

DDMS Serialized Setup Manual



eCommerce Industries, Inc.



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Introduction to Serialized

Welcome to the DDMS Serialized application. Running an office machine dealership is a complex task. The Serialized application can help you manage this task easily and efficiently. The application includes powerful features that let you quickly respond to service calls, automatically create contracts, and easily generate billings.

The purpose of Serialized is to track every item as a unique, individual unit. Using Serialized, you know who owns, borrows, or leases each individual unit, what maintenance has been performed on that unit, what service is due, and how much profit each unit has generated for your company.

About This Manual

This manual is designed to help you set up and get started on the serialized application. It contains all the information you need to start practicing or to start using the Serialized application for business transactions. We recommend that you read this entire introduction before you get started.

The chapters in this manual include instructions on changing Serialized parameters, as well as a detailed description of each parameter. A list of all serialized files is in the appendixes, as well as a description of the contract formats you can use with the Serialized application. If you need more detailed instructions on any of the processes in the Serialized application, see your online documentation.

In addition to manually loading your customer and item information, you can send your database information to O/PUS to be converted.

Setting Up the Serialized Application

Getting started is one of the most important tasks of running a successful dealership. Before you can actually use Serialized for business transactions, you must set up the Serialized parameters, design your contract types, and add your previous records to Serialized.

To help you set up your application, we've included a checklist with each of the screens and the steps to perform to get started. For details, see the heading **Checklist of Setup Procedures**.

If desired, you can set up your machine service as a separate profit center.

Navigating Serialized

The Serialized application is designed to help you quickly move from one window and tab to the next, while displaying basic information about a particular serialized item.

The Machine Master Menu

Serialized includes many windows. Select the window to access from the Machine Master Menu, with one exception. To place serialized orders, you access the Order Entry window and select Serialized from the Order Style drop down list box.

The Machine Master Menu works like the DDMS Master Menu. It's divided into several icons, including Serialized databases, contract information, and so forth. To open a window, simply double-click the icon.

Serialized Databases

In Serialized, each machine has its own record in the Serial Item database. These records display in the Machine Detail window.

When you first purchase and receive items in the Purchase Order Entry window, the system automatically assigns these items to the Serial customer that you set up in the Customer window. After you sell the item to a customer, the system automatically transfers the item to the customer and updates the Machine Detail window with the sale information. This window also provides basic information about the item, including the vendor from whom it was purchased and the purchase price and date.

In addition to the Serial Item database, Serialized includes several other databases:

- Customer Machines tab. This tab displays information from the Customer database. It also displays information specifically for serialized, such as the territory code and service times.
- Salesperson Technician tab. This database contains information about your technicians, order-writers, and salespersons. (Only those technicians set up in the Salesperson Technician tab can be dispatched on service calls.)
- Contract Detail window. This database contains records for each service contract. These contract records include the terms of the contract, such as meter information. They're set up so you can easily generate billings, monitor preventive maintenance, track and bill meters, and track profitability.

System and Subsystem Numbers

Before getting started, you should have a clear understanding of the difference between a system and a subsystem number. Every unit has a serial number, which you can use to retrieve information about the unit in most Serialized screens. The serial number is the manufacturer's identifying number, which is usually stamped or engraved into the unit or on a plate attached to the unit.

Each unit also has a system number, and some have subsystem numbers. The combination of system and subsystem numbers is the primary key, or unique identifier, for each unit. There are never any duplicates of that combination in the Serialized database.

When you first receive your system, a beginning system number and call number are not set. You must go to the (EZ1S) Serial System Parameters screen and enter a beginning system and call number in both the Next Call # and Next System # fields. For example, you could enter 10 as your beginning system number and 100 as your beginning call number. For details concerning the (EZ1S) screen, see

**Chapter 3:
Setting Global
Serialized
Parameters.**

The system number can identify either a unique unit or a unique group of units, such as a computer, monitor, keyboard, and printer that are grouped together at a particular workstation. If the system number identifies a unique unit, the subsystem number is not used. If the system number identifies a unique group of units, however, the subsystem number identifies each individual unit within that group, so that each unit has a different subsystem number.

Suppose a group of units includes a computer, monitor, keyboard, and printer. The system number for the entire group could be 10, and the subsystem number for each unit within the group would be different. The computer itself might be system number 10, with no subsystem number. The keyboard would be system number 10 and subsystem number 02, and the printer would be system number 10 and subsystem number 03.

The machine identification number can also be used as the system number.

When you purchase a unit for your Serialized inventory, you must enter that unit's serial number into the database and assign a unique system number. This lets you track each unit individually from the time it enters your stockroom. You assign these numbers when you receive the serialized items in the Purchase Order Entry window. You can also assign system numbers when you manually add serial items through the Machine Detail window. In addition, you can assign a system number when logging a call in the Work Orders window, and when selling a serial item through the Serialized Order Entry window.

Serialized Applications

In addition to these databases, Serialized also includes several applications:

- Call logging in the Work Orders window. In this window, you can quickly log and dispatch your service calls.
- Call monitoring in the Machine Monitor window. The Machine Monitor Calls tab lets you view all your existing calls and your call responses, while the Machine Monitor Schedule tab lets you monitor your technicians' work schedules.
- Serialized Order Entry in the Serialized Order Entry window. In this window, you can sell machines and contracts.
- Contract, meter, and lease billing in the (EZY) Serial Maintenance Report Selection screen. This screen can greatly automate your billing process.

Serialized Flexibility

The Serialized application is designed to offer you tremendous flexibility. For example, when logging calls in the Work Orders window, you can retrieve a serialized item using its system number, subsystem number, serial number,

item number, or item description. Similarly, you can retrieve a customer record in a number of other ways: by account number, by phone number, or by zip code.

Another important benefit of the Serialized application is that you can customize it to fit your business. You do this by setting parameters.

Customizing the Serialized Application

The serialized application provides a number of parameter screens to automate procedures and increase efficiency. For example, you can customize the information that appears on your call monitor. You can specify that the system display the calls by time and date, or by priority order. You can also set up the call monitor to display the customer's shipping address instead of the billing address. You can customize the serialized application using the following :

- (EZ1S) screen
- (EZ1O) Serial Order Entry Parameters screen
- (EZ1M) Serial Monitor Parameter screen
- (EZ1L) Serial Log In Parameters screen
- (EZ1J) Serial Workorder Journal Parameters screen.

Unlike other DDMS parameter screens, the Serialized parameter screens include no preset options: all the fields in the parameter screens are blank when you first receive the system. However, there are default settings. This means that even if you leave the parameters blank, they react in some way.

For example, if you do not specify a printer to use for workorders, they print on the P9 printer. If you do not specify the number of copies, only one prints.

For this reason, we recommend that you view the Serialized parameters to determine whether they meet the needs of your business as part of your getting started procedures.

Flagging Suspect Meter Readings

You can set an alarm to alert you when you enter an incorrect meter reading. The meter reading for each machine is automatically calculated, using an estimate of the clicks a copier uses per day. By entering an allowed variance, you are alerted when an unusual number of clicks have been used.

For example, if you specify a variance of 25 percent, each time you enter a meter reading, the system checks to see if the new reading fits with the rate of use. If the new reading is 25 percent more or less than the existing reading, you're alerted that you've entered a suspect meter reading.

You can also specify whether to calculate suspect meter readings based on current or average monthly volume readings.

About Codes

Service codes, territory codes, and qualification codes are another time-saving feature of the Serialized application.

About Service Codes

Service codes are one- or two-digit user-defined codes used to separate and track serialized inventory service history. You enter service codes when you log and complete service calls in the Work Orders window. There are five different types of service codes:

- Call codes
- Problem codes
- Reopen codes
- Solution codes
- Transfer codes.

When you log service calls, it is important that you code the call to distinguish its priority, to specify the time frame in which it must be accomplished, or to indicate how the call was resolved. By using codes for commonly occurring problems and their solutions, you can significantly reduce the time you spend logging and responding to service calls. For this reason, we strongly recommend that you use call, problem, and solution codes to automate text entry for your calls. If you design these codes carefully, many of the calls you generate require little or no typing — the code descriptions provide all the necessary information. In addition, since you can sort and limit by service codes, you can print reports listing only a particular type of call. This lets you easily track your service calls.

About Territory Codes

You can use territory codes to divide the geographical regions that you sell and service into smaller areas called territories. Once you set up territory codes, you can group your customers by codes. You can also assign each of your technicians a territory code. By assigning your customers territory codes, you can determine how many technicians to assign any given area. For example, rural locations may require fewer assigned technicians, while congested city areas may require more.

Obviously, territory codes can help you increase efficiency and profitability in many ways. Since both the customer's and technician's territory codes appear when you dispatch service calls, they help the dispatcher determine which technician to send on which calls. They can also help you determine the travel rates you charge for service calls based on the territories you service. For example, you may charge congested areas a higher travel rate due to traffic delays, parking fees, and so forth.

About Qualification Codes

Qualification codes identify the different types of service that your customers require, and the technician who is best qualified to perform the service. For example, you might have one or more qualification codes set up for copiers and another set of codes for printers. Once your qualification codes are set up, you assign the codes to your technicians. This helps you quickly identify their skill levels and their experience working with particular types of equipment. In addition, when you dispatch calls, the system provides a list of the four technicians most qualified to take a particular call. You can quickly assign an available technician from the list without searching through all the technicians in the database.

Generating Preventative Maintenance Calls

The Serialized application can automatically generate preventive maintenance (PM) calls for all your contracts. Since there are several fields that let you set the defaults for PM calls, you can set the frequency for PM calls in several different ways.

- You can base your PM calls on a set period of time (once a month, for example).
- You can base your PM calls as a set period of time or as a number of clicks for each meter record in a contract.
- In addition, you can set the number of clicks between PM calls for each model in your inventory. However, you can only set the clicks between PM calls for each contract type or for each model, not both.

About Contracts

The Serialized application includes several windows, tabs and dialog boxes to help you set up your service contracts:

- Contract Types window
- Contract Types Lease tab
- Contract Types Departments tab
- Contract Types Service Rates tab
- Contract Types Renewals tab
- Item Machine dialog box
- (EZ1B) Serial Contract/Meter Billing Parameters screen.

To automate the process of using contracts, you first set up the contract types in the Contract Types window. Set up a contract type for each type of service that you provide, including leases, rentals, loaners, and so forth. A contract

type holds the default settings for a particular type of contract. For example, the contract type for rentals holds all the default settings for a rental contract. These defaults provide the basic guidelines for a rental.

You can also set up universal contract types. Universal contract types set default service rates for items that aren't covered by a specific contract. To set up universal contracts, you first set up the records in the Contract Types window. Then you specify the universal contract names in the Universal Contract boxes in the Serialized Order Entry window.

You can also set up parameters for your lease contract types in the Contract Types Lease tab. Set up the billing frequencies, billing amounts, billing department, and buyout options for your lease contracts.

To divide the income from your contracts into separate departments, use the Contract Types Departments tab. This tab lets you break out your income into 10 different departments.

After you set up all your contract types, you can link the contract types to your serialized items (models). To do this, you assign the contract types to the models in the Item Machine dialog box. Using the earlier example, you would assign the contract type for rentals to all models that you rent. You can assign different contract types to each model. For example, you may have models that you rent, demonstrate, and lease.

After you link the contract types to your items, you can use contract types to sell contracts through the Serialized Order Entry window. When you sell a contract, the contract type, together with the settings in the Item Machine dialog box, provide the default terms for the contract. Nearly all of these default terms can be changed when you complete the sale. Changing these defaults lets you customize each individual contract. Once a contract is sold to a customer, the system automatically adds a contract record in the Contract Detail window. If the contract includes meters and you enter meter information, the system also adds a record for each meter in the Contract Detail Meter tab.

Once all your basic contract types are set up, you can specify default labor and travel rates for each contract type. You specify these parameters in the Contract Types Service Rates tab.

Getting Started

Before you can practice using the Serialized application, you must enter existing information about the customers, machines, and contracts that you already have. The (EZ+S) Serial Setup screen makes this process easier. Instead of accessing each screen separately, the (EZ+S) screen lets you enter related information in several different screens at once. Before using the (EZ+S) screen, be sure that you have performed all the steps listed in the **Checklist of Setup Procedures**, later in this Introduction.

Practicing with Serialized

There will be fewer errors and less frustration if employees practice using Serialized before using it for daily business operations. It's particularly important to practice logging and dispatching calls. Although these applications are fast, powerful, and easy to use, they provide such a wealth of options that you need to practice to feel comfortable with them.

If you are not already live on Order Entry, you can also practice selling serial items and contracts.

If you are live on Order Entry, you can practice selling serial items and contracts by setting up a practice location. To do this, go to the (LØ) Global Master Parameters screen and create a separate parameter record for the practice location. In the Volume Serials portion of this screen, set all volume serials to a spare work unit, with two exceptions: the system and report writer volume serials should remain on the system residence volume serial, SR.

In the (LG) Order Entry Parameters screen, create a separate parameter record for the practice location. In the Invoice# field, specify a beginning invoice number that does not conflict with your real invoice numbers. For example, if your real invoice numbers begin with 1000, set the Invoice# field for the practice location to 1. This gives you invoice numbers from 1 to 999 as practice invoices.

Understanding Serialized Files

Several files store Serialized information. These files are stored on the volume serial specified in the Serial field in the (LØ) screen, with the following exceptions:

- PARAMETERS This file is stored on the volume serial that is specified as the system residence.
- Z-S-AUX This file is stored on the volume serial specified in the Salesman field in the (LØ) screen.
- C-ZIP This file is stored on the volume serial specified in the Customer field in the (LØ) screen.

Familiarity with these files can prevent errors or help you troubleshoot any errors that may occur. Each file is listed below, along with the function it serves.

- ;SYS Stores update and inquiry passwords for the Serialized application. This information is displayed in the (EZX) Serialized Program Security screen.
- PARAMETERS Stores system parameters. The system updates this file when you perform the (M)[A] Daily Backup procedure.

C-ZIP	Links the customer's record to their zip code, so you can retrieve the customer's record by zip code in the Workorders window.
P-MASTER	Stores open and complete orders before they are flushed to the sales journal during the (M)[A] procedure.
Z-A-KEYS	Contains supplemental files when used as a master file for call history reports, which display in the (EZZ) Serial Selectors screen.
Z-A-SUPP	Stores the service type, temporary shipping address, P/O number, closing order-taker, and call number for calls you log in the Workorders window.
Z-AUX	Stores information about the calls you log in the Workorders window regardless of the call's status.
Z-C-METER	Stores the meter parameters for contract types from the Contract Types Meters tab.
Z-C-RATES	Stores the labor and travel rates for contract types. This information appears in the Contract Service Rates tab.
Z-C-RECAN	Stores the renewal information for contract types from the Contract Renewals tab.
Z-C-SUPP	Stores information about department income breakouts from the Contracts Type Departments tab and the Contract Types Lease tab.
Z-C-TIME	Stores contract time block information from service workorders.
Z-C-TYPES	Stores the parameters for contract types, excluding meters, which are displayed in the Contract Types Types tab.
Z-CALLS	Stores calls that have not been dispatched, which display in the Machine Monitor window.
Z-CBACK	Stores call backs in the Machine Monitor window.
Z-CODES	Stores the service call code descriptions from the Machine Tools Call Codes tab.
Z-CON-AUX	Stores extended contract history information from the Contract Detail History tab. This file is also updated when you perform the (M)[A] procedure.
Z-CONSUP	Stores information about department income breakouts by machine.

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Z-CONTRA	Contains master contract information from the Contract Detail Contract tab.
Z-CUSINDEX	Links serial items to the customer's name or account number, so you can retrieve the item using the customer's name or account number.
Z-CUST	Contains Serialized customer information, such as the customer's territory, time zones, service times, and so forth. This information comes from the Customer Machines tab.
Z-D-HIST	Stores monthly entries made in the lower portion of the Contract Detail Deferred Inc tab.
Z-D-INDEX	Stores calls by date in the Workorders window. The system also uses this file to print history reports through the (EZY) Serial Maintenance Report Selection screen.
Z-DEFAULTS	Stores item information that is set in the Item Machine General tab.
Z-DEFERRED	Stores deferred income information, excluding monthly entries. This information comes from the Contract Detail Deferred Inc tab.
Z-DEPREC	Stores depreciation information from the Machine Detail Depreciation tab.
Z-EXCEPT	Stores information concerning changing a call code, deleting a call, or changing the technician assigned to a call in the Workorders window and the Machine Monitor window.
Z-FYI	Stores the FYI lines for the calls you log in the Workorders window. These lines contain user-defined text that you enter while logging calls.
Z-INDEX	Links service calls to the call number, and links calls to system number. This lets you retrieve calls by call number and system number in the Workorders window.
Z-INFO	Stores location information which displays in the Location box in the Machine Detail Master tab.
Z-ITEM	Stores information for uncataloged items.
Z-ITMINDEX	Links serial items to the item number, so you can retrieve the item using the item number.
Z-JOURNAL	Stores the service workorder journal information. This journal contains information about invoiced service workorders, including information about the invoice, the machine, the technician, use tax, service type, parts and supplies, and so

Since these files are more likely to contain real information than those for call logging, time tracking, and meter billing, we briefly describe each file.

forth. This information is used to print serialized item journal reports in the (EZY) Workorder Journal Report Selection screen.

Z-L-ITEMS	Stores information about machines you lease and the accessories to the machine.
Z-LEASE	Stores machine leasing information from the Contract Detail Lease tab.
Z-LIMITS	Stores each technician's preferred limits for the Machine Monitor window. This information is displayed in the Salesperson Monitor Limits dialog box.
Z-M-AUX	Stores meter history, which is displayed in the Contract Detail History tab. This file is also updated when you perform the (M)[A] procedure.
Z-M-BILL	Stores meter readings in the (EZV) Serial Meter Maintenance screen.
Z-M-COUNTS	Stores meter readings for the last 10 service calls in the Contract Detail Meter tab.
Z-M-KEYS	Stores information used for meter reports printed in the (EZZ) screen.
Z-MASTER	Contains master serial file information, which stores system, subsystem, and serial numbers and links the item to its customer. This information comes from the Machine Detail Master tab.
Z-METER	Contains master meter information, which stores the terms for each meter contract. This information comes from the Contract Detail Meter tab.
Z-NOTEPAD	Stores notepad text from the Workorders window.
Z-NUMBERS	Stores information about the last 10 calls logged in the Workorders window.
Z-PARTS	Stores critical part information from the Item Machine Critical Parts tab.
Z-QLFS	Stores descriptions of technician qualification codes from the Machine Tools Qualification tab.
Z-REMARKS	Stores contract remarks from the Contract Detail Contract tab.
Z-RENEWALS	Stores contract renewal information when renewing in the (EJU) Serial Contract Maintenance screen.

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Z-RSPNS	Stores dispatched calls and call backs before the call back time, which display in the Machine Monitor window.
Z-S-AUX	Contains technician information from the Salesperson Technician tab.
Z-SCHEDULE	Stores assigned and dispatched calls by technician number, which are displayed in the Machine Monitor Schedule tab.
Z-SERINDEX	Links serial items to the serial number, so you can retrieve the item by the serial number.
Z-SUPP	Stores machine Shipto information from the Machine Detail Other tab. This file also stores umbrella system numbers from the Machine Detail Other tab.
Z-T-RECAP	Stores technician information for each call, including work and travel time, miles billed and paid, and so forth, from the Tech Recap tab.
Z-T-TOTAL	Stores technician information from the Tech Totals tab.
Z-TNF-EXCP	Stores transfer exceptions. These occur when you override the default on-hand quantity in the Item Transfer dialog box.
Z-TERR	Contains territory descriptions from the Machine Tools Territories tab.
Z-TIMES	Stores times and dates for call login, dispatch, completion, and so forth, in the Workorders window.
Z-TOTALS	Stores the time totals for each call (work time, travel time, and so forth) from the Workorders window.
Z-TRANS	Displays transferred calls in the Machine Monitor window.
Z-TRANSFER	Stores completed inventory transfers that are made in the Item Transfer dialog box.
Z-TYPES	Stores service types from the Machine Tools Service Types tab.
Z-U-INDEX	Links umbrella system numbers to the machines that the contract covers.

About Going Live

When you have practiced enough to be comfortable with the Serialized application, you're ready to go live, and use it for real business transactions.

Before going live, you need to delete the files with the practice transactions you created.

Note: Before deleting any files, back up the unit containing your serial files.

For details concerning going live and deleting files, contact the DDMS Training Department at www.ddms.com.

Checklist of Setup Procedures

The checklist shown below summarizes the steps for getting started with Ensight Pro's Serialized application. It has been divided into six parts:

- Part 1: Database Records
- Part 2: Parameters
- Part 3: Codes and Technicians
- Part 4: Contracts
- Part 5: Renewals
- Part 6: Getting Started.

The checklist provides a complete overview of setting up your Serialized system. Please *use this checklist as a guide to help you perform the correct steps*. Optional steps are noted on the checklist with an asterisk (*). All other steps must be performed before using Serialized. Information for performing these steps can be found in the corresponding chapters in this manual.

As you complete each step, be sure to mark the box beside it. Optional steps can be set up later after you begin practicing.

Part 1: Database Records

Set up essential database records in the following:

- 1 Create the Serial customer record in the Customer window. You use the Serial customer to maintain records for in-stock serialized inventory items. For details on setting up the Serial customer record, see **Chapter 1: Setting Up the Serial Customer**.
- 2 Set up serialized items in the Item window. To use an item with the Serialized application, you mark the item with either a Y (for serialized items), P (for serialized items that you bill as parts), or X (for non-serialized items that you bill as parts). For details, see **Chapter 2: Setting Up Serialized Items**.

Part 2: Parameters

Set up essential parameters in the following:

- 3 Set up parameters in the (EZ1S) screen. Many of the fields in this screen let you set global parameters that customize the Serialized application. For details, see **Chapter 3: Setting Global Serialized Parameters**.
- 4 Set up parameters in the (EZ1O) screen. These parameters let you customize the Serialized Order Entry application. For details, see **Chapter 4: Customizing Order Entry**.
- 5 Set up parameters in the (EZ1M) screen. The fields in this screen determine the call information that appears in the Machine Monitor. For details, see **Chapter 5: Customizing the Call Monitor**.
- 6 Set up parameters in the (EZ1L) screen. These parameters let you specify the information that you view when logging calls. For details, see **Chapter 6: Customizing Logging Calls**.
- 7 Set up parameters in the (EZ1J) screen. The fields in this screen let you create a workorder journal. This journal stores all the service workorder usage and activity information about your machines. Secondly, if you don't pay sales tax on service contracts, but do pay tax on parts used to service machines, you also need to set up the (EZ1J) screen. For details, see **Chapter 7: Setting Up Workorder Journal Parameters**.
- 8 Set up parameters in the (EZ1T) Serialized Parameters screen. The fields in this screen let you specify the general ledger accounts to use for your serialized information. By specifying accounts, you can easily track your service department's performance. You can also use this screen to specify information for your machine trade-ins. For details, see **Chapter 8: Setting Up Other Serialized Parameters**.
- 9 Set up parameters in the Machine Disposition Parameters dialog box. This chapter describes the parameters you use to set up Machine Dispositions. When final-receiving machines in Purchase Order Entry, you can assign dispositions to each machine. You can also specify default dispositions for rental, demo, and loaner returns. You must set up parameters before using the machine disposition features. For details, see **Chapter 9: Setting Up Machine Disposition Parameters**.

Part 3: Codes and Technicians

Set up essential codes in the following:

- 10** Set up service codes in the Machine Tools Call Codes tab. You use service codes to separate and track serialized inventory service history. For details, see **Chapter 10: Setting Up Call Codes**.
- *11** Set up service types in the Machine Tools Service Types tab. Service types help you classify your service calls by the type of service you perform. For example, you might set up one service type for warranty work, another for contract work, and another for non-contract work, and so forth. If you don't plan to use service types, you can skip this step. For details, see **Chapter 11: Setting Up Service Types**.
- *12** Set up territory codes in the Machine Tools Territories tab. Territory codes divide the geographical regions that you sell and service into smaller areas. For details, see **Chapter 12: Setting Up Territory Codes**.
- *13** Set up qualification codes in the Machine Tools Qualifications tab. You use qualification codes to identify the different types of service that your customers require and the technician who is best qualified to perform the service. For details, see **Chapter 13: Setting Up Qualification Codes**.
- 14** Once all your codes are set up, you can assign them to your technicians and create your technician database records. You do this in the Salesperson Technician tab. Only personnel that are designated as technicians through the Salesperson Technician tab can be dispatched on service calls. For more information, see **Chapter 14: Setting Up Technicians**.

Part 4: Contracts

Set up your contracts in the following:

- 15** Set up your contract types in the Contract Types tab. Contract types hold all the default settings for a particular type of contract. For details, see **Chapter 15: Setting Up Contract Types**.
- *16** Set up your lease contracts in the Contract Types Lease tab. In this tab, you can specify the default settings for your lease contracts. If you don't sell leasing contracts, you can skip this step. For details, see **Chapter 16: Setting Up Lease Contracts**.

- *17 Set up your department breakouts in the Contract Types Departments tab. This tab lets you break out the income from your contract, meter, and lease billings to up to 10 different general ledger departments, instead of just one. If you plan to post the income to only one department, you can skip this step. For details, see **Chapter 17: Setting Up Contract Type Departments**.
- 18 Customize your serial pick tickets and invoices in the Contract Types Order Entry tab. Each box in this tab lets you print specific information on the ticket. You should also set your billing parameters in the (EZ1B) screen. See **Chapter 18: Customizing Tickets and Billings**.
- 19 Set up the Item Machine General tab. After you set up all your contract types, you can link the contract types to your serialized items (models). You can link each model to as many as 10 different contract types. For example, you may have a different contract type set up for each model that you sell, rent, lease, and loan. For more information, see **Chapter 19: Linking Items to Contract Types**.
- 20 Set up labor and travel rates in the Contract Types Service Rates tab. When you sell the customer the contract in the Serialized Order Entry window, you can indicate whether the customer or the contract is charged for travel and labor. The system then calculates the travel and labor charges for the workorder. You should set up labor and travel rates for each service contract you have. Even if you do not bill the customer for labor and travel, all labor and travel costs are assigned to the contract. This lets you accurately monitor and track the actual cost and gross profit figures of your contracts. For details, see **Chapter 20: Setting Labor and Travel Rates**.

Part 5: Renewals

- 21 Set renewal parameters for each contract type in the Contract Types Renewals tab. See **Chapter 21: Setting Up Contract Renewals**.
- 22 Set your general renewal parameters in the (EZ1B) screen. See **Chapter 22: Customizing Renewal Billings in (EZ1B)**.

Part 6: Getting Started

- 22 Enter existing information about your customers, machines, and contracts in the (EZ+S)screen. You can use this screen to enter related information in several different screens at once. For details, see **Chapter 23: Quickly Adding Serial Records**.
- *24 Decide if you want to password-protect specific screens in the Serialized application for system security. If you assign passwords and give them only to responsible personnel, you can prevent unauthorized individuals from viewing or changing confidential business information. You set up serialized screen passwords in the (EZX) Serialized Program Security screen. If you are not setting Serialized passwords, you can skip this step. For details, see **Chapter 24: Setting Passwords (Optional)**.
- *25 You should set up a terminal for use with the Serialized application. If your terminal is set up correctly in the (L1) Terminal and Tickets Parameters screen, when you receive or sell serialized items, you are prompted for the system and serial numbers. For details, see **Chapter 25: Setting Up Your Terminal**.
- *26 Catalog Serialized selectors in the (EZ5) Serialized Standard Reports screen. Once they are cataloged, the reports appear in the (EZZ) screen. If you don't catalog any report selectors, you can skip this step. For details, see **Chapter 26: Cataloging Serialized Reports (Optional)**.
- 27 Practice using the Serialized application. See **Practicing with Serialized** in this introduction.

Part 1: Database Records

This part explains how to set up the Serial customer in the Customer Master tab and how to set up your serialized items in the Item window. Before you can begin practicing on the Serialized application, you must create or modify existing database records.

You use the Serial customer to maintain records for in-stock serialized inventory items. Serialized items are assigned to this customer when they are purchased or returned. By assigning items to the Serial customer, you can easily determine which items are on-hand and available for sale. For details, see **Chapter 1: Setting Up the Serial Customer**.

To maintain a Serialized Inventory database, each serialized item must be set up in the Item window. Serialized items are items that may be very similar in model or style, but must be treated as individual units. To use an item with the Serialized application, you mark the item with either a Y (for serialized items), P (for serialized items that you bill as parts), or X (for non-serialized items that you bill as parts). You do this using the Serial box in the Item Settings tab. For details, see **Chapter 2: Setting Up Serialized Items**.

Chapter 1: Setting Up the Serial Customer

You can use the Serial customer to maintain records for in-stock serialized inventory items. You set up the Serial customer in the Customer window. Serialized items are assigned to this customer when they are purchased or returned. By assigning items to the Serial customer, you can easily determine which items are on-hand and available for sale. Once the item has been sold to a customer, the Machine Detail Master tab is automatically updated with the sale and customer information.

For details on printing the Monthly Customer Usage and Quarterly Customer Usage reports, refer to your online help.

If you have items that you loan, rent, or use as demo items, you can set up departments for the Serial customer record. By creating a separate record for each department — one for loaner, rental, and demo items — each is separately tracked and accumulates item history, and departmentalized usage reports can be created. Therefore, you can monitor any loaner, rental, and demo items separately from the serialized items that you sell.

When setting up the Serial customer, you must assign the account number manually. To disable the auto-assign feature:

- 1 In the (LA) Customer And A/R Parameters screen, type **C** in the Action field. See Figure 1.
- 2 In the G/L Location field, enter the location or press Tab to accept the default.
- 3 Tab to the Next Customer # field. Note the number and save it for later.

Figure 1:
Clearing the
Next Customer #
field in the (LA)
Screen

```

10:20:51                (LA) Customer And A/R Parameters                07/14/98
-----
Action [I] (C-Change, I-Inquiry, 1-Sales, 2-A/R )   G/L Location [ 1]
-----
Next Customer #           Save Changes ?N          Swap Name ?Y
Inc/Exc In (B) ?I   From ? To ?   From ? To ?   Add In (B) Y/N ?N   Status ?A
Inc/Exc In (G) ?I   From ? To ?   From ? To ?   Add In (G) Y/N ?N   Status ?A
-----
                                PASSWORDS
Reindex ?DDMS   Release ?DDMS   Purge ?DDMS   EOM ?DDMS   EOY ?DDMS
Delete  ?DDMS   Credit Card ?   Mask Inquiry ?N
-----
Monthly Usage From ?M To ?M   Quarterly Usage From ?Q To ?Q

Print Copies With Original Invoice Y/N ?Y
In O/E on Customer Query, Display Shipto Address instead of Billto Y/N ?
In Gateway Set Shipto Name to ? (A-Add. Name, C-Add. Contact, S-Shipto Contact)
Set Dept Name to ? (B-Billto Name, A-Add. Name, C-Add. Cont., S-Ship Cont.)
Keep Service Quality Statistics for Customer Status : [ ] to [ ] + [ , , , ]
Locs.to Exclude from Service Quality Statistics [ ] to [ ] + [ , , , ]
National Drop Ship Route [ ]
Auto Bill Invoices:   Print, Fax, Neither P/F/N ?N   Formats: Invoice :   Fax :
Sort Order ?N (#-Customer Nbr, N-Customer Name, R-Route, Z-Zip Code)
-----

```

You use the Next Customer # field to automatically assign account numbers. However, since you are setting up a special record, you must assign the account numbers yourself.

- 4 Space through the number in the Next Customer # field.
- 5 Press Enter to return to the Main Menu.

Note: Changing information in the Next Customer # field is a dedicated procedure. Make sure no one is adding customer records at another terminal until this procedure is complete.

Setting Up the Serial Customer in Ensite Pro






- 1 In the Ensite Pro Master Menu, double-click .
- 2 In the Customer Master tab, click .
- 3 In the Acct # box, type **SERIAL**.
- 4 In the Name box, enter a unique name for the Serial customer, such as SERIAL INVENTORY. See Figure 2.
- 5 Click the Order Entry tab. In the Status OE box, enter a status code to exclude the Serial customer from being selected in the Accounts Receivable Posting window. (Since items assigned to the Serial customer represent your in-house stock, you would not access the account in the Accounts Receivable Posting window — you would never receive a payment from yourself.) This prevents posting transactions to this account by mistake.



Figure 2: Setting Up the Serial Customer in the Customer Window

The screenshot shows the 'Customer: SERIAL () IN STOCK SERIALIZED INVENTORY' window. The 'Master' tab is selected. The 'Acct #' field contains 'SERIAL'. The 'Name' field contains 'IN STOCK SERIALIZED INVENTORY'. The 'City' field contains 'KELLER'. The 'St' field contains 'TX' and the 'Zip' field contains '76039'. The 'Status' field contains 'A'. The 'Entry Date' is '11/05/93'. The 'Phone' field contains '817-'. The 'Remarks' field is empty.

You do this by setting up a range of status codes to exclude in the Inc/Exc In (B) From/To field in the (LA) screen. Once you set up a status code to exclude, you can assign it the Serial customer. For example, if you specify E as a status code to exclude in the (LA) screen, you would enter E in the Status OE box.

- 6 Click  to save your changes.
- 7 If you removed the number from the Next Customer # field in the (LA) screen when you started setting up the Serial customer, follow these instructions to replace it now:
 - Step 1:** In the (LA) screen, type C in the Action field.
 - Step 2:** Tab to the Next Customer # field. Enter the number you noted previously and press Tab.
 - Step 3:** Press Esc to return to the Main Menu.

Setting Up a Department

- 1 Double-click  .
- 2 Select the Serial customer account.
- 3 Click the Dept box and specify the type of department to set up. For example, if you are adding a department to track serialized items that you loan, you could enter LOAN in this box. Likewise, to set up a department to track rental or demo items, you could enter RENT or DEMO.
- 4 When you finish, click  to save your changes.

Note: Besides manually loading your customer information, you can send your Customer database information to O/PUS to be converted.

Chapter 2: Setting Up Serialized Items

To maintain a Serialized Inventory database, each serialized item must have a record set up in the Item window. Serialized items are items that may be very similar in model or style, but must be treated as individual units.

Setting up your Inventory database for Serialized involves:



- 1 Adding an inventory record for any items not currently in your database in the Item window.
- 2 Marking new items as serialized.
- 3 Marking existing items as serialized, if you use them in the Serialized application.
- 4 Setting up a generic item for service items that you don't carry.
- 5 Setting up the Umbrella serialized item.

Note: For detailed instructions on setting up and changing items, see your online documentation.


Adding New Serialized Items

Add any items to use for Serialized that aren't currently in your database. This includes parts.

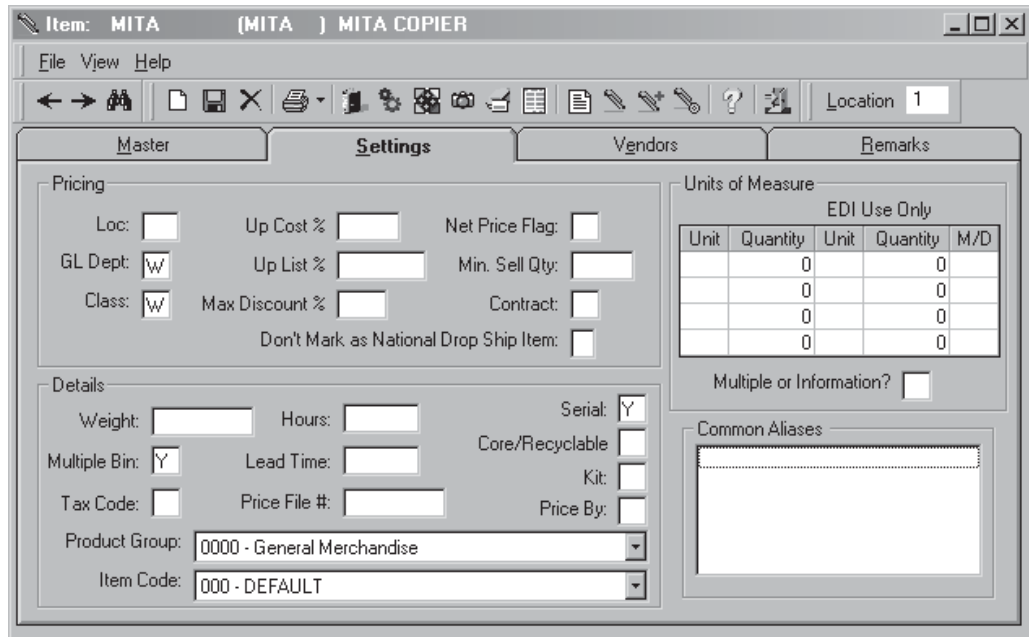
Note: Besides manually loading your item information, you can send your Item database information to O/PUS to be converted. *Spot-check commonly sold items to make sure your database is complete and correct.*

- 1 Double-click  .
- 2 Click .
- 3 In the Number box, enter the item (model) number.
- 4 In the Company box, enter the company for this item.
- 5 Complete the boxes in the Item Master tab by entering the appropriate information for this item. (For details, see your online documentation.)
- 6 When you complete the boxes in the Item Master tab, click the Item Settings tab.

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- 7 Use the Serial box to designate an item as serialized, as shown in Figure 1. In the Serial box:
 - Type **Y** to specify this is a serialized item.
 - Type **P** to specify that this is a serialized item that is billed as a part or an accessory item.
 - Type **X** to specify that this is a non-serialized item that is billed as a part.
- 8 Complete the remaining boxes in the Item window that are appropriate to this item. (For box descriptions, see your online documentation.)
- 9 Click  to save your changes.

**Figure 1: Setting
Up the Serial
Box in the Item
Settings Tab**





The screenshot shows the 'Item: MITA (MITA) MITA COPIER' window with the 'Settings' tab selected. The 'Serial' field is set to 'Y'. Other fields include 'Loc', 'GL Dept: W', 'Class: W', 'Up Cost %', 'Up List %', 'Max Discount %', 'Net Price Flag', 'Min. Sell Qty', 'Contract', 'Don't Mark as National Drop Ship Item', 'Weight', 'Hours', 'Lead Time', 'Price File #', 'Product Group: 0000 - General Merchandise', and 'Item Code: 000 - DEFAULT'. The 'Units of Measure' table is empty, and the 'Common Aliases' field is also empty.

Units of Measure				
EDI Use Only				
Unit	Quantity	Unit	Quantity	M/D
	0		0	
	0		0	
	0		0	
	0		0	

Marking an Existing Item as Serialized



When your Inventory database was loaded, some copiers and laser printers may have been added as inventory records. To mark them as a serialized item:


- 1 Double-click  .
- 2 In the Number box, select the item to mark as a serialized item. For help, see your online documentation.
- 3 Click the Item Settings tab.
- 4 In the Serial box:
 - Type **Y** to specify an item as serialized.
 - Type **P** to specify an item as serialized and that it is billed as a part or as an accessory item.
 - Type **X** to specify that this is a non-serialized item that is billed as a part.
- 5 Click  to save your changes.

Setting Up Generic Items

You set up a generic item for service items that you don't carry. For example, if you service copiers, set up a generic item record with Copier as the item number and the item description. By setting up a generic record for the service, you can avoid adding item records for specific model numbers.




To track generic items by specific manufacturer, you can set up generic items using the manufacturer's name as the company. For example, to track service for Sharp, Xerox, and Cannon copiers, you can set up three separate records with Copier as the item number and Sharp, Xerox, and Cannon as the company name. You could then print reports to monitor how much service you are performing on these copier types.

- 1 Double-click  .
- 2 Click  .
- 3 In the Number box, enter a generic name, such as COPIER.
- 4 In the Company box, enter the manufacturer's name, SHARP, for example.

- 5 Complete the boxes in the Item Master tab by entering the appropriate information for this item. (For details, see your online documentation.)
- 6 When you complete the boxes in the Item Master tab, click the Item Settings tab.
- 7 In the Serial box:
 - Type **Y** to specify this is a serialized item.
 - Type **P** to specify that this is a serialized item that is billed as a part or an accessory item.
 - Type **X** to specify that this is a non-serialized item that is billed as a part.
- 8 Complete the remaining boxes in the Item window that are appropriate to this item. (For box descriptions, see your online documentation.)
- 9 Click  to save your changes.

Setting Up the Umbrella Serialized Item

Umbrella contracts let you cover several machines with a single contract. The contract terms apply to all the machines that are covered. For example, if you sell an umbrella contract for 60,000 clicks and the contract covers three copiers, all three copiers' meter usage is checked when calculating overages. Before you can use the umbrella feature, you must add the Umbrella item in the Item window.

- 1 Double-click  .
- 2 Click .
- 3 In the Number box, type **Umbrella**.
- 4 Leave the Company box blank.
- 5 Enter any description that helps identify this as your umbrella item in the Description box.
- 6 Click the Item Settings tab.
- 7 In the Serial box, type **Y**. There's no need to complete any other boxes for this item.
- 8 Click  to save your changes.

Part 2: Parameters

The Serialized application has many parameters to customize it to fit the way your business. When you receive the system, no preset options are set. All the fields are blank when you access a parameter screen. However, the fields do have default settings. In other words, a field left blank still responds in some way. For example, if you do not specify a default printer in the Prt fields in the (EZ1S) Serial System Parameters screen, printer P9 is used. If you do not specify how many copies to print in the Copies field in the (EZ1S) screen, the one copy prints.

DDMS recommends that you view the default options in all the parameter screens before using the Serialized application to determine whether the default settings suit the way you do business.

You set serialized parameters in the following screens:

- (EZ1S) screen
- (EZ1O) Serial Order Entry Parameters screen
- (EZ1M) Serial Monitor Parameters screen
- (EZ1L) Serial Log In Parameters screen
- (EZ1J) Serial Workorder Journal Parameters screen
- (EZ1T) Serialized Parameters screen.

Chapter 3: Setting Global Serialized Parameters describes the parameters in the (EZ1S) screen and how to modify them. Many of the fields in this screen let you set global parameters that customize the serialized application.

Chapter 4: Customizing Order Entry describes the serialized parameters in the (EZ1O) screen and how to modify them. These parameters let you customize the Serialized Order Entry application.

Chapter 5: Customizing the Call Monitor lists the parameters in the (EZ1M) screen and how to modify them. The fields in this screen determine the call information that appears in the Machine Monitor screen.

Chapter 6: Customizing Logging Calls explains the serialized parameters in the (EZ1L) screen and how to modify them. These parameters let you specify the information you view when logging calls.

Chapter 7: Setting Up Workorder Journal Parameters describes the parameters in the (EZ1J) screen and how to modify them. The fields in this screen let you create a workorder journal. This journal stores all the service workorder usage and activity information about your machines. Secondly, if you don't pay sales tax on service contracts, but do pay tax on parts used to service machines, you also need to set up the (EZ1J) screen.

Chapter 8: Setting Up Other Serialized Parameters describes the parameters in the (EZ1T) screen. The fields in this screen let you specify the general ledger accounts to use for your serialized information. By specifying accounts, you can easily track your service department's performance. You can also use this screen to specify information for your machine trade-ins.

Chapter 9: Setting Up Machine Disposition Parameters describes the parameters you use to set up Machine Dispositions. When final-receiving machines in Purchase Order Entry, you can assign dispositions to each machine. You can also specify default dispositions for rental, demo, and loaner returns. You must set up parameters before using the machine disposition features.

Chapter 3: Setting Global Serialized Parameters

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For your convenience, a picture of the (EZ1S) screen has been included at the back of this chapter. You can use this page to enter your responses to the fields in this screen.

Global Parameters

This chapter describes all the fields in the (EZ1S) Serial System Parameters screen and gives you instructions for making changes to these fields. Many of the fields in this screen let you set global parameters that customize the Serialized application. For example, you can set up ticket formats and printers, beginning serialized numbers, and system passwords. You can also use this screen to enter the general ledger accounts you want to use for your serialized information. By specifying accounts, you can easily track your service department's performance.

The (EZ1S) screen has no preset options. All of the fields will be blank when you first access the screen. However, we recommend that you view the default responses in this screen to determine whether they fit the needs of your business. Begin by verifying whether the default settings for location 1 are suitable for your business needs. (The default settings for location 1 are shown in Figure 1.) If one or more of the default settings are not acceptable, change them using the [C] Change action code. (See the heading **Changing the Parameters**.) When you have set the parameters for location 1, set up separate parameters for each additional location that you run differently than location 1. If you do not set up separate parameters for a particular location, the parameters set for location 1 will be used.

Figure 1:
Default Options
in the (EZ1S)
Serial System
Parameters
Screen

```

(EZ1S) Serial System Parameters
=====
Action [1] (C=Change, I=Inquire, B=Back To EZ1)          G/L Location [ 1 ]
=====
SYSTEM GENERATED NUMBERS:
Next Serial #          703          Basic Contracts Cost      %
Next Call #          104312        Service Contracts Cost    %
Next System #          2477        Meters Cost               %
Next Transfer #         43         Labor Cost                %
Add Customers in (A) Y/N ?Y Status ?U Travel Cost              %75.0
Prompt OK To Exit Y/N ?N

SYSTEM TICKET FORMS AND PRINTERS:
Service Ticket Form :SWORKO Prt :P1 Update MTD Qtys When Transferring Y/N ?Y
P / M Ticket Form :SWORKO Prt :B: Use Projected Meter P/M Date Y/N ?Y
Edit File Form :SWORKO Prt :P1 Use Projected Expiration Date Y/N ?N
Contract Form Printer :P1 Copies # Number Of Days Before Next P/M #30
Update Exceptions Y/N ?Y Percent Of Clicks Before Next P/M %
Set Order Writer Y/N ?N Calculate Next P/M's Using Completion Date Y/N ?
Enter System # First In Quick Ref. Window Y/N ?Y
Tax Trade-In Y/N ?N Tax Depreciation Period :Y
PASSWORDS: Z-Times?DDMS Call Date/Time?DDMS Purge?DDMS Eom/Auth.?DDMS Keys?DDMS
Reindex ?DDMS Delete ?DDMS Compress ?DDMS Accessories ?DDMS
=====

```

Field Definitions

The following text describes each field in the (EZ1S) screen, as shown in Figure 1. These fields are listed in the order the cursor moves through the screen.

Next Serial

Since each item has its own serial number, we recommend that you leave the Serial # field blank and specify the serial number yourself.

Your response in this field determines the starting serial number to be assigned automatically by the system. Each serialized item in your serialized inventory database must have a serial number. You can let the system assign serial numbers or you can assign your own. Since the serial number is listed on each machine, usually you will assign the serial number yourself. If you choose to let the system assign serial numbers, enter the beginning number in this field. You can enter up to 15 characters.

Serial numbers are assigned to serialized items when you receive them in the Purchase Order Entry window. If the system assigns numbers, the number in this field increases by one each time a serial number is assigned to an item.

Next Call

Your response in this field determines the next call number that the system uses when automatically assigning numbers to customer calls. Each call is assigned a unique call number. The system assigns call numbers when calls are entered through the Work Orders window.

While you can enter a starting call number containing as many as nine characters, we recommend that you start with a small number, such as 100 or 1000. The number in this field increases by one each time the system assigns a call number.

Note: We recommend that you specify a call number in this field.

Next System

Your response in this field determines the next system number to be assigned automatically by the system. Each serialized item must have a unique system number. You can let the system assign system numbers or you can assign your own. If you leave this field blank, you must assign system numbers yourself. If you specify a starting system number in this field, the number increases by one each time a new system number is assigned to an item.

While you can enter a starting system number containing as many as nine characters, we recommend that you start with a small number, such as 100 or 1000. (Since this is the number used to identify the machine when speaking with the customer, smaller numbers are easier to use.) The number in this field increases by one each time the system assigns a system number.

A system is a group of serialized items that you sell together. For example, a computer system may include the CPU, a monitor, a keyboard, and a printer. A copier system may include the copier, collator, and stapler.

A system may also consist of a single item if the item is not sold as part of a larger group.

The parts that make up a system are called subsystems. In the copier example, the copier, collator, and stapler would each be subsystems. When a system includes subsystems, all subsystems share the same master system number, but each subsystem has a unique subsystem number. In the copier example, the master record for the copier system would have a system number without a subsystem number—1000, for instance. The system and subsystem numbers for each part may look like this:

Copier System	System Number	Subsystem Number
Copier	1000	
Collator	1000	01
Stapler	1000	02

System numbers are assigned to serialized items when you receive them in the Purchase Order Entry window. System numbers can also be assigned to serialized items when manually adding serial items through the Machine Detail window or when logging a call in the Work Orders window. They can also be assigned when selling a serial item through Serialized Order Entry.

Normally, items exist in your inventory under unique master system numbers. When you sell a group of related items to a customer, you can assign the same system number to all of the items, and give each item a unique subsystem number. These items then make up a true “system.”

You can have a separate numbering system for each location. If a starting number is assigned for a location, the system assigns system numbers separately for that location. If a starting number is not specified for a location, the system uses the number currently in the Next System # field in the parameters for location 1.

If you choose to use a separate numbering system for each location, be sure that the gap between starting numbers is large enough to prevent duplication of numbers in the Next System # field for different locations. The system and subsystem number together make up the key. These keys identify each individual serial item and must be unique. To avoid duplication, we recommend that you assign a starting number only for location 1, so that the same numbering system is used for all locations.

Next Transfer #

Your response in this field determines the starting transaction number for stock transfers. Each stock transfer must have a number. If you enter a beginning number in this field, you can let the system assign a transfer number or you can assign the number. If you leave this field blank, the default is 1.

Add Customers in (A)/Status

These fields do not apply to Ensite Pro.

Prompt OK To Exit

This field does not apply to Ensite Pro.

