 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 V
Type of Order (Appliance, Gas, Service, or Map Service Orders?	Service v
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 v
Ship Via (Driver & Route or Blank for All)?	· · · ·
Form Name	. 0001 v
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 v
Branch Number	01 v
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 Co			
Company Identification	on Code	 	
Branch Name -or- ALI	L Branches	 	 01 - DEMO Propa v
Printer Type		 	 P5 v

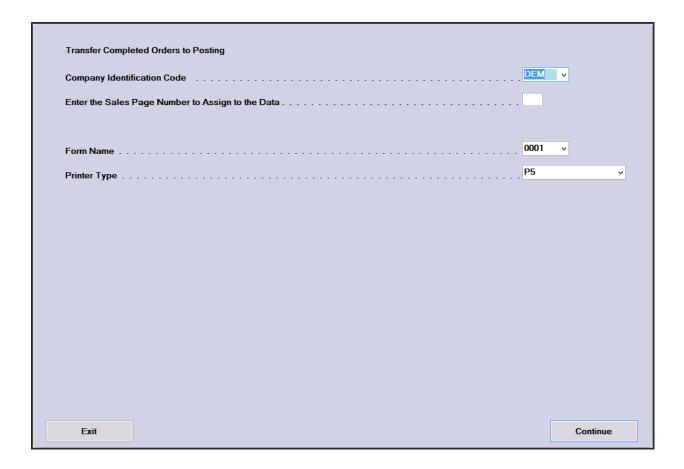
**Purpose:** Allows the operator to print a list of all shipped orders to show what will be posted.

# **Invoice Completed Service Orders:**

Company Identification Code	 	 DEM	<b>v</b>
Form Name	 	 INVC	<b>~</b>
Number of Copies	 	 1 💉	•
Printer Type		P1 - 0	ki Data Dot Mat

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

# Transfer Completed Orders to Posting:



**Purpose:** Moves processed orders into posting file.