Service Ticket Form/Prt

You can use the Service Ticket Form field to specify the custom format you want the system to use for work order tickets for general service calls. (Custom formats are created through Report Writer.) You can specify up to eight alphanumeric characters. If you leave this field blank, the system uses a standard format for all work order tickets.

In the corresponding Prt field, specify the logical name of the printer where you want the work order tickets to print. If you leave this field blank, the system will use P1.

P / M Ticket Form/Prt

In the P/M Ticket Form field, enter the name of the custom format to use when printing preventive maintenance tickets which are used for periodic service calls specified in service contracts. If you leave this field blank, the system uses a standard format for all preventive maintenance tickets.

In the corresponding Prt field, specify the logical name of the printer where you want the preventive maintenance tickets to print. If you leave this field blank, the system will use P1.

Edit File Form/Prt

These fields do not apply to Ensite Pro.

Contract Form Printer

In the Contract Form Printer field, enter the logical name for the printer that you use to print contracts.

Copies

In this field, specify how many copies of a contract you want to print. To print two copies of each contract, for example, type **2** in the Copies field. The system defaults to print one copy.

Update Exceptions

This field determines whether the system will create a file that shows changes made to call codes and technician information. There are three exceptions that the file contains: changing a technician in the Work Orders window and Monitor window, changing a call code in the Work Orders window and Monitor window, and deleting a call. This file contains the location; the system, subsystem, and call number; the date and time; the order-writer; the terminal and program where the exception occurred, and the contents of the field before and after the change was made. The system stores this information in the Z-EXCEPT file.

You can specify the printer for each type of ticket even if you do not specify custom formats.

Note: You can print the Exceptions Report showing this information in the (EZZ) Serial Selections screen. Before you do, you must first catalog the report selector Z-EXCP in the (EZ5) Serialized Standard Reports screen.

Enter your response according to the following:

Y Save the information to a file.

N (default) Do not save the information to a file.

Set Order Writer

These fields do not apply to Ensite Pro.

Basic Contracts Cost

Your response in the Cost % field determines the default cost for basic contracts. The system uses this information to track the profitability of your basic contracts.

In the Cost% field, specify the default cost as a percentage of the contract price. This cost percentage becomes the default cost percentage for the contract types you set up in the Contracts Types window. For example, if you charge \$50 per month for a basic contract and it costs you \$25 per month to service the contract, you would enter 50.0 (because \$25 is 50% of \$50).

Service Contracts Cost

Your response in the Cost % field determines the cost percentages for contract types you set up in the Contracts Types window.

In the Cost % field, specify the default cost for service contracts as a percentage of the contract price.

Meters Cost

Your response in the Cost % field determines the cost percentages for contract types you set up in the Contracts Types window.

In the Cost % field, specify the cost for meter charges as a percentage of the contract price.

Labor Cost

The Labor Cost field determines the default labor department and cost percentages for contract types you set up in the Contract Types window.

In the Cost % field, specify the cost for labor charges as a percentage of the list price.

Travel Cost

The Travel Cost field determines the default travel department and cost percentages for contract types you set up in the Contract Types window.

In the Cost % field, specify the cost for travel as a percentage of the list price.

Specifying a default contract cost is optional. Contract cost is determined by various factors including labor, supplies, parts, travel, and so forth.

Update MTD Qtys When Transferring

In this field, specify whether you want the system to update month-to-date quantities when you transfer items from one location to another in the Item Transfer dialog box. If you set this field to **Y**, the system will update the month-to-date sales and hits and year-to-date sales and hits when you transfer items from one location to another.

Enter your response according to the following:

- Y** Update month-to-date quantities when transferring items.
- N (default)** Do not update month-to-date quantities when transferring items.

Use Projected Meter P/M Date

You can use this field to determine which date the system uses to calculate the next due date for preventive maintenance (PM). You can specify that the system use either the next projected date from the Projected Next PM Date box in the Contract Detail Meter tab, or that the system calculate the date according to the last (PM) call.

Enter your response according to the following:

- Y** Uses the projected date from the Contract Detail Meter tab as the next preventive maintenance date when generating a preventive maintenance call for a machine.
- N (default)** Determines the next preventive maintenance date by calculating the amount of time between the date you specify when you run the Preventive Maintenance report in the (EZY) Maintenance Report Selection screen and the date of the last (PM) call. If this time equals or exceeds the time specified in the Service Frequency box in the Contract Detail Contract tab, the system generates a preventive maintenance call for the machine.

The Use Projected Expiration Date field only applies when you run contract renewals through the (EZU) Serial Contract Maintenance screen.

Use Projected Expiration Date

You can use this field to specify that the system use either the projected expiration date or the contract ending date from the Contract Detail window to determine when a contract renewal is due.

Enter your response according to the following:

- Y** Use the projected expiration date from the Contract Detail window to determine when a contract renewal is due.
- N (default)** Use the contract ending date from the Contract Detail window to determine when a contract renewal is due.

Number Of Days Before Next P/M

In this field, specify the number of days ahead the system should look to see if a preventive maintenance call is due when logging a call for an item in the Work Orders window, or when running a preventive maintenance report in the (EZY) screen.

When you log a call for an item, and a preventive maintenance call is due for that item within the number of days you specify in this field, the system warns you that a preventive maintenance call is due and prompts you to enter the call. When you run a preventive maintenance report in the (EZY) screen and a preventive maintenance call is due for an item within the number of days you specify in this field, the system prints the Preventive Maintenance Report and generates the preventive maintenance call.

Note: If you enter a number of days in this field and specify a percentage of clicks in the Percent of Clicks Before Next P/M field, below, the system calculates preventive maintenance call due dates using both days and clicks, but generates the call only once, for whichever factor (days or clicks) comes first.

Percent Of Clicks Before Next P/M

Like the Number Of Days Before Next P/M field above, this field is used to give advance warning of preventive maintenance calls when running a preventive maintenance report in the (EZY) screen and in the Work Orders window when adding a new call. However, this field determines when preventive maintenance calls are due by counting clicks rather than the date. If preventive maintenance calls are due every 15,000 clicks, for example, and you have the Percent Of Clicks Before Next P/M field to set to 10, then once the machine is within 10 percent of 15,000 clicks (1500 clicks) of its preventive maintenance number, the system will notify you that a preventive maintenance call is due.

When you log a call for an item in the Work Orders window, and a preventive maintenance call is due for that item within the specified percentage of clicks, the system warns you that a preventive maintenance call is due and prompts you to enter the call. When you run a preventive maintenance report in the (EZY) screen and a preventive maintenance call is due for an item within the specified percentage of clicks you specify in this field, the system prints the Preventive Maintenance Report and generates the preventive maintenance call.

Note: If you enter a percentage in this field and specify a number of days in the Number of Days Before Next P/M field, above, the system calculates preventive maintenance call due dates using both clicks and days, but generates the call only once, for whichever factor (clicks or days) comes first.

Suspect Meter Reading

The system automatically calculates an average meter reading for each machine, estimating how many clicks per day a copier uses. In the Suspect Meter Reading field, you can specify an allowed variance percentage. This feature merely serves as a warning that an unusual amount of clicks has been used.

For example, if you specify 25% in this field, each time you enter a meter reading the system checks to see if the new reading fits in with the average rate of use. If the new reading is 25% more or less than the average reading, the system prompts you that the meter reading is suspect so you can change the meter reading.

Note: The system also warns you if you try to enter a reading that's below the current reading. You can then accept the displayed reading or enter a different number.

The system uses four fields when calculating suspect meter readings: the Suspect Meter Reading field in the (EZ1S) screen, the current meter reading that you are entering, the CMV# box and the Current Reading # and Date boxes in the Contract Detail Meter tab.

Note: If no figure is set in the CMV# box, the system ignores the Suspect Meter Reading parameter and will not calculate a suspect meter reading. The system updates the CMV# box as soon as you put in more than one reading for a metered item.

The system calculates suspect meter readings using the following procedure. When you enter a meter reading, the system calculates the number of days between the system date and the date in the Current Reading box in the Contract Detail Meter tab to determine the number of days between readings. Next, the system divides the number in the Current Monthly Volume box by 30 to get the average number of clicks per day. It then multiplies the clicks per day by the number of days between readings to determine how many clicks should have been used. The system then adds the clicks that should have been used to the number in the Current Reading box to determine the expected reading. The system creates the acceptable variance by multiplying the percentage you enter in the Suspect Meter Reading field by the expected reading. Adding the acceptable variance to the expected meter reading gives you the largest acceptable number of clicks, and subtracting the acceptable variance from the expected meter reading gives you the smallest acceptable number of clicks.

[system date] - [Current Reading date] = [# days between readings]

[Current Monthly Volume] ÷ 30 = [avg clicks/day]

[avg clicks/day] x [# days between readings] = [# clicks should have been used]

[# clicks should have been used] + [Current Reading] = [expected reading]

[Suspect Meter Reading]% x [expected reading] = [acceptable variance]

[expected reading] + [acceptable variance] = [largest acceptable # clicks]

[expected reading] - [acceptable variance] = [smallest acceptable # clicks]

For example, if you specify 10% in the Suspect Meter Reading field, and the expected reading is 1,000, then the acceptable variance is 100. The largest acceptable number of clicks would be 1000 + 100, or 1100. The smallest acceptable number of clicks would be 1000 - 100, or 900. Therefore, any reading between 900 and 1100 is acceptable. Any reading greater than 1100 or less than 900 will trigger the Suspect Meter Reading prompt.

Use AMV

This field works in conjunction with the Suspect Meter Reading field, above. It lets you specify whether you want the system to calculate suspect meter readings based on current or average monthly volume readings. (The system displays current monthly and average monthly volume readings in the Contract Detail Meter tab.)

- Y** Use the average monthly volume to determine suspect readings.
- N (default)** Use the current monthly volume to determine suspect readings.

Calculate Next P/M's Using Completion Date

In this field, specify whether the system uses the completion date for a preventive maintenance (PM) call as the basis for determining when the next call is due.

When you generate PM calls through the (EZY) screen, the system must determine when the next one will be due. If PM calls are scheduled every 90 days, the system will add 90 days to the completion date of this PM call to determine the next PM call due date.

Enter your response according to the following:

- Y** Use the completion date for the current PM call to calculate when the next one is due.
- N (default)** Use the call log in date (the date when the PM call was generated) for the current PM call to calculate when the next one is due.

Enter System # First In Quick Ref Window

This field does not apply to Ensite Pro.

Tax Trade-In

In this field, you can specify whether the price of new merchandise is subject to sales tax when the price is offset by a credit from a trade-in item. Depending on state tax laws, either the entire price of the new merchandise is taxable, or the price of the new merchandise minus the trade-in amount is taxable.

For example, if the customer is trading in an item for a \$200 credit, and is purchasing a new item for \$1000, the customer must pay sales tax on all \$1000 or on \$800 (the price of the new merchandise less the trade-in amount).

Enter your response according to the following:

*Check with your
state taxing body to
determine your
specific taxing
laws.*

- Y** Sales tax applies only to the difference between the price of the new merchandise and the trade-in amount (new merchandise minus trade-in).
- N (default)** Sales tax applies to the entire price of the new merchandise, regardless of trade-in credit.

Tax Depreciation Period

You can use this field to specify a default period for the Tax box in the Machine Detail Depreciation tab. The Tax box in the Machine Detail Depreciation tab determines how often items are depreciated. If you do not specify a default period in this field, the Tax box in the Machine Detail Depreciation tab will be blank. Enter your response according to the following:

- M** Depreciate items on a monthly basis.
- Q** Depreciate items on a quarterly basis.
- Y** Depreciate items on a yearly basis.

PASSWORDS/Z-Times

This password works in conjunction with the Call Date/Time password, below. You can use this field to specify a password restricting the ability to change the records in the Z-TIMES file.

The Z-TIMES file stores dates and times for logging, dispatching, completing calls, and so forth. The system displays this information in the Tech Recap window. You change the dates and times in the Z-TIMES file. When you do, the system will prompt you for the password.

If a password is set in this field and in the Call Date/Time field, described below, you must enter one of these passwords to change the dates and times in the Z-TIMES file. If you enter the password from the Z-Times field, you can change all the dates and times, *except* for the date and time of the original call-in. If you enter the password from the Call Date/Time field, you can change *all* the dates and times for the call.

You can enter up to four characters in this field.

PASSWORDS/Call Date/Time

This password works in conjunction with the Z-TIMES password, above. In the Call Date/Time field, specify a password restricting the ability to change *all* dates and times.

The Z-TIMES password in combination with the Call Date/Time password provides a dual layer of password protection. The Z-TIMES password restricts the ability to change dates and times while keeping call-in dates and times inaccessible. The Call Date/Time password restricts the ability to change *all* dates and times.

Call-in dates and times are important. They allow you to monitor your technicians' performances, such as how long it takes to complete a call, how quickly the technician arrives, and so on. Users with the Call Date/Time password have the power to change *every* date and time for a call.

You can enter up to four characters in this field.

PASSWORDS/Purge

In this field, enter a password restricting access to the purging function. You use this function to purge serial inventory history through the (EZY) Serial Maintenance Report Selection screen and work order journal information in the (EZYJ) Work Order Journal Report Selection screen.

If you specify a password in this field, users must know the password to purge information.

PASSWORDS/Eom/Auth

You can use this field to specify a password restricting access to the end-of-month function. You use this password for the [Q] Depreciation Quarter End and [Y] Depreciation Year End functions in the (EZ+P) Period End Procedure screen.

If you specify a password in this field, users must know the password to perform the end-of-month function.

PASSWORDS/Keys

In this field, enter a password restricting access to the key-changing function. You use this function to change the keys for serialized inventory items. The system uses the keys, which are the combination of system and serial numbers, to identify serialized inventory records. For example, you enter this password when changing a system number to another number or when changing or moving a call from one machine to another machine.

You also enter this password when changing keys in the Work Orders window. In the Work Orders window, the key that you can change is the system number to which a particular call refers.

If you specify a password in this field, users must know the password to change key fields.

PASSWORDS/Reindex

This field allows you to specify a password restricting access to the reindexing function. You use this function to reindex the serialized inventory database through the text-based (EZG) Serial Master screen, or to reindex calls through the text-based (EZP) Call Monitor screen.

If you specify a password in this field, users must know the password to reindex files.

PASSWORDS/Delete

In this field, specify a password restricting access to the deleting function. You use this function to delete serialized items through the Machine Detail Master tab, to delete calls through the Work Orders window, to delete contracts in the Contract Detail Contract Master tab, to delete contract information in the Contract Detail History tab, to delete meter records in the Contract Detail Meter tab, and to delete depreciation records in the Machine Detail Depreciation tab.

If you specify a password in this field, you must know the password to delete information.

PASSWORDS/Compress

This field does not apply to Ensite Pro.

PASSWORDS/Accessories

You can use this field to enter a password restricting access to the accessories feature. You use this feature to attach accessories to machines in the Serialized Order Entry window and the Machine Detail Accessories dialog box.

If you enter a password in this field, users must know the password to open the Machine Detail Accessories dialog box.

Changing the Parameters

Serialized Parameters are in the text-based (EZ) Serial Master Menu screen. To access the (EZ) screen, use TBL Client.

- 1 From the DDMS Master Menu, type **EZ**.
- 2 When the Serial Master Menu opens, select the [1] System action code.
- 3 In the (EZ1) Serial Parameters menu, select the [S] System action code.
- 4 In the (EZ1S) screen and select the [C] Change action code.

Chapter 3: Setting Global Serialized Parameters

- 5 In the G/L Location field, enter the location for which you want to set the parameters. (This field defaults to the location entered for your terminal in the (L1) Terminal and Tickets Parameters screen.) You can enter a new location or accept the default location:
 - To accept the default location, press Tab.
 - To set parameters for a different location, enter the number. If you enter fewer than two characters, press Tab.

Note: Your responses to the fields in the (EZ1S) screen apply only to the location you specify in the G/L Location field.

- 6 Enter the appropriate responses in each of the fields in this screen. For a description of the fields, see the heading **Field Definitions**. Use the following instructions for cursor movement in this screen:
 - To move the cursor ahead one field, press Tab.
 - To move the cursor back one field, press Backspace.
- 7 When you finish changing the parameters in this screen, press Enter until the cursor returns to the action code field. If you press Esc before doing so, the system will not save your changes.

The (EZ1S) Serial System Parameters Screen

For your convenience, a picture of the (EZ1S) screen is shown below. You can use this page to enter your responses to the fields in this screen.

```

=====
(EZ1S) Serial System Parameters
=====
Action [I] (C=Change, I=Inquire, B=Back To EZ1)      G/L Location [ 1]
=====
SYSTEM GENERATED NUMBERS:
Next Serial #          703      Basic Contracts Cost      %
Next Call #          104312     Service Contracts Cost    %
Next System #         2477      Meters Cost               %
Next Transfer #         43      Labor Cost                 %
Add Customers in (A) Y/N ?Y Status ?U      Travel Cost                %75.0
Prompt OK To Exit Y/N ?N

SYSTEM TICKET FORMS AND PRINTERS:
Service Ticket Form :SWORKO  Prt :P1      Update MTD Qtys When Transferring Y/N ?Y
P / M Ticket Form :SWORKO  Prt :B:    Use Projected Meter P/M Date Y/N ?Y
Edit File Form :SWORKO  Prt :P1      Use Projected Expiration Date Y/N ?N
Contract Form Printer :P1 Copies #      Number Of Days Before Next P/M #30
Update Exceptions Y/N ?Y                Percent Of Clicks Before Next P/M %
Set Order Writer Y/N ?N                  Suspect Meter Reading 10% Use AMV Y/N ?
Enter System # First In Quick Ref. Window Y/N ?Y      Calculate Next P/M's Using Completion Date Y/N ?
Tax Trade-In Y/N ?N Tax Depreciation Period :Y
PASSWORDS: Z-Times?ROB Call Date/Time?DDMS Purge?DDMS Eom/Auth.?DDMS Keys?DDMS
Reindex ?DDMS Delete ?DDMS Compress ?DDMS Accessories ?DDMS
=====
```

Chapter 4: Customizing Order Entry

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For your convenience, a picture of the (EZ10) screen has been included at the back of this chapter. You can use this page to enter your responses to the fields in this screen.

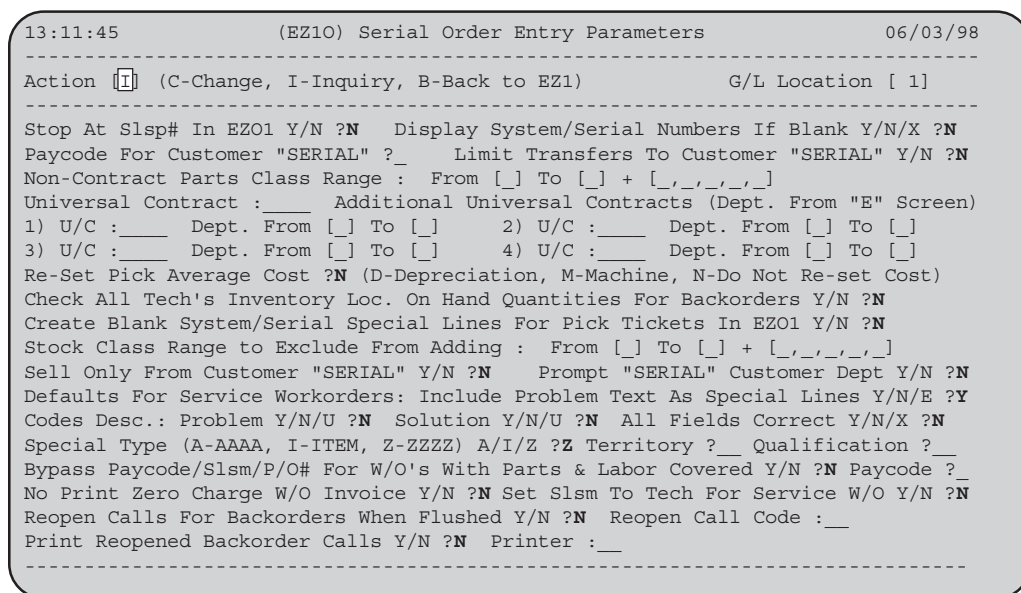
Customizing Order Entry

This chapter describes all of the fields in the (EZ10) Serial Order Entry Parameters screen and gives you instructions for making changes to these fields. Many of the fields in this screen let you customize the Serialized Order Entry application. For example, some of the fields in this screen allow you to specify how you want to handle work orders that contain backordered items. You can also set up default codes and field responses that customize the information that appears in the Machine Work Orders Work Order Billing dialog box when you place the order.

The (EZ10) screen has no preset options. All of the fields will be blank when you first access the screen. However, we recommend that you view the default responses in this screen to determine whether they fit the needs of your business. Begin by verifying whether the default settings for location 1 are suitable for your business needs. (The default settings for location 1 are shown in Figure 1.)

If one or more of the default settings are not acceptable, change them using the [C] Change action code. (See the heading **Changing the Parameters.**) When you have set the parameters for location 1, set up separate parameters for each additional location that you run differently than location 1. If you do not set up separate parameters for a particular location, the parameters set for location 1 will be used.

Figure 1:
Default Options
in the (EZ10)
Serial Order
Entry
Parameters
Screen



Field Definitions

The following text describes each field in the (EZ1O) screen. These fields are listed in the order the cursor moves through the screen.

Stop At Sls# In EZO1

This field not used in Ensite Pro.

Display System/Serial Numbers if Blank

This field not used in Ensite Pro.

Paycode For Customer "SERIAL"

In this field, you can specify a default pay code for sales to the Serial customer. For example, if you use pay code Ø (No Charge) for sales to the Serial customer, enter Ø. By using pay code Ø, you can bill service work orders for in-house machines, thereby maintaining accurate cost records without affecting accounts receivable.

Limit Transfers To Customer "SERIAL"

The Limit Transfers to Customer "SERIAL" parameter only affects orders entered in the Serialized Order Entry window.

You can use this field to specify that the system only allow items assigned to the Serial customer to be transferred. Items that are available for sale or rental should be assigned to the Serial customer. (Items that you receive through the Purchase Order Entry window are automatically assigned to this customer.) Enter your response according to the following:

- Y Only allow items assigned to the Serial customer to be transferred.
- N (default) Allow all items to be transferred.

Non-Contract Parts Class Range From/To/+

You can use these fields to specify default stock classes for parts that are not covered by contracts. For example, a service contract on a laser printer may include all parts except for the drum. If a part is not covered by the contract, your customer is billed for it; if a part is covered, its cost is assigned to the contract when you bill the service work order.

The stock classes you specify in this field become the defaults for the Non-Contracts Parts Class Range boxes in the Contract Types window. However, the boxes in this window can be set differently for each contract type.

You use stock classes to group similar items. For example, you may have drums for laser printers in stock class D, and other laser printer parts, which are covered by service contracts, in stock class E.

In the From field, enter the first stock class in the range of stock classes for parts *not* included on the contract. For example, if all parts with stock classes C through F are not covered by contracts, you would specify C in the From field.

In the To field, enter the last class in the range of stock classes for parts not included on the contract. Using the same example, where stock classes C through F are not covered by contracts, you would specify F in the To field.

In the remaining + fields, you can specify up to five additional stock classes that are not covered by the contract. For example, you might specify classes R, Q, N, P, and L.

Universal Contract

In this field, you enter the name of the master universal contract. Universal contracts provide the default service, labor, and travel rates for machines that are not under contract.

If your rates for service, labor, and travel are the same for all machines that are not under contract, you only need to set up a master universal contract. In this case, the master universal contract covers all machines that are not under contract.

However, if your rates are more for some types of machines than for others, you should set up additional universal contracts. These additional universal contracts are defined in the Additional Universal Contracts fields, below. When you define these additional contracts, you also define which machines you want the contracts to cover according to a range of item departments. In this case, the master universal contract covers any departments that are not covered by an additional universal contract.

To set up universal contract types, first specify the name of the master universal contract in this field. You can enter up to four alphanumeric characters (UNIV, for example).

Additional Universal Contracts U/C /Dept From/To

In these fields, you define the additional universal contracts. These contracts are used to set up additional rates that you may use for machines that are not under a contract. For example, you might set up one additional contract with the rates for copier service and another one with the rates for computer service. For each additional universal contract you enter in these fields, you specify a range of item departments that you want the contract to cover.

Note: To set up additional universal contracts, you must also enter the master universal contract in the Universal Contract field, above.

To set up additional universal contracts, enter the name of the first additional universal contract in the 1) U/C field. Then specify the range of departments that the additional universal contract covers. To do this, in the Dept From field, enter the first department in the range that this contract covers. In the To field, enter the last department in the range that this contract covers. You can repeat the process for each of the remaining three U/C fields.

You set up contract types in the Contract Type Types tab. After you set up contract types, you can specify default labor and travel rates in the Contract Types Service Rates tab. (For details, see

Chapter 15: Setting Up Contract Types and Chapter 20: Setting Labor and Travel Rates.)

In the example in Figure 2, additional universal contracts cover departments 1- C. Departments D-Z would then be covered by the master universal contract.

Re-set Pick Average Cost

When you sell a machine in order entry, the system can add the setup cost and average cost together to give you a more accurate cost for the machine. This field determines how the system will adjust the average cost. (The average cost is the average cost of an item at the time of the sale. It's recorded as part of the information for the sale. You specify the setup cost for each model in the Item Machine dialog box.) Enter your response according to the following:

- D** Replace the average cost for the machine with the depreciated book value, and add the setup cost to it. (To determine the book value, the system uses the Present Book Value box in the Machine Detail Depreciation tab.)
- M** Replace the average cost for the machine with the purchasing cost, which is displayed in the For \$ box in the Machine Detail Master tab. Add the setup cost to the machine's cost.
- N (default)** Do not reset the average cost. Use the average cost from the Item window. Add the setup cost to the machine's cost.

Check All Tech's Inventory Loc On Hand Quantities For Backorders

You can use this field to specify that the system check all technicians' inventory locations for on-hand quantities when you place a backordered item on a work order in the Serialized Order Entry window. This field allows you to automatically transfer the part from another location to fill the backorder.

Figure 2:
Specifying
Additional
Universal
Contracts

```

13:11:45                (EZ10) Serial Order Entry Parameters                06/03/98
-----
Action [C] (C-Change, I-Inquiry, B-Back to EZ1)                G/L Location [ 1]
-----
Stop At Slsp# In EZ01 Y/N ?      Display System/Serial Numbers If Blank Y/N/X ?N
Paycode For Customer "SERIAL" ?      Limit Transfers To Customer "SERIAL" Y/N ?
Non-Contract Parts Class Range : From [ ] To [ ] + [_,_,_,_]
Universal Contract :UNIV Additional Universal Contracts (Dept. From "E" Screen)
1) U/C :ONE Dept. From [1] To [3]      2) U/C :FOUR Dept. From [4] To [6]
3) U/C :SEVN Dept. From [7] To [9]      4) U/C :ABC Dept. From [A] To [C]
Re-Set Pick Average Cost ?_ (D-Depreciation, M-Machine, N-Do Not Re-set Cost)
Check All Tech's Inventory Loc. On Hand Quantities For Backorders Y/N ?_
Create Blank System/Serial Special Lines For Pick Tickets In EZ01 Y/N ?N
Stock Class Range to Exclude From Adding : From [ ] To [ ] + [_,_,_,_]
Sell Only From Customer "SERIAL" Y/N ?N Prompt "SERIAL" Customer Dept Y/N ?_
Defaults For Service Workorders: Include Problem Text As Special Lines Y/N/E ?Y
Codes Desc.: Problem Y/N/U ?_ Solution Y/N/U ?_ All Fields Correct Y/N/X ?_
Special Type (A-AAAA, I-ITEM, Z-ZZZZ) A/I/Z ?Z Territory ?_ Qualification ?_
Bypass Paycode/Slsm/P/O# For W/O's With Parts & Labor Covered Y/N ?_ Paycode ?_
No Print Zero Charge W/O Invoice Y/N ?N Set Slsm To Tech For Service W/O Y/N ?N
Reopen Calls For Backorders When Flushed Y/N ?_ Reopen Call Code :__
Print Reopened Backorder Calls Y/N ?_ Printer :__ Depreciate Leases Y/N ?
-----

```

Since the On Flushes, Only Print All Shipped parameter affects the entire system, DDMS recommends that you set it to S or N.

If you specify **Y** in this field, when you add a backordered item to a work order, the system will automatically display all the locations that have this part. It will then prompt you to transfer the part from the location you specify to the receipts file of the technician or location indicated on the ticket. When you flush the ticket, the system will reopen the call or not, depending on how you set the On Flushes, Only Print All Shipped parameter in the (LF1) Purchase Order Flushing Parameters screen.

If the (LF1) parameter is set to **Y**, the call remains closed until all items on the backorder are completely filled. If the (LF1) parameter is set to **S**, the call remains closed until the serialized items on the backorder are completely filled. If the (LF1) parameter is set to **N**, the call reopens, even if the backorder is only partially filled. Enter your response according to the following:

- Y** Check all technicians' inventory locations for on-hand quantities.
- N (default)** Do not check all technicians' inventory locations.

Create Blank System/Serial Special Lines For Pick Tickets In EZ01

This parameter gives you the option of printing special lines on pick tickets that provide spaces for the picker to enter the system and serial numbers of each serial item shipped.

If you specify **Y** in this field, the system prints the following special line for each serial item listed as shipped on the ticket:

SYSTEM # _____ SERIAL # _____

This special line is an item special—it prints after each line entry for a serial item. If you change the quantity shipped when verifying the ticket, the number of special lines printed will change accordingly.

Enter your response according to the following:

- Y** Print the special line for each shipped serial item.
- N (default)** Do not print this special line for each shipped serial item.

Stock Class Range to Exclude From Adding From/To/+

When you sell an item or contract in the Serialized Order Entry window, you enter the system and serial numbers for the item. Normally, you enter numbers that are already on file in the Machine Detail window. You can also enter new system and serial numbers in the Serialized Order Entry window. When you do, the system creates a new serial database record. You can use this field to prevent users from entering new system and serial numbers for specific items. You do this by using the item's stock class. (You use stock classes to group similar items. For example, you may assign one class to items that you stock and another to items that you don't stock.)

To use the special lines for pick tickets feature, you must use a terminal whose default ticket status is less than 8. (You set up a terminal's default ticket status in the T-I-C-K-E-T-S ST field in the (L1) Terminal and Tickets Parameters screen.)

In the From and To fields, enter a range of stock classes for which you do not want new system or serial numbers added. For example, if you want to exclude items with stock classes W through Z, you would enter W in the From field and Z in the To field.

In the + fields, you can specify up to five additional stock classes for which you do not want new system or serial numbers added. For example, you may want to specify stock classes A, C, E, J, and R.

Sell Only From Customer "SERIAL"

In this field, you can restrict sales to items assigned to the Serial customer. Items that are available for sale or rental should be assigned to the Serial customer. This notifies you that the item is available to be sold and helps prevent you from inadvertently reselling the item to another customer. (Items that you receive through the Purchase Order Entry window are automatically assigned to this customer.) Enter your response according to the following:

- Y** Restrict sales and rentals to items assigned to the Serial customer.
- N (default)** Do not restrict sales and rentals to items assigned to the Serial customer.

Prompt "SERIAL" Customer Dept

You can use this field to specify that the system prompt you for a customer department each time you do a credit return in the Serialized Order Entry window. Enter your response according to the following:

- Y** Prompts for a customer department when doing credits on serial items.
- N (default)** Does not prompt for a customer department when doing credits on serial items.

Include Problem Text As Special Lines

When you complete a call in the Work Orders window with the Complete and Bill Work Order option, the system displays the Work Order Billing dialog box. See Figure 3. This dialog box includes the Include Call Text As Special Lines box, which allows you to add the call's text as special lines to the ticket.

In this field, you can set the default response for the Include Call Text As Special Lines box. However, this field only sets the default response; you can always change the default response when you complete the work order. Enter your response according to the following:

- Y (default)** Set the default response to **Y**, indicating that the call's text will be included as special lines on the ticket.
- N** Set the default response to **N**, indicating that the call's text will not print on the ticket.

To use the Prompt "SERIAL" Customer Dept field, you must first set up customer departments in the Customer window. For details, see your online documentation.

- E Set the default response to E, indicating that the user can edit the call's text. The call's text will also be included as special lines on the ticket.

Note: This field does not apply to calls that you end with the Batch Work Order completion code and process with the Work function in the (EZY) Serial Maintenance Report Selection screen. In this case, the system automatically includes the call's text as special lines on the ticket.

Codes Desc: Problem

When you complete a call in the Work Order window with the Complete and Bill Work Order option, the system displays the Work Order Billing dialog box. This dialog box includes the Include Problem Code Description box, which allows you to specify whether you want the system to include the call's problem code. You can also specify that the system update the problem code description in the call's text if the description has changed. However, this field only sets the default response, you can always change the default response when you complete the work order.

Note: If you specify U in this field, the problem code description will be updated in the Z-AUX file, which contains call history, including the call's text. However, if you have already created a pick ticket, the specials on the pick ticket will not be updated with the new problem code description, if any. These special lines are stored in the file P-MASTER, which is not affected by changes to the Z-AUX file.

Figure 3: The Workorder Window in the (EZO) Screen

```

15:03:50 (EZ01) Serial Order Entry 04/25/97
Ser#: 453444 Sys#: 34553 - Contract #COP5
Text: Type desc:COPIER SERVICE
Item#:345 COPIER Co:HITECH Location:2ND FLOOR
Desc:COPIER WI/COLLATOR Customer:EL RANCHO FIREHOUSE #12
Writer [MIKE] G/L Loc [ 4] Inv Loc [ 4] Account # 4343556 Dept # Status :A
Paycode:3 Slsm: 420 PO:52222 Lines:___ Total:_____ Pick: -
# Item Mfg Description Order Ship Price
-----
* * * * *
* INCLUDE Problem Text as Special Lines Y/N/E ?Y *
* INCLUDE Problem Code Description Y/N ?N Code : *
* INCLUDE Solution Code Description Y/N ?N Code : *
* Special Type (A=AAAA, I=ITEM, Z=ZZZZ) A/I/Z ?Z *
* INCLUDE Labor Y/N ?Y Qlf : Pay Period : Travel % *
* (R)egular, (O)vertime, (W)eekend ? Hours: : *
* INCLUDE Travel Y/N ? Charge Y/N ? Terr / Miles T/M ? *
* (R)egular, (O)vertime, (W)eekend ? Miles : *
* Territory : *
* * * * *
Are All Fields Correct Y/N ?N
    
```

DDMS recommends that you use call, problem, and solution codes to automate text entry for your calls. If you design these codes carefully and set parameters so that the code descriptions are included as text in the call, many of the calls you generate will require little or no typing—the code descriptions will provide all the necessary information.

Enter your response according to the following:

- Y** Set the default response to **Y**, and display the call's problem code in the corresponding Code field.
- U** Set the default response to **Y**, and update the problem code description in the call's text if the description has changed.
- N (default)** Set the default response to **N**.

Codes Desc: Solution

When you complete a call in the Work Order window with the Complete and Bill Work Order option, the system displays the Work Order Billing dialog box. This dialog box includes the Include Solution Code Description box, which allows you to specify whether you want the system to include the call's solution code. You can also specify that the system update the solution code description in the call's text if the description has changed. However, this field only sets the default response, you can always change the default response when you complete the work order.

Note: If you specify **U** in this field, the solution code description will be updated in the Z-AUX file, which contains call history, including the call's text. However, if you have already created a pick ticket, the specials on the pick ticket will not be updated with the new solution code description, if any. These special lines are stored in the file P-MASTER, which is not affected by changes to the Z-AUX file.

Enter your response according to the following:

- Y** Set the default response to **Y**, and display the call's solution code in the corresponding Code field.
- U** Set the default response to **Y**, and update the solution code description in the call's text if the description has changed.
- N (default)** Set the default response to **N**.

All Fields Correct

This field not used in Ensite Pro.

Special Type (A=AAAA, I=ITEM, Z=ZZZZ)

When you complete a call in the Work Order window with the Complete and Bill Work Order option, the system displays the Work Order Billing dialog box. This dialog box includes the Special Line Type box. You can use the Special Line Type box to specify where you want the special lines containing the call's text to print on the ticket. You can print special lines in one of three places: as an AAAA special (start of order), before the first item; as an Item special, after the item description; or as a ZZZZ special (end of order), after the last item. You can also use this parameter to specify that the system not display the Work Order Billing dialog box.

Enter your response according to the following:

- A** Set the default to **A**, to print the call's text before the first item.
- I** Set the default to **I**, to print the call's text after the information about the item you're servicing.
- Z (default)** Set the default to **Z**, to print the call's text after the last item.

Territory

When you complete a call in the Work Order window with the Complete and Bill Work Order option, the system displays the Work Order Billing dialog box. This dialog box includes the Terr box, which displays the territory code for this work order. You can use this field to specify a default territory code. (If you're calculating travel charges by territory, the territory code determines which line of the Travel Rates by Territory Table in the Contract Types Service Rates tab is used to calculate travel charges.)

The system uses the territory code you specify in this field unless a territory code is assigned to the customer in the Territory box in the Customer Machines tab. If the customer has already been assigned a territory code, it will be the default in the Work Order Billing dialog box and will override any code you may specify in this field.

If you do not want to specify a default, leave this field blank.

Qualification

When you complete a call with the Complete and Bill Work Order option, the system displays the Work Order Billing dialog box. This dialog box includes the Qualification box which displays the qualification code for this work order. You can use this field to specify a default qualification code. (The qualification code determines which line of the labor rate table in the Contract Types Service Rates tab the system uses to calculate the labor charge.)

The system will use the qualification code you specify in this field only if the following two statements are true:

- No qualification code is specified for the serial item in the Qualification box in the Machine Detail window. (The system will search this field first to find the default qualification code.)
- No qualification code is specified for the customer in the Qlf box in the Customer Machines tab. (The system will search this field second to find the default qualification code.)

If you do not want to specify a default, leave this field blank.

Bypass Paycode/Slsm/P/O# For W/O's With Parts & Labor Covered

This field not used in Ensite Pro.

You set up territory codes in the Machine Tools Territories tab. For details, see

**Chapter 12:
Setting Up
Territory Codes.**

You set up qualification codes in the Machine Tools Qualifications tab.

For details, see
**Chapter 13:
Setting Up
Qualification
Codes.**

Paycode

This field not used in Ensite Pro.

No Print Zero Charge W/O Invoice

This field not used in Ensite Pro.

Set Slsm To Tech For Service W/O

In this field, specify whether you want to use the technician number as the default salesperson number on work order tickets. The salesperson number indicates which salesperson receives credit for the work order.

There are advantages for using the technician number. For example, you can use sales reports to monitor the cost and income of each technician's work orders. (You print sales reports in the (U) Sales Selectors and (UR) Sales Reports screens.) Enter your response according to the following:

- Y** Use the technician number as the default salesperson number on work orders.
- N (default)** Do not use the technician number as the default salesperson number.

Reopen Calls For Backorders When Flushed

You can use this field to indicate whether you want to reopen calls in the Machine Monitor window when backordered items are flushed. If you handle backorders manually, you can use this field to specify whether you want the system to reopen calls in the Machine Monitor.

If you set this field to **Y** to reopen calls, the system will search the On Flushes, Only Print All Shipped parameter in the (LF1) screen to determine *when* you want the call reopened.

If the (LF1) parameter is set to **S**, the call remains closed until the serialized items on the backorder are completely filled. If the (LF1) parameter is set to **N**, the call reopens, even if the backorder is only partially filled. (Since this parameter affects the entire system, we recommend that you set it to either **S** or **N**.)

Note: To use this feature, you must complete and bill the service work order through the Serialized Order Entry window. You must also set the Check All Tech's Inventory Loc On Hand Quantities For Backorders field, described earlier in this chapter, to **Y**.

Enter your response according to the following:

- Y** Reopen calls in the Machine Monitor when backordered items are flushed. (The system will use the On Flushes, Only Print All Shipped parameter in the (LF1) screen to determine *when* to reopen the call.)

- N **(default)** Do not reopen calls in the Machine Monitor when backordered items are flushed.

Reopen Call Code

This field works in conjunction with the Reopen Calls For Backorders When Flushed field, above, and allows you to specify the call code you want the system to use when it reopens calls with backordered parts. (The code you specify must be set up in the Machine Tools Call Codes tab.)

To automate the text that prints on tickets, consider setting the Log Code As Description field in the (EZ1L) screen to Y. This sets the call code description as the first line of text for the call. (For details, see

Chapter 6: Customizing Logging Calls.

If your terminal sends tickets to a status 6, when you complete the invoice, you can change the print line and print the workorder invoice to a status B.

Print Reopened Backorder Calls/Printer

This field works in conjunction with the Reopen Calls For Backorders When Flushed field, above. In this field, indicate whether you want the system to automatically print the call when filling a backorder. Enter your response according to the following:

- Y Automatically prints when filling a backorder.
- N **(default)** Does not automatically print when filling a backorder.

In the Printer field, enter the logical name of the printer you want to use when printing calls with filled backorders.

Depreciate Leases

In this field, specify whether you want the system to automatically create a record in the Machine Detail Depreciation tab when you sell a lease contract in the Serialized Order Entry window. If you want to depreciate items that you lease, this field can save you time by automatically creating the depreciation record for you in the Machine Detail Depreciation tab. In addition, the system adds the information to the Z-DEPREC file when you sell the lease contract.

Enter your response according to the following:

- Y Automatically creates a record in the Machine Detail Depreciation tab when you sell a leasing contract.
- N **(default)** Does not automatically create a record in the Machine Detail Depreciation tab when you sell a leasing contract. In order to depreciate the lease item, you must manually create the record in the Machine Detail Depreciation tab.

Note: If you have serialized accessories, such as sorters and document feeders, the system will add them to the Z-DEPREC file during the (MA) Daily Backup Procedure.

Changing the Parameters

Serialized Parameters are in the text-based (EZ) Serial Master Menu screen. To access the (EZ) screen, use TBL Client.

- 1 From the DDMS Master Menu, type **EZ**.
- 2 When the Serial Master Menu opens, select the [1] System action code.
- 3 In the (EZ1) Serial Parameters menu, select the [O] Order Entry action code.
- 4 In the (EZ1O) screen and select the [C] Change action code.
- 5 In the G/L Location field, enter the location for which you want to set the parameters. (This field defaults to the location entered for your terminal in the (L1) Terminal and Tickets Parameters screen.) You can enter a new location or accept the default location:
 - To accept the default location, press Tab.
 - To set parameters for a different location, enter the number. If you enter fewer than two characters, press Tab.

Note: Your responses to the fields in the (EZ1O) screen apply only to the location you specify in the G/L Location field.

- 6 Enter the appropriate responses in each of the fields in this screen. For a description of the fields, see the heading **Field Definitions**. Use the following instructions for cursor movement in this screen:
 - To move the cursor ahead one field, press Tab.
 - To move the cursor back one field, press Backspace.
- 7 When you finish changing the parameters in this screen, press Enter until the cursor returns to the action code field. If you press Esc before doing so, the system will not save your changes.

The (EZ10) Serial Order Entry Parameters Screen

For your convenience, a picture of the (EZ10) screen is shown below. You can use this page to enter your responses to the fields in this screen.

```
13:11:45          (EZ10) Serial Order Entry Parameters          06/03/98
-----
Action [I] (C-Change, I-Inquiry, B-Back to EZ1)      G/L Location [ 1]
-----
Stop At Slsp# In EZ01 Y/N ?      Display System/Serial Numbers If Blank Y/N/X ?
Paycode For Customer "SERIAL" ?      Limit Transfers To Customer "SERIAL" Y/N ?
Non-Contract Parts Class Range : From [ ] To [ ] + [_,_'_'_'_'_]
Universal Contract : _____ Additional Universal Contracts (Dept. From "E" Screen)
1) U/C : _____ Dept. From [ ] To [ ]      2) U/C : _____ Dept. From [ ] To [ ]
3) U/C : _____ Dept. From [ ] To [ ]      4) U/C : _____ Dept. From [ ] To [ ]
Re-Set Pick Average Cost ?_ (D-Depreciation, M-Machine, N-Do Not Re-set Cost)
Check All Tech's Inventory Loc. On Hand Quantities For Backorders Y/N ?
Create Blank System/Serial Special Lines For Pick Tickets In EZ01 Y/N ?
Stock Class Range to Exclude From Adding : From [ ] To [ ] + [_,_'_'_'_'_]
Sell Only From Customer "SERIAL" Y/N ?      Prompt "SERIAL" Customer Dept Y/N ?
Defaults For Service Workorders: Include Problem Text As Special Lines Y/N/E ?Y
Codes Desc.: Problem Y/N/U ?_ Solution Y/N/U ?_ All Fields Correct Y/N/X ?
Special Type (A-AAAA, I-ITEM, Z-ZZZZ) A/I/Z ?_ Territory ?_ Qualification ?
Bypass Paycode/Slsm/P/O# For W/O's With Parts & Labor Covered Y/N ? Paycode ?
No Print Zero Charge W/O Invoice Y/N ?_ Set Slsm To Tech For Service W/O Y/N ?
Reopen Calls For Backorders When Flushed Y/N ?_ Reopen Call Code :
Print Reopened Backorder Calls Y/N ?_ Printer : _____ Depreciate Leases Y/N ?
-----
```

Chapter 5: Customizing the Call Monitor

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Customizing the Monitor

For your convenience, a picture of the (EZ1M) screen has been included at the back of this chapter. You can use this page to enter your responses to the fields in this screen.

This chapter describes all of the fields in the (EZ1M) Serial Monitor Parameters screen and gives you instructions for making changes to these fields. Many of the fields in this screen determine the call information that appears in the Machine Monitor window. By setting defaults, you can customize the information your users view and change.

The (EZ1M) screen has no preset options. All of the fields are blank when you first access the screen. However, DDMS recommends that you view the default responses in this screen to determine whether they fit the needs of your business. Begin by verifying whether the default settings for location 1 are suitable for your business needs. (The default settings for location 1 are shown in Figure 1.)

If one or more of the default settings are not acceptable, change them using the [C] Change action code. (See the heading **Changing the Parameters**.)

When you have set the parameters for location 1, set up separate parameters for each additional location that you run differently than location 1. If you do not set up separate parameters for a particular location, the parameters set for location 1 are used.

Field Definitions

The following text describes each field in the (EZ1M) screen. These fields are listed in the order the cursor moves through the screen.

Figure 1:
Default Options
in the (EZ1M)
Screen

```

11:05:07                (EZ1M) Serial Monitor Parameters                05/27/98
-----
Action [C] (C-Change, I-Inquiry, B-Back to EZ1) G/L Location [ 1]
-----
Display Calls by Time & Date or Priority Y/N/P ?N
Auto Add on From Monitor Y/N ?Y
Display Transfers for Split Screen Y/N ?N
Display Shipto Address on Monitor Y/N ?N
Display Log In Time on Monitor Y/N ?N
Display Monitor By Location Y/N ?N
Monitor ?_ (1-Call#, 2-No Call#/Equip. Type, 3-No Call#/Item#, 4-Call#/Item#)1
Display Customer/Serial Information On Monitor Y/N/T ?N
Exclude Callbacks When Displaying Responses and Tech Schedule Y/N ?N
-----

```

Display Calls by Time & Date or Priority

In this field, specify whether calls in the Machine Monitor display in call number order, time and date order, or priority order. Enter your response according to the following:

- Y** Display calls in time and date order, with the oldest calls first.
- N (default)** Display calls in call number order, from lowest to highest.
- P** Display calls in time and date order from the highest priority Ø (zero), followed by 1-9, and A-Z. Calls without a priority display last. Calls with the same priority are sorted by call number.

Auto Add on From Monitor

This field does not apply to Ensite Pro.

Display Transfers for Split Screen

This field does not apply to Ensite Pro.

Display Shipto Address on Monitor

You can use this field to specify which customer's address display in the Machine Monitor. You can display the city from the shipping address or the city from the billing address. Enter your response according to the following:

Note: This field works with the Monitor field, described below, and only applies if you specify 2, 3, or 4 in the Monitor field.

- Y** Display the customer's shipping address.
- N (default)** Display the customer's billing address.

Display Log In Time on Monitor

You can use this field to specify the time to display in the Time box in the Machine Monitor. You can specify that the system display the time *since* the call was logged, or the time *when* the call was logged. Enter your response according to the following:

- Y** Display the actual time when the call was logged.
- N (default)** Display the time that has past since the call was logged. (After 24 hours, the time is automatically replaced with the date the call was logged.)

Display Monitor By Location

You can use this field to specify whether the Machine Monitor displays calls for all locations, or only calls for the current location. (The location is specified in the Loc field for your terminal in the (L1) Terminal and Ticket Parameters screen). While you can use this field to set the default, you can always change the location in the Machine Monitor. Enter your response according to the following:

- Y Display calls for the current location only.
- N **(default)** Display calls for all locations.

Monitor

In this field, you can specify which information displays in the Machine Monitor. You can also specify how to display certain information. For example, 19, 17, or 6 characters of the customer's address display, depending on the code you specify. Enter your response according to the following:

- 1 **(default)** Display the time the call was logged, problem number, call code, tech number, customer name, first line of problem text, territory, minimum tech qualification, and priority.
- 2 Display the equipment type, but not the problem number, territory, or tech qualification. Instead, problems are identified by sequential numbers, 1 through 17. If you select this response, the user can view the call code, customer name, city (19 characters in length), and territory or state, time the call was logged, first line of text, tech number, equipment type, and priority. (Your response in the Display Shipto Address On Monitor field, described above, determines whether the city from the shipping address or the city from the billing address appears.)
- 3 Display the item number, but not the problem number, territory, or tech qualification. Instead, problems are identified by sequential numbers, 1 through 17. If you select this response, the user can view the call code, customer name, city (10 characters in length), and territory or state, the time the call was logged, the call text, tech number, item number, and priority. (Your response in the Display Shipto Address On Monitor field, described above, determines whether the city from the shipping address or the city from the billing address appears.)

- 4 Display the problem number and the item number, but not the call code, territory, or tech qualification. Using this code, the problem number is followed by the tech number, customer name, city (six characters in length), and territory or state, item number, first line of text, time the call was logged, and priority. (Your response in the Display Shipto Address On Monitor field, described above, determines whether the city from the shipping address or the city from the billing address appears.)

Display Customer/Serial Information On Monitor

This field does not apply to Ensite Pro.

Exclude Callbacks When Displaying Responses and Tech Schedule

You can use this field to specify when to view callbacks in the Responses tab of the Machine Monitor. You can exclude callbacks until the callback time arrives, or you can always display callbacks up until the callback time. (If you exclude callbacks, you can still view them by limiting the calls that display.) Enter your response according to the following:

- Y** Display callbacks before the callback time arrives. At that time, they will appear in the Calls tab of the Machine Monitor if they are already assigned to a technician. (The callback only appears in the Responses tab in after the call is dispatched.)
- N (default)** Display callbacks until the callback time.

Callbacks always appear in the Calls tab in the Machine Monitor when the callback time arrives. They also appear in the Responses tab once they've been dispatched.

Changing the Parameters

Serialized Parameters are in the text-based (EZ) Serial Master Menu screen. To access the (EZ) screen, use TBL Client. Use the following instructions to set up or change parameters.

- 1 From the DDMS Master Menu, type **EZ**.
- 2 When the Serial Master Menu opens, type **1** in the Action field.
- 3 In the (EZ1) Serial Parameters menu, type **M** in the Action field.
- 4 In the (EZ1M) screen, type **C** in the Action field.
- 5 In the G/L Location field, you enter the location for which to set the parameters. (This field defaults to the location entered for the terminal you are using in the (L1) screen.) You can enter a new location or accept the default location:
 - To accept the default location, press Tab.
 - To set parameters for a different location, enter the number. If you enter fewer than two characters, press Tab.

Note: Your responses to the fields in this screen apply only to the location you specify in the G/L Location field.

- 6 Enter the appropriate responses in each of the fields. For a description of the fields, see the heading **Field Definitions**. Use the following instructions for cursor movement:
 - To move the cursor ahead one field, press Tab.
 - To move the cursor back one field, press Backspace.
- 7 When you finish, press Enter until the cursor returns to the Action field. If you press Esc before doing so, your changes are lost.

The (EZ1M) Serial Monitor Parameters Screen

For your convenience, a picture of the (EZ1M) screen is shown below. You can use this page to enter your responses to the fields in this screen.

```
11:05:07                (EZ1M) Serial Monitor Parameters                05/27/98
-----
Action [I] (C-Change, I-Inquiry, B-Back to EZ1) G/L Location [ 1]
-----

Display Calls by Time & Date or Priority Y/N/P ?_

Auto Add on From Monitor Y/N ?_

Display Transfers for Split Screen Y/N ?_

Display Shipto Address on Monitor Y/N ?_

Display Log In Time on Monitor Y/N ?_

Display Monitor By Location Y/N ?_

Monitor ?_ (1-Call#, 2-No Call#/Equip. Type, 3-No Call#/Item#, 4-Call#/Item#)

Display Customer/Serial Information On Monitor Y/N/T ?_

Exclude Callbacks When Displaying Responses and Tech Schedule Y/N ?_
-----
```


Chapter 6: Customizing Logging Calls

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Customizing Logging Calls

For your convenience, a picture of the (EZ1L) screen has been included at the back of this chapter. You can use this page to enter your responses to the fields in this screen.

This chapter describes all of the fields in the (EZ1L) Serial Log In Parameters screen and gives you instructions for making changes to these fields. Many of the fields in this screen let you specify the information you view when logging calls. You can also specify how information for serial items in the Work Orders window displays.

The (EZ1L) screen has no preset options. All of the fields are blank when you first access the screen. However, we recommend that you view the default responses in this screen to determine whether they fit the needs of your business. Begin by verifying whether the default settings for location 1 are suitable for your business needs. (The default settings for location 1 are shown in Figure 1.) If one or more of the default settings are not acceptable, change them using the [C] Change action code. (See the heading **Changing the Parameters**.) When you have set the parameters for location 1, set up separate parameters for each additional location that you run differently than location 1. If you do not set up separate parameters for a particular location, the parameters set for location 1 are used.

Field Definitions

The following text describes each field in the (EZ1L) screen, as shown in Figure 1. These fields are listed in the order the cursor moves through the screen.

Update: Z-A-KEYS File

This field is not used in Ensite Pro.

Figure 1:
Default Options
in the (EZ1L)
Screen

```

10:16:03                (EZ1L) Serial Log In Parameters                10/27/04
-----
Action [ ] (C=Change, I=Inquiry, B=Back to EZ1) G/L Location [ 1 ]
-----
Update: Z-A-KEYS File Y/N ?N Z-A-SUPP File Y/N/L ?N Z-T-RECAP File Y/N ?N
Add Customers Y/N ?N Status ? Add Serial Items Y/N ?N
Display: Address/City A/C ?A Remarks Y/N ?N Serials Y/N ?Y By Location Y/N ?N
Display Type ?1 {1=Sys#, Sub#, Ser#, 2=Sys#, Sub#, Item#, 3=Ser#, Item#}
              {4=Ser#, Item Desc, 5=Sys#, Sub#, Item Desc, 6=Ser#, Location}
A/R Info Y/N ?N Check Past Due Y/N/H ?N Display Contract/Meter Info. Y/N/X ?N
Display for Last 10 Calls C/D/P/S ?D Display Completion Date Y/N ?N
Review Call Codes For New Calls Y/N ?N Number Of Days To Review #
Taker # Reverse Date Inquire Y/N ?N Combine Calls When Inquiring Y/N ?N
Assign Call# Y/N ?N Display Z-A-SUPP Info Y/N ?N Log Code As Description Y/N ?N
Prompt Problem Code Y/N/X ?Y Solution Code Y/N/X ?Y FYI Line Y/N/X ?N
Display Serv. Codes/Type Window Y/N/X ?Y Prompt Taker# When Closing Call Y/N ?N
Prompt for Dispatch Time Y/N ?N Print Call Y/N/O/B/X ?Y Printer ?P9
First Time/Date When Closing A Call (D=Dispatch, S=Start, C=Completion) ?C
Callbacks: Call/Prob./Sol. C/P/S/Any ?C Exclude [ ] To [ ] + [ , , , , ]
Bill Complete Y/N ?N Call Codes To Exclude [ ] To [ ] + [ , , , , ]
Business Hours From : To : (Hours = Military) P/M Taker #
Prompt Service Type When Closing Call Y/N ?N Display Notepad From EZP Y/N ?Y
Work Hours Window Order (1=Work, 2=Travel, 3=Miles Bill, 4=Miles Paid) [1,2,3]

```

Z-A-SUPP File

In this field, specify whether to create the Z-A-SUPP file. This file contains the following information:

- Service type
- Purchase order number
- Shipto address
- Closing taker number.

Enter your response according to the following:

- Y** Create the Z-A-SUPP file.
- L** Create the Z-A-SUPP file and lets you change the physical location of the machine when logging a call.
- N (default)** Do not create the Z-A-SUPP file.

Z-T-RECAP File

This field is not used in Ensite Pro.

Add Customers/Status

These fields are not used in Ensite Pro.

Add Serial Items

This field is not used in Ensite Pro.

Display: Address/City

This field is not used in Ensite Pro.

Display: Remarks

If you leave the Display: Remarks field blank, or set it to N, no remarks display in the Remarks box in the Customer Master tab.

In this field, specify whether you view the customer and contract remarks when logging calls. If you set this field to Y these remarks also appear when you edit calls in the Machine Monitor window.

This option lets you view any customer remarks from the Remarks box in the Customer Master tab. If the item is under contract, remarks from the Contract Remarks dialog box display in the Contract Detail window. These remarks display before you begin entering specific information about the call. Enter your response according to the following:

- Y** Display customer and contract remarks when logging calls.
- N (default)** Do not display customer and contract remarks when logging calls.

Display: Serials

This field is not used in Ensite Pro.

Display: By Location

When you log calls, you can view a list of the serial items assigned to the customer. In this field, specify whether to limit the list of serialized items to the general ledger location specified for the call, or whether to include items from all locations. Enter your response according to the following:

- Y Display serialized items for the specified location only.
- N **(default)** Display serialized items for all locations.

Display Type

This field is not used in Ensite Pro.

A/R Info

You can use this field to display the customer's account information when you log calls. Set this field to Y to display the customer's current, total, 30, 60, and 90 day account information from the Customer History window. Along with this information, the check number and the amount was last paid also appear.

- Y Display the customer's account information when you log calls.
- N Do not display the customer's account information.

Check Past Due

When you log calls, you can use this field to notify you when the customer's account is past due. If you set this field to Y, you can also place any calls logged to this customer's account on hold if the account is past due.

Note: To use this option, you must specify the number of days when the customer's account becomes past due. You specify this number in the Pastdue Days # field in the (LGØ) Order Entry Parameters screen. The system uses the number of days set in this field to notify you when an account is past due throughout the DDMS system, not just the Serialized application.

- Y Notify you when the customer's account is past due when logging calls. The amount the customer's past due amount also displays.

- H** Notify you when the customer's account is past due when logging calls. The amount that the customer's account is past due also appears. The call is placed on hold and "HELD" is assigned as the call's technician number. The on-hold information is sent to the Serialized exception file: Z-EXCEPT so you can easily print it. To print the Serialized exception file information, you must set the Update Exceptions field in the (EZ1S) Serial System Parameters screen to Y.
- N (default)** Do not notify you when the customer's account is past due.

Display Contract/Meter Information

This field is not used in Ensite Pro.

Display for Last 10 Calls

You can use this field to specify the information to display about your customer's calls. When you log calls and retrieve the customer and item record, you can view a list of the last 10 calls concerning the item, listing one line of information for each call. This field lets you specify the type of information you view for each of these calls. Enter your response according to the following:

- C** Display the description of the call code selected for this call.
- D (default)** Display the descriptive text entered when the call was logged.
- P** Display the description of the problem code selected for this call.
- S** Display the description of the solution code selected for this call.

Display Completion Date

In this field, specify whether to display the completion date or the log-in date when displaying the last 10 calls. Enter your response according to the following:

- Y** Display the completion date for each of the last 10 calls.
- N (default)** Display the log-in date for each of the last 10 calls.

Review Call Codes For New Calls

This field works with the Number of Days To Review field, described below. You can use these fields to notify you when a machine has two calls logged with the same call code a few days apart.

In the Review Call Codes For New Calls field, specify whether you are prompted when you log a call for a machine that already has a call with the same code. If a call with the same code has been logged for a machine, it's considered a recall. The second call is automatically logged as a callback to the original technician.

Then, in the Number Of Days To Review field, specify the number of days to check back for codes when reviewing calls. Enter your response according to the following:

Note: You can also use the Callbacks: Call/Prob/Sol field (described later in this chapter) to specify which code to match when reviewing calls. You can use either the call code, the problem code, or the solution code.

- Y** Prompt you when a call is logged for a machine that has another call with the same code. (The Recall # box in the Machine Detail Other tab is used to track the number of recalls that occur for each machine. The date of the last recall displays.)
- N (default)** Do not prompt you when a call is logged for a machine that has another call with the same code.

Number Of Days To Review

This field works with the Review Call Codes For New Calls field, described above, and lets you specify the number of days to check back for calls logged with the same code.

Suppose you specify 30 in this field and log a call for a machine with a call code of C1. If another call is logged for this machine within 30 days with C1 as the call code, you are prompted that a call with the same call code has recently been logged. The call is considered a recall and is automatically logged as a callback to the original technician.

Note: You can also specify which code to match when reviewing calls in the Callbacks: Call/Prob/Sol field described later in this chapter.

Taker

This field is not used in Ensite Pro.

Reverse Date Inquire

This field is not used in Ensite Pro.

Combine Calls When Inquiring

This field is not used in Ensite Pro.

Assign Call

In this field, specify whether to automatically assign call numbers when you log service calls, or whether to assign the call numbers yourself.

DDMS recommends that you set this field to N to automatically assign call numbers. If you assign call numbers yourself, you must be careful not to use the same call number more than once. If you accidentally reassign a call number, it could result in duplicate records. Enter your response according to the following:

- Y You can assign call numbers.
- N **(default)** Call numbers are assigned automatically.

Display Z-A-SUPP Info

This field works with the Z-A-SUPP File field, described previously, and lets you display the information from the Z-A-SUPP file when you log calls in the Work Orders window. This information also displays when you edit or view previously logged calls. (The Z-A-SUPP file contains information about a specific machine, including the service type, the physical location, and the shipping address.) Enter your response according to the following:

- Y Automatically display the Z-A-SUPP file information when logging calls.

Note: For the system to display this information, you must have set the Z-A-SUPP File field to Y.

- N **(default)** Do not automatically display the Z-A-SUPP file information.

Log Code As Description

In this field, specify whether to automatically enter call code descriptions as the first part of the call description when you log calls. Call codes are user-defined codes that identify the customer's problem.

DDMS recommends that you use call codes to automate text entry for your calls. If you design these codes carefully and set parameters so that the code descriptions are included as text in the call, many of the calls you generate require little or no typing — the code descriptions provide all the necessary information. Enter your response according to the following:

- Y Automatically enters call code descriptions when logging calls.
- N **(default)** Do not automatically enter call code descriptions when logging calls.

The Display Z-A-SUPP Info field only applies if the Z-A-SUPP File field is set to Y.

Prompt Problem Code

In this field, specify whether you are prompted for a problem code when you log calls. You can also use this field to specify that problem codes must be entered before the call can be completed in the Work Orders window. Problem codes are used to indicate what kind of problem a customer has. These codes are usually entered after a technician has determined the problem. Enter your response in this field according to the following:

- Y (default)** Prompt for the problem code when a call is logged or completed in the Work Orders window. However, you do not have to enter the problem code to complete the order.
- N** Do not prompt for problem codes when a call is logged or completed.
- X** Prompt for problem codes when a call is logged, and requires a problem code before you can complete the call. (If you choose this option, you must set up problem codes in the Machine Tools window. If you do not set up codes, you cannot complete calls. For details, see **Chapter 10: Setting Up Call Codes.**)

Solution Code

In this field, specify whether you are prompted for a solution code when you log calls in the Work Orders window. (Solution codes indicate how the problem was solved, and are usually entered before you complete the call.) You can also use this field to specify that a solution code must be entered before you can complete a call. Enter your response according to the following:

- Y (default)** Prompt for a solution code when a call is logged or completed. A solution code is not required to complete the order.
- N** Do not prompt for solution codes when calls are logged or completed.
- X** Prompt for solution codes when calls are logged, and require solution codes before the user can complete the call. (If you choose this option, you must set up solution codes in the Machine Tools window. If you do not set up codes, you cannot complete calls. For details, see **Chapter 10: Setting Up Call Codes.**)

FYI Line

In this field, specify whether to be prompted to enter an FYI line when you close a call in the Work Orders window. You use this line to enter additional information about a call that is not part of the call description. For example, you may use this line to specify the page numbers in a service manual that apply to a call. The FYI line displays whenever you view a call, but this line does not print on standard problem tickets. Enter your response according to the following:

- Y** Prompt to enter an FYI line before completing a call. However, an FYI line is not required to complete the call.
- X** Require an FYI line to be entered to complete the call.
- N (default)** Do not prompt to enter an FYI line.

Display Serv Codes/Type Window

This field is not used in Ensite Pro.

Prompt Taker# When Closing Call

In this field, specify whether to be prompted to enter an order-taker number when you close calls. If you enter an order-taker number, the number is included in the Z-A-SUPP file, described earlier in this chapter. Since the person who closes calls also enters the call's completion date and time, as well as the travel time, this field can provide important information. Enter your response according to the following:

- Y** Prompt for an order-taker number when closing calls.
- N (default)** Do not prompt for an order-taker number when closing calls.

Prompt for Dispatch Time

You can use this field to specify whether to be prompted for dispatch and start times when you dispatch service calls in the Machine Monitor window. Enter your response according to the following:

- Y** Prompt for dispatch and start times when calls are dispatched.
- N (default)** Do not prompt for dispatch and start times when calls are dispatched.

DDMS recommends you set the Print Call field to Y.

Print Call

In this field, specify whether to be prompted to print calls, and, if so, when. This field also determines whether you are prompted to print a call when dispatching it. Enter your response according to the following:

- Y (default)** Prompt you to print the call whenever it is logged or dispatched.
- N** Do not prompt you to print the call.
- O** Prompt you to print the call when it is logged.
- B** Prompt you to print the call when it is logged, completed, and dispatched.
- X** Prompt you to print the call only when it is completed.

Printer

In this field, specify the default printer for printing calls through the Work Orders window and Machine Monitor. To choose a printer, enter the logical name of a printer connected to the system. For example, to use logical printer P1, enter P1. If you leave this field blank, it defaults to P9.

First Time/Date When Closing A Call

This field is not used in Ensite Pro.

Callbacks: Call/Prob/Sol

This field works with the Review Call Codes For New Calls field, described earlier in this chapter. You can use this field to specify which code to match when reviewing calls. You can check for call, problem, or solution codes. Enter your response according to the following:

- C (default)** Search for matching call codes when reviewing calls.
- P** Search for matching problem codes when reviewing calls.
- S** Search for matching solution codes when reviewing calls.
- A** Do not search for any matching codes when reviewing calls.

Exclude/To/+

These fields work with the Callbacks: Call/Prob/Sol field described above, and let you exclude certain codes when reviewing calls.

You can use the Exclude and To fields to specify the range of codes to ignore when determining whether a call is a recall. You can specify a range of call codes, problem codes, or solution codes.

In the Exclude field, enter the first code in the range to exclude from consideration. Enter the last code in the range in the To field. For example, to exclude codes C1 through FF, you would specify C1 in the Exclude field and FF in the To field.

In the remaining + fields, enter up to five additional codes outside of the range to exclude from consideration. For example, you could exclude codes AA, HA, R2, XX, and Z1.

Bill Complete

When you complete service calls in the Work Orders window, you can select Complete and Bill and Completed. If you choose the Completed option, no bill is created for the service call. However, we recommend that you always bill service calls, even those covered by contracts. Services provided under contract are then charged against the contract in the Contract Detail History tab, so you can determine your gross profit for each contract.

In the Bill Complete field, specify whether to create a bill even when someone selects the Completed option. (By selecting this option, you can also exempt calls with certain call codes from being billed. To do this, specify the call codes to exempt in the Call Codes To Exclude fields, described below.) Enter your response according to the following:

- Y Create a bill when using the Complete option.
- N **(default)** Do not create a bill when using the Complete option.

Call Codes To Exclude/To/+

These fields work with the Bill Complete field, above. You can use this field to exempt certain calls from billing. For example, you may log calls where no service is performed, such as inquiries from potential customers.

In the From and To fields, enter the range of call codes to exempt from billing. Enter the beginning of the range in the From field, and the end of the range in the To field. For example, to exempt call codes C1 through FF, you would specify C1 in the From, and FF in the To field.

In the remaining + fields, you can enter up to five individual call codes to exempt from billing. For example, you could exempt call codes AA, HA, R2, XX, and Z1.

Business Hours From/To

In these fields, specify your hours of operation. This information determines the length of time that a service call requires.

Suppose your hours are from 8:00 a.m. to 5:00 p.m. A technician starts a call at 4:00 p.m. one afternoon, and completes it at 10:00 a.m. the next day. If you enter your business hours in these fields, the actual time is recorded as three hours. If you leave these fields blank, the time is recorded as 18 hours. For calls that are completed on the same day, even if the completion time is after your regular business hours, the actual time is recorded.

Note: You must enter your business hours in military time. For example, if your hours are from 8:00 a.m. to 5:00 p.m., you would specify 08:00 to 17:00.

In the Business Hours From field, specify the time that your business hours begin each day. In the To field, specify the time that your business hours end each day.

P/M Taker

You can use this field to specify a default order-taker number when you automatically generate preventive maintenance calls in the (EZY) Serial Maintenance Report Selection screen.

Prompt Service Type When Closing Call

In this field, specify whether to be prompted for a service type when you close a call. If you set this field to Y, the Service Type box in the Work Orders Call Detail tab displays. Enter your response according to the following:

- Y Prompt for a service type when closing a call.
- N **(default)** Do not prompt for a service type when closing a call.

Display Notepad From EZP

This field is not used in Ensite Pro.

Work Hours Window Order

This field is not used in Ensite Pro.

Changing the Parameters

Serialized Parameters are in the text-based (EZ) Serial Master Menu screen. To access the (EZ) screen, use TBL Client. To set up or change parameters in the (EZ1L) screen:

- 1 From the DDMS Master Menu, type **EZ**.
- 2 When the Serial Master Menu opens, type **1** in the Action field.
- 3 In the (EZ1) Serial Parameters menu, type **L** in the Action field.
- 4 In the (EZ1L) screen, type **C** in the Action field.

- 5 In the G/L Location field, enter the location for which you want to set the parameters. (This field defaults to the location entered for your terminal in the (L1) Terminal and Tickets Parameters screen.) You can enter a new location or accept the default location:
 - To accept the default location, press Tab.
 - To set parameters for a different location, enter the number. If you enter fewer than two characters, press Tab.

Note: Your responses to the fields in the (EZ1L) screen apply only to the location you specify in the G/L Location field.

- 6 Enter the appropriate responses in each of the fields in this screen. For a description of the fields, see the heading **Field Definitions**. Use the following instructions for cursor movement in this screen:
 - To move the cursor ahead one field, press Tab.
 - To move the cursor back one field, press Back Space.
- 7 When you finish, press Enter until the cursor returns to the Action field. If you press Esc before doing so, your changes are not saved.

The (EZ1L) Serial Log In Parameters Screen

For your convenience, a picture of the (EZ1L) screen is shown below. You can use this page to enter your responses to the fields in this screen.

```
10:42:22                (EZ1L) Serial Log In Parameters                10/27/04
=====
Action [C] (C=Change, I=Inquiry, B=Back to EZ1)  G/L Location [ 1]
=====
Update:  Z-A-KEYS File Y/N ?N  Z-A-SUPP File Y/N/L ?N  Z-T-RECAP File Y/N ?N
Add Customers Y/N ?N  Status ?  Add Serial Items Y/N ?N
Display: Address/City A/C ?A  Remarks Y/N ?N  Serials Y/N ?Y  By Location Y/N ?N
Display Type ?1 {1=Sys#, Sub#, Ser#, 2=Sys#, Sub#, Item#, 3=Ser#, Item#}
              {4=Ser#, Item Desc, 5=Sys#, Sub#, Item Desc, 6=Ser#, Location}
A/R Info Y/N ?N  Check Past Due Y/N/H ?N  Display Contract/Meter Info. Y/N/X ?N
Display for Last 10 Calls C/D/P/S ?D  Display Completion Date Y/N ?N
Review Call Codes For New Calls Y/N ?N  Number Of Days To Review #
Taker #  Reverse Date Inquire Y/N ?N  Combine Calls When Inquiring Y/N ?N
Assign Call# Y/N ?N  Display Z-A-SUPP Info Y/N ?N  Log Code As Description Y/N ?N
Prompt Problem Code Y/N/X ?Y  Solution Code Y/N/X ?Y  FYI Line Y/N/X ?N
Display Serv. Codes/Type Window Y/N/X ?Y  Prompt Taker# When Closing Call Y/N ?N
Prompt for Dispatch Time Y/N ?N  Print Call Y/N/O/B/X ?Y  Printer ?P9
First Time/Date When Closing A Call  (D=Dispatch, S=Start, C=Completion) ?C
Callbacks: Call/Prob./Sol. C/P/S/Any ?C Exclude [ ] To [ ] + [ , , , , ]
Bill Complete Y/N ?N  Call Codes To Exclude [ ] To [ ] + [ , , , , ]
Business Hours From :  To :  (Hours = Military)  P/M Taker #
Prompt Service Type When Closing Call Y/N ?N  Display Notepad From EZP Y/N ?Y
Work Hours Window Order (1=Work, 2=Travel, 3=Miles Bill, 4=Miles Paid) [1,2,3]
```


Chapter 7: Setting Up Workorder Journal Parameters

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Check with your attorney or tax accountant to find out what use tax laws, if any, apply in your state.

Understanding Workorder Journal Parameters

You can use the parameters in the (EZ1J) Serial Workorder Journal Parameters screen to create a workorder journal. This journal stores all the service workorder usage and activity information about your machines. You can use it to print reports that can show you all the parts you've used, including all your labor and travel charges, the machines that needed the parts, and a listing of all the technicians who replaced them.

In some states, machine dealers do not have to pay sales tax on service contracts, but they do have to pay a tax on the parts used when repairing machines under a service contract. This tax is called a "use tax." Naturally, dealers need a way to track these items to pay the use tax. The (EZ1J) Serial Workorder Journal Parameters and (EZYJ) Workorder Journal Report Selection screens provide a way to track these parts. To track the parts used when repairing machines under a service contract, you must first set the parameters in the (EZ1J) screen, determine which items to track, and then run the tracking reports through the (EZYJ) screen.

The (EZ1J) screen has no preset options. All of the fields are blank when you first access the screen. However, we recommend that you view the default responses in this screen to determine whether they fit the needs of your business. Begin by verifying whether the settings for location 1 are suitable for your business needs. (The default settings for location 1 are shown in Figure 1.)

If one or more of the default settings are not acceptable, change them using the [C] Change action code. (See the heading **Changing the Parameters.**)

Figure 1:
Default Settings
in the (EZ1J)
Serial
Workorder
Journal
Parameters
Screen

```

17:38:26                (EZ1J) Serial Workorder Journal Parameters                09/08/98
=====
Action [I] (C=Change, I=Inquiry, B=Back To EZ1)  G/L Location [ 1 ]
=====
Update Workorder Journal Y=All Items, N=No Update, U=Use Tax Items Only Y/N/U ?N

Include For Use Tax:
Service Type      From [ ] To [ ] + [ , , , , ]

Item Department  From [ ] To [ ] + [ , , , , ]

Item Stock Class From [ ] To [ ] + [ , , , , ]

Include Labor Y/N ?N      Include Travel Y/N ?N      Use Tax      %

State      Use Tax
[ ]                %
[ ]                %
[ ]                %
[ ]                %
=====
    
```

When you have set the parameters for location 1, set up separate parameters for each additional location that you run differently than location 1. If you do not set up separate parameters for a particular location, the parameters set for location 1 are used.

Field Definitions

The following text describes each field in the (EZ1J) screen. These fields are listed in the order the cursor moves through the screen.

Update Workorder Journal

In this field, specify whether to create a workorder journal file to track items. You can create a workorder journal that will track all the items you sell, or only those items that are subject to the use tax. This workorder journal is called the Z-JOURNAL file.

To create a workorder journal that tracks only items subject to the use tax, for an item to be included in the journal, it must meet at least one of the limits you set in the Include For Use Tax fields, below.

Enter your response according to the following:

- Y** Create and update a workorder journal to track all items. Since this option provides the greatest flexibility when printing reports, DDMS recommends that you use this option.
- U** Create and update a workorder journal that includes only those items that are subject to the use tax.
- N (default)** Do not create a workorder journal.

Include For Use Tax: Service Type From/To/+

You can track items that are subject to the use tax using service types. Service types help you organize your calls by the type of service you perform. For example, you might set up one service type for warranty work, another for contract work, and another for non-contract work, and so forth.

In these fields, specify the service types to include. You can specify a range of service types, plus up to five additional service types. All items with service types specified in these fields are tracked for the use tax.

Note: You can track items for the use tax using service types, item departments, and/or item stock classes. An item must meet *at least one* of the limits you set in the Service Type, Item Department, and Item Stock Class fields to be tracked for the use tax. However, an item does *not* have to meet *all* the limits you set to be tracked for the use tax.

*You set up service types in the Machine Tools window. For more information on service types, refer to **Chapter 11: Setting Up Service Types.***

To specify a range of service types, in the Service Type From field enter the first service type in the range to include for the use tax. In the corresponding To field, enter the last service type in the range. In the + fields, enter up to five additional non-sequential service types to include for the use tax.

Item Department From/To/+

You can track items that are subject to the use tax using item departments. In these fields, specify which departments to include in use tax information. You can specify a range of departments, plus up to five additional departments. All items with departments specified in these fields are tracked for the use tax. For more information on departments, refer to your online documentation.

Note: You can track items that are subject to the use tax using service types, item departments, and/or item stock classes. An item must meet *at least one* of the limits you set in the Service Type, Item Department, and Item Stock Class fields to be tracked for the use tax. However, an item does *not* have to meet *all* the limits you set to be tracked for the use tax.

To specify a range of departments, in the Item Department From field enter the first department in the range to include for the use tax. In the corresponding To field, enter the last department in the range. Then, in the + fields, enter up to five additional departments to include for the use tax.

Item Stock Class From/To/+

You can track items that are subject to the use tax using stock classes. In these fields, specify which stock classes to include in use tax information. You can specify a range of stock classes, plus up to five additional stock classes. All items with stock classes specified in these fields are tracked for the use tax. For more information on stock classes, refer to your online documentation.

Note: You can track items that are subject to the use tax using service types, item departments, and/or item stock classes. An item must meet *at least one* of the limits you set in the Service Type, Item Department, and Item Stock Class fields to be tracked for the use tax. However, an item does *not* have to meet *all* the limits you set to be tracked for the use tax.

To specify a range of stock classes, in the Item Stock Class From field enter the first stock class in the range to include for the use tax. In the corresponding To field, enter the last stock class in the range. Then, in the + fields, enter up to five additional non-sequential stock classes to include for the use tax.

Check with your attorney or tax accountant to find out if labor is subject to the use tax in your state.

Include Labor

In this field, specify whether labor is subject to the use tax. (Labor is usually included on work orders.) Enter your response according to the following:

- Y Labor is subject to the use tax.
- N **(default)** Labor is not subject to the use tax.

Include Travel

In this field, specify whether travel is subject to the use tax. (Travel is included on workorders.) Enter your response according to the following:

- Y Travel is subject to the use tax.
- N **(default)** Travel is not subject to the use tax.

Check with your attorney or tax accountant to find out if travel is subject to the use tax in your state.

Use Tax %

In this field, specify the use tax percentage for your home state.

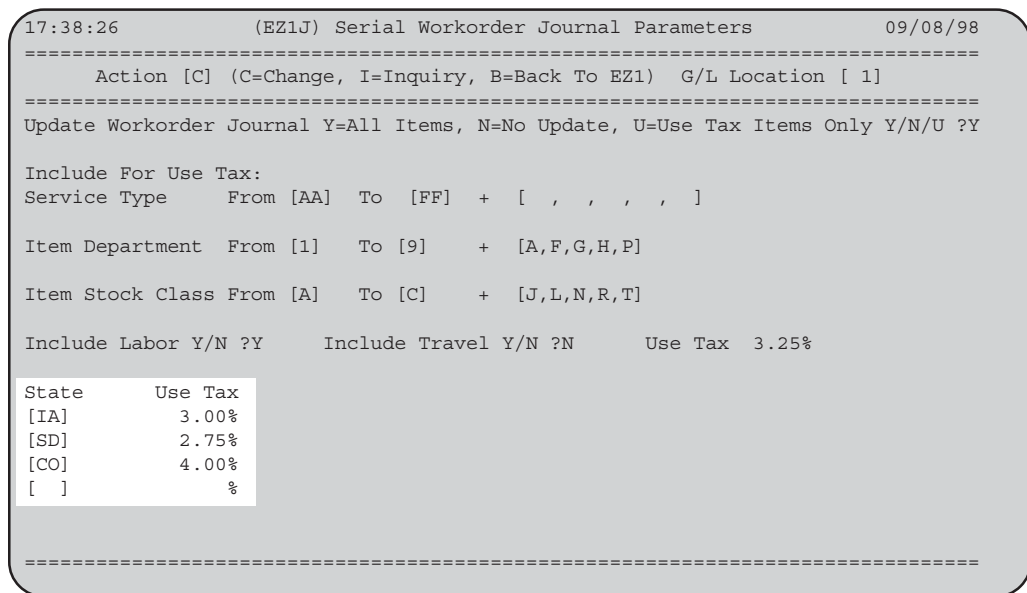
Note: If you do not know the use tax percentage for your state, contact your tax accountant.

State/Use Tax %

In these fields, enter the state abbreviations and use tax percentages for each additional state in which your company does business that has a use tax.

For example, if your home state is Nebraska but you do business in Iowa, and Iowa has a 3 percent use tax, you would enter IA in the State field and 3 in the Use Tax field. See Figure 2.

Figure 2:
Specifying the Use Tax in Other States Where You Do Business



Note: If you do not know the use tax percentage for the states in which you do business, contact your tax accountant.

Changing the Parameters

Serialized Parameters are in the text-based (EZ) Serial Master Menu screen. To access the (EZ) screen, use TBL Client. Use the following instructions to set up or change parameters in the (EZ1J) screen.

- 1 From the DDMS Master Menu, type **EZ**.
- 2 When the Serial Master Menu opens, type **1** in the Action field.
- 3 In the (EZ1) Serial Parameters menu, type **J** in the Action field.
- 4 In the (EZ1J) screen, type **C** in the Action field.
- 5 In the G/L Location field, enter the location for which you want to set the parameters. (This field defaults to the location entered for your terminal in the (L1) Terminal and Tickets Parameters screen.) You can enter a new location or accept the default location:
 - To accept the default location, press Tab.
 - To set parameters for a different location, enter the number. If you enter fewer than two characters, press Tab.

Note: Your responses to the fields in the (EZ1J) screen apply only to the location you specify in the G/L Location field.

- 6 Enter the appropriate responses in each of the fields in this screen. For a description of the fields, see the heading **Field Definitions**. Use the following instructions for cursor movement in this screen:
 - To move the cursor ahead one field, press Tab.
 - To move the cursor back one field, press Back Space.
- 7 When you finish, press Enter until the cursor returns to the action code field. If you press Esc before doing so, your changes are not saved.

Chapter 8: Setting Up Other Serialized Parameters

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Understanding Other Serialized Parameters

You can use the parameters in the (EZ1T) Serialized Parameters screen to enter the general ledger accounts you want to use for your serialized information. See Figure 1. By specifying accounts, you can easily track your service department's performance. You can also use this screen to specify information for your machine trade-ins.

The (EZ1T) screen has no preset options. All of the fields are blank when you first access the screen. However, we recommend that you review the fields in this screen to determine whether they fit the needs of your business. Begin by verifying whether the settings for location 1 are suitable.

If one or more of the settings are not acceptable, change them using the [C] Change action code. (See the heading **Changing the Parameters**.) When you have set the parameters for location 1, set up separate parameters for each additional location that you run differently than location 1. If you do not set up separate parameters for a particular location, the parameters set for location 1 are used.

Field Definitions

The following text describes each field in the (EZ1T) screen. These fields are listed in the order the cursor moves through the screen.

Figure 1: The (EZ1T) Screen

```

11:06:21                (EZ1T) Serialized Parameters                10/27/04
=====
Action [C] (C=Change, I=Inquiry, B=Back To EZ1)
=====
Contract/Service/Meter G/L Major :      [Depts] Basic :   Service :   Meter :
Labor/Travel G/L Major           :      [Depts] Labor :   Travel  :
Trade-In Asset - Trade-In Discount -   Deferred Income G/L Major :
Depreciation G/L Accum.          -   Depreciation G/L Expense   -

Trade-in Authorization Password [    ] Trade-in Contact Slsp #
Contracts Slsp #

=====
    
```

Contract/Service/Meter G/L Major

In this field, enter the three-digit major account for contracts, service, and meter billings. The number you specify is the major for contract, service, and meter general ledger sales accounts. (You do not need to enter the location. The location specified in the G/L Location field is used.)

Depts Basic/Service/Meter

In the Basic field, enter the two-digit minor for basic contracts. The minor corresponds directly to the item's department number.

Specify the two-digit minor for service contracts and service calls in the Service field. The minor corresponds directly to the item's department number.

In the Meter field, specify the two-digit minor for meters. The minor corresponds directly to the item's department number.

Labor/Travel G/L Major

In the Labor/Travel G/L Major field, enter the three-digit major for labor and travel. The number you specify is the major for labor and travel general ledger sales accounts. (You do not need to enter the location. The location specified in the G/L Location field is used.)

Depts Labor/Travel

In the Labor field, specify the two-digit minor for labor. The minor corresponds directly to the item's department number.

In the Travel field, specify the two-digit minor for travel.

Trade-In Asset

Use this field to enter the general ledger account number for merchandise your customers trade in. Trade-in dollars reduce the total amount owed by a customer. The account you specify in this field is usually an asset account.

Enter the three-digit major prior to the dash, and the two-digit minor following the dash. (You do not need to enter the location. The location specified in the G/L Location field is used.)

Trade-In Discount

In this field, enter the general ledger account number used when the credit you give a customer for a trade-in is more than the merchandise is actually worth. Suppose you credit the customer \$1000 for a trade-in, but the true worth (or cost) of the item is actually \$800. The G/L account for your trade-in assets is automatically credited \$800, and the G/L account for your trade-in discounts is credited \$200.

Enter the three-digit major prior to the dash, and enter the two-digit minor following the dash. (You do not need to enter the location. The location specified in the G/L Location field is used.)

Deferred Income G/L Major

In this field, specify the major for the deferred income liability account. By deferring contract income, you can spread the income over the life of the contract. Since you incur costs over the life of the contract, deferring income gives you a more accurate picture in your general ledger.

Depreciation G/L Accum

In this field, enter the general ledger asset account number for depreciation. Each time you run the Serialized Depreciation Report in the (EZY) Serial Maintenance Report Selection screen, this account is credited. Enter the three-digit major prior to the dash, and enter the two-digit minor following the dash. (You do not need to enter the location. The location specified in the G/L Location field is used.)

Depreciation G/L Expense

You can use this field to enter the general ledger expense account number for depreciation. Each time you run the Serialized Depreciation Report in the (EZY) screen, this account is debited. Enter the three-digit major prior to the dash, and enter the two-digit minor following the dash. (You do not need to enter the location. The location specified in the G/L Location field is used.)

Trade-in Authorization Password

Enter a password in this field to authorize trade-ins in Ensite Pro.

Trade-in Contact Slsp #

The salesperson whose number is entered in this field is notified via email that a trade-in needs to be authorized.

If the trade-in was on a contract, the salesperson whose number is in the Contracts Slsp # field is notified via email that a trade-in was made on a contract and the contract should be amended.

Contracts Slsp #

If a trade-in was on a contract, the salesperson whose number is in the Contracts Slsp # field is notified via email that a trade-in was made on a contract and the contract should be amended.

If the trade-in is not on a contract, the salesperson whose number is entered in the Trade-in Contact Slsp # field is notified via email that a trade-in needs to be authorized.

Changing the Parameters

Serialized Parameters are in the text-based (EZ) Serial Master Menu screen. To access the (EZ) screen, use TBL Client. Use the following instructions to set up or change parameters in the (EZ1T) screen.

- 1 From the DDMS Master Menu, type **EZ**.
- 2 When the Serial Master Menu opens, type **1** in the Action field.
- 3 In the (EZ1) Serial Parameters menu, type **T** in the Action field.
- 4 In the (EZ1T) screen, type **C** in the Action field.
- 5 In the G/L Location field, enter the location for which to set the parameters. (This field defaults to the location entered for your terminal in the (L1) Terminal and Tickets Parameters screen.) You can enter a new location or accept the default location:
 - To accept the default location, press Tab.
 - To set parameters for a different location, enter the number. If you enter fewer than two characters, press Tab.

Note: Your responses to the fields in the (EZ1T) screen apply only to the location you specify in the G/L Location field.

- 6 Enter the appropriate responses in each of the fields in this screen. For a description of the fields, see the heading **Field Definitions**. Use the following instructions for cursor movement in this screen:
 - To move the cursor ahead one field, press Tab.
 - To move the cursor back one field, press Back Space.
- 7 When you finish, press Enter until the cursor returns to the Action field. If you press Esc before doing so, your changes are not saved.

Chapter 9: Setting Up Machine Disposition Parameters

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Understanding Machine Disposition Parameters

You use the Machine Disposition Parameter Set Up dialog box to set up parameters for Machine Dispositions. When final-receiving machines in Purchase Order Entry, you can assign dispositions to each machine. You can also use this dialog box to specify default dispositions for receiving machines and rental returns. You must set up parameters before using the machine disposition features. You do this using the Machine Disposition Parameter Password dialog box.

Box Definitions

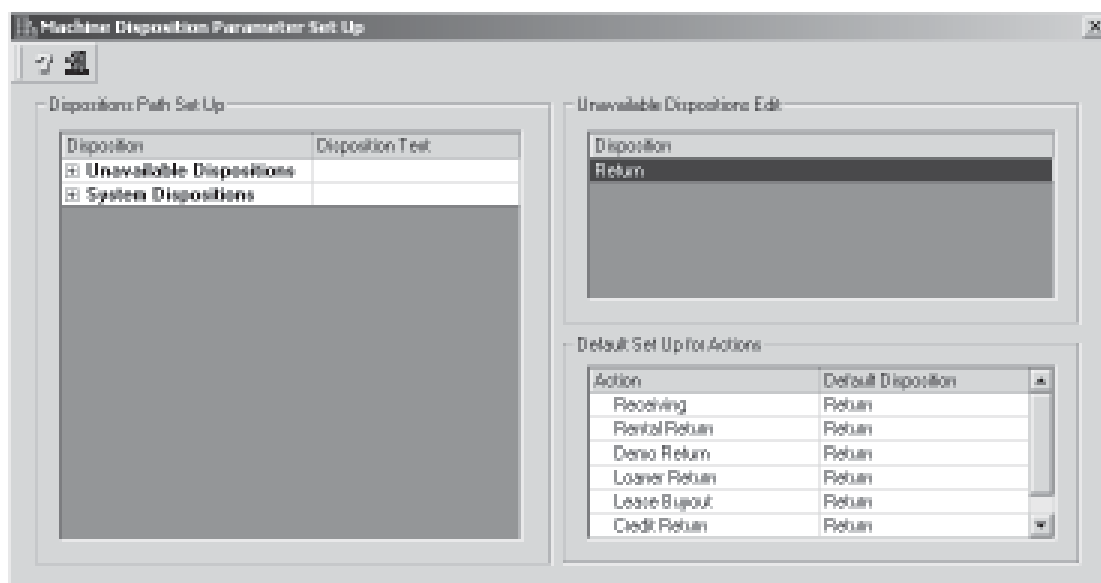
The following text describes the boxes in the Machine Disposition Parameter Set Up dialog box. See Figure 1. The parameter boxes in the Machine Disposition Parameter Password dialog box are also described. See Figure 2.

Dispositions Path Set Up

This portion of the dialog box contains the Disposition and Disposition Text boxes. Click the + (plus) sign to the left of the System Dispositions column to display any dispositions that are already set up. This column contains the system defined dispositions that are available to you. The corresponding Disposition Text box displays the text that appears on screen. You can change this text by double-clicking the box and typing the new text over the existing text.

You can also use this section of the dialog box to add future dispositions. To do so, right-mouse-click the first selection under the System Dispositions column. When the Add Future Dispositions option appears, click it. The Avail-

Figure 1: The Machine Disposition Parameter Set Up Dialog Box



able Disposition for New System dialog box opens. Click each option you want to select, or you can click the Check All option to select all available options shown. Click OK.

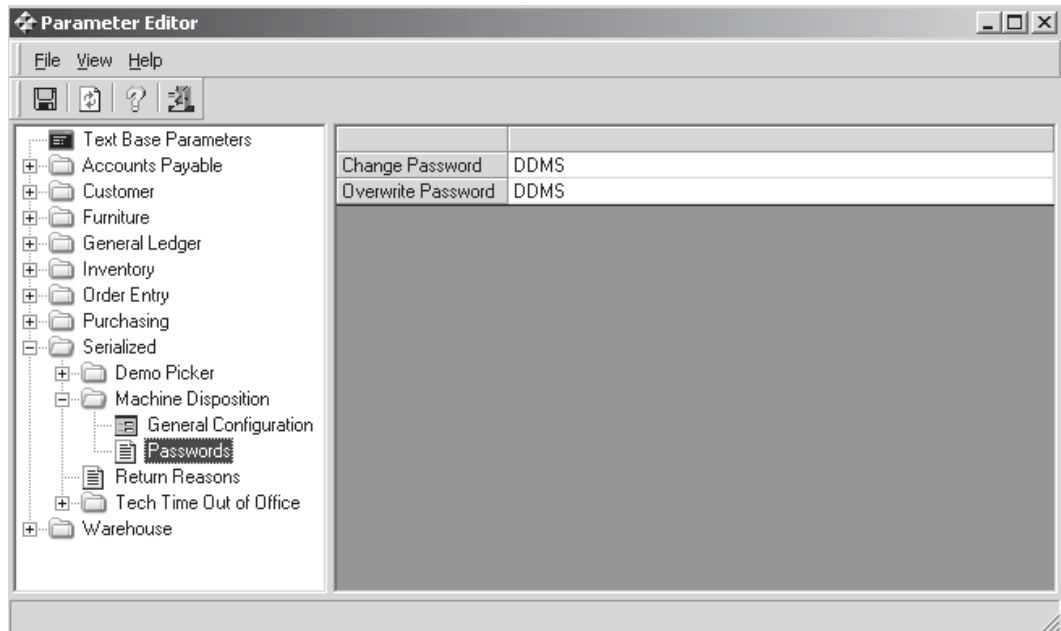
Unavailable Dispositions Edit

This section of the dialog box contains the Disposition box. Use this box to create user-defined dispositions in order to mark a machine as unavailable. To do so, right-mouse-click the Disposition box. Click the Add New option. In the New Disposition box, enter the unavailable disposition that you want to add, Trash, for example. Press Enter. The text you added appears on the left-hand-side of the dialog box under the Unavailable Dispositions column. You can add as many dispositions as necessary. You can also right-mouse-click to delete dispositions you've added.

Default Set Up for Actions Action

This section contains the Action and Default Disposition columns. Actions include Receiving, Rental Return, and Demo Return. While these actions are permanent, the corresponding dispositions shown in the Default Disposition column can be changed. To do so, click the Default Disposition box corresponding to the action you want to change. When the down arrow appears, click the disposition you want to use. Suppose the Receiving action is set to Return and you want to change it to On Hand. Using this example, you would click the Default Disposition box corresponding to the Receiving action. Click the down arrow and select On Hand. Whenever you receive a machine, the machine's disposition will now default to on hand.

Figure 2: The Machine Disposition Parameter Password Dialog Box







Change Password

Entering a password in this box allows you to change the disposition to the any of the dispositions defined in the Machine Disposition Parameter Set Up dialog box. Enter the password to change machine dispositions in the Machine Detail Machine Master tab and press Enter.

Overwrite Password

Entering a password in this box allows you to change the disposition to whatever you need it to be. (It does not have to be predefined in the parameters.) Enter the password to change machine dispositions and press Enter.

Changing the Parameters

- 1 Double-click  .
- 2 From the Keyop Menu, double-click  .
- 3 The Parameter Editor window opens. Double-click Serialized.
- 4 Double-click Machine Disposition. The General Configuration and Passwords options open.
 - To change general configuration parameters, double-click General Configuration. When the Machine Disposition Parameter Set Up dialog box opens, enter the appropriate responses in each of the boxes in the window. For more information, see the heading **Box Definitions**. When you finish, close the Machine Disposition Parameters Set Up dialog box by clicking .
 - To change passwords, double-click Passwords. When the Machine Disposition Parameter Password dialog box opens, enter the appropriate responses in each of the boxes in the window. For more information, see the heading **Box Definitions**.
- 5 The Default Set Up for Actions Action box contains the actions that you will be performing in Machine Dispositions. In the Default Disposition box, click the drop down arrow to select the default action.
- 6 The General Configuration and Password options appear in bold after you make changes. To save your changes, click  . If you fail to do so, when you exit the Parameter Editor window, you will be prompted to save your changes.

Part 3: Codes and Technicians

You can use codes in the serialized application to group and track information. There are several different types of codes you can use including the following:

- Service codes
- Service types
- Territory codes
- Qualification codes.

You use service codes to separate and track serialized inventory service history. Service codes are information that you enter when logging and completing service calls in the Work Orders window. You set up service codes in the Machine Tools Call Codes tab. For details on setting up service codes, see **Chapter 10: Setting Up Call Codes**.

Service types help you classify your service calls by the type of service you perform. For example, you might set up one service type for warranty work, another for contract work, and another for non-contract work, and so forth. You set up service types in the Machine Tools Service Types tab. For more information, see **Chapter 11: Setting Up Service Types**.

You set up territory codes in the Machine Tools Territories tab. Territory codes help divide the geographical regions that you sell and service into smaller areas. Once you set up territory codes, you can group your customers by codes. For example, you might have one group of customers assigned to the southwest and another to the northeast. You can also assign each of your technicians a territory code. By assigning your customers territory codes, you can determine how many technicians to assign any given area. For details on setting up territory codes, see **Chapter 12: Setting Up Territory Codes**.

You use qualification codes to identify the different types of service that your customers require and the technician who is best qualified to perform the service. For example, you might have one or more qualification codes set up for copiers and another set of codes for printers. After you've set up your qualification codes, you assign the codes to your technicians. This helps you quickly identify their skill levels and their experience working with particular types of equipment. You set up qualification codes in the Machine Tools Qualifications tab. For details, see **Chapter 13: Setting Up Qualification Codes**.

Once all your codes are set up, you can assign them to your technicians and create your technician database records. You do this in the Salesperson Technician tab. Only personnel that are designated as technicians through the Salesperson Technician tab can be dispatched on service calls. For more information, see **Chapter 14: Setting Up Technicians**.

Chapter 10: Setting Up Call Codes

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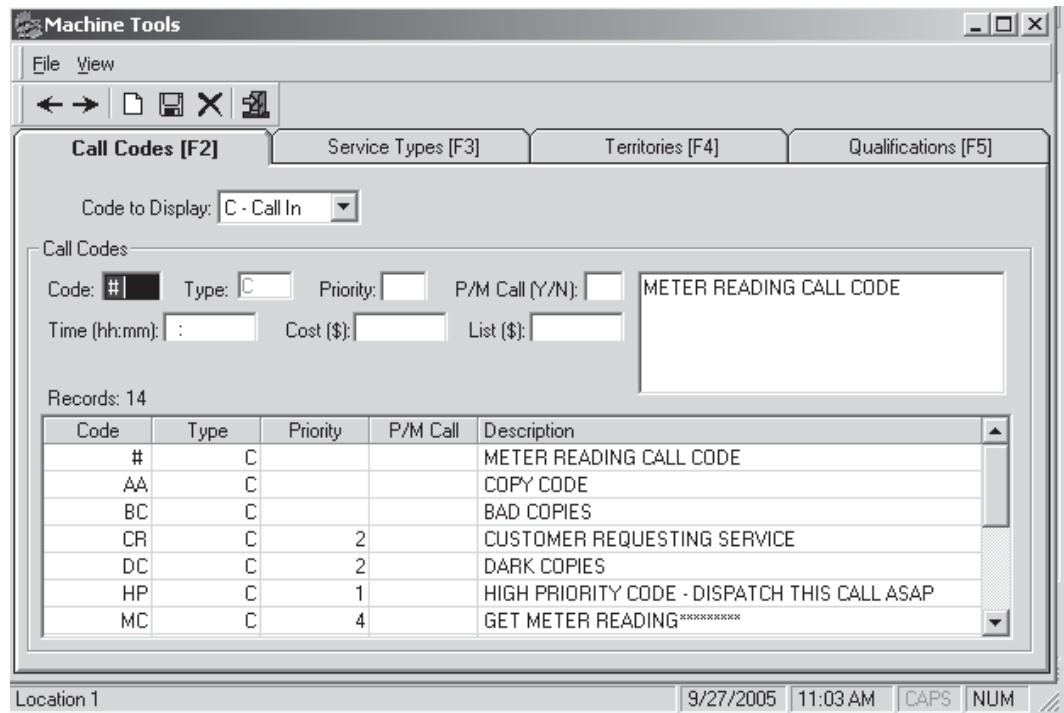
Understanding Service Codes

You use service codes to separate and track serialized inventory service history. Service codes are information that you enter when logging and completing service calls in the Work Orders window. You set up service codes in the Machine Tools Call Codes tab. The system stores service codes in the Z-CODES file. There are five kinds of service codes:

- Call codes
- Problem codes
- Reopen codes
- Solution codes
- Transfer codes.

When you log calls, it is important that you code the call to distinguish its priority, the time frame in which it must be accomplished, or to indicate how the call was resolved. This code will be displayed as part of the call information in the Machine Monitor window. The system lets you set up user-defined service codes to accommodate this need.

Figure 1: The Machine Tools Call Codes Tab



You can set fields in the (EZIL) Serial Log In Parameters screen that let you determine whether the system prompts you for problem and solution codes when you log calls in the Work Orders window. You can also specify that the system require these codes before the call can be completed. For details, see

**Chapter 6:
Customizing
Logging Calls.**

By using codes for commonly occurring problems and their solutions, you can significantly reduce the time you spend logging and responding to service calls. Call codes provide a fast, efficient way for a dispatcher to identify a customer's problem when he enters a service call in the Work Orders window. Suppose a customer calls to report that the text on their laser printer is getting light or even fading out in places. If you normally rent or lease laser printers, or sell them with service contracts, you may have a predefined call code set up. This eliminates the need for the dispatcher to manually enter a description of the problem while logging the call. Instead, the dispatcher can simply enter the call code.

Similarly, when you dispatch and close a call, you will be prompted to enter a problem code. Problem codes are used to identify the cause of a problem. Using the same example, a service technician may discover that the customer's laser printer is low on toner, and enter the problem code for low toner.

Once the call has been completed, you can also assign a solution code. Solution codes are used to describe how the call was resolved. For example, after servicing the laser printer, the solution code could be RT for replaced toner.

Reopen codes are used when you need to reopen a call that has been closed. You must use these codes to identify the reasons for reopening a call. You use transfer codes when transferring a call from one technician to another.

DDMS recommends that you use call, problem, and solution codes to automate text entry for your calls. If you design these codes carefully, many of the calls you generate will require little or no typing — the code descriptions will provide all the necessary information. In addition, since you can sort and limit by service codes, you can print reports listing only a particular type of call. This lets you easily track your service calls.

Box Definitions

The following text describes each box in the Machine Tools window, as shown in Figure 1. These boxes are listed in the order the cursor moves through the tab.

Code to Display

You use click the down arrow in this box to specify the type of code you are adding, changing or deleting. Enter your response according to the following:

C = Call Code

P = Problem Code

R = Reopen Code

S = Solution Code

T = Transfer Code.

Code

You use this box to enter the one- or two-character service code that you are setting up.

You can set up several service call codes with the same code number, as long as they are different code types. For example, you can use code number A1 for both a call code and a problem code.

Type

This box displays the type of code you are setting up. For example, if you specified to add a transfer code, this box displays a T. The cursor does not move to this box. It is for display only.

Priority

This box only applies when setting up call codes. You use this box to prioritize your call codes. Each call code you set up can be assigned a corresponding priority. This notifies your technicians which calls are the most urgent. The priority will be displayed along with the call code in the Machine Monitor.

You can use any alphanumeric character to define priorities: 1,2, 3, for example, or A, B, C, D.

P/M Call

This box only applies when setting up call codes. In this box, specify whether the call code you are setting up is for a preventative maintenance (P/M) call. Enter your response according to the following:

- Y** For preventative maintenance. The system will update the preventative maintenance information for the machine.
- N (default)** If you do not want preventative maintenance.

Time

This box is reserved for future use.

Cost

This box is reserved for future use.

List

This box is reserved for future use.

Code Description




You can use the Code Description box to enter any text that helps you identify the service code. You must enter text in this box or the system will not add the code.

While you can enter a total of 70 characters, the system will only display a maximum of 25 characters of the text in the Machine Monitor. The same amount of descriptive text appears when the system displays the last ten calls

If you set the Log Code As Description field to Y in the (EZIL) screen, any text you specify in the Code Description box for a call code will appear as the first part of the problem description for every service call to which the code is assigned. For details, see Chapter 6: Customizing Logging Calls.

in the Work Orders window. For this reason, DDMS recommends that you specify only 25 characters per line. If you need to enter additional text, press Enter and complete the code description.


Adding Service Codes

- 1 Double-click . The Machine Menu opens.
- 2 Double-click .
- 3 The Machine Tools window opens, displaying the Call Codes tab. To add a call code, click  or type **Ctrl + N**.
- 4 Click the Code to Display list box and select the type of code you want to add. You can choose to add a call code, problem code, solution code, reopen code, or transfer code.
- 5 Click the Code box and enter the code you want to add. You can set up several codes with the same code number, as long as they are different code types. For example, you can use code number A1 for both a call code and a problem code.






If you are setting up a call code, go to **Step 6**.

If you are setting up a problem, reopen, solution, or transfer code, go to **Step 8**.







- 6 If you are adding call codes, click the Priority box. This box only applies when setting up call codes. You can use this box to prioritize your call codes. Each call code you set up can be assigned a corresponding priority. This notifies your technicians which calls are the most urgent. The priority is displayed along with the call code in the Call Monitor. You can use any alphanumeric character to define priorities: 1, 2, 3, for example, or A, B, C.
- 7 If you are adding call codes, click the P/M Call box. This box only applies when setting up call codes. In this box, specify whether the call code you are setting up is for a preventative maintenance (P/M) call. Type Y and the system updates the preventative maintenance information for the machine. Type N if you do not want preventative maintenance.

- 8 Click the Code Description box to enter any text that helps you identify the service code. You must enter text in this box for the system to add the code. While you can enter a total of 70 characters, the system only displays a maximum of 25 characters of the text in the Call Monitor. (The arrow (^) that appears in the Code Description box indicates the length of text that appears in the Call Monitor. The same amount of descriptive text appears when the system displays the last ten calls in the Work Order window. For this reason, we recommend that you specify only 25 characters per line.) If you need to enter additional text, press Enter and complete the code description.
- 9 Click any additional boxes for which you want to enter call code information. When you finish adding the code, click .

Changing Service Codes

- 1 Double-click . The Machine Menu opens.
- 2 Double-click .
- 3 In the Code to Display list box, click the down arrow and select the type of code you want to change. Enter your response according to the following:
 - C Call Code
 - P Problem Code
 - R Reopen Code
 - S Solution Code
 - T Transfer Code.
- 4 In the Code box, enter the code that you want to change. You can also click the  (previous) and  (next) buttons to locate the code.
- 5 When the cursor moves to the Priority box, click the box for which you want to change information or press Tab to move the cursor from box to box. Enter the new text over the existing text.
- 6 When you finish changing codes, click  to save your changes.

Deleting Service Codes

- 1 Double-click . The Machine Menu opens.
- 2 Double-click .
- 3 In the Code to Display list box, click the down arrow and select the type of code you want to delete. Enter your response according to the following:
 - C Call Code
 - P Problem Code
 - R Reopen Code
 - S Solution Code
 - T Transfer Code
- 4 In the Code box, enter the service code that you want to delete. You can also click the  (previous) and  (next) buttons to locate the code.
- 5 Click .
- 6 At the Enter Password prompt, enter the password set in the Delete field in the (EZ1S) Serial System Parameters screen and click OK.
- 7 At the Permanently Delete Record message, click OK. The cursor returns to the Code box.
- 8 When you finish deleting codes, click  to save your changes.

Chapter 11: Setting Up Service Types

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Understanding Service Types

You can use service types to classify your service calls. Service types are user-defined codes that help you organize your calls by the type of service involved. For example, you might set up one service type for warranty work, another for contract work, and another for non-contract work, and so forth.

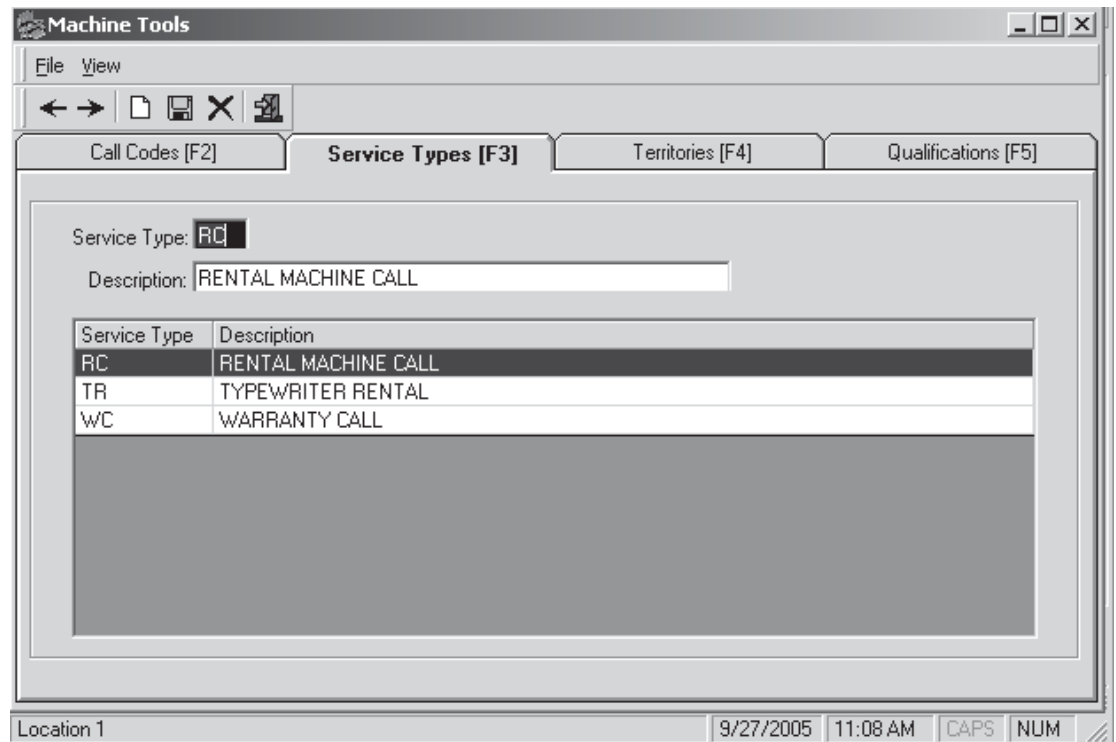
When you complete service calls in the Work Orders window, the system allows you to assign and change service types for the call. In addition, since you can sort and limit by service types, you can print reports listing only the service types you want to monitor.

You set up service types in the Machine Tools Service Types tab. The system stores these types in the Z-TYPES file.

Box Definitions

The following text describes each box in the Machine Tools Service Types tab, as shown in Figure 1. These boxes are listed in the order the cursor moves through the screen.

Figure 1: The Machine Tools Service Types Tab







Service Type

In this box, specify the one- or two-character service type that you are setting up. You can specify any alphanumeric character that will help identify the type. The system displays the available service types in the Service Type and Description boxes shown in the lower part of the Machine Tools Service Types tab.

Description



You can use this box to enter any text that helps you identify the service type. You must enter text in this box or the system will not add the type. You can enter a total of 70 characters. The system displays the available service types in the Service Type and Description boxes shown in the lower part of the Machine Tools Service Types tab.




Adding Service Types

- 1 Double-click . The Machine Menu opens.
- 2 Double-click .
- 3 The Machine Tools window opens, displaying the Call Codes tab. Click the Service Types tab.
- 4 To add a service type, click  or type **Ctrl + N**.
- 5 Click the Service Type box and enter the code for the service type you are adding, BC for billable calls, for example.
- 6 In the Description box, enter any text that describes the service type you are adding. If you do not enter text in this box, the system does not add the service type.
- 7 Click . The system adds the service type.







You can't change the service type code. If you want to change the code for the service type, you must first delete it, and add the service type again using the new code.

Changing Service Types

- 1 Double-click . The Machine Menu opens.
- 2 Double-click .

- 3 The Machine Tools window opens, displaying the Call Codes tab. To change a service type, click the Service Types tab.
- 4 Click the Service Type box and enter the service type that you want to change. You can also click the  (previous) and  (next) buttons to locate the code.
- 5 In the Description box, enter the new service type description over the existing description.
- 6 Click  to save your changes.

Deleting Service Types

- 1 Double-click . The Machine Menu opens.
- 2 Double-click .
- 3 The Machine Tools window opens, displaying the Call Codes tab. To delete a service type, click the Service Types tab.
- 4 Click the Service Type box and enter the service type you want to delete. You can also click the  (previous) and  (next) buttons to locate the code.
- 5 Click .
- 6 At the Enter Password prompt, enter the password set in the Delete field in the (EZ1S) Serial System Parameters screen and click OK.
- 7 At the Permanently Delete Record message, click OK. The system deletes the service type.
- 8 Click  to save your changes.

Chapter 12: Setting Up Territory Codes

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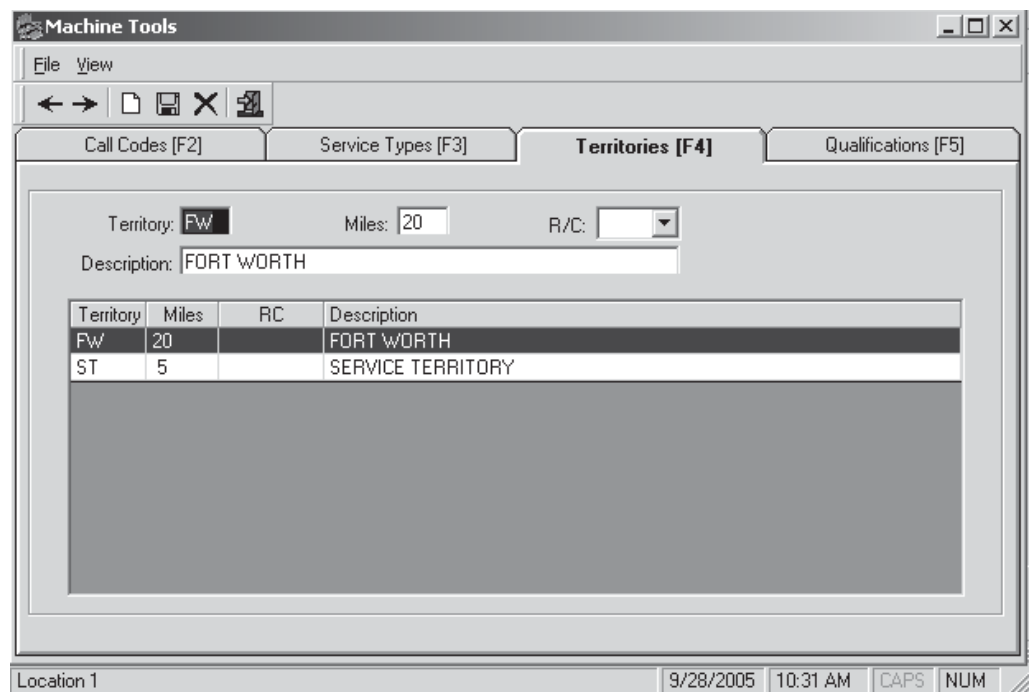
Understanding Territory Codes

You can use the Machine Tools Territories tab to divide the geographical regions that you sell and service into smaller areas called territories. Once you set up territory codes, you can group your customers by codes. For example, you might have one group of customers assigned to the southwest and another to the northeast. You could also group your customers by zip codes. (You assign your customers a territory code in the Territory box in the Customer Machines tab.)

You can also assign each of your technicians a territory code. By assigning your customers territory codes, you can determine how many technicians to assign any given area. For example, rural locations may require fewer assigned technicians while congested city areas may require more. (You assign your technicians a territory code in the Territories boxes in the Salesperson Technician tab.)

Obviously, territory codes can help you increase efficiency and profitability in many ways. Since both the customer's and technician's territory codes appear in the Machine Monitor window, these codes can help the dispatcher quickly determine which technician to send on which calls. You can also limit by technician codes in the Machine Monitor and when printing serialized reports. These codes also help you determine the travel rates you charge for service

Figure 1: The Machine Tools Territories Tab



calls based on the differing territories you service. For example, you may charge congested areas a higher travel rate due to traffic delays, parking fees, and so forth.

Box Definitions

The following text describes each box in the Machine Tools Territories tab as shown in Figure 1. These boxes are listed in the order the cursor moves through the screen.

Territory

You use this box to enter the one- or two-character territory code that you are setting up.

Miles

You use this box to specify the miles for the territory code. The miles you specify can help you determine how long your technician will be on a call as well as which technicians to send on which calls. In addition, if you bill the customer for your technician's travel time in miles, you can use this box to specify the number of miles that you want to bill for this territory. (For more information on billing for travel time, see **Chapter 20: Setting Labor and Travel Rates.**)

R/C




You use this box to specify the responsibility center for this territory code. Click the down arrow in this box and select one of the displayed codes.


Description

You can use this box to enter any text that helps you identify the territory. You can enter up to 40 characters in this box.






*The R/C box
applies to version 8
software only.*

Adding Territory Codes







- 1 Double-click . The Machine Menu opens.
- 2 Double-click .
- 3 The Machine Tools window opens, displaying the Call Codes tab. Click the Territories tab.
- 4 To add a territory, click  or type **Ctrl + N**.

- 5 Click the Territory box and enter the code for the territory you are adding, FW for Fort Worth, for example.
- 6 In the Miles box, you can enter the number of miles that applies to this territory code. Enter the number of miles, or press Tab if you do not want to enter mileage.
- 7 Click the down arrow in the R/C box (Version 8 only) to select a responsibility center for this territory code.
- 8 In the Description box, enter any text that helps you identify this territory. For example, you might set up an area between two small towns such as Prairie City to Springtown.
- 9 When you finish adding the code, click . The system adds the territory code.

Changing Territory Codes

- 1 Double-click . The Machine Menu opens.
- 2 Double-click .
- 3 The Machine Tools window opens, displaying the Call Codes tab. Click the Territories tab.
- 4 In the Territory box, enter the territory code that you want to change. You can also click the  (previous) and  (next) buttons to locate the code.
- 5 In the Description box, enter the new territory code description over the existing description.
- 6 In the Miles box, you can change the number of miles that applies to this territory code. Enter the number of miles, or press Tab if you do not want to change the mileage.
- 7 In the R/C box, click the down arrow to change the responsibility center for this territory code.
- 8 When you finish changing the territory code, click  to save your changes.

Deleting Territory Codes

- 1 Double-click . The Machine Menu opens.
- 2 Double-click .
- 3 The Machine Tools window opens, displaying the Call Codes tab. Click the Territories tab.
- 4 In the Territory box, enter the territory code that you want to delete. You can also click the  (previous) and  (next) buttons to locate the code.
- 5 Click .
- 6 At the Enter Password prompt, enter the password set in the Delete field in the (EZ1S) Serial System Parameters screen and click OK.
- 7 At the Permanently Delete Record message, click OK. The system deletes the territory code.
- 8 When you finish deleting territory codes, click  to save your changes.

Chapter 13: Setting Up Qualification Codes

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Understanding Qualification Codes

You set up qualification codes in the Machine Tools Qualifications tab. You use qualification codes to identify the different types of service that your customers require. For example, you might set up qualification codes for basic copier repair and another set up for major copier repair.

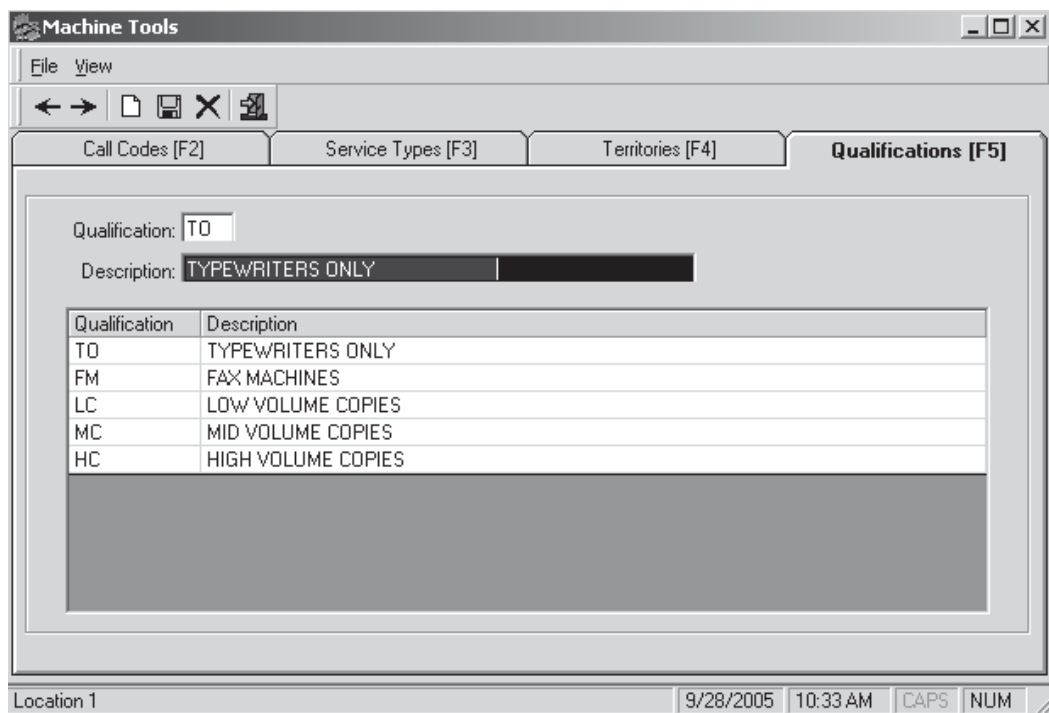
For details on assigning qualification codes to technicians, see

**Chapter 14:
Setting Up
Technicians.**

Once your qualification codes are set up, you assign the codes to your technicians, according to their expertise. This helps you quickly identify their skill levels and their experience working with particular types of equipment. For example, if you divide your service into three segments such as printer service segment 1, segment 2, and segment 3, a technician who is minimally qualified to work on printers would be assigned segment 1. The same technician's expertise could be working on copiers. In this case, you would assign all three copier service segments, 1, 2, and 3 to this technician. You can assign each of your technicians multiple qualification codes. You assign technicians qualification codes in the Salesperson Technician tab, according to their expertise.

You also can assign default technician qualification codes when you set up contract types in the Item Machine General tab. You can also assign each of your machines a qualification code in the Machine Detail Other tab.

Since qualification codes appear in the Machine Monitor, they can be very useful tools for your dispatcher. When calls are dispatched, the system provides a list of the four technicians most qualified to handle a particular call.



**Figure 1: The
Machine Tool
Qualifications
Tab**

The dispatcher can then assign an available technician from the list without needing to search through all the technicians in the database.

Box Definitions

The following text describes each box in the Machine Tools Qualification tab, as shown in Figure 1. These boxes are listed in the order the cursor moves through the screen.





Qualification

You use this box to enter the one- or two-character qualification code that you are setting up.

Description





You can use this box to enter any text that helps you identify the code. You can enter up to 40 characters in this box. For example, you might specify Simple Laser Printer Maintenance in this box.

Adding Qualification Codes







- 1 Double-click . The Machine Menu opens.
- 2 Double-click .
- 3 The Machine Tools window opens, displaying the Call Codes tab. Click the Qualifications tab.
- 4 To add a code, click  or type **Ctrl + N**.
- 5 In the Qualification box, specify a one or two character code for the code you are adding. If you enter a single-digit code, press Tab.
- 6 In the Description box, enter any description that helps you identify this code.
- 7 When you finish specifying qualification codes, click  to save your changes.

Changing Qualification Codes

- 1 Double-click . The Machine Menu opens.

- 2 Double-click . The Machine Tools window opens, displaying the Call Codes tab. Click the Qualifications tab.
- 3 The Machine Tools window opens, displaying the Call Codes tab. Click the Qualifications tab.
- 4 Click the Qualification box and enter the qualification code that you want to change. You can also click the  (previous) and  (next) buttons to locate the code.
- 5 In the Description box, enter the new description over the existing description.
- 6 When you finish changing codes, click  to save your changes.

Deleting Qualification Codes

- 1 Double-click . The Machine Menu opens.
- 2 Double-click . The Machine Tools window opens, displaying the Call Codes tab. Click the Qualifications tab.
- 3 The Machine Tools window opens, displaying the Call Codes tab. Click the Qualifications tab.
- 4 Click the Qualification box and enter the qualification code you want to delete. You can also click the  (previous) and  (next) buttons to locate the code.
- 5 Click .
- 6 At the Enter Password prompt, enter the password set in the Delete field in the (EZ1S) Serial System Parameters screen and click OK.
- 7 At the Permanently Delete Record message, click OK. The system deletes the qualification code.
- 8 When you finish deleting qualification codes, click  to save your changes.

Chapter 14: Setting Up Technicians

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Understanding the Salesperson Technician Tab

When you add a salesperson, technician, or order-writer through the Salesperson Technician tab, this information is automatically supplied to all other parts of the DDMS system. In addition, you can use this tab to maintain specific information about technicians. Only personnel that are designated as technicians through the Salesperson Technician tab can be dispatched on service calls through the Machine Monitor.

Box Definitions

The following text describes each box in the Salesperson Technician tab, as shown in Figure 1. These boxes are listed in the order the cursor moves through the screen.

Beeper

In this box, enter the telephone number for the salesperson's beeper.

R/C

Click the down arrow in this box and select the responsibility center number you want to assign to this technician.

Month to Date Sales \$

This box is updated by the system and is for display only. It shows the salesperson's total sales amount for the month-to-date.

Figure 1: The Salesperson Technician Tab

Mo	24 Month History		Goals	Calls
	1-12	13-24	1-12	1-12
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				

If you choose to update the salesperson's history at month-end, the system moves the amount from this box to the 24 Month History box for the month that just ended.

Avg Monthly Sales \$

This box is updated by the system and is for display only. It shows this salesperson's average monthly sales amount.

If you choose to update the salesperson's history at month-end, the system recalculates this amount by adding all of the previous month's totals together. Then, it divides this amount by the total number of months to calculate the average monthly sales amount.

Qualifications From/To/+

You can use the Qualifications From and corresponding To boxes to specify a range of qualification codes for the technician. Qualification codes are used to organize your technicians according to their skill level and their ability to service different types of equipment. (You set up qualification codes in the Machine Tools Qualifications tab.)

You can use the remaining + boxes to specify up to 16 additional qualification codes.

Territories From/To/+

In the Territories From and corresponding To boxes, you can specify a range of territories to which the technician is assigned. Territory codes are used to organize your business area into smaller areas called territories. The territories help the dispatcher determine which technician to send on a particular service call. (You set up territory codes in the Machine Tools Territories tab.)

You can use the remaining + boxes to specify up to five additional territory codes.

OW/S/T/F

You can use this box to specify whether this employee is an order-writer, a salesperson, or a technician. Only employees that you designate as technicians in this box can be dispatched on service calls. Enter your response according to the following:

- O** The employee is an order-writer.
- S** The employee is a salesperson.
- T** The employee is a technician.
- F** The employee is a furniture technician.

Locations: G/L

In this box, specify the location (store, for example) in which the technician is based. Enter the two-digit number representing the technician's location. If you do not specify a location, the system defaults to use the location in the Machine Detail window.

Locations: Inventory

In this box, specify the location from which the technician obtains parts (a warehouse or car stock, for example). Enter the two-digit number representing this location.

Pricing Record

You use this box to specify the location of the pricing record that you want to be used by the technician on workorders. Enter the two-digit number representing this location.

For example, if the technician is assigned location 50, and you want the system to use the information from the Pricing Record in the Item window for location 50, you would enter 50 in this box.

24 Month History/1-12/13-24

These boxes are updated by the system and show extended sales history for the salesperson or technician. Extended history includes total dollar amounts for the past 24 months. These totals are kept in columns based on calendar months. For example, totals for the previous January are kept in position 1 in the 1-12 column; totals for January of the year before are kept in position 1 in the 13-24 column.

The 1-12 column shows figures for each month that has passed in the current year; for each month that has not passed in the current year, the 1-12 column shows totals for the previous year. Each monthly total in the 13-24 column is one year older than the corresponding total in the 1-12 column.

The system updates monthly totals when you perform the month-end procedure.

Goals/1-12



These boxes are reserved for future use.

Calls/1-12


These boxes are updated by the system and are for display purposes only. They show the number of calls credited to the salesperson for the month.

If you choose to update this box at month-end, the system clears the Calls box for the month that just ended.

Adding Technician Records



- 1 Double-click . The Salesperson window opens, displaying the information for the last salesperson selected.
- 2 Click . The boxes in the window are cleared.
- 3 Click the SalesPerson # box and enter a unique salesperson, order-writer, or technician number. While you can specify up to four alphanumeric characters, you should use numbers that are three or four digits in length. If you assign a two-digit number, this user cannot place orders in order entry. Some serialized dealers use the last two digits of the salesperson number to represent the car stock location assigned to the technician. For example, if you assign a technician number 150, 50 would represent the inventory location assigned to the technician.
- 4 Click the Name box and enter the name of the salesperson, technician, or order writer.

Note: If you enter a name and number combination that already exist in the salesperson database, a dialog box displays the message This Record Already Exists Replace It. Click Yes to replace the existing salesperson with the information you entered. Click No to return to the Salesperson Master tab without replacing the existing salesperson.




- 5 After you enter the salesperson's number and name, enter the appropriate information in each box in the Salesperson Master tab, including the phone number, address, and so on.
- 6 When you finish entering the information in the Master tab, complete any necessary boxes in each of the other tabs. Be sure to complete the Salesperson Technician tab. This tab contains specific information concerning your technicians. For example, if you are adding a technician, you use this tab to assign the technician territory and qualification codes. In addition, when adding technicians, you must set the OW/S/T box in the Salesperson Technician tab to T. Only personnel that have a T set in this box can be dispatched on service calls.
- 7 Once you finish adding your salespersons, order-writers, and technicians, you can restrict the functions they can perform. To do so, use the Allowable Functions for Salespersons dialog box. You can do this now or add restrictions later.
- 8 When you finish entering information, click  to save your changes.

Note: If you add several salespersons, order-writers, or technicians at once, you may need to reindex the salesperson database. Reindexing is only necessary when you have difficulty retrieving salespersons by name.

Changing Technician Records

- 1 Double-click . The Salesperson window opens, displaying the information for the last salesperson selected.
- 2 In the SalesPerson # box, retrieve the record of the salesperson, order-writer, or technician that you want to change.
- 3 After you retrieve the salesperson, click the Technician tab to change specific information. Click each box you want to change and enter the new information over the existing information. You can also press Tab to move the cursor from box to box.
- 4 When you finishing changing the record, click  to save your changes.

Deleting Technician Records

- 1 Double-click . The Salesperson window opens, displaying the information for the last salesperson selected.
- 2 In the SalesPerson # box, retrieve the record of the salesperson, order-writer, or technician that you want to delete.
- 3 When the salesperson you want to delete displays, click . The Delete password box opens.
- 4 Enter the password from the Delete field in the (LHY) Salesperson Parameters screen and click OK. If there is no password set in the Delete field, click OK to continue. The Permanently Delete box opens.
- 5 Click OK to delete the salesperson.
- 6 Click  to save your changes.

Part 4: Contracts

The Serialized application lets you easily customize your service contracts. Before you can sell customers service contracts, you must first set up the serialized contracts that you want to use. The steps you must perform to set up contracts are as follows:

- **Set up the Contract Types Types tab.** Specify the contract types and descriptions that you want to use. Contract types hold all the default settings for a particular type of contract. For example, a contract type for rentals would hold all the default settings that you want to use for rental contracts. You must set up a contract type for each type of service that you provide, including preventive maintenance, rentals, loaners, and so forth. You also use the Contract Types Types tab to specify the billing frequency and amount, and the contract's length. For details, see **Chapter 15: Setting Up Contract Types**.
- **Set up the Contract Types Lease tab.** You use this tab to specify the default settings for your lease contracts. In this tab, you enter the contracts terms, including billing frequency and billing amount. For details, see **Chapter 16: Setting Up Lease Contracts**.
- **Set up the Contract Types Departments tab.** This tab lets you breakout the income from your contract, meter, and lease billings to up to 10 different general ledger departments, instead of just one. For example, you may want to divide this income and post it to several different departments. For more information, see **Chapter 17: Setting Up Contract Type Departments**.
- **Set up the Contract Types Order Entry tab.** You use this tab to customize serial pick tickets and invoices for your contract types. Each box in this tab gives you the option of printing specific information on the ticket. For details, see **Chapter 18: Customizing Tickets and Billings**.
- **Set up the Item Machine General tab.** After you set up all your contract types, you can link the contract types to your serialized items (models). You can link each model to as many as 10 different contract types. For example, you may have a different contract type set up for each model that you sell, rent, lease, and loan.

After you link the contract types to your items, you can use contract types to sell contracts through the Serialized Order Entry window. When you sell a contract, the contract type, together with the settings in the Item Machine General tab, provide the default terms for the contract. However, nearly all of these default terms can be changed when you complete the sale. For more information, see **Chapter 19: Linking Items to Contract Types**.

- **Set up the Contract Types Service Rates tab.** You use this tab to assign your contract types default labor and travel rates. When you sell the customer the contract in the Serialized Order Entry window, you can also indicate whether the customer or the contract will be charged for travel and labor. The system then calculates the travel and labor charges for the workorder.

You should set up labor and travel rates for each service contract you have. Even if you do not bill the customer for labor and travel, the system will assign all labor and travel costs to the contract. This allows you to accurately monitor and track the actual cost and gross profit figures of your contracts. For details, see **Chapter 20: Setting Labor and Travel Rates**.

Chapter 15: Setting Up Contract Types

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Understanding Contract Types

To automate the process of selling contracts, you first set up the contract types in the Contract Types Types tab and Contract Types Meters tab. See Figures 1 and 2. A contract type holds the default settings for a particular type of contract. The system uses these settings to create default terms for a contract when you sell one. You can change these default terms, if necessary, to customize the contract for a particular sale. However, you'll want to plan your contract types so that you can accept the default terms most of the time.

For details on linking, see

Chapter 19: Linking Items to Contract Types.

Set up a contract type for each type of service that you provide, including preventive maintenance, leases, rentals, loaners, and so forth. For example, the contract type for leases would hold all the default settings that you want to use for a lease contract.

After you set up all your contract types, you link the contract types to your serialized items (models). To do this, you assign the contract types to machine models in the Item Machine Defaults dialog box.

For details on selling contracts, see your online documentation.

Suppose you sell three kinds of contracts for copier model ABC: a metered maintenance contract, a rental contract, and a demo contract. You would create a contract type for each of these contracts. Then you would link these three contract types to model ABC through the Item Machine Defaults dialog box.

Figure 1: The Contract Types Types Tab

The screenshot shows a software window titled "Type: TCZZ (TOTAL CARE FOR ST JOSEPH)". The window has a menu bar with "File", "Databases", and "Help". Below the menu bar is a toolbar with various icons. The main area of the window is divided into several tabs: "Types", "Meters", "Lease", "Order Entry", "Departments", "Renewals", and "Service Rates". The "Types" tab is currently selected.

Under the "Types" tab, there is a "Contract" field with the value "TCZZ". To the right of this is a "Description" section with two text boxes: "Type" containing "TOTAL CARE FOR ST JOSEPH" and "Extended" containing "THIS M/C COVERS ALL COPIERS".

Below the description, there are several input fields:

- Billing: Freq [] at \$ 9600.00
- Cost % []
- Code []
- Dept [M]
- Service Type [06]
- Coverage [B]
- Tech Qualification []
- Service Frequency [] at \$ []
- PM Code []
- Accumulate Clicks [X]

There are two "Supplies Included Class Range" and "Non-Contract Parts Class Range" sections, each with "From [] To [] + []" fields.

At the bottom, there are "Contract Lengths" and "Department" sections:

- Contract Lengths: Time # [], Billing \$ [] or % [], Clicks # [600000], Period [9], Start [], Auto-Renew [Y], Umbrella [], Defer Income []
- Department: Service [D], Cost % [], Labor [E], Cost % [75.0], Travel [E], Cost % [75.0]

After you link the contract types to your items, you can use contract types to sell contracts through the Serialized Order Entry window. When you sell a contract, the contract type, together with the model's settings in the Item Machine Defaults dialog box, provide the default terms for the contract.

Once you sell a contract, the system automatically adds a contract record in the Contract Detail window. If the contract includes meters, the system also adds a record for each meter in the Contract Detail Meter tab.

In addition to setting up contract types for each kind of contract you sell, you can also set up universal contract types. Universal contract types set default service rates for items that aren't covered by a specific contract. If a customer walks in with a copier that needs repair, for example, a universal contract is a convenient way to specify the labor rates, warranty coverage, and so forth. To set up universal contracts, you first create contract types for this purpose in the Contract Types window. Then you specify the universal contract names in the Universal Contract fields in the (EZ1O) Serial Order Entry Parameters screen.

Once all your basic contract types are set up, you can specify default labor and travel rates for each contract type. You can also set the parameters for contract renewal. You specify these parameters in the Contract Types Service Rates and Contract Types Renewals tabs.

Figure 2: The Contract Types Meters Tab

The screenshot shows a software window titled "Type: 0" with a menu bar (File, Databases, Help) and a toolbar. The "Meters" tab is selected, showing a table with the following data:

Nbr	Description
2	.00 TO 10,000 NO CHG.

Below the table are several input fields:

- Link To:
- Over #: at \$
- Department:
- Service Clicks #:
- Job Item:
- Min Charge \$:
- Freq:
- Cost %:
- Service Freq:
- Company:
- Scale:
- Code:

Box Definitions

The following text describes each box in the Contract Types Types tab. These boxes are listed in the order the cursor moves through the screen.

Defining the Basic Terms for the Contract Type

The first boxes in this tab let you identify the contract type and define its basic characteristics, such as how long it lasts and what it covers.

Contract

In this box, enter the name of the contract type you are adding or changing. You can specify up to four alphanumeric characters. For example, if you are adding a full service maintenance agreement, you could enter FSMA in this box.

Description: Type

In this box, enter a useful description of the contract type. You can enter up to 30 alphanumeric characters. For example, you could enter Full Serv Maint Agreement in this box.

Description: Extended

In this box, you can add more descriptive text—it simply extends your description from one line to the next. For example, you might want to summarize the terms for the contract type in the description. If you specify Full Serv Maint Agreement in the Description: Type box, you could enter 60k Allowed Overage Qtrly in the Description: Extended box.

Billing: Freq

In this box, specify the default billing period for contracts created using this contract type. Specify this period by entering one of the following codes:

D Daily	Y Yearly
W Weekly	H Every 18 months
B Biweekly (every two weeks)	2 Every two years
M Monthly	3 Every three years
T Every two months	4 Every four years
Q Quarterly	5 Every five years
S Semi-annually.	

At \$

In this box, specify a flat rate amount that will be charged at each billing period. The amount you enter becomes the default billing amount for contracts you sell using this contract type. You can enter up to five digits before the

decimal and two after the decimal. (The decimal does not appear until the cursor moves to the next box.) If you do not want to specify a default billing amount, leave this box blank.

Customers who purchase contracts with this contract type will be placed on an auto-billing schedule. Each time you create billings through the (EZY) Serial Maintenance Report Selection screen, the system checks each customer's auto-billing schedule to determine whether a billing is due.

Cost %

In this box, you can specify the default cost of a contract billing. You can enter two digits before the decimal and one after the decimal.

Note: For the most accurate cost, we recommend that you specify only the cost of processing a billing here. The true cost of a contract comes from the service you provide. Each time you complete a workorder for a machine covered by a contract, the system charges the costs for that workorder (labor, travel, supplies, and parts) against the contract's income. You set the labor and travel costs through the Contract Types Service Rates tab. (See **Chapter 20: Setting Labor and Travel Rates.**)

The totals for each contract—income and the costs associated with the work done to service the contract—are displayed in the Contract Detail History tab.

The cost is the product of this percentage and the amount billed. For example, if the contract billing amount is \$100.00, and you specify 5 in the Cost % box, the cost is \$5.00.

This box defaults to use the percentage entered in the Basic Contracts Cost % field in the (EZ1S) Serial System Parameters screen, if any.

Code

You can use this box to assign a default call code for calls generated from the Contract Billing Report. (You can print this report through the (EZY) screen.) Enter the code that you want to use as the default, if any.

If you do not want to assign a default, leave this box blank. The system will automatically use call code **c** for calls generated from the Contract Billing Report.

Note: If you enter a default code in this box, you must also set up the code in the Machine Tools Call Codes tab. Otherwise, the system will use the default call code, **c**, instead. For details, see **Chapter 10: Setting Up Call Codes.**

The department specified in the First Non-Tax Department field in the (LG3) Order Entry Parameters screen, and all subsequent departments, are non-taxable. Consider your state's tax laws when assigning departments for contracts.

Dept

In this box, specify the default sales department to which the income generated from contract billings will be posted. This box defaults to use the department that corresponds to the minor (last two digits) specified in the Basic Contracts field in the (EZ1S) screen. Department numbers correspond directly to general ledger minor accounts, as shown in Chart 1.

If you use the deferred income feature, the system will also use the department you specify here for deferred income.

Service Type

In this box, specify the service type for calls covered by this contract. Service types are a user-defined way to classify service calls. You can organize calls by the type of service involved. For example, one service type might be for warranty work, another for contract work, another for non-contract work, and so on.

To specify the default period of time between preventive maintenance calls, enter a code from the following list:

- D Daily
- W Weekly
- B Biweekly (every two weeks)
- M Monthly
- T Every two months
- Q Quarterly
- S Semi-annually.
- Y Yearly
- H Every 18 months
- 2 Every two years
- 3 Every three years
- 4 Every four years
- 5 Every five years

You set up service types in the Machine Tools Service Types tab. For details, see

**Chapter 11:
Setting Up
Service Types**

Chart 1: The Department and Corresponding G/L Sales Minor Account Numbers

Department Number	G/L Sales Minor Account Number
1 – 9	01 – 99
A – J	11 – 20
K – T	21 – 30
U – Z	10

Service Frequency

In this box, you can specify the default frequency of preventative maintenance calls based on a period of time. The Serialized application can automatically generate preventive maintenance calls for your contracts. This box applies only to preventive maintenance calls based on periods of time (once a month, for example).

Note: You can also base preventive maintenance calls on meter readings. You do this by using the Meter Service Clicks box. If you specify service frequency as a period of time and as a number of clicks, the system will use the frequency which occurs first. For example, if you set the Service Frequency box to Y, and the Meter Service Clicks box to 100000, preventative maintenance will be due after.

At \$

In this box, enter the default amount you charge the customer for preventive maintenance calls. You can enter up to five digits before the decimal and two after the decimal.

If you do not charge for preventive maintenance calls, leave this box blank.

Coverage

In this box, specify whether preventive maintenance calls under this contract cover parts, labor, or both. Enter the appropriate code:

- | | |
|--------------|---|
| P | The contract covers only parts |
| L | The contract covers only labor. |
| B | Both parts and labor are covered. |
| Blank | The contract does not cover either parts or labor. Customers will be charged for both parts and labor on preventive maintenance calls |

PM Code

In this box, specify the default call code for preventive maintenance calls. (If you do not want to assign a default call code, leave the PM Code box blank. The system will use the default call code of PM, for preventive maintenance.)

Note: If you enter a default code in this box, you must also set up the code in the Machine Tools Call Codes tab. Otherwise, the system will use the default call code, **PM**, instead. For details, see **Chapter 10: Setting Up Call Codes**.

Tech Qualification

In this box, specify the default qualification code for the contract type. Qualification codes organize your technicians according to their level of expertise and ability to provide service for different types of equipment. They can also

determine labor rates. (See **Chapter 20: Setting Labor and Travel Rates** for details.) These codes can help your dispatchers assign technicians according to the nature of the call and the skill level required.

Accumulate Clicks

This box gives you the option of accumulating meter readings until they reach a billable level. This option is particularly useful if you charge a set amount each time a customer uses a specific number of clicks (for example, you may charge \$200 each time 10,000 clicks have been used).

Before billing meters, you post meter readings in the (EZV) Serial Meter Maintenance screen. The system stores the readings you post in the Z-M-BILL file. After posting the readings, you bill meters through the (EZY) Serial Maintenance Report Selection screen. The system bills a meter if the number of clicks the customer used is greater than the number of clicks specified in the Over # box.

After billing meters, the system clears from the Z-M-BILL file the readings for all meters included in the billing, even if these readings were below the amount in the Over # box. However, if you set the Accumulate Clicks box to **Y** or **X**, readings below the amount in the Over # box are not cleared. These readings will accumulate until they are greater than the amount in the Over # box, and then the meter will be billed and the reading will be cleared from the Z-M-BILL file.

Suppose you set the Over # box to 10000, and set the Accumulate Clicks box to **Y** or **X**. If you post a reading indicating that only 8000 clicks were used, the system will not bill the meter, but it will keep the reading in the Z-M-BILL file. Then, the following week, you post another reading indicating that 2500 more clicks were used. The next time you run a meter billing, the system will bill this meter, since the total, 10500, is now greater than the 10000 in the Over # box. After billing the meter, the reading will be cleared from the Z-M-BILL file.

If you decide to accumulate clicks, you can do it in two ways.

- The first method of accumulating clicks charges the customer whenever the reading exceeds a multiple of the amount specified in the Over # box. For example, if you set the Over # box to 10000 and enter a reading of 12000, the meter is billed because the reading is more than 10000. Additional billings would occur each time the clicks exceed a multiple of 10000: after 20000, 30000, 40000, and so forth. If you want to accumulate clicks in this manner, you would set the Accumulate Clicks box to **X**.
- The second method of accumulating clicks determines when the next billing will occur by adding the clicks in the Over # box to the reading used for a billing. Suppose again that you set the Over

box to 10000 and enter a reading of 12000. The meter is billed, since the reading exceeds 10000. To determine when the next billing would occur, the system adds the amount in the Over # box to the reading posted for this billing. In this example, the system adds 10000 (the amount in the Over # box) to 12000 (the reading posted for this billing) to set the next billing level at 22000. If the reading for the second billing is 23000, the third billing will be at 33000. If you want to accumulate clicks in this manner, you would set the Accumulate Clicks box to **Y**.

Enter your response according to the following:

- Y** Accumulates clicks. The system bills the customer when the reading exceeds a multiple of the amount specified in the Over # box.
- X** Accumulates clicks. The system determines the next billing by adding the clicks in the Over # box to the reading used for the billing.
- N (default)** The system does not accumulate clicks.

Note: If you accumulate clicks, you may want to set the price using the Minimum Charge \$ box. For example, suppose you want to bill customers \$200 each time they use 10000 clicks. To do this, you could specify **X** in the Accumulate Clicks box, specify **200** in the Minimum Charge \$ box, and specify **10000** in the Over # box.

How the System Tracks Accumulating Clicks

To track accumulating clicks, the system makes use of the Last Bill # box in the Contract Detail Meter tab. This box displays the meter reading used when a meter was last billed. The system updates the Last Bill # box when you post a new reading in the Z-M-BILL file. It does not update the Last Bill # box when you change a reading in the Z-M-BILL file.

If you do not accumulate clicks, the system updates the Last Bill # box each time you bill meters, even if the reading is below the number in the Over # box. Since the system clears the readings you posted from the Z-M-BILL file, the next meter reading is a new reading, and the Last Bill # box is updated.

If you accumulate clicks, the system does not update the Last Bill # box until the clicks reach a billable level; since readings that are below the billable level are not cleared from the Z-M-BILL file, the next meter reading is a change, not a new reading. Therefore, the Last Bill # box is not updated.

To determine how many clicks to bill a customer for, the system first subtracts the clicks in the Last Bill # box from those in the Current # box. The result appears in the Used # box. The system subtracts the clicks in the Tech Use box (if any) from

the Used # box to determine the number of clicks used by the customer. The result, less the amount in the Over # box, is the number of billable clicks:

$$\begin{aligned} \text{Current \#} - \text{Last Bill \#} &= \text{Used \#} \\ (\text{Used \#} - \text{Tech Use \#}) - \text{Over \#} &= \text{Billable Clicks} \end{aligned}$$

When you accumulate clicks, the Last Bill # box keeps the reading used when you last billed the customer for the meter, while the readings in the Current # box increase each time you post a reading, until a billable level has been reached.

Suppose you set the Accumulate Clicks box to **Y**, and set the Over # box to **10000**. The Last Bill # box displays **0**. You post readings monthly, and do not enter readings in the Tech Use # box. For the first three months, the customer uses only 1000 clicks per month. After the third month, the Current # box displays 3000, and the Last Bill # box still displays 0. The fourth reading is 12000. The customer is now billed for 2000 clicks:

$$\begin{aligned} \text{Current \# } 12000 - \text{Last Bill \# } 0 &= \text{Used \# } 12000 \\ (\text{Used \# } 12000 - \text{Tech Use \# } 0) - \text{Over \# } 10000 &= 2000 \text{ Billable Clicks} \end{aligned}$$

However, if you had set the Accumulate Clicks box to **N**, there would be no billable clicks, because the Last Bill # box would be at 3000. Since $12000 - 3000 = 9000$, the clicks that were used would be below the billable level.

How the System Bills Clicks When You Set Accumulate Clicks to X

In the example just given, the customer was billed for 2000 clicks when the reading was 12000. The system displays the number of clicks billed in the Last Bill # box. In this case, the Last Bill # box would be set to 2000.

If Accumulate Clicks was set to **X**, the next billing would occur when the reading exceeds 20000. To bill at 20000, the system must include the clicks that exceeded the amount in the Over # box. Therefore, when Accumulate Clicks is set to **X**, the system adds the amount in the Last Bill # box to the amount in the Used # box when calculating billable clicks. For example, if you post a reading of 21000, the system would calculate billable clicks in the following manner:

$$\begin{aligned} \text{Current \# } 21000 - \text{Last Bill \# } 12000 &= \text{Used \# } 9000 \\ ((\text{Used \# } 9000 + \text{Last Bill \# } 2000) - \text{Tech Use \# } 0) - \text{Over \# } 10000 &= \\ 1000 &\text{ Billable} \end{aligned}$$

Supplies Included Class Range From/To/+

You can use these boxes for service contracts that include supplies. For example, a service contract for a copier may include paper. You can use the Supplies Included Class Range boxes to specify the default stock classes for supplies that are covered by contracts.

The system considers the item to be a supply item if you set the Serialized box in the Item window to N or leave it blank.

In the From and To boxes, enter a range of stock classes for which you want supplies included. For example, if you want to include items with stock classes A through C, you would specify A in the From box and C in the To box.

In the + boxes, you can specify up to five additional stock classes for supplies included in contracts. For example, you could specify classes J, L, N, R, and T.

Non-Contract Parts Class Range From/To/+

In these boxes, you can specify the stock classes for parts that are *not* covered by contracts. You do this using the item's stock class. For example, you may have some service contracts that include parts but have certain exceptions — a service contract for a copier may include all parts except for the drum.

In the From and To boxes, enter a range of stock classes for items that are not covered by contracts. For example, if you want items with stock classes C through F *not* to be covered by service contracts, you would specify C in the From box and F in the To box.

In the + boxes, you can specify up to five additional stock classes for items that are not covered by service contracts. For example, you may want to specify classes R, Q, N, P, and L.

Time #/Billing \$/or %

The Time #, Billing \$ and corresponding % boxes apply when setting up time block contracts. These boxes show the amount of the time block contract. In the Time # box, you can specify the default contract length in terms of service hours. This box can be useful if you sell or support computers or software. You can include a contract for 20 hours of software support, for example. The system automatically converts the period you specify into beginning and ending dates when you sell contracts through the Serialized Order Entry window. These dates also appear in the Contract Detail window. In the Billing \$ and corresponding or % boxes, you can enter the billing amount or a billing percentage for the time block contract. For example, if a customer purchases a telephone support contract for \$500, you could enter \$500 in the Billing \$ box.

Note: You can also indicate contract length as a period of time or as a number of clicks. These options are described under the **Period** and **Clicks #** headings below. You can use any combination of these three boxes to set contract length. The contract expires when any of these conditions is met. Suppose you specified 20 in the Time # box, Y in the Period box, and 100000 in the Clicks box. The contract would expire after 20 service hours, one year, or 100,000 clicks, whichever occurred first.

Clicks #

Specify the default contract length as a number of clicks.

The system uses the number of clicks specified, along with the machine's current meter reading, to measure contract length by clicks. (Current clicks + number of clicks specified = number of clicks at end of contract.) Suppose a copier has 100 clicks. The customer buys a contract that covers 10,000 clicks. The contract expires when the meter reading is 10,100.

The contract length in clicks is displayed in the Clicks From and To boxes in the Contract Detail Meter tab. You can enter a maximum length of 999,999 clicks.

Note: You can also indicate contract length as a number of service hours or a period of time. These options are described in the Time and Period boxes. You can use any combination of these three boxes to set contract length. The contract expires when any of these conditions is met. Suppose you specified 20 in the Time box, Y in the Period box, and 100000 in the Clicks box. The contract would expire after 20 service hours, one year, or 100,000 clicks, whichever occurred first.

Period

In this box, specify the default contract length as a period of days, weeks, months, or years. The system automatically converts the period you specify into beginning and ending dates when you sell contracts.

These dates are also displayed in the Contact Detail window. Enter your response according to the following:

Contracts set with the Period box expire after a specific length of time has passed.

Contracts set with the Time # box expire after a specific number of hours have been spent servicing the contract.

- | | |
|---------------------|---|
| D Day | Y Year |
| W Week | H 18 months |
| B Two weeks | 2 Two years |
| M Month | 3 Three years |
| T Two months | 4 Four years |
| Q Quarter | 5 Five years |
| S Six months | 9 Open-ended contract (the ending date is set to 99/99/99) |

Note: You can also indicate contract length as a number of service hours or as a number of clicks. These options are described under the **Time #** and **Clicks #** headings. You can use any combination of these three boxes to set contract length. The contract expires when any of these conditions is met. Suppose you specified 20 in the Time # box, Y in the Period box, and 100000 in the Clicks # box. The contract would expire after 20 service hours, one year, or 100,000 clicks, whichever occurred first.

Start

In this box, you specify the default starting time for contracts added using this contract type. You can start contracts when you sell the contract or when the dealer's or manufacturer's warranty expires.

The length and coverage of the manufacturer's warranty for each item is specified in the Item Machine Defaults General tab. For details, see

Chapter 19: Linking Items to Contract Types.

- Y** Begins the contract starting time when the contract is sold, so that the contract and the dealer's or manufacturer's warranty start at the same time.
- N (default)** Begins the contract starting time when the dealer's or manufacturer's warranty expires.

Auto-Renew

You use this box to specify a default response for the Auto-Renew box in the Contract Detail Contract tab. (The system uses the Auto-Renew box in the Contract Detail Contract tab to automatically create contract renewals.)

- Y** Sets the default for the Auto-Renew box in the Contract Detail Contract tab to **Y**. The system will automatically create a renewal pick ticket for contracts that are due. Choose this option if you intend to renew contracts through the (EZU) Serial Contracts Maintenance screen.
- N (default)** Sets the default for the Auto-Renew box in the Contract Detail Contract tab to **N**. You must create renewal pick tickets manually. Choose this option if you intend to renew contracts by reselling them through the Serialized Order Entry window.
- X** Sets the default for the Auto-Renew box in the Contract Detail Contract tab to **X**. The system automatically renews contracts each time you bill them through the (EZY) Serial Maintenance Report Selection screen. *If you use this option, you can bill a contract only once during the contract period.*

DDMS recommends that you start with UBR as your first umbrella contract type.

Umbrella

In this box, specify whether you want to use this contract type as an umbrella contract. You use umbrella contracts to cover several different machines with a single contract. The contract terms you specify apply to all the machines that are covered. For example, if you sell an umbrella contract for 60,000 clicks and the contract covers three copiers, all three copiers' clicks would contribute to the contract. (Once you have created the umbrella contract type, you must link the umbrella contract type to all the machines you want to sell it for in the Item Machine Defaults dialog box.)

- Y** Uses this contract type as an umbrella contract.
- N (default)** Not an umbrella contract; it applies only to individual machines.

Defer Income

In this box, specify whether you want to defer the income from contracts sold using this contract type. (Deferring contract income lets you spread the income over the life of the contract. This provides a more accurate picture in your general ledger, and may also offer tax advantages.)

- Y Defers the income from contract billings.
 N **(default)** Does not defer the income from contract billings.

Tracking Service Costs

In the three department boxes, below, you can specify the default general ledger departments to use when posting contract income and costs. The system uses these departments to track the profitability of your contracts.

In the Cost boxes for each department, you can specify the cost as a percentage of the income. Suppose that the income from a service call is \$100. If you set the Cost box for the service department to 60%, the cost would be \$60.

When assigning departments, remember that the department specified in the First Non-Tax Department field in the (LG3) screen, and all subsequent departments, are non-taxable. Consider your state's tax laws when assigning departments for contracts. If travel and labor are not taxable, for example, you need to assign nontaxable departments in the Labor Department and Travel Department fields.

Notes: Using the Cost boxes is a simple method for tracking your service costs. However, there is another method, which is usually more accurate. To use this alternate method, you set service costs and rates in the Contract Types Service Rates tab. This screen gives you the ability to set a number of different costs for labor and travel. For details, see **Chapter 20: Setting Labor and Travel Rates**. If you set parameters in the Contract Types Service Rates tab, set the three Cost boxes below to Ø.

When you place parts and supplies on service workorders, the department and cost default to the Dept and Cost boxes in the Pricing Record in the Item window. (If the Dept box is blank in the Pricing Record for your location, the system uses the Dept box in the Master Record.)

Service Department/Cost

In the Service Department box, specify the default department to which income or cost generated from preventive maintenance workorders will be posted. This box defaults to the department that corresponds to the general ledger minor account specified in the Basic Contracts Dept field in the (EZ1S) screen.

In the corresponding Cost box, specify the default cost percentage of a service workorder for contracts created using this contract type. The cost is the product of this percentage and the amount billed, as specified in the At \$ box, described above (At \$ x Cost %= Cost). The Cost box defaults to the percentage specified in the Service Contracts Cost field in the (EZ1S) screen. You can enter two digits before the decimal and one after the decimal.

Labor Department/Cost

In the Labor Department box, specify the default department to which income or cost generated from labor will be posted. This box defaults to the department that corresponds to the general ledger minor account specified in the Labor field in the (EZ1S) screen.

In the corresponding Cost box, specify the default cost percentage of labor for contracts created using this contract type. The cost is the product of this percentage and the amount billed for labor ($\text{Labor} \times \text{Cost \%} = \text{Cost}$). The default percentage is the percentage specified in the Labor Contracts Cost field in the (EZ1S) screen. You can enter two digits before the decimal and one after the decimal.

Travel Department/Cost

In the Travel Department box, specify the department to which income or cost generated from travel charges will be posted. This box defaults to the department that corresponds to the general ledger minor account specified in the Travel field in the (EZ1S) screen.

In the corresponding Cost box, specify the default cost percentage of travel charges for contracts created using this contract type. The cost is the product of this percentage and the amount billed ($\text{Travel} \times \text{Cost \%} = \text{Cost}$). The default for this box is the percentage specified in the Travel Cost field in the (EZ1S) screen. You can enter two digits before the decimal and one after the decimal.

Setting the Meter Terms

You can use the boxes in the Contract Types Meters tab, shown in Figure 2, to set the default meter terms for a contract type. The system stores these boxes in the Z-C-METER file.

You can create up to nine different meter records for each contract type..

Nbr

In the Nbr box, specify the number of the meter you are setting up. You can create up to nine meters for a contract, numbering them from 1 to 9.

Description

In this box, enter a useful description of the meter. This description can include as many as 25 alphanumeric characters.

Link to

You use this box to set up virtual meters. Virtual meters let you use a single meter reading to accomplish several tasks. For example, if the contract billing, preventive maintenance, and supplies for a copier are all billed by clicks, but at different intervals, meter 1 may be for contract billing. It represents the actual meter built into the copier. Meter 2 is for preventive maintenance, a virtual meter using the clicks from meter 1. To do this, meter 2 must be linked to meter 1. Meter 3 is for supplies. It is also a virtual meter linked to meter 1.

To set up a virtual meter, enter the number of the actual meter whose clicks will be used. Using the same example, when you set up meter 2 for preventive maintenance, you would link it to meter 1 by typing **1** in the Link To box.

Note: Do not link a meter to itself by specifying the same number in the Meter and Link To boxes. The number in the Link To box must be lower than the number in the Meter box. For example, when creating meter 2, you can specify 1 in the Link To box, since 1 is lower than 2. However, you cannot specify 3 in the Link To box for meter 2.

Min Charge \$

In this box, you can specify a minimum charge for meter billings. If the meter reading exceeds the number of clicks specified in the Over # box, below, the system will charge the amount specified in the Min Charge box or the charge based on the number of clicks, whichever is greater. (For information on how the system calculates a charge based on the number of clicks, see the Over # and At \$ box descriptions above.)

Scale

This box works in conjunction with the Over # and At \$ boxes, below. When billing for clicks, you can use the Scale box to offer quantity breaks or set up a sliding rate scale. To use this feature, you must set up multiple meters for billing clicks, each with a different rate per click. Use the Link To box, above, to link the meters with different click rates to the meter with the lowest number.

- To set up quantity breaks when setting up the meter with the lowest number, set the Scale box to **Y**. Next set the price per click for the lowest quantity by specifying the number of clicks per billing period that you do not charge for in the Over # box. For example, if you charge for every click, enter 0 in the Over # box. Then specify the amount that you charge for each click over that amount in the At \$ box (0.0105, for example).

When you complete the first meter record, create the meter for the first quantity break by entering a meter number that is higher than the first, and specify the first meter number in the Link To box.

For example, if the first meter number is 1, you might specify 2 in the Meter box, and 1 in the Link To box. Set the Scale box for the second meter to **Y**. In the Over # box for this meter, specify the minimum number of clicks a customer must use to receive the first quantity break price. In the At \$ box, specify the price per click. For example, if you charge \$0.0085 per click if the customer uses at least 5000 clicks, you would specify 5000 in the Over # box, and \$0.0085 in the At \$ box.

You can continue in the same manner to set up additional quantity breaks. For example, if you charge \$0.0055 per click if the customer uses 8,000 or more, you might create a record for meter 3, specify 1 in the Link To box, enter **Y** in the Scale box, enter 8000 in the Over # box, and 0.0055 in the At \$ box.

- To set up a sliding scale, when setting up the meter with the lowest number, set the Scale box to **S**. With a sliding scale, you charge one price for the clicks within one range, and another price for clicks within another range.

Using the same example, if you set up the same three meters, but set the Scale box in these meters to **S**, then a customer who used 10,000 clicks would pay \$0.0105 per click for the first 5,000 clicks, \$0.0085 per click for the clicks from 5,001 to 8,000, and \$0.0055 per click for the clicks from 8,001 through 10,000.

Enter your response according to the following:

- Y** Use quantity breaks.
- S** Use a sliding rate scale.
- N (default)** Do not use quantity breaks or a sliding rate scale.

Over #

In this box, you specify the number of clicks that you do not charge for during the billing period. For example, if you specify 1000 in the Over # box and bill meters monthly, then the customer would not be charged for the first 1,000 clicks used in a month. You can enter as many as eight characters.

At \$

In this box, specify the amount per click that you charge for any clicks in excess of the number specified in the Over # box. You can enter two digits before the decimal and as many as four digits following the decimal. For example, suppose you specified 0.01 in the At \$ box, and 1000 in the Over # box. A customer who used 2000 clicks in a month would be billed for 1000 clicks at 0.01 per click.

You can bill contracts by the click, by date, or by a combination of date and clicks. If you bill by date or by a combination of date and clicks, in addition to the Over # and At \$ boxes you also use the Billing Frequency box and the corresponding At \$ box. (These two boxes are described earlier.) These differing methods are described below:

- If you bill by the click, enter **Ø** in the Over # box or leave the box blank, and set the rate per click in the At \$ box. Leave the Billing Frequency and the corresponding At \$ box blank.

- If you bill by a combination of date and clicks, specify the time period in the Billing Frequency box and the rate in the corresponding At \$ box. Specify the number of clicks included without additional charge in the Over # box, and specify the charge for each click that exceeds that amount in the corresponding At \$ box. Specify the meter billing time period in the Freq box (this period may be the same as the period specified in the Billing Frequency box).

Freq

In the Freq box, you specify the default time between meter readings. Specify this time by entering a code. Valid codes include the following:

D Daily	Y Yearly
W Weekly	H Every 18 months
B Biweekly (every two weeks)	2 Every two years
M Monthly	3 Every three years
T Every two months	4 Every four years
Q Quarterly	5 Every five years
S Semi-annually.	

Before billing meters, you must post readings for them. The principal way to do this is through the (EZV) Serial Meter Maintenance screen. The system automatically determines which meters are due for readings when you select the [M] Meter Billing action code in the (EZV) screen. The Freq box determines which meters need to be read. If the time elapsed since a meter was last billed is equal to or greater than the time period specified in the Freq box, then the meter is included.

Department

In this box, specify the default department to which some or all of the income generated by meter clicks will be posted. This box defaults to the department corresponding to the minor (last two digits) in the general ledger account number specified in the Meters field in the (EZ1S) screen.

Department numbers correspond directly to general ledger minor accounts.

Cost %

In this box, specify the default cost for meter income as a percentage of the billing amount. The cost is the product of this percentage and the amount billed for meters ($\text{Cost \%} \times \text{Billed} = \text{Cost}$). The default percentage is the percentage set in the Meters Cost % field in the (EZ1S) screen. You can enter two digits before the decimal and one after the decimal.

The department specified in the First Non-Tax Department field in the (LG3) screen, and all subsequent departments, are non-taxable. Consider your state's tax laws when assigning departments for contracts.

Code

The Contract Billing Report can include meter billings as well as contract billings. The Code box lets you assign a default call code for meter billing calls generated from the Contract Billing Report, in the same way that the Bill Code box is used to assign a default code for contract billing calls.

Enter the code that you want to use as the default for meter billing calls.

Note: If you enter a default code in this box, you must also define the code in the Machine Tools Call Codes tab. Otherwise, the system will use the default call code **mr**, instead. For instructions, see **Chapter 10: Setting Up Call Codes**.

If you do not want to assign a default, leave this box blank. The system will automatically use call code **mr** for meter billing calls generated from the Contract Billing Report.

Service Clicks

In this box, specify the number of clicks between preventive maintenance calls for this meter.

Note: Instead of using this box to specify the number of clicks between PM calls *for this meter*, you can use the Meter Service Clicks # box in the Item Machine Defaults General tab to specify the number of clicks between PM calls *for an entire model*. You can set the clicks between PM calls for each meter or for each model, but not both. If you set the Service Clicks # box in the Contract Detail Meter tab, it will override the setting in the Item Machine Defaults General tab.

You can also specify the interval between preventive maintenance calls by specifying a period of time in the Service Freq box, below. If you specify both a period of time and a number of clicks, the system uses whichever occurs first.

Enter the number of clicks between preventive maintenance calls. You can enter as many as eight digits.

You can specify a service interval for the entire contract in the Service Frequency box, described earlier in this chapter. You can set several service intervals for one contract: one in the Service Frequency box, and one in the Service Clicks # box of each meter you set up for a contract type.

Note: If you create additional meters so that you can specify several different service intervals, you can link these meters to the main meter by using the Link To box, described above. Using the Link To box lets you enter a single meter reading that applies to all of the linked

meters. For example, if you created meter 2 for toner service, and meter 3 for replacing the drum, you could link both of these meters to meter 1.

Service Freq

In this box, you can specify the time interval between preventive maintenance calls. Specify this interval by entering a code. Valid codes include the following:

The Service Freq box only affects meter readings. It does not determine the frequency of meter billings.

D Daily	Y Yearly
W Weekly	H Every 18 months
B Biweekly (every two weeks)	2 Every two years
M Monthly	3 Every three years
T Every two months	4 Every four years
Q Quarterly	5 Every five years
S Semi-annually.	

You can specify a service interval for the entire contract in the Service Frequency box, described earlier in this chapter. You can set several service intervals for one contract: one in the Service Frequency, and one in the Service Freq box of each meter you set up for a contract type.

You can also specify the interval between preventive maintenance calls by specifying a number of clicks in the Service Clicks # box, above.

If you specify both a period of time and a number of clicks, the system uses whichever occurs first.

Job Item/Company

These boxes let you specify the item number and company of an item or assembly that is required when preventive maintenance is performed on the part of a machine represented by a meter.

For example, you may have a meter set up for the drum and cleaning unit on a copier, which need to be replaced every 100,000 clicks. After creating an inventory record in the Item window for a drum unit, you would create an assembly in the (EB) Bill Of Materials Link screen that includes both the drum and the cleaning unit. (An assembly is a group of items that are sold as a single unit.) You would then enter the assembly's item number and company in these boxes.

Note: If you use these boxes to specify toner for a copier, and the EPA requires you to include a Material Safety Data Sheet, specifying this sheet as a part of a toner assembly in the (EB) screen can act as a reminder to bring the sheet when delivering the toner.

In the Job Item box, enter the item number for the item or assembly required when preventive maintenance is performed. In the Company box, enter the company corresponding to the item.

Adding Contract Types


- 1 Double-click




- 2 In the Machine Menu, click





The Contract Types window opens, displaying the information for the last type selected. The cursor moves to the Contract box.

- 3 Click  to add a new contract type.
- 4 In the Contract box, specify the name of the contract type you are adding. You can specify up to four alphanumeric characters. For example, if you are adding a full service maintenance agreement contract type, you could enter FSMA in this box.
- 5 In the remaining boxes, enter the appropriate information in each box in the Contract Types tab. For details, see the heading **Box Definitions**.
- 6 When you finish entering the information in the Types tab, you can enter meter information for this contract type.




If you do not want to enter meter information, click  to save your changes.


If you want to enter meter information, click the Meter tab. Go to **Step 7**.

- 7 In the Meter tab, click .
- 8 The cursor moves to the Nbr box. In this box, enter the meter number of the first meter you want to assign this contract type.
- 9 When the cursor moves to the Link To box, complete any necessary boxes in this tab.
- 10 When you finish, click  to save your changes.

Copying Contract Types

You may need to create contract types that are similar to those you have already added. If so, you can save time by copying an existing contract type and making any changes.

- 1 Double-click .
 - 2 In the Machine Menu, click . The Contract Types window opens, displaying the information for the last type selected. The cursor moves to the Contract box.
 - 3 In the Contract box, retrieve the contract type that you want to copy. For example, if you want to copy the settings from the UMBR contract type to a different contract type, enter UMBR in this box.
 - 4 Click  to copy an existing contract type.
 - 5 The Copy Contract dialog box opens, and the cursor moves to the New Contract box. Enter the new contract type you want to create.
 - 6 If you want to create multiple copies of the existing contract type, click the Multiple option. The system redisplay the Copy Contract dialog box when you finish entering information for the first contract type.
 - 7 In the Options portion of this dialog box, check each box that you want to apply to this new contract type.
 - **Meters:** Check this box if you want the system to copy all of the original contract type's meters to the new contract type. If you do not want to copy all the original contract type's meters, leave this box blank.
 - **Renewals:** Check this box if you want the system to copy all of the original contract type's renewal information to the new contract type. If you do not want to copy the original contract type's renewal information, leave this box blank.
 - **Service Rates:** Check this box if you want the system to copy all of the original contract type's service rate information to the new contract type. If you do not want to copy the original contract type's service rate information, leave this box blank.

- 8 When you finish, click OK.
- 9 If you clicked the Multiple option, the system redisplay the Copy Contract dialog box so you can specify contract type information for the next contract type. This dialog box continues to appear until the Multiple box is unchecked.
- 10 When you finish specifying contract type information, the cursor returns to the Contract box. The system copies the settings to the contract type you specified. At this point, you can retrieve the new contract type so you can modify the newly created record.
- 11 Enter the appropriate information in each box in the Contract Types tab. For details, see **Box Definitions**.
- 12 When you finish entering the information in the Types tab, complete any necessary boxes in each of the other tabs. For example, you can set up meters for this contract type, set up lease information, department breakouts and so on.
- 13 When you finish entering information for this contract type, click  to save your changes.

Chapter 16: Setting Up Lease Contracts

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Understanding Lease Contracts

The Serialized application lets you easily manage your internal leases and also allows you to bill lease customers separately from your regular billings. The serialized leasing feature gives you the ability to monitor your lease contracts until the buy out is billed.

You can set up default parameters for your lease contracts in the Contract Types Lease tab, as shown in Figure 1. This tab lets you specify default leasing terms, billing frequency, and service amounts. When you sell a lease contract, the system uses these settings to generate the default contract terms. You can override these defaults when you sell the contract, if necessary.

After you sell a lease contract, the system creates a record showing the terms of this contract in the Contract Detail window. A tab in the Contract Detail window contains the terms of the lease. This tab is called the Contract Detail Lease tab.

You can also specify a buy out option for the lease. For example, if the customer decides to purchase the machine at the end of the lease or at any time during the lease, you can specify how much you want to charge for the machine as either a portion of the selling price, the fair market value of the item, or only \$1.00.

Figure 1: The Contract Types Lease Tab

The screenshot shows a software window titled "Type: 2MTR (2 METERS FOR BILLING OF THE AC)". The window has a menu bar with "File", "Databases", and "Help". Below the menu bar is a toolbar with various icons. The main area has several tabs: "Types", "Meters", "Lease", "Order Entry", "Departments", "Renewals", and "Service Rates". The "Lease" tab is currently selected and active. It contains the following fields and options:

- Description: [Redacted]
- Terms: Months # []
- Billing Freq [] at \$ []
- Bill Code []
- Billing Cost % []
- Dept []
- Service Amount \$ []
- Nbr of First Payments # []
- Nbr of Last Payments # []
- Buy Out Options:
 - Percent of Sell Price --> []
 - \$1.00
 - Fair Market Value
 - None

Box Definitions

The following text describes each box in the Contract Types Lease tab. These boxes are listed in the order the cursor moves through the tab. (A contract type must be set up for leasing in the Contract Types Types tab. See **Chapter 15: Setting Up Contract Types** for instructions.)

Contract Type

In this box, specify the name of the contract type for which you are setting up leasing parameters. You can specify up to four alphanumeric characters.

Description

Click this box to enter a lease description. You can specify up to 30 characters in this box. When you sell a lease contract using this contract type in serialized order entry, the system displays the description you enter in this box. After you complete the sale, and retrieve the item in the Contract Detail Lease tab, the system displays the leasing contract description in the Description box. (We recommend that you set up descriptions for your lease contract types that include service.)

Terms: Months

Specify the length of the lease in months in this box. For a one year lease, for example, type 12.

Billing Freq

In this box, specify the default billing period for lease contracts created using this contract type. Specify this period by entering one of the following codes:

D Daily	Y Yearly
W Weekly	H Every 18 months
B Biweekly (every two weeks)	2 Every two years
M Monthly	3 Every three years
T Every two months	4 Every four years
Q Quarterly	5 Every five years
S Semi-annually.	

At \$

In this box, specify a flat rate that will be charged at each billing period. The amount you enter becomes the default billing amount for lease contracts using this contract type. You can enter up to five digits before the decimal and two after the decimal. (The decimal does not appear until the cursor moves to the next box.) If you do not want to specify a default billing amount, leave this box blank.

Specifying a default leasing contract cost is optional. You may want to set the cost of the machine when the lease is sold. Check with your accounting department to determine the way in which you want to track the cost.

The department specified in the First Non-Tax Department field in the (LG3) Order Entry Parameters screen, and all subsequent departments, are non-taxable. Consider your state's tax laws when assigning departments for contracts.

Customers who lease using this contract type will be placed on a lease auto-billing schedule. Each time you create billings through the (EZY) Serial Maintenance Report Selection screen, the system checks each customer's auto-billing schedule to determine whether a billing is due.

Bill Code

You can use this box to assign a default billing code for calls generated from the Contract Billing Report. This code is used to track billings from the history file. (You can print this report through the (EZY) screen.) Enter the code that you want to use as the default, if any.

If you do not want to assign a default, leave this box blank. The system will automatically use call code **I** for calls generated from the Contract Billing Report.

Note: If you enter a default code in this box, you must also set up the code in the Machine Tools Call Codes tab. Otherwise, the system will use the default call code **I**, instead. For details, see **Chapter 10: Setting Up Call Codes**.

Billing Cost

In this box, enter the default cost of a lease contract billing as a percentage. You can enter two digits before the decimal and one after the decimal.

The cost is the product of this percentage and the amount billed. For example, if the contract billing amount is \$100.00, and you specify 50 in the Billing Cost box, the cost is \$50.00.

Chart 1: The Department and corresponding G/L Sales Minor Account Numbers

Department Number	G/L Sales Minor Account Number
1 – 9	01 – 99
A – J	11 – 20
K – T	21 – 30
U – Z	10

Dept

In this box, specify the default sales department to which the income generated from lease billings will be posted. This box defaults to the department that corresponds to the minor (last two digits) specified in the Basic Contracts field in the (EZ1S) screen. Department numbers correspond directly to general ledger minor accounts, as shown in Chart 1.

Service Amount \$

In this box, specify the default service amount for this contract type. The amount you specify in this box is added to the billing amount. For example, if this contract type is set up to bill on a monthly basis for \$100, and you enter \$25 in this box, the total billing due per month is \$125.

The income from the amount you specify in this box is posted to the billing department specified in the Billing Department box in the Contract Types Types tab. Department numbers correspond directly to general ledger minor accounts, as shown in Chart 1. (For more information on department numbers and general ledger account numbers, refer to your online documentation.)

Note: You specify only the service amount here. A number of parameters in the Contract Types Types tab let you specify other contract terms relating to service. For details, see **Chapter 15: Setting Up Contract Types**.

To bill a lease customer for the first and last payments when he purchases the lease, specify 1 in the # Of First Payments field, and 1 in the # Of Last Payments box.

Any service amount that is billed with the lease will update the contract history record for contract profitability and history purposes.

Nbr Of First Payments #

In this box, specify the default number of beginning payments you want to require for this contract type. For example, if you want to bill the customer for one payment when the lease begins, enter 1 in this box. The system multiplies the number you enter in this box by the billing amount in the At \$ box to determine the amount due.

Nbr Of Last Payments #

If you require customers to pay the last payment (or the last several payments) when they purchase the lease, specify the number of last payments in this box. For example, if you want to bill the customer for the last payment when the lease begins, enter 1 in this box. The system multiplies the number you enter in this box by the billing amount in the At \$ box to determine the amount due.

Buy Out Options

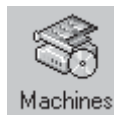
In these boxes, you can specify the buy out terms for this lease contract type. You can specify that the system charge the customer a percentage of the selling price of the item, charge the customer \$1.00, or charge the customer the fair market value of the item.

Enter your response according to the following:

- **Percent of Sell Price:** The system will charge the customer a percentage of the selling price. (If you choose this option, specify the percentage of the selling price you want to use in the corresponding box. If a lease customer can buy out a machine for 75 percent of the selling price, for example, specify 75 here.) To determine the selling price, the system will multiply the percentage in this box by the amount in the Buy Out Options: Percent of Sell Price box in the Contract Detail Lease tab.
- **\$1.00:** The system will charge the customer \$1.00.
- **Fair Market Value:** The system will charge the customer the fair market value for the item based on the amount specified in the Buy Out Options: Fair Market Value box in the Contract Detail Lease tab.

Changing the Parameters

- 1 Double-click




- 2 In the Machine Menu, click



The Contract Types window opens,

displaying the information for the last type selected. The cursor moves to the Contract box.

- 3 In the Contract box, select the contract type for which you want to specify lease terms.
- 4 After you retrieve the contract type, click the Lease tab.
- 5 Enter the appropriate responses in each of the boxes. For a description of the boxes, see the heading **Box Definitions**.
- 6 When you finish changing the parameters, click  to save your changes.

Chapter 17: Setting Up Contract Type Departments

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Understanding Contract Departments

If you're only posting the income to one department, it is not necessary to set up this screen.

Instead all of the income goes to that department.

In the Serialized application, you can post the income from contract, meter, and lease billings to up to 10 different general ledger departments, instead of just one. For example, you can divide this income between the service department, the sales department, the supplies department, and the parts department. You can set up default department breakouts for each contract type in the Contract Types Departments tab, as shown in Figure 1.

You can break out income from only contract billings, or both contract and meter billings. You can also break out the income on lease billings to up to 10 different G/L departments. You can break out the income based on a fixed dollar amount or on a percentage. However, to break out the income from contract billings, and to defer this income, you must break out the income by percentage. If you break out the income by dollar amount, it cannot be deferred.

If you break out the income by percentage, the total of all the percentages you specify must equal 100 percent. For example, if you break out income among departments A, B, and C, the breakout for the departments may appear as follows:

- 1) Dept: A \$ 40%
- 2) Dept: B \$ 40%
- 3) Dept: C \$ 20%

Figure 1: the Contract Types Departments Tab

The screenshot shows the 'Contract Types Departments' tab. At the top, the window title is 'Type: 2MTR (2 METERS FOR BILLING OF THE AC)'. Below the title bar is a menu bar with 'File', 'Databases', and 'Help'. A toolbar contains various icons. The main area has several tabs: 'Types', 'Meters', 'Lease', 'Order Entry', 'Departments' (selected), 'Renewals', and 'Service Rates'. Below the tabs, there is a 'Department Breakout' dropdown menu set to '4'. Underneath are three sections for 'Contract', 'Meter', and 'Lease', each with a dropdown menu. Below these are three tables, each with 10 rows and 5 columns: 'Dept', '\$', '%', 'RC', and 'Defer'. The first table (Contract) has a '4' in the 'Dept' column of the first row. The other two tables (Meter and Lease) are empty.

If you break out the income by dollar amount, the total dollar amounts you specify must equal the total billing amount, which is set in the At \$ box in the Contract Types Types tab.

Suppose you set the At \$ box to \$500, as shown in Figure 2. The breakout for departments 4, 5, and 6 may appear as follows:

- 1) Dept: 4 \$ \$300.00
- 2) Dept: 5 \$ \$100.00
- 3) Dept: 6 \$ \$100.00

You can view and change department breakouts for your contracts in the Contract Detail Departments tab, as shown in Figure 3. In addition, when you sell or renew contracts in the Serialized Order Entry window, you can change the default departments.

Specifying Department Breakouts

To specify department breakouts for contract, meter and lease billings:

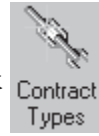
- 1 Double-click  .

Figure 2: The At \$ Box in the Contract Types Types Tab

The screenshot shows a software window titled "Type: 2MTR (2 METERS FOR BILLING OF THE AC)". The window has a menu bar with "File", "Databases", and "Help". Below the menu bar is a toolbar with various icons. The main area is divided into several tabs: "Types", "Meters", "Lease", "Order Entry", "Departments", "Renewals", and "Service Rates". The "Types" tab is active. In the "Types" tab, there are several input fields and checkboxes. The "Contract" field contains "2MTR". The "Billing" section has "Freq" set to "Y" and "at \$" set to "500.00". The "Cost %" field is empty. The "Code" field is empty. The "Dept" field is set to "4". The "Description" field contains "2 METERS FOR BILLING OF THE AC" and the "Extended" field contains "CUMULATE OF CLICKS.". There are also fields for "Service Type", "Service Frequency", "Coverage", "PM Code", "Tech Qualification", and "Accumulate Clicks". At the bottom, there are sections for "Supplies Included Class Range", "Non-Contract Parts Class Range", "Contract Lengths", and "Department". The "Department" section has "Service" set to "D", "Labor" set to "K", and "Travel" set to "E". The "Cost %" for "Travel" is set to "75.0".

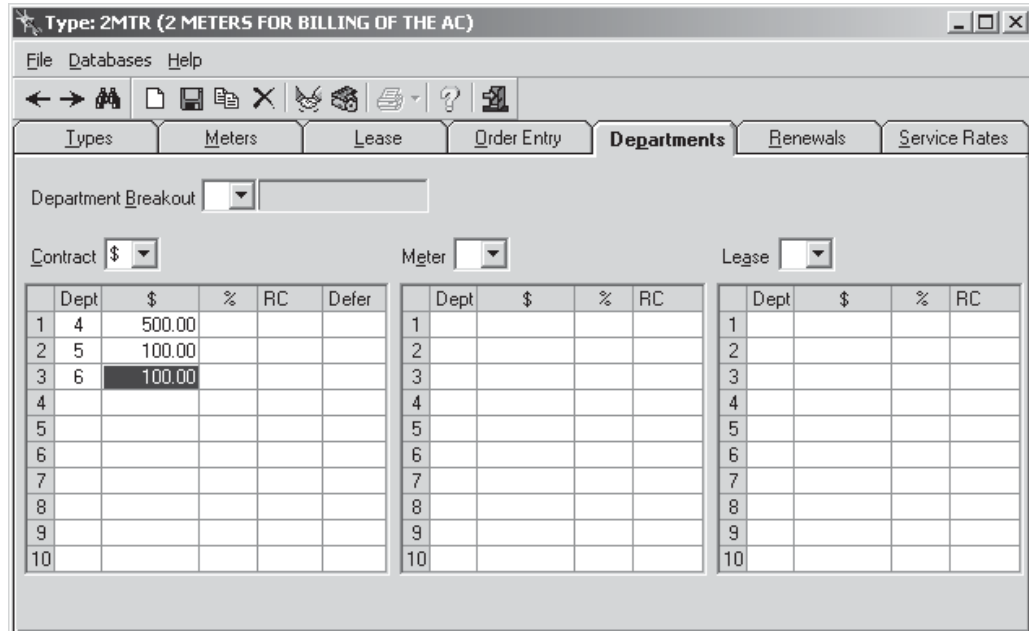
You cannot change the department in the first Contract Dept box. This field defaults to the department specified in the Dept box in the Contract Detail Contract tab for this contract type. To change the first department, you must use the Contract Detail Contract tab.

- 2 In the Machine Menu, click



- 3 In the Contract box, retrieve the contract type for which you are setting up department breakouts. For example, if you are setting up departments for a full service maintenance agreement contract type, you could enter FSMA in this box.
- 4 Click the Departments tab.
- 5 Click the down arrow in the Department Breakout box and indicate whether you want to break out the income from contract billings, meter billings, or both contract and meter billings. Enter your response according to the following:
 - C Break out the income from contract billings only.
 - B **(default)** Break out the income from both contract and meter billings.
- 6 When you finish, click to save your changes.

Figure 3:
Displaying the Department Breakouts in the Contract Detail Departments Tab



Setting Up Departments for Contract Billings

You can use the Contract box on the left section of the tab to break out the income for contract billings.

If you are not breaking out the income on contract billings, go to the heading **Setting Up Departments for Meter Billings**. To break out income on contract billings, use the following steps:

- 1 In the Contract box, you can break out the income by dollar amount or by percentage on contract billings. Click the down arrow in this box, and:
 - Type \$ to break out this income by a dollar amount on contract billings. Go to **Step 2**.
 - Type % to break out this income by a percentage on contract billings. Go to **Step 3**.
- 2 In the first \$ box, enter the dollar amount to post to this department, and press Tab. You can enter five numbers before the decimal, and two numbers after the decimal.
- 3 In the first % box, enter the percentage to post to this department. You can enter two numbers before the decimal, and one number after the decimal.
- 4 In the corresponding RC box, click the down arrow and enter the responsibility center for this department. You can choose from salesperson, technician, or territory.
- 5 In the corresponding Defer box, click the down arrow and specify whether the income billed from this item is deferred or recognized immediately. Since you can click the Defer box for each department, you can defer income for each of the 10 departments, or you can defer income for only specific departments.
- 6 In the second Dept box, specify the sales department to which a portion of the income generated from contract billings is to be posted.
- 7 In the corresponding \$ box, you can specify the amount to post to this department as a dollar amount, or as a percentage.
 - When entering a dollar amount, you can enter five numbers before the decimal, and two numbers after the decimal. Go to **Step 8**.
 - To enter the amount as a percentage, click the % box and enter the percentage to post to this department. You can enter two numbers before the decimal, and one number after the decimal.


- 8 In the corresponding RC box, click the down arrow and enter the responsibility center for this department. You can choose from salesperson, technician, or territory.
- 9 The cursor moves to the next Dept box so you can continue to enter departments. You can specify up to 10 different departments.

Setting Up Departments for Meter Billings

You can use the Meter box in the middle section of the tab to break out the income for meter billings.


If you are not breaking out the income on meter billings, go to the heading **Setting Up Departments for Lease Billings**. To break out income on meter billings:

- 1 In the Meter box, you can break out income by dollar amount or by percentage on meter billings. Click the down arrow in this box, and:
 - Type \$ to break out this income by a dollar amount on meter billings.
 - Type % to break out this income by a percentage on meter billings.
- 2 In the first Dept box, enter the sales department to which a portion of the income generated from meter billings is to be posted. This box defaults to the meter department set in the Department box in the Contract Types Meters tab. Dollar or percentage amounts you specify are posted to the department you enter in the first Dept box. After posting to the first department, the remaining amounts are posted to any additional departments you enter.
 - To break out this income by a dollar amount, go to **Step 3**.
 - To break out this income by a percentage, go to **Step 4**.
- 3 In the first \$ box, enter the dollar amount to post to this department, and press Tab. You can enter five numbers before the decimal, and two numbers after the decimal. Go to **Step 5**.
- 4 In the first % box, enter the percentage to post to this department, and press Tab. You can enter two numbers before the decimal, and one number after the decimal.
- 5 In the corresponding RC box, click the down arrow and enter the responsibility center for this department. You can choose from salesperson, technician, or territory.
- 6 In the second Dept box, you can continue to enter the sales departments to which a portion of the income generated from meter billings is to be posted.

- 7 When you finish, click .

Setting Up Departments for Lease Billings

You can use the Lease box on the right hand side of the tab to break out the income for lease billings. To break out income on lease billings:

- 1 In the Lease box, you can break out the income by dollar amount or by percentage on lease billings. Click the down arrow in this box and:
 - Type \$ to break out this income by a dollar amount on lease billings.
 - Type % to break out this income by a percentage on lease billings.
- 2 In the first Dept box, enter the sales department to which a portion of the income generated from lease billings is to be posted. The dollar or percentage amounts you specify post to the department you enter in the first Dept box. After posting to the first department, the remaining amounts are posted to any additional departments you enter.
 - To break out this income by a dollar amount, go to **Step 3**.
 - To break out this income by a percentage, go to **Step 4**.
- 3 In the first \$ box, enter the dollar amount to post to this department, and press Tab. You can enter five numbers before the decimal, and two numbers after the decimal. Go to **Step 5**.
- 4 In the first % box, enter the percentage to post to this department, and press Tab. You can enter two numbers before the decimal, and one number after the decimal.
- 5 In the corresponding RC box, click the down arrow and enter the responsibility center for this department. You can choose from salesperson, technician, or territory.
- 6 In the second Dept box, you can continue to enter the sales departments to which a portion of the income generated from meter billings is to be posted.
- 7 When you finish, click .

Chapter 18: Customizing Tickets and Billings

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Understanding Ticket and Billing Parameters

This chapter describes the fields in the (EZ1B) Serial Contract/Meter Billing Parameters screen and the boxes in the Contract Types Order Entry tab. This chapter also includes instructions for making changes.

You can further customize tickets through the DDMS Report Writer. (For details, see your online documentation.)

Several fields in the (EZ1B) screen affect how you handle your contract and meter billings. For example, you can specify a default order-writer number for generating billings.

The remaining fields in this screen affect how you handle your contract and meter renewals. These fields are not covered in this chapter. For information about setting these parameters, see **Chapter 22: Customizing Renewal Billings in (EZ1B)**.

You can also use the Contract Types Order Entry tab to customize the information that prints on your contract billings, meter billings, and workorders. (You print serial tickets and invoices through the Serialized Order Entry and Commercial Order Entry windows.) Each box in the Contract Types Order Entry tab lets you print specific information on the ticket. The order in which the boxes are listed follows the order in which the information prints. For example, since the Contract Billing Text box appears last, this text appears last on the ticket as a ZZZZ (End of Order) special.

Figure 1: The Contract Types Order Entry Tab

The screenshot shows a software window titled "Type: 2MTR (2 METERS FOR BILLING OF THE AC)". The window has a menu bar with "File", "Databases", and "Help". Below the menu bar is a toolbar with various icons. The main area of the window is divided into several tabs: "Types", "Meters", "Lease", "Order Entry" (which is the active tab), "Departments", "Renewals", and "Service Rates".

The "Order Entry" tab contains the following sections and fields:

- Contracts:**
 - Serial Text & Location
 - Type & Description
 - Billing Period
 - Remarks
 - Time
- Meters:**
 - Description
 - Used Copies
 - Copies Allowed
 - Contract Copies
 - Current Date & Reading
 - Tech Use Copies
 - Net Copies
 - Copies From & To
 - Previous Date & Reading
 - Used Copies Minus Tech Use
 - Last Bill Date & Copies
- Billing Text:** A large empty text area for entering billing text.

Sample invoices are provided at the end of this chapter to illustrate the information that prints.

You normally update meter billing information by entering meter readings in the (EZV) Serial Meter Maintenance screen. For details, see your online help.

Box Definitions

The following text describes fields and boxes in the (EZ1B) screen and the Contract Types Order Entry tab. Fields that affect billing contracts and meters are described first, followed by the fields that let you customize your serial pick tickets and invoices.

Fields in the (EZ1B) Screen

The text below describes the fields in the (EZ1B) screen that affect generating billings. These are listed in the order the cursor moves through the screen. The remaining fields in the (EZ1B) screen determine how the system handles your contract and meter renewals. These fields are not covered in this chapter. For information concerning setting these parameters, see **Chapter 22: Customizing Renewal Billings in (EZ1B)**.

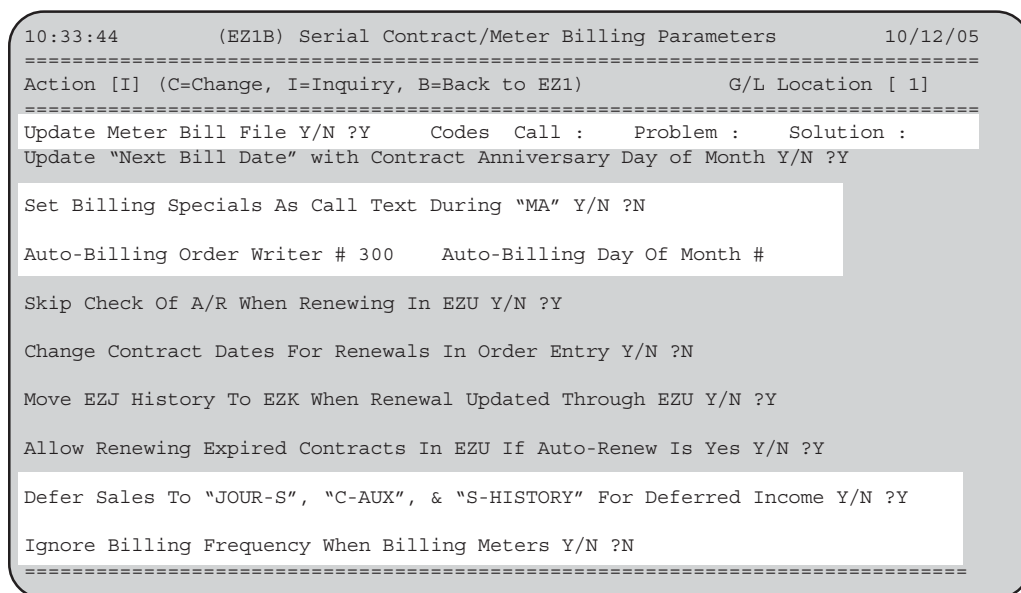
Update Meter Bill File

When you enter meter readings in the Work Orders window and Serialized Order Entry window, you can update meter readings in the Z-M-BILL file. The meter reading in this file is used to generate meter billings.

Note: This field has no affect on how meter readings are stored in the Z-AUX and Z-METER files. Those fields are automatically updated when you enter meter readings.

When the Z-M-BILL file is updated, the meter readings in the Current Reading and Tech Use # boxes in the Contract Detail Meter tab are also updated. The Current Meter Reading and Tech Use fields in the (EZV) Serial Meter Maintenance screen are updated, too.

Figure 2: Fields in the (EZ1B) Screen that Affect Billings and Their Default Settings



Note: If you also set the Display Contract/Meter Information field in the (EZ1L) Serial Log In Parameters screen to X, you are prompted to enter meter readings when you log a call in the Work Orders window. If you set the Update Meter Bill File field to Y, the readings you enter when logging calls also update the Z-M-BILL file.

- Y **(default)** Update the Z-M-BILL field when you enter meter readings in the Work Order and Serialized Order Entry windows.
- N Do not update the Z-M-BILL file when you enter meter readings in the Work Order and Serialized Order Entry windows.

Codes Call

This field works with the Update Meter Bill File field, described above. If you set the Update Meter Bill File field to N, a call is created that lists the new meter reading each time you renew a metered contract. In the Codes Call field, enter a call code for this call. (You use service call codes to indicate the type of service problem the customer has.)

This field is valid only if you set the Update Meter Bill File field to N. If you set that field to Y or leave it blank, leave the Codes Call field blank.

Note: You must either use an existing call code or create one in the Machine Tools Call Codes tab. For more information on call codes, refer to **Chapter 10: Setting Up Call Codes**.

Problem

This field works with the Update Meter Bill File field, described above. If you set the Update Meter Bill File field to N, a call is created that lists the new meter reading each time you renew a metered contract. In the Problem field, enter a problem code for this call. You use problem codes to describe the customer's service problem.

This field is valid only if you set the Update Meter Bill File field to N. If you set that field to Y leave the field blank, leave the Problem field blank.

Note: You must either use an existing problem code or create one in the Machine Tools Call Codes tab. For more information on call codes, refer to **Chapter 10: Setting Up Call Codes**.

Solution

This field works with the Update Meter Bill File field, described above. If you set the Update Meter Bill File field to N, a call is created that lists the new meter reading each time you renew a metered contract. In the Solution field, you enter the solution code for this call. You use solution codes to indicate how the customer's service problem was resolved.

This field is valid only if you set the Update Meter Bill File field to N. If you set that field to Y or leave the field blank, leave the Solution field blank.

Note: You must either use an existing solution code or create one in the Machine Tools Call Codes tab. For more information on call codes, refer to **Chapter 10: Setting Up Call Codes**.

Set Billing Specials As Call Text During “MA”

In this field, you can indicate whether special lines appear as text in the calls created when you generate billings. You specify any special lines to print on contract billings, meter billings, and work orders in the Contract Types Order Entry tab. When you generate billings, calls are automatically created in the Work Orders window. This field lets you include these special lines as text in the calls you create when you generate billings. Enter your response according to the following:

- Y** Include the special lines as text in calls created when you generate the billings.
- N (default)** Do not include these special lines as text in the calls.

Auto-Billing Order Writer #

This field lets you set up a default order-writer number for generating billings. The order-writer number you enter prints on pick tickets and invoices when you create contract billings, meter billings, and renewals.

This field can help you keep your Serialized and regular Order Entry invoices separate. If you enter an order-writer number in this field and use it to generate billings, you can also use the same order-writer number when you limit the invoices that print in the (TR) Order Entry Reports screen.

If you leave this field blank, the order taker number defaults to 1.

Note: You must either use an existing order-writer number or create one in the Salesperson Technician tab. For details on setting up order-writer numbers, see **Chapter 14: Setting Up Technicians**.

Auto-Billing Day Of Month #

In the Auto-Billing Day Of Month # field, specify the day of the month for the next billing date.

Once the ticket is created in the (EZY) Serial Maintenance Report Selection screen, the Next Bill Date box in the Contract Detail History tab is updated. The Next Bill Date box displays the date when the next billing is due.

If you specify a day of the month in the Auto-Billing Day Of Month # field, the Next Bill Date is set to the specified day of the month in the next billing period. Suppose you bill contracts monthly, and you set the Auto-Billing Day Of Month # field to 10. You generate a billing on 08/15/04. Instead of setting the Next Bill Date to 09/15/04, the Next Bill Date is set to 09/10/04.

The Auto-Billing Day Of Month # parameter also affects contracts that you renew. When you renew a contract, the Contract Window displays the contract's default terms. The Contract Window includes the Next Bill Date box. If you specify a number in the Auto-Billing Day Of Month # field, it is used to calculate the default date for this Next Bill Date box.

If you defer contract billing income, the system uses the Auto-Billing Day Of Month # parameter is used to calculate the next batch date. If you set this parameter to 10, for example, the next batch date is set to the 10th of the next month.

- To set the Next Bill date to a specific day of the month, enter that number in the Auto-Billing Day Of Month # field.
- If you are not setting the Next Bill date to a specific day of the month, leave this field blank.

Defer Sales To "JOUR-S", "C-AUX", & "S-HISTORY" For Deferred Income

This field applies to contracts with deferred income and lets you specify how you handle sales information for deferred contract billings.

When you perform an (M)[A] Daily Backup Procedure and flush the contract invoices to the sales journal, you can send the entire amount to the sales journal (JOUR-S), customer history (C-AUX), and salesperson history (S-HISTORY), or it can defer sales information.

Note: The entire amount of the sale goes to Accounts Receivable or cash, no matter how you set this field.

If you defer sales information, the entire amount of the billing is divided by the number of months the billing covers. One month's portion posts to the JOUR-S file. One month's portion posts to the C-AUX file, and the last posts to the S-HISTORY file. An invoice is created each time you post deferred income at month end. This invoice, which has the same number as the original invoice, is used to update the sales files. Because these invoices have only one month's portion of the entire sale, *you cannot reprint an invoice with the entire sale amount from the sales journal.*

Since only one month's portion of the sale is posted to the sales journal, salespeople receive only one month's portion of the commission when you print the Salesperson Master Report With Commission Analysis or the Salesman Compensation Report through the (UR) Sales Reports screen. The remainder of the commission is spread out over the life of the contract, as is the income.

Deferring sales information also affects your tax reports — only one month's portion of the tax for a deferred sale appears on the Monthly Sales Tax Report that you print through the (U) Sales Selectors or (UR) screen.

Note: DDMS recommends that you check with your accountant before deciding how to set this parameter. State and federal laws may determine whether you can legally defer sales information. For example, if your state requires you to pay all sales tax billed when you sell the contract, you must set this field to N.

Y Defer sales information.

N (default) Do not defer sales information.

Ignore Billing Frequency When Billing Meters

Usually, you only bill meters according to the setting in the Bill Freq box. For example, if the Bill Freq box is set to M for monthly, the meter is billed once a month, even if you generate meter billings once a week.

This field lets you bill the meter whenever there are billable clicks on the meter. This means that any time you generate meter billings, any meter with billable clicks is billed, regardless of the billing frequency specified in the Bill Freq box in the Contract Detail Contract tab. This field lets you override the setting in the Bill Freq box.

Y Bill meters every time a meter has billable use on it when you generate meter billings, regardless of the frequency specified in the Bill Freq box in the Contract Detail Contract tab.

N (default) Bill meters only when the meter is due for a billing (according to the Bill Freq box in the Contract Detail Contract tab).

Boxes in the Contract Types Order Entry tab

The text below describes each box in the Contract Types Order Entry tab. They are listed in the order the cursor moves through the tab.

Serial Text & Location

You can use this box to print the serial item's text, the serial item's location, or both.

If you print the serial item's text, the information from the Text box in the Machine Detail Master tab prints. This information prints directly below the item that the billing or workorder is for.

If you print the serial item's location, the first line from the Location box in the Machine Detail Master tab prints.

If you print both the text and the location, the location prints to the right of the text. (A sample contract billing invoice is shown at the end of this chapter.) If you're printing only the location, it prints directly below the item that the billing or workorder is for. Enter your response according to the following:

- Y Print both the serial text and location. The last character from the Text box in the Machine Detail Master tab is dropped when it prints the information. The last four characters from the Location box are also dropped.
- T Print only the text, but not the location. All the information from the Text box in the Machine Detail Master tab prints.
- L Print only the location. The entire first line of the text entered in the Location box in the Machine Detail Master tab prints.
- N **(default)** Do not print the text or the location.

Billing Period

In this box, you can specify whether to print the contract billing period. Enter your response according to the following:

- Y Print the contract billing period.
- N **(default)** Do not print the contract billing period on meter billings or workorders.

Type & Description

In this box, specify whether to print the contract's type and description on contract billings, meter billings, and workorders. Enter your response according to the following:

- Y Print the contract's type and description.
- N **(default)** Do not print the contract's type and description.

If you do not enter remarks for a specific contract, remarks from the Customer window in the Contract Detail window display. However, the remarks from the Customer window do not print on tickets; only remarks entered for a specific contract print.

Remarks

In this box, specify whether to print contract remarks. You can print remarks on all contract billings, meter billings, and service workorders; on contract billings and service workorders; or only on service workorders. Enter your response according to the following:

- Y Print contract remarks on contract billings, meter billings, and service workorders.
- S Print contract remarks on both contract billings and service workorders.
- W Print contract remarks only on service workorders.
- N **(default)** Do not print contract remarks.

Time

In this box, specify whether to include time information on invoices by printing the original amount of time included on the contract, the amount of time used, and the amount of time left. Enter your response according to the following:

- Y Print time information on invoices.
- N **(default)** Do not print time information on invoices.

Description

In this box, specify whether to print the description of each meter. Enter your response according to the following:

- Y Print meter descriptions after the meter number.
- N **(default)** Do not print meter descriptions.

If you do not set any of the meter fields to Y, the meter number prints, followed by the last reading for this meter. The current meter reading and date are also listed.

Current Date & Reading

In this box, specify whether to print the current meter reading for this billing along with the date when the reading was entered. Enter your response according to the following:

- Y Print the current meter reading and date, followed by the current meter reading.
- N **(default)** Do not print the current meter reading.

Previous Date & Reading

In this box, specify whether to print the previous meter reading and the date when the reading was entered. Enter your response according to the following:

- Y Print the previous reading and the date, followed by the previous meter reading.
- N **(default)** Do not print the previous reading and date.

Used Copies

In this box, specify whether to print the total number of copies (clicks) used. This number represents the difference between the current and previous meter readings. It includes any copies used by technicians when servicing the machine. (Copies used by technicians may not be billable.) Enter your response according to the following:

- Y Print the total number of copies used. The Copies Used message follows.
- N **(default)** Do not print the total copies used.

You enter the number of copies used by technicians when specifying the current meter reading in the (EZV) screen.

Tech Use Copies

In this box, specify whether to print the number of copies (clicks) used by technicians while servicing the machine. (Copies used by technicians may not be billable.) Enter your response according to the following:

- Y** Print the total number of copies used by technicians. The Copies Used By Tech message follows.
- N (default)** Do not print the total number of copies used by technicians.

Used Copies Minus Tech Use

In this box, specify whether to print the net number of copies (clicks) used, after deducting the copies used by the technician. To calculate this number, subtract the number of copies used by technicians from the total number of copies used. After determining the net number of copies, the number of copies allowed (specified in the Over box in the Contract Detail Meter tab) is subtracted from the net number of copies. The resulting amount is the number of billable copies. You can use the Net Copies field, below, to specify whether the number of billable copies prints. Enter your response according to the following:

- Y** Print the net number of copies used. The Total Copies Used message follows.
- N (default)** Do not print the net number of copies used.

Copies Allowed

In this box, specify whether to print the number of free copies (clicks) allowed during each billing period. This number comes from the Over box in the Contract Detail Meter tab. Enter your response according to the following:

- Y** Print the number of free copies allowed.
- N (default)** Do not print the number of free copies allowed.

Net Copies

In this box, specify whether to print the number of billable copies and the price per copy. To determine the number of billable copies, the number of copies used by technicians is subtracted from the total number of copies used during this billing period. The result is the net number of copies. The number of copies allowed free of charge is then subtracted from the net to calculate the number of billable copies:

$$(\text{Total Copies} - \text{Technician Use}) - \text{Copies Allowed} = \text{Billable Copies}$$

The price per copy comes from the At box in the Contract Detail Meter tab. Enter your response according to the following:

- Y Print the number of billable copies and the price per copy.
- N **(default)** Do not print the number of billable copies.

Contract Copies

In this box, you can specify whether to print the number of contract copies (clicks) as a special line on invoices for renewals and contract billings. Enter your response according to the following:

- Y Print the number of contract copies on invoices.
- N **(default)** Do not print the number of contract copies on the invoices.

Copies From & To

In this box, specify whether to print the beginning and ending clicks (copies) for the contract. These clicks display in the Clicks From # and To # boxes in the Contract Detail Meter tab. Enter your response according to the following:

- Y Print the beginning and ending clicks.
- N **(default)** Do not print the beginning and ending clicks.

Last Bill Date & Copies

In this box, specify whether to print information about the meter's last billing. This information includes the date and the number of billable copies. This information displays in the Last Bill # and Date boxes in the Contract Detail Meter tab. Enter your response according to the following:

- Y Print information about the last billing. Print the date, followed by the number of copies and the Excess Copies Last Billed message.
- N **(default)** Do not print information about the last billing.

Billing Text

In this box, you can enter a message to print on billings and renewals. You can enter up to five lines of text, with up to 50 characters on each line.

Changing the Parameters in (EZ1B)

Serialized Parameters are in the text-based (EZ) Serial Master Menu screen. To access the (EZ) screen, use TBL Client. To set up or change parameters in the (EZ1B) screen:

- 1 From the DDMS Master Menu, type **EZ**.
- 2 When the Serial Master Menu opens, type **1** in the Action field.
- 3 In the (EZ1) Serial Parameters menu, type **B** in the Action field.




- 4 In the (EZ1B) screen, type **C** in the Action field.
- 5 In the G/L Location field, enter the location for which to set the parameters. (This field defaults to the location entered for your terminal in the (L1) Terminal and Tickets Parameters screen.) You can enter a new location or accept the default location:
 - To accept the default location, press Tab.
 - To set parameters for a different location, enter the number. If you enter fewer than two characters, press Tab.

Note: Your responses to the fields in the (EZ1B) screen apply only to the location you specify in the G/L Location field.

- 6 Enter the appropriate responses in each of the fields in this screen. For a description of the fields, see the heading **Field Definitions**. Use the following instructions for cursor movement in this screen:
 - To move the cursor ahead one field, press Tab.
 - To move the cursor back one field, press Backspace.
- 7 When you finish, press Enter until the cursor returns to the Action field. If you press Esc before doing so, your changes are not saved.

Changing the Parameters in Contract Types Order Entry tab

Use the following instructions to change the boxes in this tab:

- 1 Double-click  .
- 2 In the Machine Menu, click  .
- 3 In the Contract Types window's Contract box, select the contract type for which you are setting these report parameters. You can customize contract billings, meter billings, and workorders for different contract types.
- 4 Click the Order Entry tab.
- 5 Enter the appropriate responses in each of the boxes. For a description of the boxes, see the heading **Box Definitions**.
- 6 When you finish, click  .

Sample Invoices

The sample invoices on the following pages show how the information that you select through these parameters looks when it prints.

Four sample invoices are included: a contract billing invoice, a meter billing invoice, a combined contract and meter billing invoice, and a workorder. Each sample shows what prints if you select every available option. (In other words, all boxes in the Contract Types Order Entry tab are set to Y and the text is entered wherever possible.)

These samples use invoice format 4I, which is one of the standard formats provided with your system. (For details about invoice formats, see your online documentation.)

Below each sample is a key, which specifies which parameter is responsible for each optional line on the invoice.

For the sake of clarity, each invoice appears on a single page. However, actually printing invoices with this much information may require two pages, if you use standard seven-inch invoice forms.

Sample Meter Billing Invoice

D.D.M.S., INC.		817-431-0668	05/06/98	2661-0
P.O. BOX 507			SALESMAN 100	TIME 10:16:37
KELLER	TX 76248		WRITER 14	PAGE 1
CUSTOMER #	1 DEPT	CHARGE	FEDERAL	#12-12345678
BILLING ADDRESS		INVOICE	PO #78654	
BETTY PAGE			SHIPPING ADDRESS	
SUITE 645			CLIFF SECORD	
789 ROANOKE AVE			HANGER 3	
KELLER	TX 76248		HOLLIS AIRFIELD	
			LOS ANGELES	CA 92345

ITEM NBR.	CO.	DESCRIPTION	UNIT	QTY	ORDER	B/O	SHIP	UNIT D	EXTENDED
Z123	HIT	HITECH COPIER	EA	1			1	48.200 N	48.20
		SYSTEM #	10026		SERIAL #		10022		
		1 WITH ADF							
		2 METER 1 DESC: METER 1-25000 @.015							
		3 04/05/98 24124 CURRENT READING							
		4 01/05/98 120 PREVIOUS READING							
		5 24004 COPIES USED							
		6 10 COPIES USED BY TECH							
		7 23994 TOTAL COPIES USED							
		8 0 COPIES ALLOWED							
		9 23994 NET COPIES @ .0150 PER COPY							
		10 01/06/98 120 EXCESS COPIES LAST BILLED							
		11 COPIES FROM # 0 TO # 40000							
		12 CONTRACT DATES 08/01/97 TO 08/01/98							
		13 CONTRACT CON1 HITECH COPIER RENTAL							
		14 THIS CONTRACT INCLUDES GUARANTEED REPLACEMENT WITHIN 24 HOURS TAKE ADVANTAGE OF OUR CLEARANCE PRICES ON HITECH COPIERS!							
		15 MODEL Z123 ONLY \$2395 (WAS \$2695) MODEL Z234 ONLY \$3275 (WAS \$3695)							

PLEASE REMIT PAYMENT PROMPTLY		SUB-TOTAL	48.20
		TAX	4.00
		TOTAL	52.20

Key

No.	Controlling Parameter	No.	Controlling Parameter
1	Serial Text & Location Y/N/T/L	9	Net Copies Y/N
2	Description Y/N	10	Last Bill Date & Copies Y/N
3	Current Date & Reading Y/N	11	Clicks From & To Y/N
4	Previous Date & Reading Y/N	12	Billing Period Y/N
5	Used Copies Y/N	13	Type & Description Y/N
6	Tech Use Copies Y/N	14	Remarks Y/N
7	Used Copies Minus Tech Use Y/N	15	Billing Text
8	Copies Allowed Y/N		

Sample Combined Contract and Meter Billing Invoice

ITEM NBR.	CO.	DESCRIPTION	UNIT	QTY	ORDER B/O SHIP QTY	UNIT PRICE	T	EXTENDED
Z123	HIT	HITECH COPIER	EA	1	1	20.000	N	20.00
		SYSTEM # 10026		SERIAL # 10022				
		[1] WITH ADF						
		MONTHLY CONTRACT BILLING FOR 05/04/97						
		P.O. # 12345						
		OUR ANNUAL PAPER PALLETTE SALE BEGINS ON FEB. 1!						
		[2] CONTRACT DATES 03/14/97 TO 04/14/97						
		[3] CONTRACT CON1 HITECH COPIER RENTAL						
		[4] THIS CONTRACT INCLUDES GUARANTEED REPLACEMENT WITHIN 24 HOURS						
Z123	HIT	HITECH COPIER	EA	1	1	48.200	N	48.20
		SYSTEM # 10026		SERIAL # 10022				
		[1] WITH ADF						
		[5] METER 1 DESC: METER 1-25000 @.015						
		[6] 04/05/97 24124 CURRENT READING						
		[7] 01/05/97 120 PREVIOUS READING						
		[8] 24004 COPIES USED						
		[9] 10 COPIES USED BY TECH						
		[10] 23994 TOTAL COPIES USED						
		[11] 0 COPIES ALLOWED						
		[12] 23994 EXCESS COPIES @ .0150 PER COPY						
		[13] 04/06/97 120 NET COPIES LAST BILLED						
		[14] COPIES FROM # 0 TO # 40000						
		[15] TAKE ADVANTAGE OF OUR CLEARANCE PRICES ON HITECH COPIERS!						
		MODEL Z123 ONLY \$2395 (WAS \$2695)						
		MODEL Z234 ONLY \$3275 (WAS \$3695)						
		PLEASE REMIT PAYMENT PROMPTLY						
						SUB-TOTAL		68.20
						TAX		6.82
						TOTAL		75.02

The top portion of this invoice was left off so that all of the contract and meter information could be printed on a single page.

Key

No. Controlling Parameter

- [1] Serial Text & Location Y/N/T/L
- [2] Billing Period Y/N
- [3] Type & Description Y/N
- [4] Remarks Y/N
- [5] Description Y/N
- [6] Current Date & Reading Y/N
- [7] Previous Date & Reading Y/N
- [8] Used Copies Y/N

No. Controlling Parameter

- [9] Tech Use Copies Y/N
- [10] Used Copies Minus Tech Use Y/N
- [11] Copies Allowed Y/N
- [12] Net Copies Y/N
- [13] Last Bill Date & Copies Y/N
- [14] Copies From & To Y/N
- [15] Billing Text

Sample Workorder Invoice

D.D.M.S., INC.	817-431-0668	05/06/97	2661-0
P.O.BOX 507		SALESMAN 100	TIME 10:16:37
KELLER TX 76248		WRITER 14	PAGE 1
CUSTOMER # 1	DEPT	FEDERAL #12-12345678	
BILLING ADDRESS	SERVICE INVOICE	PO #78654	SHIPPING ADDRESS
BETTY PAGE		CLIFF SECORD	
SUITE 645		HANGER 3	
789 ROANOKE AVE		HOLLIS AIRFIELD	
KELLER TX 76248		LOS ANGELES	CA 92345

ITEM NBR.	CO.	DESCRIPTION	UNIT	ORDER QTY	B/O QTY	SHIP QTY	UNIT PRICE	D	EXTENDED
TRAVEL-UC	COP	TRAVEL CHARGE	EA	1		1	5.000	N	5.00
Z123PS	LAZ	HITECH COPIER	EA	1		1	.000	N	.00
		SYSTEM # 10026		SERIAL # 10022					
		1 WITH ADF		;3RD FLOOR IN COPIER ROOM					
		SERVICE WORKORDER # 200848		TECH: 120		CODE: AD			
		2 CONTRACT CON1 HITECH COPIER RENTAL							
		THIS CONTRACT INCLUDES							
		3 GUARANTEED REPLACEMENT WITHIN							
		24 HRS							
LABOR-UC	COP	LABOR CHARGE	EA	1		1	45.000	N	45.00
		ADF JAMMED							
		REMOVED OBSTRUCTION							
PLEASE REMIT PAYMENT PROMPTLY							SUB-TOTAL		50.00
							TAX		4.25
							TOTAL		54.25

Key

No. Controlling Parameter in the Contract Types Order Entry tab

- 1** Serial Text & Location Y/N/T/L
- 2** Type & Description Y/N
- 3** Remarks Y/N/S/W

Chapter 19: Linking Items to Contract Types

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Understanding the Links Between Contract Types and Models

For more information on setting up contract types, see **Chapter 15: Setting Up Contract Types.**

After you set up all your contract types, you can link the contract types to your serialized items (models). You do this by assigning the contract type to your models in the Item Machine Defaults General tab. See Figure 1. You can link each model to as many as 10 different contract types.

Linking Helps you Choose a Contract Type

You might set up three contract types for a copier, for example: one to use when you sell the copier, one for rentals, and one for demos. Linking items to contract types allows you to select available contract types for an item when selling a service contract: the system can display all the contract types that are linked to that model. It also gives you the option to sell a service contract when you sell a machine.

After you link the contract types to your items, you can use contract types to sell contracts through the Serialized Order Entry window. When you sell a contract, the contract type, together with the settings in the Item Machine Defaults General tab, provide the default terms for the contract. Nearly all of these default terms can be changed when you complete the sale. Changing these defaults lets you customize each individual contract. Once a contract is sold to a customer, the system automatically adds a contract record in the Contract Detail Contract tab. If the contract includes meters, the system also automatically adds a record for each meter in the Contract Detail Meter tab.

Figure 1: Linking Items to Contract Types in the Item Machine Default sTab

Contract Defaults:		
	Type	R
1	FC36	
2	RENT	Y
3	ST24	
4		
5		
6		
7		
8		
9		
10		

Linking Helps you Track Critical Parts

You can set up a list of replacement parts in the Item Machine Defaults Critical Parts tab for each model. For example, a Critical Parts List for a copier may include replacement toners, drums, and rollers. This list includes the part's item number, company, and description; and how many clicks a part yields before it needs to be replaced.

To use the Critical Parts List, you first set up the list in the Item Machine Defaults General tab. Once you set up the critical parts list in the Item Machine Defaults Critical Parts tab and replace the part, the system automatically creates a record for the item in the Machine Detail Critical Parts tab and lists the date when the critical part was replaced, along with the meter reading. This helps you track the age and performance of the parts in each machine. Since you can view the Critical Parts List when logging calls, you can easily determine which parts the technician needs to bring when servicing a model.

Once all your items are linked to contract types, you can specify default labor and travel rates for each of your contract types. You do this in the Contract Types Service Rates tab. For more information about contract service rates, see **Chapter 20: Setting Labor and Travel Rates**.

Box Definitions

The following text describes each box in the Item Machine Defaults dialog box. These boxes are listed in the order the cursor moves through the screen.

Tech Qualification

In this box, enter a technician qualification code for this item. Qualification codes can be used to organize your technicians according to their skill level and their ability to service different types of equipment. For more information about qualification codes, see **Chapter 13: Setting Up Qualification Codes**.

Equipment Type

In this box, specify the type of equipment this item is assigned to. Equipment types let you group items together. For example, you might have one equipment type that you use for copiers, another for fax machines, and another for printers. You can create equipment types using descriptive words, such as Copier, Printer, and Fax, or develop a system of codes.

When you sell this item in the Serialized Order Entry window, the system automatically updates the Equip Type box in the Machine Detail Other tab with the equipment type you enter in this box.

Application

You can use this user-defined box to organize or further classify serialized items. You can also use the information in this box when sorting and limiting reports.

You can also use equipment types to categorize information on reports. (You can sort and limit reports by equipment type in the (EZY), (EZY), and (EZZ) screens.)

Meter Svc Clicks #

In this box, specify the number of clicks between preventive maintenance (PM) calls for this model.

Note: If you enter information in the Service Clicks # box in the Contract Types Meters tab, the system calculates PM calls based on each meter record. You can set the clicks between PM calls for each contract type or for each model, but not both. The box in the Contract Types Meters tab sets the clicks between PM calls for a contract type: if you set that box, it will override the setting in the Item Machine Defaults General tab.

Dealer Warranty Period/(P/L/B)

In these boxes, you can specify the length of the dealer's warranty and whether the warranty covers parts, labor, or both. The system uses the warranty period when calculating the beginning and ending dealer's warranty dates on a contract.

Note: If you complete both the Mfg Warranty Period box and the Dealer Warranty Period box, the dealer's warranty begins when the manufacturer's warranty expires.

In the Dealer Warranty Period box, specify the length of the dealer's warranty, using the following codes:

D	Day	W	Week	B	Two weeks
M	Month	T	Two months	Q	Quarter
S	Six months	Y	Year	H	Eighteen months
2	Two years	3	Three years	4	Four years
5	Five years.				

Note: One month is defined as 30 days in the Serialized application. Therefore, you would specify **M** for a 30 day warranty, **Q** for a 90 day warranty, and so forth.

In the corresponding (P/L/B) box, specify whether the warranty covers parts, labor, or both. Select the appropriate code from the following:

- P** The warranty covers parts only
- L** The warranty covers labor only
- B** The warranty covers both parts and labor.

Depreciation: Each

In this box, specify how often depreciation will be reported for tax purposes on items that you still own (rentals, loaners, and demos, for example). Enter your response according to the following:

D Day	W Week	B Two weeks
M Month	T Two months	Q Quarter
S Six months	Y Year	H Eighteen months
2 Two years	3 Three years	4 Four years
	5 Five years.	

Note: If you enter a depreciation period in this box and enter the number of months it will take to completely depreciate the item in the Depreciation: Months box, described below, the system will automatically create a depreciation record for you in the Machine Detail Depreciation tab when you sell the rental contract in the Serialized Order Entry window. The system will also automatically add the information to the Z-DEPREC file when you sell the contract.

Depreciation: Months

You can use this box to specify the number of months it will take to completely depreciate the item. The system uses the number of months you specify to calculate the beginning and ending dates for an item's depreciation. (The beginning date is the date on which the item was rented or loaned.) You can specify up to 999 months.

Note: If you enter the number of months it will take to completely depreciate the item in this box and a depreciation period in the Depreciation Each box, described above, the system will automatically create a depreciation record for you in the Machine Detail Depreciation tab when you sell the rental contract in the Serialized Order Entry window. The system will also automatically add the information to the Z-DEPREC file when you sell the contract.

Mfg Warranty Period/(P/L/B)

In these boxes, you can specify the length of the manufacturer's warranty and whether the warranty covers parts, labor, or both.

Note: If you complete both the Mfg Warranty Period box and the Dealer Warranty Period box, the dealer's warranty begins when the manufacturer's warranty expires.

The system displays depreciation information in the Machine Detail Depreciation tab.

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Specify the length of manufacturer's warranty, by entering your response according to the following:

D	Day	W	Week	B	Two weeks
M	Month	T	Two months	Q	Quarter
S	Six months	Y	Year	H	Eighteen months
2	Two years	3	Three years	4	Four years
				5	Five years.

Note: One month is defined as 30 days in the Serialized application. Therefore, you would specify **M** for a 30 day warranty, **Q** for a 90 day warranty, and so forth.

In the corresponding (P/L/B) box, specify whether the warranty covers parts, labor, or both. Select the appropriate code from the following:

- P** The warranty covers only parts
- L** The warranty covers only labor
- B** The warranty covers both parts and labor.

Clicks

This box lets you set up a default number of clicks. If you create a warranty record that includes meters, and the manufacturer's warranty can expire by clicks, enter the number of clicks that the warranty period covers in this box.

When you sell a machine and create a warranty record, the system defaults to use the number of clicks you specify in this box. However, you can always change it. After you complete the order, the system enters the number of clicks you specify in the Warranty Clicks To # box in the Contract Detail Meter tab.

Boxes in the Setup Cost Record

In this section of the tab, you can specify setup costs for the item. This lets you add the cost of setting up a machine to the cost of selling it. When you sell a machine in order entry, the system can add this setup cost to the average cost, giving you a more accurate cost for the machine. (The average cost is the average cost of an item at the time of the sale. It's recorded as part of the information for the sale.)

Labor \$

In this box, enter the labor cost for setting up this item.

Supplies \$

In this box, enter the cost for supplies needed to set up this item.

Parts \$

In this box, enter the cost for parts needed to set up this item.

Freight \$

In this box, enter the freight cost for this item.

Total \$

This box lists the total setup cost for the machine. It is for display only.

Boxes in the Contract Defaults Record

The boxes in this record show the different contract types that this item (model) is linked to and whether this contract can be used as a rental contract for the item. If you're going to use this item as a rental, loaner, or demo item, you must set the R (Rent) box to Y for each appropriate contract type.

In addition, if you set up the Contract Defaults Record, when you sell a contract for this item in serialized order entry, the system will display a list of the contracts linked to this item, so you can choose the contract that you want to use.

Type

In this box, specify the contract type that you want to link this machine to. You can enter up to four characters.

R

In this box, specify whether this contract can be used as a rental, demo, or loaner contract for this item, or if the contract is only for use when the customer owns or leases the item. Enter your response according to the following:

- Y Allows this item to be rented, demonstrated, or loaned using this contract.
- N **(default)** Requires that this contract type be used for this item when the customer owns or leases it.

Boxes in the Critical Parts Tab

Critical parts are items that need to be replaced at certain intervals — by a certain date or number of clicks. For example, Copier X might require Toner 123. You would specify Toner 123 in the Critical Parts List for Copier X, as well as the average number of clicks Toner 123 yields. Then, when writing a workorder in the Work Orders window for a customer who uses Copier X, you could refer to the Critical Parts List to see if this machine requires toner yet, and which toner to bring.

Note: If you are linking a generic item, you do not need to complete the Critical Parts List. See the heading **Linking Models to Contract Types**.

You can view the Critical Parts List in the Machine Detail Critical Parts tab.

The Re-set Pick Average Cost box in order entry determines how the average cost for machines will be adjusted. For details, see Chapter 4: Customizing Order Entry.

Replacement Notice: Days Before

In this box, you can enter the number of days for which you want the system to prompt you that a critical part for this machine needs to be replaced. For example, if you want as much as 15 days advance notice, you would enter 15. Each time you log a call for the machine, the system checks to see if the system date is within 15 of the projected next replacement date. If the date is within the 15 days, the system prompts you that the part needs replaced.

Item Number

In this box, specify an item that you want to put on the Critical Parts List for this machine.

Co

In this box, specify a company name for an item that you want to put on the Critical Parts List for this machine.

Description

This box displays the item's description from the Item window. The cursor does not move to this box.

Yield

In this box, specify the expected useful life of this part in thousands of clicks. For example, if Toner 123 can provide 60,000 copies, you would enter 60 in the Yield box. You can specify up to 999K (or 999,000) clicks in this box.

%


You use this box to have the system prompt you when the next projected reading is within a certain percentage of the actual meter reading. The system uses the percentage you specify along with the current meter reading, and the next meter reading to determine when the part needs to be replaced.

Suppose you want the system to prompt you when the next projected reading is within 10 percent of the actual meter reading for the part. In this case, you would set this box to 10.




Linking Models to Contract Types

- 1 Double-click






- 2 Select the machine (model) that you want to link contract types.
- 3 Click  or type **Ctrl + M**.

- 4 If there are no records for this item, the There Are No Machine Records for this Item message appears. Click Yes.







- 5 The Item Machine dialog box opens, and the cursor moves to the Tech Qualification box. Enter the appropriate responses in the Tech Qualification through the Set Up Costs boxes. For a description of these boxes, see the heading **Box Definitions**.
- 6 In the Contract Defaults Type box, you can link the item (model) to a contract type. Enter a valid contract type in the Type box.
- 7 In the R box, specify whether this contract type can be used as a rental, demo, or loaner contract for this item or whether the contract is only for use when the customer owns the item. You can link this item to a maximum of 10 different contract types.
- 8 When you finish specifying contract type information, click the Critical Parts tab. Most machines have parts that need to be replaced at specific intervals. You can use this tab to create a list of replacement parts for each item a technician might need when servicing a machine. When you log calls for the machine, you can also view the list to determine if it is time for the part to be replaced.
- 9 In the Replacement Notice: Days Before box, you can enter the number of days for which you want the system to prompt you that a critical part for this machine needs to be replaced. For example, if you want as much as 15 days advance notice, you would enter 15. Each time you log a call for the machine, the system checks to see if the system date is within 15 of the projected next replacement date. If the date is within the 15 days, the system prompts you that the part needs replaced.
- 10 You can use the Item Number through % boxes to add a list of critical part items for this machine. Click each box and enter the appropriate information. If you cannot recall the item number, click  to open the Item Query dialog box. For more information concerning these boxes, see **Box Definitions**. You can enter up to 12 critical parts for each machine.
- 11 When you finish linking contract types and entering critical parts for this machine, click .
- 12 When the cursor returns to the Item window, click  to save your changes.

Changing Item Default Settings

- 1 Double-click .

- 2 Select the machine (model) that you want to change.
- 3 Click  or type **Ctrl + M**. The Item Machine dialog box opens.
- 4 Click each box you want to change and enter the new information over the existing information.
- 5 Click .
- 6 When the cursor returns to the Item window, click  to save your changes.

Deleting the Default Settings for an Item

- 1 Double-click  .

- 2 Select the machine (model) for which you want to delete critical parts.
- 3 Click  or type **Ctrl + M**. The Item Machine dialog box opens.
- 4 Click .
- 5 At the Are You Sure prompt, click Yes.
- 6 Click .
- 7 When the cursor returns to the Item window, click  to save your changes.

Chapter 20: Setting Labor and Travel Rates

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The system stores parameters from the Contract Types Service Rates tab in the Z-C-RATES file.

Understanding Labor and Travel Rates

Once you have set up your contract types, you can assign them default labor and travel rates in the Contract Types Service Rates tab. Each contract type, together with the settings in the Contract Types Service Rates tab, provide the default settings for a particular type of contract. For example, the contract type for leases would hold all the default settings that you want to use for a lease contract. These defaults provide the basic guidelines for the lease. However, when you sell the contract, nearly all of these default terms can be changed when you complete the sale. At the time of the sale, you can also indicate whether the customer or the contract will be charged for travel and labor. The system then calculates the travel and labor charges for the work order.

You should set up labor and travel rates for each service contract you have. Even if you do not bill the customer for labor and travel, the system will assign all labor and travel costs to the contract. This allows you to accurately monitor and track the actual cost and gross profit figures of your contracts.

The Contract Types Service Rates tab also lets you set labor rates according to the qualifications of the technician who performs the service. You can determine the travel rates you want to charge using the following information:

- Mileage
- Customer's territory
- Percentage of the labor charge.

Figure 1: The Contract Service Rates Tab

The screenshot shows the 'Service Rates' tab in a software application. The window title is 'Type: 2MTR (2 METERS FOR BILLING OF THE AC)'. The 'Service Rates' tab is active, showing fields for labor rates and travel rates. The labor rates section includes a table with columns for 'From', 'To', 'Cost %', 'Regular \$', 'Overtime \$', and 'Weekend \$'. The travel rates section includes two tables: 'Travel Rates By Mileage' and 'Travel Rates By Territory', both with columns for 'Time', 'Charge \$', and 'Miles' or 'From', 'To', 'Cost %', 'Regular \$', 'Overtime \$', and 'Weekend \$'. There are also checkboxes for 'Dispatch or Start Time', 'Travel %', 'Charge for Travel', and 'Territory or Mileage'.

You can also set up labor and travel rates for those customers who do not have contracts. You do this by setting up universal contract types. Begin by assigning a name to the universal contract in the Universal Contract Type field in the (EZ1O) Serial Order Entry Parameters screen. Next, set up a contract type using this universal contract name in the Contract Types Types tab. Then, set up the labor and travel rates for the universal contract in the Contract Types Service Rates tab. These labor and travel rates will be the default rates for workorders involving machines that are not covered by contracts.

Box Definitions

The following text describes each box in the Contract Types Service Rates tab, as shown in Figure 1. The boxes are listed in the order the cursor moves through the tab.

Boxes in the Labor Rates Record

The boxes that you use to set the default labor rates for a contract type are described below. Remember, to accurately determine contract costs, you should set labor rates even if you do not charge the customer for labor.

Labor Per Minutes

In this box, you can specify how many minutes will be covered by the labor rates you set. If you set hourly rates, for example, you could enter 60 in this box. You can specify any number of minutes from 1 to 99.

The number of minutes you specify determines how the system will round up labor times when calculating a labor charge. For example, if you specify 15 minutes, the labor time will be rounded up to the nearest quarter of an hour. If you specify 60 minutes, the labor time will be rounded up to the nearest hour.

Because the system rounds up to the number of minutes you specify, this number of minutes is also the minimum number of minutes charged for labor. If your minimum labor time is higher than the number of minutes in the Labor Per Minutes box, specify the minimum in the Minimum Minutes fbox, described below.

You set labor rates in the Tech Rate Table, described later in this chapter. The system uses the Labor Per Minutes box and the Tech Rate Table to determine the hourly labor rate. If you specify 15 in the Labor Per Minutes box, for example, an amount of \$10.00 in the Tech Rates Table means the hourly rate is \$40.00. If you specify 60, an amount of \$10.00 in the Tech Rate Table means the hourly rate is \$10.00.

Minimum Minutes

In this box, you can specify the minimum labor charge as a number of minutes. You will use this box only when your minimum labor charge is *greater than* the rate for the number of minutes specified in the Labor Per Minutes box.

For example, if you enter 15 in the Labor Per Minutes box, the minimum labor charge is for 15 minutes, since the system will round up any shorter amount of minutes to 15. However, if your minimum labor charge is for 60 minutes, then enter 60 in the Minimum Minutes box. This ensures that 60 minutes of labor will be charged even if the actual labor was only 15 minutes.

Dispatch or Start Time

You can use this box to indicate whether labor time begins when the call is dispatched or when the technician starts working at the customer's site. Enter your response according to the following:

- D** Labor time begins when the call is dispatched.
- S (default)** Labor time begins when the technician starts working at the customer's site.

Boxes in the Labor Rates Table

You set up labor rates in the Labor Rates Table. This table lets you set up different rate levels by using the qualification codes of the technicians who perform the labor. You can set up rate levels in two ways:

- If you charge different rates for different types of labor, you can set up labor rates using the qualification codes of the technicians who perform each type of service.
- If you charge a flat rate for labor, but some technicians cost you more than others, you can indicate this by entering different cost percentages for each range of qualification codes.

You define each level by specifying the range of qualification codes that it applies to. You can specify up to five different rate levels.

From/To

In these boxes, you can specify a range of technician qualification codes to include in the rate level. In the first From box, specify the beginning of the range you want to include. In the corresponding To box, specify the end of the range. (If you are only setting up a single rate level for all labor, you can leave the From and To boxes blank.)

When you enter the range, remember that numbers are sorted before letters. For example, a range of 0-AA includes all numeric qualification codes (0 to 99). Also, because qualification codes are left-justified, they are sorted primarily by the first character: CC comes before D, and 10 comes before 2.

Note: When you bill workorders, the system uses the qualification code for the serial item set in the Qualification box in the Machine Detail Other tab to determine labor charges. However, you can always change the qualification code when billing the work order. (If the Qualification box for the serial item is blank in the Machine Detail Other tab, there is

no default qualification code. Therefore, you may want to leave the first From boxes blank. This way, there will be default rates for those items with blank Qualification boxes.)

Cost %

In this box, you can specify a cost as a percentage of the labor charge. The percentage you specify overrides any percentage set in the Labor Cost % field in the (EZ1S) Serial System Parameters screen.

Regular/Overtime/Weekend

In these boxes, you can specify regular, overtime, and weekend rates for the corresponding rate level. For example, you may want to assign a labor rate of \$10 for a regular time, \$15 for an overtime, and \$20 for a weekend time.

Boxes in the Travel Rates Table

The boxes that you use to set the default travel rates for a contract type are described below. For the system to accurately track and determine your contract costs, you should set travel rates even if you do not charge the customer for travel.

Travel %

In this box, you can specify travel charges as a percentage of the labor charge. For example, if you specify 10 in the Travel box, the travel charge equals 10 percent of the labor charge.

Note: If you specify travel as a percentage of the labor charge, the system ignores the settings in the Travel Rates by Mileage and Travel Rates by Territory Tables. If you want to figure travel charges using mileage or territory, you *must* leave the Travel % box blank.

Charge For Travel

In this box, you can set a default response for the Charge box in the Work Order Window when you bill work orders. You bill work orders through the Work Order Window. When you do, the system displays the Work Order Window, which includes the Include Travel and Charge boxes. These boxes work together and allow you to charge the customer for travel time on the work order.

If you set the Include Travel box to **Y**, the system calculates travel charges for the work order. If you set the Charge box to **Y**, the system bills the customer for travel charges. However, if you set the Charge box to **N**, the system assigns travel costs to the contract so you can track the charges, but the customer is not billed for the actual travel time.

Setting up the technician qualification codes is optional.

You must set up qualification codes in the Machine Tools Qualifications tab before you can use them to set up labor rates. For details, see

**Chapter 13:
Setting Up
Qualification
Codes.**

In this box, you can specify the default for the Charge box in the Work Order Window. Enter your response according to the following:

- Y (default)** Sets the default for the Charge box to **Y**. The customer will be charged for the travel on the work order.
- N** Sets the default for the Charge box to **N**. If you also set the include Travel box to **Y**, the system will track the travel charges incurred, but will not bill the customer on the work order.

Territory or Mileage

You can use this box to specify whether travel charges will be calculated by territory or by the number of miles traveled.

Note: The system uses the settings in this box only if you leave the Travel % box blank. If you enter a percentage in the Travel % box, the system will use the percentage you specify to calculate travel rates and it doesn't matter what you enter in this box.

Enter your response according to the following:

- M (default)** Calculates travel charges by mileage. (Complete the Travel Rates By Mileage Table. See the heading **Boxes in the Travel Rates By Mileage Table**.)
- T** Calculates travel charges by territory. (Complete the Travel Rates By Territory Table. See the heading **Boxes in the Travel Rates By Territory Table**.)

Boxes in the Travel Rates By Mileage Table

If you want to calculate travel charges by mileage, you must complete the Travel Rates By Mileage Table. Each of the boxes in this table are described below.

Note: The system uses the settings in this table only if you leave the Travel % box blank. If you enter a percentage in the Travel % box, the system will use the percentage you specify to calculate travel rates and it doesn't matter what you enter in this table.

Regular Charge \$/Miles

You can use the Regular Charge \$ box to specify a dollar amount. In the corresponding Miles box, you can enter the number of miles this charge applies to. For example, if you charge \$1.00 for every five miles, enter 1.00 in the Regular Charge \$ box, and 5 in the corresponding Miles box.

Overtime Charge \$/Miles

You can use these boxes to specify higher travel rates for when your technicians work overtime hours. In the Overtime Charge \$ box, specify the overtime dollar amount. In the corresponding Miles box, enter the number of miles to which this overtime charge applies.

Weekend Charge \$/Miles

You can use these boxes to specify higher travel rates for when your technicians work weekend hours. In the Weekend Charge \$ box, specify the weekend dollar amount. In the corresponding Miles box, enter the number of miles to which this weekend charge applies.

Boxes in the Travel Rates By Territory Table

If you want to calculate travel charges by territory, you must complete the Travel Rates By Territory Table. Each of the boxes in this table are described below.

Note: The system uses the settings in this table only if you leave the Travel % box blank. If you enter a percentage in the Travel % box, the system will use the percentage you specify to calculate travel rates and it doesn't matter what you enter in this table.

You define each level by specifying the range of territory codes that it applies to. You can specify up to five different rate levels.

From/To

In these boxes, you can specify a range of territories to include in the rate level. In the first From box, specify the beginning of the range you want to include. In the corresponding To box, specify the end of the range.

When you enter the range, remember that numbers are sorted before letters. For example, a range of 0-AA includes all numeric territory codes (0 to 99). Also, because territory codes are left-justified, they are sorted primarily by the first character: CC comes before D, and 10 comes before 2.

Cost %

In this box, you can specify a cost as a percentage of the labor charge.

Regular/Overtime/Weekend

In these boxes, you can specify regular, overtime, and weekend amounts for the corresponding rate level. For example, you may want to assign a travel rate of \$10 for a regular time, \$15 for an overtime, and \$20 for a weekend time for one territory and \$12, \$17, and \$22 for a different territory.

You must set up territories in the Machine Tools Territories tab before the system can calculate travel rates by territory.

For details, see

**Chapter 12:
Setting Up
Territory Codes.**

You should also specify a territory for each customer in the Territory box in the Customer Machines tab. If you do, the system will display the rate for the customer's territory as the default travel charge for a workorder. If you do not specify a customer's territory, there will be no default travel charge.

Changing the Parameters

- 1 Double-click




- 2 In the Machine Menu, click



The Contract Types window opens,

displaying the information for the last type selected. The cursor moves to the Contract box.

- 3 In the Contract box, select the contract type for which you are setting parameters.
- 4 After you retrieve the contract type, click the Service Rates tab.
- 5 Enter the appropriate responses in each of the boxes. For a description of the boxes, see the heading **Box Definitions**.
- 6 When you finish changing the parameters, click  to save your changes.

Copying the Parameters

If you have a number of contract types that need the same labor and travel rate parameters, you can save time by copying these parameters. To do this, you set the parameters for one contract type, and then create copies for the other contract types that need the same parameters.

- 1 Double-click





- 2 In the Machine Menu, click



The Contract Types window opens,

displaying the information for the last type selected. The cursor moves to the Contract box.

- 3 In the Contract box, retrieve the contract type that you want to copy. For example, if you want to copy the settings from the UMB contract type to a different contract type, enter UMB in this box.
- 4 After you retrieve the contract type, click the Service Rates tab.

- 5 Click  to copy an existing contract type. The Copy Contract dialog box opens, and the cursor moves to the New Contract box.
- 6 Enter the new contract type you want to create.
- 7 If you want to create multiple copies of the existing contract type, click the Multiple option. The system redisplay the Copy Contract dialog box when you finish entering information for the first contract type.
- 8 In the Options portion of this dialog box, check each box that you want to apply to this new contract type.
 - **Meters:** Check this box if you want the system to copy all of the original contract type's meters to the new contract type. If you do not want to copy all the original contract type's meters, leave this box blank.
 - **Renewals:** Check this box if you want the system to copy all of the original contract type's renewal information to the new contract type. If you do not want to copy the original contract type's renewal information, leave this box blank.
 - **Service Rates:** Check this box if you want the system to copy all of the original contract type's service rate information to the new contract type. If you do not want to copy the original contract type's service rate information, leave this box blank.
- 9 When you finish, click OK.
- 10 If you clicked the Multiple option, the system redisplay the Copy Contract dialog box so you can specify contract type information for the next contract type. This dialog box continues to appear until the Multiple box is unchecked.
- 11 When you finish specifying contract type information, the system copies the settings to the contract type you specified. At this point, you can retrieve the new contract type so you can modify the newly created record.
- 12 When you finish entering the information in the Types tab, complete any necessary boxes in each of the other tabs. For example, you can set up meters for this contract type, set up lease information, department breakouts and so on. You can move to each of these tabs by clicking them.
- 13 When you finish entering information for this contract type, click  to save your changes.

Part 5: Renewals

Once you've entered existing information and set up your passwords and reports, the last step to getting started is to set up your renewal parameters.

In the Serialized application, you can renew contracts using several different methods:

- You can generate renewals in the (EZU) Serial Contract Maintenance screen.
- You can renew contracts by billing them in the (EZY) Serial Maintenance Report Selection screen.
- You can resell the contract to the customer in the Serialized Order Entry window.

Since renewing contracts in the (EZU) screen gives you the most control over the renewal process, this is often one of the preferred methods for renewing. You can automatically increase billing amounts and costs, analyze cost and income, and hold renewals until the customer pays the invoice. You can also generate the renewals before the contract expires. For example, you can renew all contracts that are within 30 days of expiration, or all contracts that have used 90 percent of their clicks.

Since this method can be customized to suit the way you do business, the way in which your parameters are set can influence how you renew contracts in the (EZU) screen. Before you renew contracts, DDMS recommends that you set parameters in the (EZ1B) Serial Contract/Meter Billing Parameters and Contract Types Renewals tab.

Chapter 21: Setting Up Contract Renewals details how to set parameters in the (EZ1B) screen. This screen lets you set up default options for renewing contracts in the (EZY) and (EZU) screens. **Chapter 22: Customizing Renewal Billings in (EZ1B)** details how to set the fields that directly affect renewing contracts in the (EZU) screen and Serialized Order Entry window.

Chapter 21: Setting Up Contract Renewals

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Understanding Renewals

You can set up renewal parameters for contract types in the Contract Types Renewals tab. The system stores these parameters in the Z-C-RENCAN file.

A contract type holds the default settings for a particular type of contract. For example, the contract type for rentals would hold all the default settings that you want to use for a rental contract. These defaults provide the basic guidelines for a contract. In the Contract Types Renewals tab, you can assign default renewal settings for your contract types. For example, you can specify the number of days or the maximum number of clicks allowed before the contract type expires. There are several methods available for renewing your contracts.

- You can generate renewals in the (EZU) Serial Contract Maintenance screen.
- You can renew contracts by billing them in the (EZY) Serial Maintenance Report Selection screen.
- You can resell the contract to the customer in the Serialized Order Entry window.

Since the boxes in this tab directly affect renewals, DDMS recommends that you review them before generating renewals. Each of the boxes in this tab is described in this chapter under the heading **Box Definitions**. If you want to set up these boxes, you can change them. (See the heading **Changing the Parameters**.)

Figure 1: The Contract Types Renewals Tab

The screenshot shows a software window titled "Type: 2MTR (2 METERS FOR BILLING OF THE AC)". The window has a menu bar with "File", "Databases", and "Help". Below the menu bar is a toolbar with icons for navigation and actions. The main area is divided into tabs: "Types", "Meters", "Lease", "Order Entry", "Departments", "Renewals", and "Service Rates". The "Renewals" tab is active and contains the following fields and options:

- Contract Form: [Text Field]
- Lease Form: [Text Field]
- Generate Renewals Expiring Within:
 - Days
 - % of Maximum Clicks
 - Hours
- Forms:
 - Fax: [Text Field]
 - Email: [Text Field]
- Up Percents for Renewals:
 - Billing Cost %:
 - Billing Amount %:
 - Meter Overage Amount %:
 - Renewal Meter Reading Call Code: [Text Field]
- Contract Cancellation:
 - Cancellation Form: [Text Field]
 - Reletting Fee %:
 - Minimum Fee \$: [Text Field]
 - Maximum Fee \$: [Text Field]

Box Definitions

The following text describes each box in the Contract Types Renewals tab, as shown in Figure 1. The boxes are listed in the order the cursor moves through the screen.

Contract Form

In this box, you can specify the name of the contract form you want to use for this contract type. Contract forms list the agreed upon rates and terms of the contract. You can send this form to the customer.

If you enter a form in this box, the system will prompt you to print the forms when you renew contracts in the (EZU) screen. You can also use the [F] Contract Forms function in the (EZU) Serial Contract Maintenance screen to print copies of a contract at any time. The system defaults to the form that you enter in this box when printing a contract form.

Two contract forms are included for use with the serialized module: SERVC2 and MAINT. If you use the contract type to sell contracts that include meters, you should use the SERVC2 contract form. If you use the contract type to sell only service contracts that don't include meters, enter MAINT in this box.

Note: Contract forms consist of a Report Writer format and, optionally, a text file. You can use one of two contract forms provided by DDMS (described above), modify the provided forms, or create your own. (For more details about contract forms, see **Appendix B: Contract Forms**.)

Lease Form

In this box, you can specify the name of the contract form you want to use for your lease contract types. The system uses contract forms to print copies of a contract. The contract form lists the agreed upon rates and terms for the lease contract.

Contract forms consist of a Report Writer format and, optionally, a text file. Currently, DDMS does not provide a contract form for use with lease contracts. To use a lease contract form, you can modify either the SERVC2 or MAINT contract form, or create your own. You do this using the DDMS word processing or text editor program and the Report Writer module. For details, see **Appendix B: Contract Forms**.

Once you set up a contract form and specify it in the Lease Form box, you'll have the option of printing copies of lease contract forms each time you sell a leasing contract. You can also use the [F] Contract Forms function in the (EZU) Serial Contract Maintenance screen to print copies of a contract at any time.

Days

In this box, indicate when renewals will be generated for contracts by specifying the number of days before the contract expires. Suppose you specify that

the contract will expire in 60 days, when you generate renewals through the (EZU) screen, the system includes all contracts that are within 60 days of expiration. The system determines the contract's expiration date and when renewals should be generated based on the specifications of the Use Projected Expiration Date box in the (EZ1S) screen.

- If the Use Projected Expiration Date field in the (EZ1S) screen is blank or set to **N**, the system uses the Contract To box in the Contract Detail Meter tab to determine when renewals are due.
- If the Use Projected Expiration Date field in the (EZ1S) screen is set to **Y**, the system uses the Projected Expiration Date box in the Contract Detail Meter tab to determine when a metered contract should be renewed. The system uses the average number of clicks used per month to calculate the projected expiration date.

If a contract's ending date is specified in the Contract To or Projected Expiration Date boxes it will be included if the number of days before expiration is the same or fewer than the number you specify in the Days box.

Note: If a contract has both a projected expiration date and a date in the Contract To box, the system first checks the projected date, and then checks the Contract To date when searching for contracts eligible for renewal. Therefore, if a contract has both dates, the system uses the earlier date to renew the contract.

% of Maximum Clicks

In this box, indicate when renewals will be generated for contracts by specifying a percentage of the total number of clicks allowed. (The total number of clicks allowed for a contract is specified in the Contract Clicks Length box in the Contract Detail Meter tab.)

If a contract's length is specified as a number of clicks in the Contract Clicks Length box, the system determines what percentage of the total clicks have been used. If this percentage meets or exceeds the percentage specified in the % Of Maximum Clicks box, the contract will be included for renewal.

Note: If you specify a contract's length as a period of time and as a number of clicks, the system uses both the Days box and the % Of Maximum Clicks box to determine which contracts to include for renewals.

Hours

In this box, indicate how many hours the contract will have left when it's eligible for renewal. (The total number of hours allowed for a contract are specified in the Time box in the Contract Detail Contract tab. The total number of hours the contract has left is shown in the Left box in the Contract Detail Contract tab.)

If a contract's length is determined only by a time block (no date range or number of clicks is set), any hours that remain on the contract when you renew it will be added to the renewed contract. Suppose that you sold a time block contract for 40 hours, and you renewed it when there were 4 hours left. If you renew by time alone, the renewed contract will have a total of 44 hours. *If you renew by time and by date or clicks, any remaining hours will not be added to the renewed contract.*

Renewal Forms/Fax/Email

You can use the Forms: Fax and Forms: Email boxes to specify the name of the contract forms you want to use when renewing contracts. Click each box and enter the renewal form you want to use when faxing and emailing renewal forms to your customer.

A contract form that's used for renewals is called a renewal form. The system uses these renewal forms to print copies of a renewed contract. Renewal forms include the agreed upon rates and terms.

Two contract forms are included for use with the serialized module: SERVC2 and MAINT. If you use this contract type to renew contracts that include meters, you should use the SERVC2 contract form. If you use this contract type to renew only service contracts that don't include meters, you can use the MAINT contract form.

Once you set up a renewal contract form and specify it in the Renewal Form: Fax and Email boxes, you'll have the option of printing copies of contract forms each time you renew a contract. You can also use the [F] Contract Forms function in the (EZU) Serial Contract Maintenance screen to print copies of a contract at any time.

Note: Renewal forms, like all contract forms, consist of a Report Writer format and, optionally, a text file. You can use one of the contract forms provided by DDMS described above, modify these forms, or create your own. You must set up contract forms before you can use them. For details, see **Appendix B: Contract Forms**.

Billing Cost %

In this box, you can indicate how much you want a contract's billing cost to increase when you renew the contract. This box applies when you renew contracts in either the (EZU) or (EZY) screens.

To increase the billing cost, you enter the increase as a percentage in the Billing Cost % box. When you renew a contract, the system displays this percentage as the default in the Up Cost % box in the Machine Contract Detail Contract tab. However, you can still change the cost percentage when renewing. When you complete the renewal, the system multiplies the up cost percentage by the current billing cost to determine the billing cost for the renewal invoice.

The forms specified in the Contract Form and Renewal Form: Fax and Email boxes can be the same form, or you can create separate forms for each purpose.

The current billing cost appears in the Bill Cost box in the Machine Contract Detail Contract tab. If the Bill Cost box is blank, the system calculates the current billing cost by multiplying the billing amount by the percentage specified in the Cost Percent % in the Contract Types Types tab.

After you complete the renewal, the up cost percentage will appear in the Up Cost % box in the Contract Detail Contract tab. (If there is already a figure in the Up Cost % box, it will be replaced with the new figure.)

If you don't want to increase the billing cost, leave the Billing Cost box blank.

Note: Any increase you make in the Billing Cost box affects the entire contract type. To make changes to individual contracts, use the Contract Detail Contract tab instead.

Any increase you enter in the Billing Cost, Billing Amount, and Meter Overage Amount boxes affect the renewal billing and each subsequent renewal billing.

Billing Amount

In this box, you can indicate how much you want a contract's billing amount to increase when you renew the contract. This box applies when you renew contracts in either the (EZU) or (EZY) screens.

To increase the billing amount, you enter the increase as a percentage in this box. When you renew the contract, the system multiplies this percentage by the current billing amount, and displays the result as the default billing amount in the Contract Detail window.

If you don't want to increase the billing amount, leave this box blank.

Note: Any increase you make in the Billing Amount box affects the entire contract type. To make changes to individual contracts, use the Contract Detail window instead.

When renewing, you have the option of completing all renewals in a batch. If you select this option, the Contract Window does not appear, and the billing costs, billing amounts, and meter overage amounts automatically increase by the percentages you specify.

Meter Overage Amount

In this box, enter a percentage by which you want the rate per click to increase. When you renew the contract, the system multiplies this percentage by the current overage amount to determine the new amount per click.

The current overage amount is set in the At box in the Contract Detail Meter tab. After the contract is renewed, the new rate per click will replace the old one in the At box. Suppose you currently charge the customer a penny for every click that exceeds the limit. If you want to increase this amount by 15 percent when you renew the contract, you would enter 15 in this box. If you don't want to increase the rate per click leave this box blank.

Note: Any increase you make in the Meter Overage Amount box affects the entire contract type. To make changes to individual contracts, use the Contract Detail Meter tab.

Renewal Meter Reading Call Code

You can use this box to enter a call code that the system can use to generate call backs for metered contracts.

After you generate renewals, the system creates a call back for each metered contract that you generate a pick ticket for. The call backs will appear on the date you specify as the renewal date. They will appear at the time specified in the Business Hours From field in the (EZ1L) Serial Log In Parameters screen. If the Business Hours From field is blank, the calls appear at 00:01 AM (one minute after midnight). These calls serve as a reminder to call customers and obtain a current meter reading before completing the renewal. (You can enter the current meter reading when completing the call. It becomes the current meter reading for the renewed contract.)

Cancellation Form/Reletting Fee/Minimum Fee/Maximum Fee

These boxes are reserved for future use.


Changing the Parameters

- 1 Double-click



- 2 From the Machines Menu, double-click



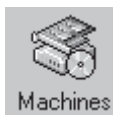
- 3 The Contract Types window opens. In the Contract box, enter the contract type for which you want to set up renewal parameters. For example, if you want to set up renewal parameters for the FSMA contract type, enter **FSMA** in this box.
- 4 After you retrieve the contract type, click the Renewals tab.
- 5 When the cursor moves to the Contract Form box, enter the appropriate responses in each of the boxes in this tab. For a description of the boxes, see the heading **Box Definitions**. Use the following instructions for cursor movement in this tab:
 - To move the cursor ahead one box, press Tab.
 - To move the cursor back one box, press Backspace.
- 6 When you finish changing the parameters in this screen, click  to save your changes.

*You set up call codes in the (EZS) Service Codes/Service Types screen. For details, see **Chapter 10: Setting Up Call Codes**.*

Copying the Parameters


If you have a number of contract types that need the same renewal parameters, you can save time by copying these parameters. To do this, you set the parameters for one contract type, and then create copies for the other contract types that need the same, or similar, parameters.


- 1 Double-click



- 2 From the Machines Menu, double-click



- 3 The Contract Types window opens. Retrieve the contract type that you want to copy. For example, if you want to copy the settings from the UMBR contract type to a different contract type, enter **UMBR** in this box.
- 4 Click  to copy an existing contract type.
- 5 The Copy Contract dialog box opens, and the cursor moves to the New Contract box. Enter the new contract type you want to create.
- 6 If you want to create multiple copies of the existing contract type, click the Multiple option. The system redisplay the Copy Contract dialog box when you finish entering information for the first contract type.
- 7 In the Options portion of this dialog box, check each box that you want to apply to this new contract type.
 - **Meters:** Check this box if you want the system to copy all of the original contract type's meters to the new contract type. If you do not want to copy all the original contract type's meters, leave this box blank.
 - **Renewals:** Check this box if you want the system to copy all of the original contract type's renewal information to the new contract type. If you do not want to copy the original contract type's renewal information, leave this box blank.
 - **Service Rates:** Check this box if you want the system to copy all of the original contract type's service rate information to the new contract type. If you do not want to copy the original contract type's service rate information, leave this box blank.

- 8 When you finish, click OK.
- 9 If you clicked the Multiple option, the system redisplay the Copy Contract dialog box so you can specify contract type information for the next contract type. This dialog box continues to appear until the Multiple box is unchecked.
- 10 When you finish specifying contract type information, the cursor returns to the Contract box. The system copies the settings to the contract type you specified. At this point, you can retrieve the new contract type so you can modify the newly created record.
- 11 Enter the appropriate information in each box in the Contract Types tab. Press Tab to move from box to box.
- 12 When you finish entering the information in the Types tab, complete any necessary boxes in each of the other tabs. For example, you can set up meters for this contract type, set up lease information, department breakouts and so on. You can move to each of these tabs by clicking them.
- 13 When you finish entering information for this contract type, click  to save your changes.

Chapter 22: Customizing Renewal Billings in (EZ1B)

Contents

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There are three different renewal methods you can use.

Understanding Renewal Billing Parameters

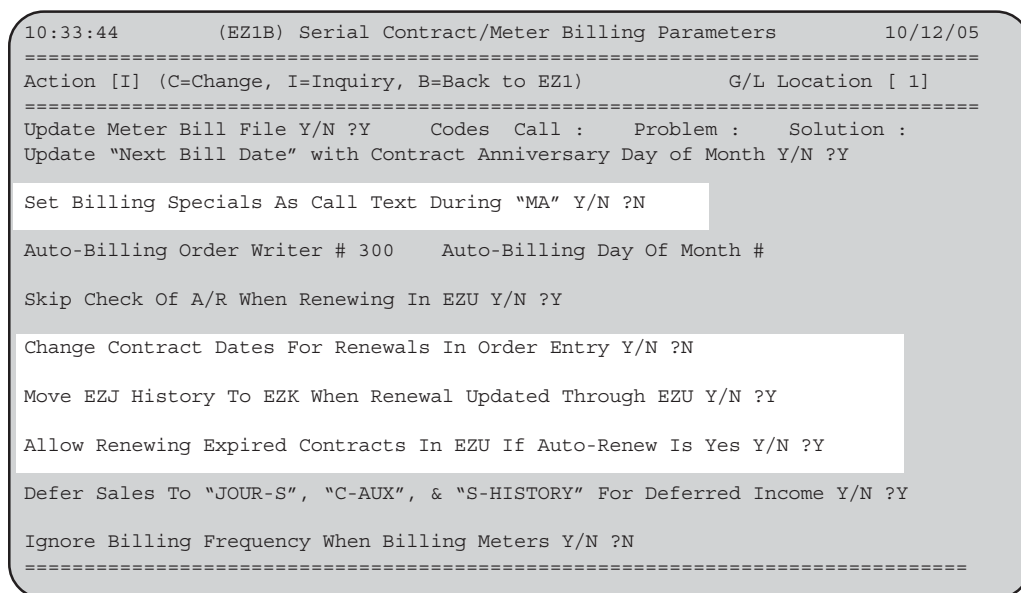
This chapter describes the fields in the (EZ1B) Serial Contract/Meter Billing Parameters screen that affect generating renewals. Four fields in this screen determine how the system handles your contract and meter renewals. For example, you can specify when the system moves current contract history to extended contract history, and indicate whether you want the ability to renew expired contracts. There are several methods available for renewing your contracts.

- You can generate renewals in the (EZU) Serial Contract Maintenance screen.
- You can renew contracts by billing them in the (EZY) Serial Maintenance Report Selection screen.
- You can resell the contract to the customer in the Serialized Order Entry window.

The remaining fields in this screen determine how the system handles your contract and meter billings. These fields are not covered in this chapter. For information concerning setting these parameters, see **Chapter 18: Customizing Tickets and Billings**.

The (EZ1B) screen has no preset options. All of the fields will be blank when you first access the screen. However, DDMS recommends that you view the default responses in this screen to determine whether they fit the needs of your business. Begin by verifying whether the default renewal parameter settings for location 1 are suitable for your business needs. (The default renewal settings for location 1 are shown in Figure 1.)

Figure 1: Fields in the (EZ1B) Screen that Affect Renewals and Their Default Settings



If one or more of the default settings are not acceptable, change them using the [C] Change action code. (See the heading **Changing the Parameters**.)

When you have set the parameters for location 1, set up separate parameters for each additional location that you run differently than location 1. If you do not set up separate parameters for a particular location, the parameters set for location 1 will be used.

Field Definitions

The following text describes the four fields in the (EZ1B) screen that affect generating renewals. These are listed in the order the cursor moves through the screen.

Skip Check Of A/R When Renewing In EZU

This field lets you update the customer's contract record even if the customer hasn't paid the renewal invoice.

Note: This field works in conjunction with the Change Contract Dates For Renewals In Order Entry field, described below, and only applies when that field is set to **N** or left blank.

Enter your response according to the following:

- Y** The system updates the customer's contract record even if the customer hasn't paid the renewal invoice.
- N (default)** The system updates the customer's contract record only after the customer has paid the renewal invoice. (You must complete renewals after posting payment for the renewal invoices in the Accounts Receivable Posting window.)

Change Contract Dates For Renewals In Order Entry

In this field, you can specify how you want to complete the renewal process when you use the (EZU) screen. You can complete the process in two ways. You can final-verify each renewal pick ticket in the Order Entry window using the Final Verify action code, or you can invoice the pick tickets in the (TR) Order Entry Reports screen and then use the [U] Update Renewals function in the (EZU) screen to update the renewal records. Enter your response according to the following:

- Y** You complete the contract renewal by final-verifying the renewal pick tickets in the Order Entry window using the Final Verify action code.
- N (default)** You must complete the contract renewal by invoicing the pick tickets in the (TR) screen. Then you use the [U] Update Renewals function in the (EZU) screen to update the customer's records.

Note: If you renew contracts by reselling them in the Serialized Order Entry window, you should set this field to **Y**. The system uses this field to automatically change the contract's dates when you renew the contract in the Serialized Order Entry window. If you leave this field blank or set it to **N**, to update the contract's dates, you must use the [U] Update Renewals function in the (EZU) screen. For details, see your Serialized online documentation.

Move EZJ History To EZK When Renewal Updated Through EZU

In this field, specify when you want the system to move the information in the Contract Detail History tab to the Contract Detail Renew History tab. (The Contract Detail History tab stores current contract history, and the Contract Detail Renew History tab stores extended contract history.)

You can specify that the system move the history when you create the renewal pick tickets (using the [I] Invoice Renewals function in the (EZU) screen) or when you complete the renewal (using the [U] Update Renewal function in the (EZU) screen). Enter your response according to the following:

- Y** The system automatically renews contracts and updates the information in the Contract Detail Renew History tab when you create the renewal pick tickets.
- N (default)** The system does not move the contract history when you create the renewal pick tickets. To update the information in the Contract Detail Renew History tab, you must use the [U] Update Renewals function in the (EZU) screen.

Allow Renewing Expired Contracts in EZU If Auto-Renew Is Yes

You can use this field to give you the option of renewing contracts that have expired.

Note: This field only applies to those contracts that have the Auto-Renewal box in the Contract Detail Contract tab is set to **Y**.

Enter your response according to the following:

- Y** The system will let you renew expired contracts in the (EZU) screen.
- N (default)** The system will not allow you to renew expired contracts in the (EZU) screen.

Changing the Parameters

Serialized Parameters are in the text-based (EZ) Serial Master Menu screen. To access the (EZ) screen, use TBL Client.

- 1 From the DDMS Master Menu, type **EZ**.
- 2 When the Serial Master Menu opens, select the [1] System action code.
- 3 In the (EZ1) Serial Parameters menu, select the [B] Contract/Meter Billing & Renewals action code.
- 4 In the (EZ1B) screen and select the [C] Change action code.
- 5 In the G/L Location field, enter the location for which you want to set the parameters. (This field defaults to the location entered for your terminal in the (L1) Terminal and Tickets Parameters screen.) You can enter a new location or accept the default location:
 - To accept the default location, press Tab.
 - To set parameters for a different location, enter the number. If you enter fewer than two characters, press Tab.

Note: Your responses to the fields in the (EZ1B) screen apply only to the location you specify in the G/L Location field.

- 6 Enter the appropriate responses in each of the fields in this screen. For a description of the fields, see the heading **Field Definitions**. Use the following instructions for cursor movement in this screen:
 - To move the cursor ahead one field, press Tab.
 - To move the cursor back one field, press Backspace.
- 7 When you finish changing the parameters in this screen, press Enter until the cursor returns to the action code field. If you press Esc before doing so, the system will not save your changes.

Part 6: Getting Started

Before you can practice using the Serialized application, you must enter existing information about the customers, machines, and contracts that you already have. The (EZ+S) Serial Setup screen makes this process easier. Instead of accessing each screen separately, the (EZ+S) screen lets you enter related information in several different screens at once. For more information about setting up existing customer information, see **Chapter 23: Quickly Adding Serial Records**.

You should also decide if you want to password specific screens in the Serialized application to provide system security. By assigning passwords to these screens, and giving them only to responsible personnel, you can prevent unauthorized individuals from viewing or changing confidential business information. You set up serialized screen passwords in the (EZX) Serialized Program Security screen. For details, see **Chapter 24: Setting Passwords**.

You may also want to set up your terminal for use with the Serialized application. If your terminal is set up correctly, when you purchase and receive serialized items in the Purchase Order Entry window, or sell serialized items and contracts in the Serialized Order Entry window, the system will prompt you to enter a serial and system number for each item. You set up your terminal in the (L1) Terminal and Tickets Parameters screen. For instructions, see **Chapter 25: Setting Up Your Terminal**.

You can also increase your report capabilities by cataloging serialized selectors. When a report has been created, it can be cataloged so that it will display in the (EZZ) Serial Selectors screen. To catalog a selector, you must first enter it in the (EZ5) Serialized Standard Reports screen. A list of the reports you can catalog and instructions for cataloging them are in **Chapter 26: Cataloging Serialized Reports**.

Chapter 23: Quickly Adding Serial Records

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While you can use the (EZ+S) screen to quickly add records, you can also add existing records manually.

Understanding the (EZ+S) Screen

Before you can practice using the Serialized application, you must enter existing information about the customers, machines, and contracts that you already have. The (EZ+S) Serial Setup screen makes this process easier. Instead of accessing each screen separately, the (EZ+S) screen lets you enter related information in several different screens at once. Before using the (EZ+S) screen, be sure that you have:

- Set up the Serialized parameters outlined in **Part 2: Parameters**.
- Set up all your contract types in the Contract Types tab as outlined in **Chapter 15: Setting Up Contract Types**.
- Linked items (models) to your contract types in the Item Machine General tab as outlined in **Chapter 19: Linking Items to Contract Types**.

To add customer records in the Customer window, the Add Customer In (A) field in the (EZ1S) Serial System Parameters screen must be set to Y.

When you add records in the (EZ+S) screen, the screens display in succession, so you can enter the information for your customers, items, and contracts. Through the (EZ+S) screen, you can quickly add records in each of the following screens:

- (EZA) Serial Customer Master screen (Customer window) Sets up a customer database record. This step is optional, depending on whether the customer's record is set up in the (A) Customer Master screen (Customer window). If the customer's record is already set up in the (A) screen, you can access the customer's record in the Serialized application and do not need to set up a separate record for the customer in the (EZA) screen (Customer Machines tab). This chapter assumes that the customer record is already set up in the (A) screen or Customer window.
- (EZG) Serial Master screen (Machine Detail window) Sets up Serial Master database records for a serial item, and assigns a customer to the item. Before you can assign a customer to the item, the customer must have a record set up in the (EZA) screen, (A) screen, or Customer window.
- (EZI) Serial Contracts Master screen (Contract Detail window) Sets up a record for a contract and lets you specify the contract's terms. Before you can set up a contract record, there must be a master record for the item in the (EZG) screen or Machine Detail window.
- (EZJ) Serial Contracts Status screen (Contract Detail History tab) Displays information about a contract's current status, including the income and gross profit generated from the contract. There is only one field in this screen that must be set up before using the Serialized application.

- (EZL) Serial Meter Master screen (Contract Detail Meter tab) Sets up a meter record for a contract and lets you specify the contract terms for the meter. Before you can set up a contract's meter record, there must be a contract record in the (EZI) screen or in the Contract Detail Meter tab.
- (EZM) Serial Meter Status screen (Contract Detail Meter tab) Displays a meter's current status, including the income and gross profit generated from the meter and the meter's invoice history. Since this screen displays a meter's status, you do not need to specify information in this screen to get started using the Serialized application.
- (EZH) Serial Depreciation screen (Machine Detail Depreciation tab) Sets up a depreciation record for serial items that you own, including items that you rent, lease, lend, and use as demonstrators. This step is optional, depending on whether you are going to depreciate items and your state depreciation laws. Since this step is optional, information for setting up the (EZH) screen or Machine Detail Depreciation tab is not included in this chapter.

To help you quickly start using Serialized, this chapter includes the screens and field descriptions that you must set up before using the application. Therefore, some screens and fields that do not apply to getting started have been omitted from this chapter. The screens you need to set up are shown in Figure 1. There are four basic steps to setting up a customer to use serialized:

- Assign the customer the appropriate items (models).
- Specify the customer's contract information.

Figure 1:
Screens that You
Access to Get
Started Using
Serialized

10:07:46 Serial Setup Screen 07/01/98

Ser#: _____ Sys#: _____ - _____ Contract # _____

Text: _____ Type desc: _____

Item#: _____ Co: _____ Customer: _____

Desc: _____ Location: _____

Customer # _____ Dept : _____ Name : _____

1) Customer Master	Y/N [N]	(EZA)
2) Serial Master	Y/N [N]	(EZG)
3) Contract Master	Y/N [N]	(EZI)
4) Contract History	Y/N [N]	(EZJ)
5) Meter Master	Y/N [N]	(EZL)
6) Meter History	Y/N [N]	(EZM)
7) Depreciation Master	Y/N [N]	(EZH)

ACTION [] (A-Add, C-Change, D-Delete)

- Specify the next contract billing date.
- If the model includes meters, specify the meter information for the contract.

Later, when you begin practicing on the Serialized application, you can return to each of the screens listed above to familiarize yourself with the information each contains and to maintain your serialized information.

Quickly Adding the Information

To quickly add information:

- 1 Set up a new customer record or retrieve an existing customer record.
- 2 Assign items to the customer in the (EZG) screen.
- 3 Assign contracts to the customer in the (EZI) screen.
- 4 Set up the contract billing date in the (EZJ) screen.
- 5 Set up meters in the (EZL) screen.

Setting Up or Retrieving a Customer Record

When you add records for customers who are not set up in the (A) screen or Customer window, you must type Y in the Customer Master field and add the customer's record in the (EZA) screen first.

- 1 In the (EZ+) Serial Special Programs screen, type **S** in the Action field. appears.
- 2 In the (EZ+S) screen, type **A** in the Action field.
- 3 In the Customer Master field, type **N**.
- 4 In the Serial Master field, type **Y**.
- 5 In the Contract Master field, type **Y**.
- 6 In the Contract History field, type **Y**.
- 7 In the Meter Master field, specify whether to enter meter information.
 - Type **Y** to enter meter information.
 - Type **N** to omit meter information.
- 8 In the Meter History field, type **N**.
- 9 In the Depreciation Master field, type **N**.
- 10 In the Contract # field, enter the contract type for which to set up information for. If you specify fewer than four characters, press Enter.
- 11 The contract type's description displays in the Type Desc field. At the Correct Record prompt, type **Y**.
- 12 At the If Record On File Change prompt, specify whether to change contract, meter, or depreciation records that already exist. To add a new record, type **N**.

If you specify N at the Correct Record prompt, the cursor returns to the Contract # field.

The If Record On Field Change prompt applies only to master contract, meter, and depreciation records. These records are displayed in the (EZI), (EZL), and (EZH) screens, respectively.

To retrieve the customer record, the customer must be set up in the (A) screen or Customer window.

- 13 When the Set Contract Defaults prompt appears, specify whether to use the defaults that are set up for this contract type from the (EZ2) Contract Billing Rates Parameters screen (Contract Types window) and (EZ3) Contract Service Rates Parameters screen (Contract Types Service Rates tab).
 - Type **Y** to use the defaults set up for this contract type (default).
 - Type **N** if you are not using the defaults that are set up for this contract type.
- 14 In the Customer # field, retrieve the record for the first customer for which to add records. You can retrieve the record using the customer's account number or name.
 - To retrieve the record using the customer's account number, enter the number in the Customer # field. In the Dept field, you can retrieve a specific customer department. Enter the department number, or press Enter to access the master account. At the Correct Customer prompt, type **Y**.
 - To retrieve the record using the customer's name, tab to the Name field. Enter part or all of the customer's name. At the Correct Customer prompt, type **Y**.
- 15 At the Add Multiple Records for This Customer prompt, specify whether to add several different item and contract records for this customer. For example, if you retrieve a customer who has four different contracts, you can enter all four contracts at one time without retrieving the customer's record again.
 - Type **Y** to add several records for this customer (default).
 - Type **N** if you are not adding multiple records for this customer.
- 16 At the Are You Sure prompt, type **Y** to add the records. The (EZG) screen opens and the cursor moves to the System # field.

Assigning the Customer Items in the (EZG) Screen

In the (EZG) screen, you can specify the system number and serial item to assign to this customer record. The fields you must complete in the (EZG) screen are shown in Figure 2. To add records in the (EZG) screen:

If the customer has already been assigned the system number you specify, the Encountered Duplicate Number message appears.

The item description displays in the Desc field. This field is for display only. To change the item's description, use the Item window.

- 1 In the System # field, you can assign a system number to this customer record. If a number is set in the Next System # field in the (EZ1S) screen, the number is automatically assigned. If a number is not set in the Next System # field in the (EZ1S) screen, you must manually assign a system number.
 - If a number is set in the Next System # field, press Enter. At the System To Assign prompt, type **Y**. The next sequential number from the Next System # field is automatically assigned.
 - If a number is not set in the Next System # field, enter the number to assign this system and press Enter.
- 2 In the Sub # field, you can specify a subsystem number. Parts that make up a system are called subsystems. For example, a copier, collator, and stapler would each be subsystems. (When a system includes subsystems, all subsystems share the same master system number, but each subsystem has a unique subsystem number.) Enter the subsystem number, if any, or press Tab to leave the Sub field blank.

Figure 2: Fields You Must Complete in the (EZG) Screen

```

09:51:26                               (EZG) Serial Master                               09/04/98
Ser#: _____ Sys#: _____ - _____ Contract # _____
Text: _____ Type desc: _____
Item#: _____ Co: _____ Ext. desc: _____
Desc: _____ Location: _____
-----
System # _____ Sub # _____ Contact : _____
Serial # _____ Location: _____
Item # _____ Co: _____
Desc: _____
Text: _____ Loc: _____ Customer Acct # _____ Dept : _____
Purchase Order # _____ Name : _____
Purchased Date MM/DD/YY _____ Suite : _____
Vendor: _____ for $ _____ Street: _____
Calls # _____ Rent/Loan/Demo/Lease : _____ City : _____
Application : _____ Qualification : _____ Phone: - - - Customer Inv: _____
Tech # _____ Equipment Type : _____ P/O : _____
Recall? # _____ MM/DD/YY _____ Sold on MM/DD/YY @ $ _____ Slsm : _____
Trade-In Acct # _____ Dept: _____ Trade-in $ _____ # _____
Umbrella System # _____ Suite: _____
Leasing Acct # _____ Dept : _____ Street: _____
Do Billings To Leasing Acct# Y/N ? _____ City : _____
-----
ACTION [I] A-Add, C-Chg, D-Del, I-Inq, K-Chg Keys, Q-Qualifications, R-Reindex
    
```

The default ending date is calculated using the time period specified in the Contract Length box in the Contract Types Types tab. For example, if the contract length is one year, and the contract is sold on 10/30/02, 10/30/03 displays as the contract's ending date.

- 3 In the Serial # field, specify the serial number for the item you are assigning this system. Entering a serial number helps you to identify the item. Usually, you specify the serial number provided by the manufacturer.
- 4 In the Item # field, enter a model or stock number for the item and press Tab.
- 5 In the Co field, you can specify either the company name of the manufacturer or the item color. (This is considered a serialized item if you set the Ser field in the (E) screen to Y or P.)
- 6 The item that most closely matches the number you specified displays, along with the Is This The Correct Item prompt.
 - Type **Y** to accept the displayed item (default).
 - Type **N** to display the next item in the database.
- 7 In the Text field, you can enter additional information about this item. For example, if one of the copier models you sell includes an automatic document feeder and a sorter, you might enter With ADF And Sorter in the Text field. If you are specifying information for a generic serial item such as Copier or Printer, you could enter specific information in this field pertaining to the item, such as the make or model number. You can enter up to 25 characters of descriptive text.
- 8 In the Loc field, specify the general ledger location for this item. This is the location used when you bill contracts and meters. (The Loc field defaults to the location specified on the purchase order you used to purchase the item.)
- 9 When you finish, press Enter until the (EZI) screen opens.

Assigning the Customer Contracts in the (EZI) Screen

In the (EZI) screen, you can specify contract information for this serial item. The fields you must complete in the (EZI) screen are shown in Figure 3. To add records in the (EZI) screen:

- 1 At the Enter Starting Reading For Meter [1] prompt, you can enter the beginning meter reading for the first meter assigned to this item. If this item does not have meters, press Esc.
- 2 In the Original Contract Date field, you can specify the starting date for this contract. This date determines which contracts are active and those that are not. This date is also used to generate billings and preventative maintenance calls. This field defaults to the system date. Press Tab to accept the default date, or enter the starting contract date.
- 3 In the Contract To field, you can specify the ending date for this contract. This date determines which contracts are active or inactive. This date is also used to generate billings and preventative maintenance calls.

If this contract includes meters, you can also specify a number of clicks as the length of this contract. You do this in the Clicks From and To fields in the (EZL) screen. See **Setting Up Meters in the (EZL) Screen**.

Enter an ending date for this contract, or press Tab to accept the default date.

Figure 3. Fields You Must Complete in the (EZI) Screen

```

09:51:12                (EZI) Serial Contracts Master                09/04/98
Ser#:_____ Sys#:_____ - _____ Contract #_____ Equip Type:_____
Text:_____ Type desc:_____
Item#:_____ Co:_____ Ext. desc:_____
Desc:_____ Location:_____
-----
Name :_____ Customer #_____ Dept :_____

Original Contract Date MM/DD/YY Mfg Wty MM/DD/YY to MM/DD/YY (P/L/B) :_
Contract From MM/DD/YY to MM/DD/YY Dlr Wty MM/DD/YY to MM/DD/YY (P/L/B) :_
Contract Length: Period :_
Time :HHHHH Used HHHHH:MM Left HHHHH:MM Service Freq :_ at $_____. (P/L/B) :_
Supplies Included Class Range :
Bill Freq :_ at $_____. Bill Code :_ From :_ To :_ + [_,_,_,_] PM Code :_
Bill Cost $_____. Dept :_ Slsm #_____ Depts Service :_ Labor :_ Travel :_
Up Renewal Billing Amount ___%
Auto-Renew :_ Up Cost ___.%
P/O #_____ Defer Income :_ [ Serial Data ]
[ Customer Remarks ] Umbrella System #_____
Tech Qlf :_ Slsm :_____ Application :_
Customer Ext P.O. :_
Contact :_____ Loc [ ]
-----
ACTION [ ] (A-Add, C-Change, D-Delete, I-Inquire)
    
```

- 4 In the Period field, specify the contract length as a period of days, weeks, months, or years. This field defaults to the period specified in the Period field in the (EZ2) screen, if any.
 - Type **D** to set the contract length to a day.
 - Type **W** to set the contract length to a week.
 - Type **B** to set the contract length to two weeks.
 - Type **M** to set the contract length to a month.
 - Type **T** to set the contract length to two months.
 - Type **Q** to set the contract length to a quarter.
 - Type **S** to set the contract length to six months.
 - Type **H** to set the contract length to 18 months.
 - Type **Y** to set the contract length to a year.
 - Type **2** to set the contract length to two years.
 - Type **3** to set the contract length to three years.
 - Type **4** to set the contract length to four years.
 - Type **5** to set the contract length to five years.
 - Type **9** to set an open-ended contract length. The ending date is set to 99/99/99.)
- 5 The Time field applies when setting up time block contracts. Press Tab and leave this field blank.
- 6 The Used field applies when setting up time block contracts. Press Tab and leave this field blank.
- 7 The Left field, applies when setting up time block contracts. Press Tab and leave this field blank.
- 8 In the Bill Freq field, specify how often to bill the customer for this contract. This field defaults to the billing frequency specified in the Billing Frequency field in the (EZ2) screen.
 - Type **D** for daily.
 - Type **W** for weekly.
 - Type **B** for biweekly (every two weeks).
 - Type **M** for monthly.
 - Type **T** for every two months.
 - Type **Q** for quarterly.

- Type **S** for semi-annually.
 - Type **Y** for yearly.
 - Type **H** for every 18 months.
 - Type **2** for every two years.
 - Type **3** for every three years.
 - Type **4** for every four years.
 - Type **5** for every five years.
- 9 In the At \$ field, specify the amount to bill this customer each billing period. For example, if you specify M in the Bill Freq field (for monthly billing), and you specify \$50.00 in this field, the customer is billed \$50.00 each month. This field defaults to the billing amount specified for this contract type in the At field in the (EZ2) screen. Press Tab to accept the default billing amount, or enter an amount.
- 10 In the Bill Code field, specify the call code for calls generated by contract billings. If you leave this field blank, the call code for contract billing calls defaults to c.
- 11 In the Bill Cost \$ field, specify the cost for a contract billing. This amount is used when you bill the contract.
- 12 Tab to the Auto-Renew field and specify whether to automatically generate pick tickets for contracts when you renew them. The Serialized application includes three ways to renew contracts:
- Type **Y** to renew contracts automatically when you final verify the renewal pick ticket in the (EZU) Serial Contract Maintenance screen. You can also renew them manually in the (EZU) screen. If you manually renew contracts, you can renew them only after the customer pays the renewal invoice.
 - Type **X** to bill each contract only once, through the (EZY) Serial Maintenance Report Selection screen. Suppose you sell rental contracts that last one month, and bill the customer only once. Using this method, the contract automatically renews each time you bill the customer.
 - Type **N** (default) to renew contracts by selling them to the customer again in the (EZO1) Log In Calls screen (Serialized Order Entry window). This is a manual renewal. You must initiate the renewal process for each contract. It also lacks the flexibility of using the (EZU) screen.

- 13 Tab to the Defer Income field. Use it to specify whether to defer the income that you generate from this contract. Since income deferral takes place on a monthly basis, a contract must meet two conditions to be deferred: It must last longer than one month, and the billing periods must be more than one month apart.
 - Type **Y** to defer the income that is generated from this contract. (You must enter deferral information for this system in the Contract Types Deferred Inc tab.)
 - Type **N** (default) if you are not deferring the income that is generated from this contract.
- 14 Tab to the (P/L/B) field. Use it to indicate whether all service calls on this contract include parts, labor, or both.
 - Type **P** to include only parts.
 - Type **L** to include only labor.
 - Type **B** to include both parts and labor.
- 15 Press Enter until the (EZJ) screen appears.

Setting Up the Contract Billing Date in the (EZJ) Screen

There is only one field to set up in the (EZJ) screen: the Next Bill field, as shown in Figure 4. You use this field to specify the billing date for the contract.

Figure 4. The Next Bill Field in the (EZJ) Screen

```

09:51:08                (EZJ) Serial Contracts Status                09/04/98
Ser#:_____ Sys#:_____ - _____ Contract # _____
Text:_____ Type desc:_____
Item#:_____ Co:_____ Ext. desc:_____
Desc:_____ Location:_____
Customer # _____ Name : _____
Mfg Wty MM/DD/YY to MM/DD/YY (P/L/B):_ Dlr Wty MM/DD/YY to MM/DD/YY (P/L/B):_
Original MM/DD/YY Renewal MM/DD/YY to MM/DD/YY Renew :_ Renewals #_ Hits #_
Last Contract Invoice # _____ MM/DD/YY $ _____ Next Bill MM/DD/YY
Last Service Invoice # _____ MM/DD/YY $ _____ Tech : _____
Last P/M Date MM/DD/YY Status :_ Next P/M Date MM/DD/YY Rental Return MM/DD/YY
-----
Item Totals  INCOME      COST      MARGIN      GROSS PROFIT
$ _____ $ _____ $ _____ %
-----
Contract Totals -----
Contracts  $ _____ $ _____ $ _____ %
Service    $ _____ $ _____ $ _____ %
Parts      $ _____ $ _____ $ _____ %
Supplies   $ _____ $ _____ $ _____ %
Travel     $ _____ $ _____ $ _____ %
Labor      $ _____ $ _____ $ _____ %
Meters     $ _____ $ _____ $ _____ %
Totals     $ _____ $ _____ $ _____ %
-----
ACTION [I] (C-Change, D-Delete, I-Inquire, X-Deferred Income)
    
```

- 1 In the (EZJ) screen, tab to the Next Bill field.
- 2 The Next Bill field displays the next billing date for the contract. When you run the Contract Billing Report in the (EZY) screen, the date in this field determines whether to generate a ticket for a contract. If a ticket is created, this field is updated by calculating the next billing date based on the contract's billing frequency and the date specified for the report.

Suppose you run the Contract Billing Report and generate a ticket for a contract which is billed monthly. When running the report, you enter 01/01/06 as the date for the report. Since the contract is billed monthly, the Next Bill field is automatically updated to 02/01/06.

Enter the next date on which to generate billing for the contract.

- 3 Press Enter to open the (EZL) screen.

Setting Up Meters in the (EZL) Screen

If the contract you assigned to this customer includes meters, you must enter the existing meter information in the (EZL) screen, as shown in Figure 5.

The cursor does not move to the Contract From and To fields. These fields display the contract starting and ending dates.

- 1 In the (EZL) screen, tab to the Contract Clicks Length field.
- 2 In the Contract Clicks Length field, enter the number of clicks this contract includes. When you renew the contract, the number of clicks in this field is the default number for the renewal.
- 3 In the Clicks From field, you can specify the contract length as a number of clicks. This field works with the contract dates you specify. You enter contract dates in the Contract To field in the (EZI) screen.

Figure 5. Fields You Must Complete in the (EZL) Screen if this Contract Includes Meters

```

09:51:17                (EZL) Serial Meter Master                09/04/98
Ser#:_____ Sys#:_____ - _____ Contract #_____ Equip Type:_____
Text:_____ Type desc:_____
Item#:_____ Co:_____ Ext. desc:_____
Desc:_____ Location:_____
Customer # _____ Name : _____
Meter [ ] Desc : _____ Link to [ ] Bill Call Code : __
Original Contract Date MM/DD/YY Contract Clicks Length # _____
Contract From MM/DD/YY to MM/DD/YY Clicks From # _____ to # _____
Over # _____ at $ _____ Scale : _ Freq : _ Default Cost ._% Dept : _
Minimum Charge $ _____ Meter Service Clicks # _____ Service Freq : _
Job Item # _____ Co: _____ Up Overage $ Amount at Renewal %
Original Start # _____ MM/DD/YY Used # _____
Contract Start # _____ MM/DD/YY Tech Use # _____
Last Meter Billing # _____ MM/DD/YY Last Bill # _____ MM/DD/YY
Last Service Call # _____ MM/DD/YY Total Billed to Date # _____
Current Reading # _____ MM/DD/YY Hits # _____ Average # _____
Current Umbrella Clicks # _____ Total Umbrella Clicks # _____
Last P/M # _____ MM/DD/YY Status : _ Current Monthly Volume # _____
Next P/M # _____ MM/DD/YY Average Monthly Volume # _____
Projected Next P/M Date MM/DD/YY Current CBC # _____
Projected Expiration Date MM/DD/YY Life CBC # _____ Calls # _____
-----
ACTION [I] (A-Add, C-Change, D-Delete, I-Inquire, U-Calculate Usage)
    
```

- To use the contract date to determine the length of the contract, leave the Clicks From and To fields blank.
 - To use the number of clicks to determine the contract length, enter the starting meter reading for the contract in the Clicks From field. Enter the ending meter reading for the contract in the Clicks To field.
 - If you specify both a contract date (in the Contract To field in the (EZI) screen) and a number of clicks in the Clicks From and To fields, the contract ends when the first one of these conditions is met.
- 4 In the Over field, enter the total number of clicks allowed during the period entered in the Freq field. For example, if you specify 1000 in the Over field, and enter M (monthly) in the Freq field, and the customer uses 1200 clicks during a month, the customer is billed for 200 clicks. To charge for every click, type Ø in the Over field, or leave the field blank.
 - 5 In the At field, enter how much per click a customer pays for each copy over the number in the Over field. For example, if you enter .02 (two cents) in the At field, and enter 1000 in the Over field, the customer pays two cents for each click over 1000.
 - 6 Tab to the Freq field and specify the billing period for this meter.
 - Type **D** for daily.
 - Type **W** for weekly.
 - Type **B** for biweekly (every two weeks).
 - Type **M** for monthly.
 - Type **T** for every two months.
 - Type **Q** for quarterly.
 - Type **S** for semi-annually.
 - Type **Y** for yearly.
 - Type **H** for every 18 months.
 - Type **2** for every two years.
 - Type **3** for every three years.
 - Type **4** for every four years.
 - Type **5** for every five years.

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- 7 After you enter the frequency, press Enter until the (EZG) screen opens.
- 8 You can continue to assign serial items to this customer. When you finish, press Esc. The Serial Master Menu opens.

To assign serial items to a different customer, repeat the instructions in this chapter. When you finish, press Esc.

Chapter 24: Setting Screen Passwords

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Understanding the (EZX) Screen

There are several different ways to set up security in the Serialized application. You can set screen passwords in the (EZX) Serialized Program Security screen, you can set specific passwords in the (EZ1S) Serial System Parameters screen, or you can use order-writer numbers to allow or deny access to the Serialized application.

For more information on passwords and other security measures, see your online help.

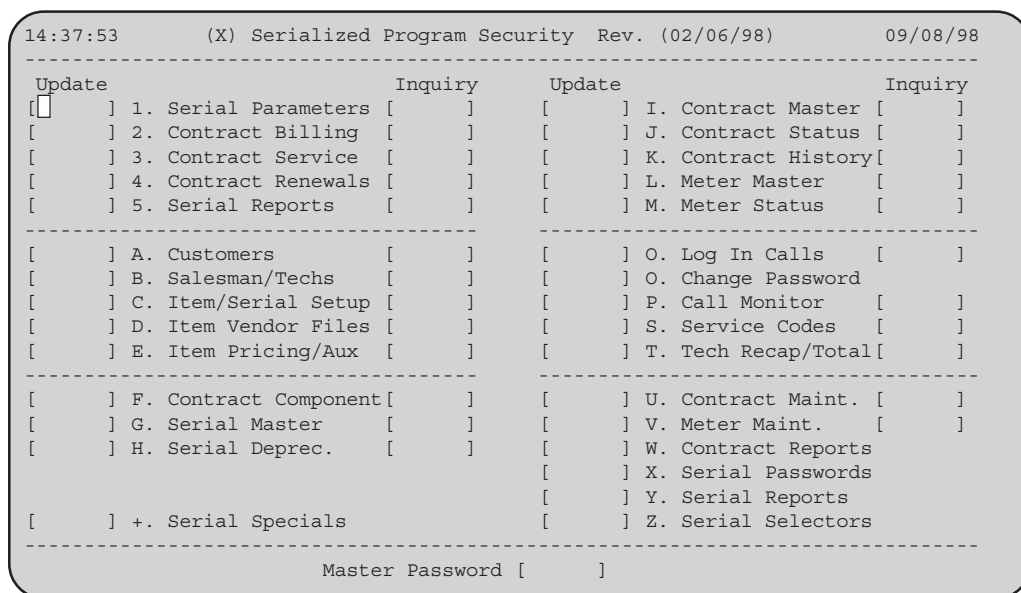
In the (EZ1S) screen, you can set eight different passwords to control specific functions such as deleting records. For details on these passwords, see **Chapter 3: Setting Global Serialized Parameters**.

Besides setting passwords, you can also control access to the entire Serialized application by requiring order-writer numbers. Begin by assigning order-writer, technician, and salesperson numbers to everyone who is authorized to use your system. You do this in the Salesperson Technician tab. For details, see **Chapter 14: Setting Up Technicians**.

Next, in the (EZ1S) screen, set the Set Order Writer field to Y. Each time someone tries to access the Serialized application, they see the Enter Order Writer # prompt. You must enter a valid number before you can access the Machine Master Menu.

This chapter explains how to restrict access to information in Serialized screens by setting up screen passwords in the (EZX) screen. Before setting up any passwords, you should decide which screens contain the information to protect. By assigning passwords to these screens, and giving them only to responsible personnel, you can prevent unauthorized individuals from viewing or changing confidential business information.

Figure 1: The (EZX) Serialized Program Security Screen



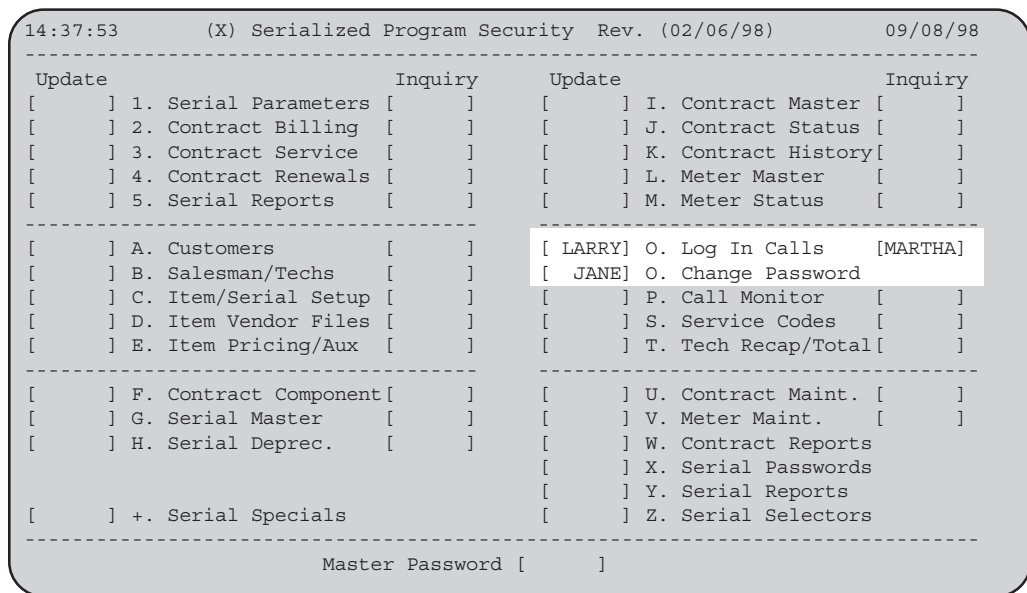
There are three different types of passwords you can set in the (EZX) screen:

- An **update** password restricts the user to specific Serialized screens. An update password lets the user view, change, and delete information in that one Serialized screen.
- An **inquiry** password restricts the user to only viewing information. The user cannot change any information in the screen.
- A **master** password provides no restrictions to the user. The master password lets the user view, change, and delete information in **any** Serialized screen. It also lets the user view and change **all** passwords set in the (EZX) screen.

In the (EZX) screen, you can set either an inquiry or update password for all Serialized screens, with a few exceptions: the (EZX) screen, the (EZY) Serial Maintenance Report Selection screen, and the (EZZ) Serial Selectors screen, which only have fields for an update password. Since you use the (EZY) and (EZZ) screens to print serialized reports, an inquiry password would not be useful. Similarly, since you use the (EZX) screen to set up security, you would not give an inquiry password for this screen.

In addition, you can set three passwords for the Work Orders window: one that gives the user full access to all the functions except changing existing call information, one that just allows the user to view information in the Work Orders window, and one that also controls changing existing call information in the Work Orders window.

Figure 2: Setting Passwords for the Work Orders Window



Setting Up Passwords

Serialized Parameters are in the text-based (EZ) Serial Master Menu screen. To access the (EZ) screen, use TBL Client. To set up or change passwords:

If you finish entering screen passwords before the cursor moves to the Master Password field, press Enter.

- 1 In the DDMS Master Menu, type **EZ**.
- 2 When the Serial Master Menu opens, type **X** in the Action field. The EZX screen opens.
 - If a master password has not been set, the cursor moves directly to the first Update field. Go to **Step 3**.
 - If a master password has already been set, the cursor appears in the Master Password field. Enter the master password.
- 3 When the cursor moves to the first Update field, you can assign screen passwords, as shown in Figure 2.
 - To move the cursor ahead one field, press Tab.
 - To move the cursor back one field, press Backspace.
 - To clear a field, press the Spacebar and then press Tab.
- 4 When the cursor moves to the Master Password field, you can enter a master password. A master password lets you view and change information in any screen. It also lets you view and change all passwords set in the (EZ) screen.
 - If you are not entering a master password, press Enter and go to **Step 6**.
 - To enter a master password, specify the password in the Master Password field. If you do not fill the entire field with characters, press Enter.
- 5 At the Please Verify New Master Password prompt, enter the new master password, exactly as you entered it in the Master Password field. If you do not fill the entire field with characters, press Enter.
- 6 At the You Have Now Changed Your Master Password To XXXXX Is This Correct prompt, enter your response according to the following:
 - Type **Y** to accept the new password as the master password.
 - Type **N (default)** if you are not changing the master password. When the cursor returns to the Master Password field, enter the correct new master password, or press Enter.
- 7 New passwords are recorded as you specified, and the cursor returns to the Serialized Master Menu.

If you do not retype the new master password exactly, the cursor returns to the Master Password field, and the Please Enter New Master Password Or Return For Old message appears. Press Enter to keep the existing master password (if any), or re-enter the new master password.

Chapter 25: Setting Up Your Terminal

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Understanding Terminal Setup

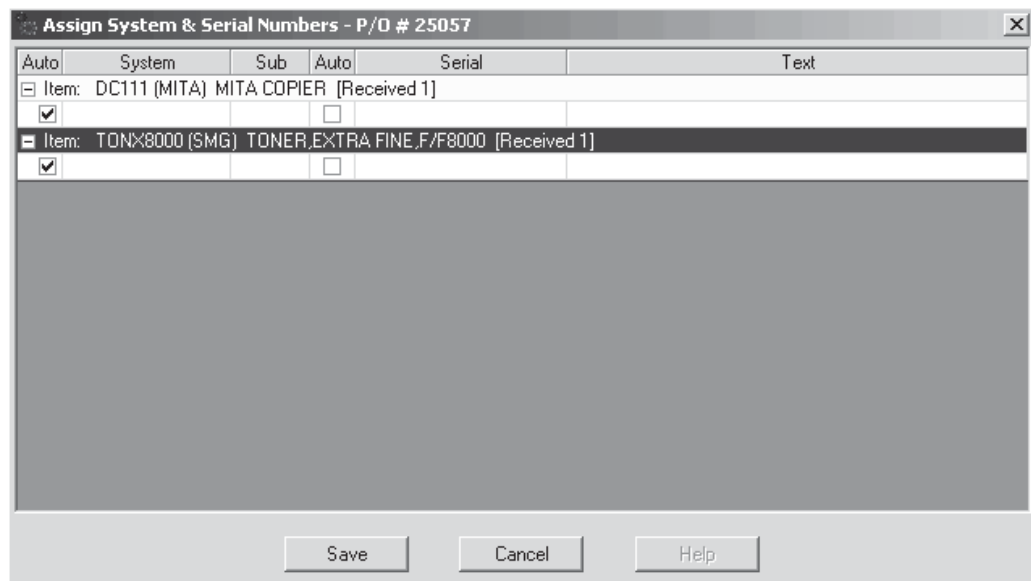
You can easily sell serialized items and contracts to your customers in the Serialized Order Entry window. Before you do, you must purchase and receive your serialized items in the Purchase Order Entry window. You should also make some decisions regarding the terminal you use to place serialized orders. If your terminal is set up correctly in the (L1) Terminal and Tickets Parameters screen, when you receive an item, you are prompted for the system and serial numbers, as shown in Figure 1.

As you receive the items, they are automatically assigned to the Serial customer. You set up the Serial customer in the Customer window. (For details, see **Chapter 1: Setting Up the Serial Customer.**)

By assigning items to the Serial customer, you can easily determine which items are on hand and available for sale. Once the item has been sold to a customer, the Machine Detail window is automatically updated with the sale and the customer's information. After you receive all the serialized items in the Purchase Order Entry window, the items are listed, along with the items' system numbers and serial numbers.

Before you receive serialized items in the Purchase Order Entry window, DDMS recommends that you set up a specific terminal for use with the Serialized application and end your tickets at a status 8 or a status B (invoice). If you end your tickets at a status 6, you are prompted for the item's system and serial number when you end the ticket and the Machine Detail window is not

Figure 1: The Assign System & Serial Numbers Dialog Box





updated with sales information. Also, to assign the system and serial numbers, you must manually final verify the ticket in Order Entry. By setting up a terminal to end tickets at a status 8 or a status B (invoice), you can eliminate final verifying your tickets.

If you end the ticket at a status 8, you must print your invoices in the (TR) Order Entry Reports screen using the [B] Invoices function. If you end your tickets at a status B (invoice), you do not need to print the invoices and can eliminate another step in the process. However, if you end your tickets at an invoice status and make a mistake, you must create a credit return.

Setting Up the Terminal

To set up your terminal in the (L1) screen:

- 1 Double-click  .
- 2 From the Keyop Menu, double-click  .
- 3 The (L) Parameters screen opens. Type **1** in the Action field.
- 4 In the (L1) screen, type **C** in the Action field.
- 5 Press Enter to go past the Starting Terminal To Have Order Entry As Master field.
- 6 The first Log Ter field shows the logical name for all your terminals. Move the cursor to the line that lists the logical name for the terminal for which to set this option:
 - If the terminal listed in the first Log Ter field is not the terminal for which to set this option, press Enter until the cursor moves to the correct line.
 - If the terminal in the first Log Ter field is the terminal for which to set this option, go to **Step 7**.
- 7 Tab to the Tickets St field, shown in Figure 2. Enter the status at which to end your tickets.
 - Type **8** to end the tickets at a status 8. You must print your invoices in the (TR) screen using the [B] Invoices function.
 - Type **B** to end the tickets at status B (invoice). You do not need to print your tickets in the (TR) screen. However, if you make a mistake on the ticket, you must create a credit return.

You should print tickets and invoices online, instead of in a batch.

- 8 Tab to the Tickets Onl field. In this field, you can set your tickets to print when you end the order. To do this, type **Y**.
- 9 Tab to the Invoices Onl field. In this field, you can set your invoices to print when you end the order. To do this, type **Y**.
- 10 Press Enter until the cursor moves through all the rows on the screen and returns to the Action field. If you press Esc before doing so, your changes are not saved.

Figure 2: The Tickets St Fields

```

14:58:31                (L1)  TERMINAL AND TICKET PARAMETERS                10/05/98
-----
ACTION [I] (C-CHANGE, I-INQUIRY, H-HELP, W-WINDOWS)
-----
Starting Terminal to have Order Entry as Master [TE]
KEY:  AHD-Ahead, ST.-Status, ONL-Print online, P-Printer number
LOG.  KEY  O/E  T-I-C-K-E-T-S  SLIP  LABELS  INVOICES
TER.  LOC. AHD TYPE ST.  ONL  FORM P  FORM P  FORM P  ONL  FORM P  OPTION
1 [T0] [ 1] [Y] [ ] [6] [Y] [4T  1] [   ] [   ] [Y] [4I  1] [  ]
2 [T1] [ 1] [Y] [F] [6] [Y] [4T  1] [   ] [   ] [Y] [4I  1] [  ]
3 [T2] [ 1] [Y] [ ] [6] [Y] [4I  1] [   ] [   ] [Y] [4I  1] [  ]
4 [T3] [ 1] [Y] [F] [6] [Y] [4I  1] [   ] [   ] [Y] [4I  1] [B ]
5 [T4] [ 1] [Y] [ ] [8] [Y] [4I  1] [   ] [   ] [Y] [4I  1] [  ]
6 [ ] [ ] [ ] [ ] [ ] [ ] [   ] [   ] [   ] [ ] [   ] [  ]
7 [ ] [ ] [ ] [ ] [ ] [ ] [   ] [   ] [   ] [ ] [   ] [  ]
8 [ ] [ ] [ ] [ ] [ ] [ ] [   ] [   ] [   ] [ ] [   ] [  ]
9 [ ] [ ] [ ] [ ] [ ] [ ] [   ] [   ] [   ] [ ] [   ] [  ]
10 [ ] [ ] [ ] [ ] [ ] [ ] [   ] [   ] [   ] [ ] [   ] [  ]
11 [ ] [ ] [ ] [ ] [ ] [ ] [   ] [   ] [   ] [ ] [   ] [  ]
12 [ ] [ ] [ ] [ ] [ ] [ ] [   ] [   ] [   ] [ ] [   ] [  ]
13 [ ] [ ] [ ] [ ] [ ] [ ] [   ] [   ] [   ] [ ] [   ] [  ]
14 [ ] [ ] [ ] [ ] [ ] [ ] [   ] [   ] [   ] [ ] [   ] [  ]
15 [ ] [ ] [ ] [ ] [ ] [ ] [   ] [   ] [   ] [ ] [   ] [  ]
    
```

Chapter 26: Cataloging Serialized Reports

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Understanding Cataloging Reports

DDMS provides various reports and selectors for the Serialized application. Some of these reports can be cataloged using the (EZ5) Serialized Standard Reports screen. In addition, you can create your own serialized reports using Report Writer. Once you create them, you can catalog them in the (EZ5) screen.

After you catalog your report selectors, they display in the (EZZ) Serial Selectors screen so you can print them. For a list of the reports you can catalog, see the heading **Serialized Report Selectors**.

Cataloging Selectors in the (EZ5) Screen

To manually catalog a serialized selector:

- 1 In the (EZ5) screen, type C in the Action field.
- 2 In the G/L Location field, press Tab to accept the default location or enter the location for which to catalog the reports.
- 3 When the cursor moves to the Select field, you can catalog your selectors.
 - If there are no selectors cataloged, with the cursor on the first blank line, enter the selector name of the report to catalog. For example, to catalog a report that lists all your rental contract types, you could enter **RENTLS**. (For a list of reports you can catalog, see the heading **Serialized Report Selectors**.)

Figure 1:
Cataloging
Reports in the
(EZ5) Screen

```

10:57:19                (EZ5) SERIALIZED STANDARD REPORTS                09/09/05
=====
ACTION [I] (C=CHANGE, I=INQUIRY)  G/L LOCATION [ 1 ]
=====
SELECT SUBTITLE DESCRIPTION                                REPORT TITLE
-----
RENTLS SORT: CONT. TYPE,SYSTEM#, LIMIT "R"                LIST OF RENTAL MACHINES
Z-MACH SORT: ITEM NUMBER, SERIAL ONLY                     SERIAL ITEM RPT- IN STOCK EQUIP.
SER-CU SERIAL MACHINES WITH NO CUSTOMERS                 DELETED CUSTOMERS WITH MACHINES
SER-OH SORT: BY ITEM #, SERIAL #                         SERIAL RECORD COUNT VS I-AUX COUNT
TECHDY CHRONOLOGICAL REPORT OF TECH'S DAY                TECH CHRONOLOGICAL REPORT
Z-CALL SORTED BY CUSTOMER NAME AND PROB #                CALL IN HISTORY REPORT BY CUSTOMER
Z-CARD METER CARD                                        METER CARDS
Z-CODE CODE LISTING                                      CALLIN, PROBLEM, SOLUTION CODE LIST
Z-CONT SORTS: CONTRACT, CUSTOMER #                       SERIALIZED CONTRACT BY CUSTOMER
Z-EZP PRINT OF EZP SCREEN                                 PRINT OF THE CALL SCREEN
Z-ITEM SORT: BY ITEM #, SERIAL #                         SERIALIZED ITEM CATALOG
ZCOST COSTS/COPY                                         COSTS/COPY
Z-EXCP SERIAL EXCEPTIONS REPORT                          SERIAL EXCEPTIONS REPORT
CBC COPIES/CALL SORT:MODEL; CBC                           COPIES PER CALL WITH VOL AND NAME
Z-CTYP CONTRACT LISTING                                  CONTRACT TYPES REPORT
Z-DEPR SORT: BY ITEM #, SERIAL #                         DEPRECIATION MASTER LISTING
Z-TIME SORT: BY SYSTEM#, CALL#, NO LIMITS                TIME BLOCK CONTRACT USAGE REPORT
    
```

- If there are report selectors listed in the Select field, tab to the first blank line. Enter the selector name of the report to catalog. For example, to catalog a report that lists all your rental contract types, you could enter **RENTLS**. (For a list of reports you can catalog, see the heading **Uncataloged Serialized Reports** at the end of this chapter.)
- 4 A brief description of the report selector you specified displays, along with the Catalog This prompt, as shown in Figure 1. Type **Y** to catalog the selector.
 - 5 The selector's name, subtitle, and description appear on the line where you entered the selector name, and the cursor moves to the next blank line so you can specify another selector to catalog. When you finish, press Enter until the cursor moves to the Action field.

Viewing the Selectors in the (EZZ) Screen

Once you've cataloged the report selectors, you can view and print them in the (EZZ) screen. See Figure 2. For details on printing reports in the (EZZ) screen, see your online help.

Figure 2:
Viewing the
Report Selectors
in the (EZZ)
Screen

```

10:56:22          (EZZ) SERIAL SELECTORS          rev. (10/06/03)          09/09/05
Number   Report: Format Description          Selector: Sorts and Limits
 1 = LIST OF RENTAL MACHINES          SORT: CONT. TYPE,SYSTEM#, LIMIT "R"
 2 = SERIAL ITEM RPT- IN STOCK EQUIP.  SORT: ITEM NUMBER, SERIAL ONLY
 3 = DELETED CUSTOMERS WITH MACHINES  SERIAL MACHINES WITH NO CUSTOMERS
 4 = SERIAL RECORD COUNT VS I-AUX COUNT SORT: BY ITEM #, SERIAL #
 5 = TECH CHRONOLOGICAL REPORT        CHRONOLOGICAL REPORT OF TECH'S DAY
 6 = CALL IN HISTORY REPORT BY CUSTOMER SORTED BY CUSTOMER NAME AND PROB #
 7 = METER CARDS                      METER CARD
 8 = CALLIN, PROBLEM, SOLUTION CODE LIST CODE LISTING
 9 = SERIALIZED CONTRACT BY CUSTOMER   SORTS: CONTRACT, CUSTOMER #
10 = PRINT OF THE CALL SCREEN          PRINT OF EZZ SCREEN
11 = SERIALIZED ITEM CATALOG           SORT: BY ITEM #, SERIAL #
12 = COSTS/COPY                       COSTS/COPY
13 = SERIAL EXCEPTIONS REPORT         SERIAL EXCEPTIONS REPORT
14 = COPIES PER CALL WITH VOL AND NAME COPIES/CALL SORT:MODEL; CBC
15 = CONTRACT TYPES REPORT            CONTRACT LISTING
16 = DEPRECIATION MASTER LISTING      SORT: BY ITEM #, SERIAL #
17 = TIME BLOCK CONTRACT USAGE REPORT  SORT: BY SYSTEM#, CALL#, NO LIMITS

 Type [ ] (blank=Mach, F=Furn)
 Selector Totals Only :_ Loc :__ Prt :__ Copies :__ Recs :__ Chain :_
ENTER THE SELECTOR NUMBER TO EXECUTE

```

Serialized Report Selectors

The following is a list of reports available or use with the Serialized application. Once you catalog the reports in the (EZ5) screen, you can print them in the (EZZ) screen.

Report Name	Report Description
LEASES	This report is a lease maturity report. It lists contract information, including the customer's name, lease billing parameters, and machine information. This report sorts by location.
LEASE1	This report prints the same information as the LEASES report select, but sorts by salesperson instead of location.
LEASE2	This report lists all expired leases so you can easily determine which customer's buyout options need to be billed.
RENTAL	This rental billing report lists your rental billing parameters and customer information. It also prints the next billing and contract billing dates.
RENTLS	This report lists all the rental contract types, and lists the machines you have rented under each type. It includes the next contract billing date and the last meter billing date. This report is limited to items with an R in the Rent/Loan/Demo/Lease box in the Machine Detail window.
SOLDMA	This sold machines report prints machine and customer information, including the sold date.
TECHDY	This report provides a summary of the hours your technicians have worked.
EZ-LBL	This report prints customer billing labels with the system number.
SER-CU	This report provides a list of the machines linked to non-existing customer records.

SER-OH	This report lists the on-hand quantities for each item from the Machine Detail window, along with the system and serial numbers. This report compares the number of records for a serialized item in the Serialized application to the on-hand quantities for the same item in the inventory file. This report can also be used for inventory counts.
Z-CALL	This report shows the open calls from the Work Orders window.
Z-CARD	This report lets you print meter cards.
Z-CODE	This report lists all the service codes set up, including any call, problem, solution, reopen, and transfer codes. This report sorts by code type.
Z-CONT	This report lists all the serialized machines on a contract and is sorted by contract type.
Z-CTYP	This report lists all the contract types set up in the Contract Types window, along with their corresponding descriptions and extended descriptions. This report sorts by contract type.
Z-CU	This report lists the serialized machines and sorts by customer with the total number of machines listed for that customer.
Z-DEF	This report provides a list of all the serialized machines that have a record set up in the Contract Detail Deferred Inc tab.
Z-DEPR	This report lists all the machines that have a record set up in the Machine Detail Depreciation tab.
Z-EV	This report shows you information from the (EZV) Serial Meter Maintenance screen. You can use this report to gather your customers' meter readings. It eliminates the need to be actually viewing the (EZV) screen while speaking with your customers.
Z-EZP	This report prints all the existing call information in the Machine Monitor.
Z-ITEM	This report lists all the serialized items including the item number, item description, system number, and serial number. This report also shows the customer's name and customer's account number assigned to the item.

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Z-JOUR	This supplies and parts journal report prints customer and machine information. It also lists those items, supplies, and parts used on service workorders. This report uses the item's actual cost.
Z/JOUR	This report provides the same information as the Z-JOUR report selector, but uses the item's pricing cost instead of actual cost.
Z-METR	This report lists all the machines with meters and includes the meter readings.
Z-RPT	This report includes billing information and shows any meter and contract information.
Z-RSPN	This report prints all the call responses in the Machine Monitor window.
Z-SHIP	This report shows all the machines with a shipping address in the Machine Detail window.
Z-TIME	This time block contract usage report shows machine and contract information, and includes the call number and time used on each call. It also prints any time remaining on the time block contract.
Z-UMB	This report lists all the machines under an umbrella contract and sorts by umbrella number.

Appendix A: Serialized Files

A number of files store Serialized information. These files are stored on the volume serial specified in the Serial field in the (LØ) Global Master Parameters screen, with the following exceptions:

- PARAMETERS This file is stored on the volume serial that is specified as the system residence.
- Z-S-AUX This file is stored on the volume serial specified in the Salesman field in the (LØ) screen.
- C-ZIP This file is stored on the volume serial specified in the Customer field in the (LØ) screen.

Being familiar with these files helps you prevent errors or troubleshoot any errors that may occur. Each file is listed below, along with the function it serves.

;SYS	Stores update and inquiry passwords for the Serialized application. This information is displayed in the (EZX) Serialized Program Security screen.
PARAMETERS	Stores all system parameters. The system updates this file when you perform the (M)[A] Daily Backup procedure.
C-ZIP	Links the customer's record to their zip code, so you can retrieve the customer's record by zip code in the Work Orders window.
P-MASTER	Stores open and complete orders before they are flushed to the sales journal during the (M)[A] procedure.
Z-A-KEYS	Contains supplemental files when used as a master file for call history reports, which display in the (EZZ) Serial Selectors screen.
Z-A-SUPP	Stores the service type, temporary shipping address, P/O number, closing order-taker, and call number for calls you log in the Work Orders window.
Z-AUX	Stores information about the calls you log in the Work Orders window regardless of the call's status.
Z-C-METER	Stores the meter parameters for contract types from the Contract Types window.

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Z-C-RATES	Stores the labor and travel rates for contract types. This information appears in the Contract Types Service Rates tab.
Z-C-RECAN	Stores the renewal information for contract types from the Contract Types Renewals tab.
Z-C-SUPP	Stores information about department income breakouts from the Contract Types Departments tab and the Contract Types Lease tab.
Z-C-TIME	Stores contract time block information from service workorders.
Z-C-TYPES	Stores the parameters for contract types, excluding meters, which are displayed in the Contract Types window.
Z-CALLS	Stores calls that have not been dispatched, which display in the Machine Monitor.
Z-CBACK	Stores callbacks in the Machine Monitor.
Z-CODES	Stores the service call code descriptions from the Machine Tools Call Codes tab.
Z-CON-AUX	Stores extended contract history information from the Contract Detail History tab. This file is also updated when you perform the (M)[A] procedure.
Z-CONSUP	Stores information about department income breakouts by machine.
Z-CONTRA	Contains master contract information from the Contract Detail Contract tab.
Z-CUSINDEX	Links serial items to the customer's name or account number, so you can retrieve the item using the customer's name or account number.
Z-CUST	Contains serialized customer information, such as the customer's territory, time zones, service times, and so forth. This information comes from the Serial Customer Information Record in the Customer Machines tab.
Z-D-HIST	Stores monthly entries made in the lower portion of the Contract Detail History tab.

Appendix A: Serialized Files

Z-D-INDEX	Stores calls by date in the Work Order window. This file is used to print history reports through the (EZY) Serial Maintenance Report Selection screen.
Z-DEFAULTS	Stores item information set in the Item Machine dialog box.
Z-DEFERRED	Stores deferred income information, excluding monthly entries. This information comes from the Contract Detail Deferred Inc tab.
Z-DEPREC	Stores depreciation information from the Machine Detail Depreciation tab.
Z-EXCEPT	Stores information concerning changing a call code, deleting a call, or changing the technician assigned to a call in the Work Orders window and Machine Monitor window.
Z-FYI	Stores the FYI lines for the calls you log in the Work Orders window. These lines contain user-defined text that you enter while logging calls.
Z-INDEX	Links service calls to the call number, and links calls to system number. This lets you retrieve calls by call number and system number in the Work Orders window.
Z-INFO	Stores location information which is displayed in the Location field in the Machine Detail Master tab.
Z-ITMINDEX	Links serial items to the item number, so you can retrieve the item using the item number.
Z-JOURNAL	Stores the service workorder journal information. This journal contains information about invoiced service workorders. This includes information about the invoice, the machine, the technician, use tax, service type, parts and supplies, and so forth. This information is used to print serialized item journal reports in the (EZYJ) Workorder Journal Report Selection screen.
Z-L-ITEMS	Stores information about machines you lease and the machine accessories.
Z-LEASE	Stores machine leasing information from the Contract Detail Lease tab.

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Z-LIMITS	Stores each technician's preferred limits for the Machine Monitor. This information is displayed in the Salesperson Monitor Limits dialog box.
Z-M-AUX	Stores meter history, which is displayed in the Contract Detail History tab. This file is updated by the (M)[A] procedure.
Z-M-BILL	Stores meter readings in the (EZV) Serial Meter Maintenance screen.
Z-M-COUNTS	Stores meter readings for the last 10 service calls in the Contract Detail Meter tab.
Z-M-KEYS	Stores information used for meter reports printed in the (EZZ) Serial Selectors screen.
Z-MASTER	Contains master serial file information, including system, subsystem, and serial numbers and links the item to its customer. This information comes from the Machine Detail Master tab.
Z-METER	Contains master meter information, including the terms for each meter contract. This information comes from the Contract Detail Meter tab.
Z-NOTEPAD	Stores notepad text from the Work Orders window.
Z-NUMBERS	Stores information about the last ten calls you logged in the Work Orders window.
Z-PARTS	Stores critical part information from the Item Machine Critical Parts tab.
Z-QLFS	Stores descriptions of technician qualification codes from the Machine Tools Qualification tab.
Z-REMARKS	Stores contract remarks from the Contract Detail Contract tab.
Z-RENEWALS	Stores contract renewal information when renewing in the (EZU) Serial Contract Maintenance screen.
Z-RSPNS	Stores dispatched calls and callbacks before the callback time. These display in the Machine Monitor.
Z-S-AUX	Contains technician information from the Salesperson Technician tab.

Appendix A: Serialized Files

Z-SCHEDULE	Stores assigned and dispatched calls by technician number. These are displayed in the Machine Monitor Schedule tab.
Z-SERINDEX	Links serial items to the serial number, so you can retrieve the item using the serial number.
Z-SUPP	Stores machine Shipto information from the Machine Detail Other tab. This file also stores umbrella system numbers from the Machine Detail Other tab.
Z-T-RECAP	Stores technician information for each call. This includes work and travel time, miles billed and paid, and so forth, from the Tech Recap tab.
Z-T-TOTAL	Stores technician information from the Tech Recap Totals tab.
Z-TNF-EXCP	Stores transfer exceptions. These occur when you override the default on-hand quantity in the Item Transfer dialog box.
Z-TERR	Contains territory descriptions from the Machine Tools Territories tab.
Z-TIMES	Stores times and dates for call login, dispatch, completion, and so forth, in the Work Orders window.
Z-TOTALS	Stores the time totals for each call (work time, travel time, and so forth) from the Work Orders window.
Z-TRANS	Displays transferred calls in the Machine Monitor.
Z-TRANSFER	Stores completed inventory transfers that are made in the Item Transfer dialog box.
Z-TYPES	Stores service types from the Machine Tools Service Types tab.
Z-U-INDEX	Links umbrella system numbers to the machines that the contract covers.

Appendix B: Contract Forms

Two sample contract forms follow this appendix.

When you sell service contracts or send renewal notices, you can print a contract form listing the agreed upon rates and terms. This eliminates the expense of pre-printed contracts.

In the Serialized application, a contract form is a combination of a Report Writer format and a special word processing text file. When you sell a contract, the contract form specified for that contract type prints. As it does, it reads the Report Writer format. When it reaches one of the special codes in the Report Writer format, it prints out a section of text from the word processing file before moving to the next line in the Report Writer format.

The Serialized application includes two standard contract text files: &SERVICE and &MAINT. These files are part of your DDMS software update. Before you can use them, you must copy the files from your DDMS software update CD to your DDMS system. Once the files are copied, you have two contract forms to use when you sell or renew contracts: the MAINT and SERVC2 forms. These forms are different versions of a service agreement. For service contracts that do not include meters, you can use the MAINT contract form. For service contracts that include meters, you can use the SERVC2 contract form.

You can modify the word processing text files &SERVICE and &MAINT using the DDMS word processing and text editor programs. To modify the Report Writer format, you use the DDMS Report Writer module. For details, see the heading **Modifying the Standard Forms** later in this chapter.

Note: It is not necessary to use a contract text file with a Report Writer format. Instead, you can set up an entire contract using only Report Writer. However, if you're not familiar with Report Writer, large sections of text are much easier to create and modify using the DDMS word processing or text editing programs rather than Report Writer.

Copying the Files From Your Software CD

There are two word processing text files that must be copied from your DDMS software update CD to your system: &MAINT and &SERVICE. These files must be copied to the disk unit whose volume serial is specified in the Rpt Writer field in the (LØ) Global Master Parameters screen. The first step in preparing to use the contract forms is to copy the special contract form text files from the CD to your system.

- 1 In the (LØ) screen, look at the Volume Serial fields. Record the volume serial where your Rpt Writer files are stored, volume serial SR, for example.

- 2 In the (Z) Master Utilities screen, select the [C3] Copy All Files function.
- 3 Record the unit where your Report Writer files are stored. (The units display at the top of the screen.) For example, if your Report Writer files are stored on volume serial SR, the corresponding unit could be Ø4.
- 4 At the Unit To Copy Files From prompt, enter the number of your CD-Rom.
- 5 At the Unit To Copy Files To prompt, enter the number of the disk unit where your Rpt Writer files are stored. For example, if you recorded unit Ø4, enter Ø4. If you enter a single-digit number, press Enter.
- 6 A list of files on the CD displays, along with the Select A=All B=Binary prompt. Type H to select handmark.
- 7 Tab to the &MAINT file. Type X to select the file, as shown in Figure 1.
- 8 In the &SERVICE file, type X to select the file.
- 9 When both files are selected, press Enter. The cursor returns to the Select A=All B=Binary prompt.
- 10 To begin copying the files, type X.
- 11 Use the Destination Volume field to specify where to copy the files &MAINT and &SERVICE. Copy them to the unit whose volume serial is specific in the Rpt Writer field in the (LØ) screen. Press Enter to accept the displayed volume serial, or enter another volume serial .
- 12 In the second Destination Volume field, press Enter.

Figure 1:
Selecting the
&MAINT File

```
Copy files from unit 90 Volume : 10/29/98 Tape created on : 10/29/98
FILE NAME VOLUME FILE NAME VOLUME FILE NAME VOLUME
!DES SR ;NEW SR CNV-PARMS SR
!EDI SR ;RPT SR GATE SR
!FRM SR ;SER SR HELP_WORD SR
!OPD SR ;SP2 SR INSTALL SR
!RID SR ;SPC SR INV-DOC SR
!RPT SR ;SPE SR LZR-SETUP SR
!SEL SR ;TAP SR PROC-DOC SR
#HLP SR ;TED SR PROC-LOG SR
#NEW SR ;TEL SR SPC2_SETA SR
#RPT SR ;UTL SR SPC_CNVST SR
#SCN SR DDMSPARMS SR SPC_CSPACE SR
#SER SR VERSION SR ZPARMS SR
#SP2 SR ZZZZZZ SR
#SPE SR !INVOICE SR
#TED SR !RID SR
#TEL SR X&MAINT SR
#WIN SR &SERVICE SR
;CNV SR -ACUMA SR
;COM SR -ACUMA2 SR
;DYN SR C3TAPE SR
Select A-All B-Binary T-Text L-Library C-Clear H-Hand mark W-WildCard
F-File V-Volume X-Execute as selected <RET>-Continue : H
```

- 13 At the Report Detail Of Copy On Printer prompt, specify whether to print a copy of the report.
 - Type **Y** to print the report.
 - Type **N** if you are not printing the report (default).
- 14 At the Recover All Deleted Records prompt, type **N**.
- 15 At the Initialize Disk On Unit prompt, type **N**.
- 16 At the Replace Old Files With The Same Name prompt, type **N**.
- 17 At the OK To Proceed prompt, type **Y**. The files are copied.
- 18 At the Copy Is Complete message, press Esc.

Modifying the Standard Formats

There are two standard contract forms: MAINT and SERVC2. These are different versions of a basic service agreement. You can use the MAINT contract form for service contracts that do not include meters and the SERVC2 contract form for service contracts that do. You can copy and modify these standard forms to create individualized rental contracts, maintenance agreements, or renewal forms. You can also use them as models to create new contract forms from scratch.

Contract forms consist of a Report Writer format used with a special text word processing file. While you can modify the text file of the contract form using the DDMS word processing or text editor programs, to modify the Report Writer format, you use Report Writer.

Therefore, to create or modify contract forms, you must have a basic understanding of Report Writer. If you can already create and change report formats, you should have no difficulty modifying contract forms — the two are very similar. However, there are three important differences:

- You set up contract forms in the Serialized Parameters, rather than cataloging them in a report screen. This means that you don't have to create a selector for the contract format in the (+Y) Setup Selectors for Reports screen. You simply enter the contract forms to print in specific fields in the Serialized application. (For details about setting up contract forms in the serialized parameters, see the heading **Setting Up Contract Form Parameters**.)
- When you modify standard forms in Report Writer, you must specify the correct master file to change. To modify the MAINT contract form, select the file Z-MASTER as the master file. This file doesn't include any meter fields. Use this format for service

contracts that don't include meters. To modify the SERVC2 contract form, select the file Z-M-KEYS as the master file. See Figure 2. This file includes the meter fields on the contract form. Use this contract form for contracts that include meters.

- You must use special codes to modify the contract formats in Report Writer. To enter new text in a contract format, select the line of the format where the text is to appear, and enter a code by typing: //XXXXXX//#. See Figure 3.

Note: The first set of forward slashes must be in the first two character positions. The Xs represent the name of the contract text file to use with this format, &SERVICE, for example. The symbol # corresponds to the line number of the text to print.

**Figure 2:
Choosing
Z-M-KEYS as
the Master File**

```

55 COPIES
56 COPIES BC
57 COPIES/DAY
58 COPIES$$
59 DAYS/CALL
60 MARGINS-1
61 TOTALS M/A
62 TRAVELCOST
63 VOLUME
64 PARAMETERS
65 PARAM2
REPORT NAME - [SERVC2 ON SR??] [!USR]
                SEND TOP? [Y] LINES [66]
TITLE -          RPT [ ] WIDTH [ ]
[SERVICE CONTRACT
MASTER FILE >> 1 Z-M-KEYS <<

HEADINGS (1-20)   BREAKS (21-25)
DETAIL (26-35)   SUBTOTALS (36-40)
TOTALS (41-55)  TRAILERS (56-65)
LINE [ ] BOILERPLATE [ ]
FONTS [ ] [ ] [ ] [ ] [ ] [ ] [ ]
SKIPS BEFORE [ ] AFTER [ 1] LAST [55]
FILE TO SELECT FROM [__]
                ** ENTER 99 FOR TEXT ONLY **

-----
YOU HAVE PICKED Z-M-KEYS AS THE MASTER. CORRECT? Y/N Y

```

For example, you can modify the contract form SERVC2. The first lines of this contract include your company logo, the customer's name and address, the coverage period, the current meter reading, and the heading SERVICE CONTRACT.

The first code for a text section is on line 26 of the format. The first two slashes followed by &SERVICE instruct the system to use the word processing file &SERVICE. The second pair of slashes, followed by 1, print the section of text in this file identified by the code //1.

When you sell this contract to a customer, the specified text prints. Then line 27 is executed, which consists of text and the Company and Item fields from the Z-MASTER file. You can then modify the text for line 27 of the contract form.

**Figure 3:
Entering a Text
File to Modify**

```

55 COPIES
56 COPIES BC
57 COPIES/DAY
58 COPIES$$
59 DAYS/CALL
60 MARGINS-1
61 TOTALS M/A
62 TRAVELCOST
63 VOLUME
64 PARAMETERS
65 PARAM2

REPORT NAME - [SERVC2 ON SR??] [!USR]
                SEND TOP? [Y] LINES [66]
TITLE -          RPT [ ] WIDTH [ ]
[SERVICE CONTRACT
MASTER FILE >> 1 Z-M-KEYS <<

HEADINGS (1-20)   BREAKS (21-25)
DETAIL (26-35)  SUBTOTALS (36-40)
TOTALS (41-55) TRAILERS (56-65)
LINE [ ] BOILERPLATE [ ]
FONTS [ 1] [ ] [ ] [ ] [ ] [ ] [ ]
SKIPS BEFORE [ ] AFTER [ 1] LAST [55]
FILE TO SELECT FROM [99]
                ** ENTER 99 FOR TEXT ONLY **

-----
//&SERVICE//1

```

Setting Up Contract Form Parameters

After you copy the files to your system and make any changes, you must check your parameter settings to be sure the contract form prints. To print the appropriate contract form, there are several parameters you must set:

- There are two parameters in the (EZ1S) Serial System Parameters screen that control where the contract form prints and the number of copies that print.
- You must enter the contract form to use when you sell and renew contracts in the Contract Types Renewals tab.

Setting Up Parameters in the (EZ1S) Screen

You must specify where to print the contract forms in the (EZ1S) screen. You can also use this screen to specify how many contract forms print.

Each time you sell a contract in the Serialized Order Entry window, an invoice automatically prints. The printer is set in the Invoices P field in the (L1) Terminals and Tickets Parameters screen. By entering the logical name of a printer in the Contract Form Printer field, you can also be prompted to print a contract form when you sell a contract in the Serialized Order Entry window.

To skip the prompt, leave the Contract Form Printer field blank and go to the heading **Setting Up Contract Forms for Renewals**. To automatically print a contract form when you sell a contract:

- 1 In the (EZ1S) screen, type **C** in the Action field.
- 2 In the G/L Location field, enter the location for which to set the parameter. (This field defaults to the location entered for your terminal in the (L1) screen.) You can enter a new location or accept the default location:
 - To accept the default location, press Tab.
 - To set parameters for a different location, enter the number. If you enter fewer than two characters, press Tab.
- 3 In the Next Serial # field, tab to the Contract Form Printer field.
- 4 In the Contract Form Printer field, enter the logical name of the printer to use, P1, for example. The contract forms are sent to the printer you enter.
- 5 In the Copies field, enter the number of copies to print. For example, to print two copies, type 2. See Figure 4.
- 6 In the Update Exceptions field, press Enter until the cursor returns to the Action field. If you press Esc before doing so, your changes are not saved.

Setting Up Contract Forms for Renewals

Next you must assign a contract form to each of your contract types in the Contract Types Renewals tab. One form is used for the basic contract. Use the form MAINT if the contract you're selling doesn't include meters. It uses Z-MASTER as the master file for the format. If the contract you're selling includes meters, use the SERVC2 contract form. This form uses the Z-M-KEYS file as the master file for the format. To specify the contract forms to use when selling or renewing contracts:


- 1 Double-click  Contract Types
- 2 Retrieve the contract type for which you are setting up contract forms.
- 3 Click the Renewals tab.
- 4 In the Contract Form box, enter the contract form to print. For example, to use this contract type to sell metered service contracts, you could enter SERVC2 in this box. See Figure 5.

Figure 4:
Setting Up the
Contract Form
Printer and
Copies Fields

```

(EZ1S) Serial System Parameters
-----
Action  (C-Change, I-Inquire, B-Back To EZ1)      G/L Location [  ]
-----
SYSTEM GENERATED NUMBERS:
Next Serial #
Next Call #
Next System #
Next Transfer #
Add Customers in (A) Y/N ? Status ?
Prompt OK To Exit Y/N ?
SYSTEM TICKET FORMS AND PRINTERS:
Service Ticket Form : Prt :
P / M Ticket Form : Prt :
Edit File Form : Prt :
Contract Form Printer :P1 Copies #2
Update Exceptions Y/N ?
Set Order Writer Y/N ? Calculate Next P/M's Using Completion Date Y/N ?
TRADE-IN AND DEPRECIATION: Enter System # First In Quick Ref. Window Y/N ?
Tax Trade-In Y/N ? Trade-In G/L Asset Discount
Tax Depreciation Period : Depreciation G/L Accum. Expense
PASSWORDS: Z-Times? Call Date/Time? Purge? Eom? Keys?
Reindex? Delete? Compress? Update MTD Qtys When Transferring Y/N ?
    
```


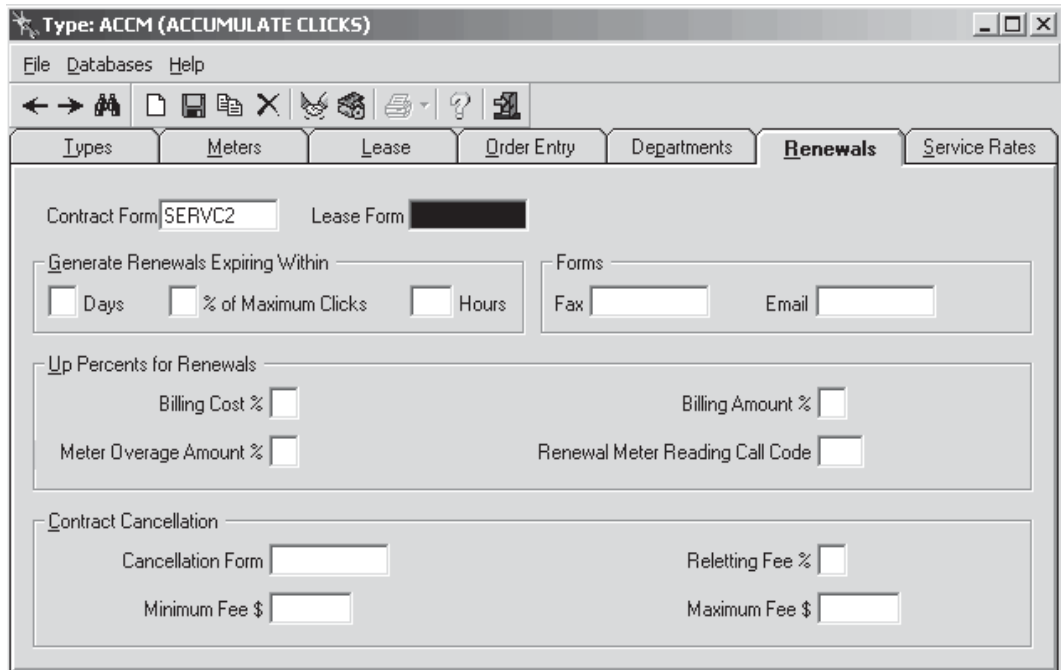
- 5 In the Lease Form box, enter the contract form to print when selling lease contracts. Currently, there is no standard contract form for lease contracts. To use a separate form with lease contracts, you must modify the existing contract forms MAINT or SERVC2, or you can create a new one using Report Writer. (For details, see the heading **Modifying the Standard Formats.**)
- 6 Click  to save your changes.

Figure 5:
Specifying a
Contract Form
in the Contract
Types Renewals
Tab



Type: ACCM (ACCUMULATE CLICKS)

File Databases Help

← → 🔍 📄 📄 ✕ 🖨️ 📄 ? 🖨️

Types Meters Lease Order Entry Departments **Renewals** Service Rates

Contract Form Lease Form

Generate Renewals Expiring Within

Days % of Maximum Clicks Hours

Forms

Fax Email

Up Percents for Renewals

Billing Cost % Billing Amount %

Meter Overage Amount % Renewal Meter Reading Call Code

Contract Cancellation

Cancellation Form Reletting Fee %

Minimum Fee \$ Maximum Fee \$

Sample Service Contract Using &MAINT as the Text File

The document shown below represents a **sample service contract**. To print the rates and terms that meet your business needs, you must modify the &MAINT text file and contract format using the DDMS Word Processing and Text Editor programs and Report Writer.

YOUR COMPANY NAME HERE
1655 TIMBER RIDGE LANE
ROANOKE TX 76262
817-444-4685

DALLAS MEDICAL PLAZA

JANE SMITH

MAINTENANCE AGREEMENT

=====

OUR SERVICES PROVIDE YOU WITH :

- * EMERGENCY SERVICE CALLS AT NO ADDITIONAL CHARGE.
- * FACTORY TRAINED TECHNICIANS TO GIVE QUALITY SERVICE.
- * PLANNED MAINTENANCE PROCEDURES TO REDUCE DOWN TIME.
- * QUICK, EFFECTIVE SERVICE.

MODEL #COPIER SERIAL # 12348500
COPIER, MODEL XX

BILLING AMOUNT: 150.00 PLUS TAX. CONTRACT FROM 08/31/98 TO 09/01/99

No terms or conditions, expressed or implied, are authorized unless they appear on original of this agreement, signed by the Customer and Manager.

THE ADDITIONAL TERMS AND CONDITIONS ON THE REVERSE SIDE HEREOF ARE INCORPORATED IN AND MADE PART OF THIS AGREEMENT. NO ONE IS AUTHORIZED TO CHANGE, ALTER, OR AMEND THE TERMS OR CONDITIONS OF THIS AGREEMENT UNLESS AGREED TO IN WRITING BY AN OFFICER OF THE COMPANY.

Continued on next page

REP. SIGNATURE DATE

CUSTOMER NAME ACCT#

PRINT NAME EMPL# TERR.

BY:AUTHORIZED SIGN DATE

BRANCH OFFICE ADDRESS

PRINTED SIGN. NAME & TITLE

CITY ST. ZIP BRANCH

CUSTOMER ADDRESS

CITY STATE ZIP

PURCHASE ORDER # DATE

Sample Service Contract Using &SERVICE as the Text File

The document shown below represents a **sample service contract**. In order to print the rates and terms that meet your business needs, you must modify the &SERVICE text file and contract format using the DDMS Word Processing and Text Editor programs and Report Writer.

YOUR COMPANY NAME HERE
1655 TIMBER RIDGE LANE
ROANOKE TX 76262-
817/444-4685 SERVICE CONTRACT

CUSTOMER: DALLAS MEDICAL PLAZA

ATTN: JANE SMITH

LOCATION: EMERGENCY ROOM

ADDRESS: 1501 AIRPORT ROAD

COVERAGE PERIOD: 12/14/97 TO 09/01/99

CITY & STATE: IRVING TX 76230-

CURRENT METER READING: 11706

- =====
- I. Our company agrees to provide service according to the manufacturer's required specifications, as well as all emergency calls requested by customer during normal working hours.
 - II. This contract covers the required service for the GENE Model COPIER Serial # 12348500, from 12/14/97 to 12/14/99
 - III. This agreement covers the cost of all labor and parts except:
Drum, Toner, and Fuser Oil,
for a period of one year or _____ copies, whichever occurs first,
\$ 150.00 , plus tax, if applicable.
(1,000 extra copies included for service inspections.) Contract
may be taken for 2 years at current rate, less 5%.
 - IV. Should the customer exceed the contracted number of copies before one year has been completed, then the customer may elect one of the following options:
 - 1) Start a new contract for another year at the current annual rate and for the number of copies that reflects the most accurate estimated annual usage for this copier.
 - 2) Pay \$.0250 per copy for all copies over the meter reading of 12000 and up to the one-year anniversary date of this agreement.

Continued on next page

In the event the customer does not elect one of the above options, the customer will be billed for all parts and labor for any service calls after either the contracted copies or contract period has been exceeded, whichever occurs first.

- V. This agreement does not cover repairs or parts replacement made necessary by accident, misuse, neglect, power failure, water damage, or other acts of God, or made necessary by repairs performed by other than our company's personnel, or by use of supplies, other than those specified for use in the equipment. Overhauls or rebuilds are not covered.
- VI. Our company warrants that parts and services furnished under this agreement will be free from defects in material and workmanship. No other warranty is expressed or implied.
- VII. This agreement is non-refundable, non-cancellable, and non-transferable.

Authorized Signature: _____ Date: _____

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