

SERVICING GUIDE



For products that require servicing and inspections, Quantify allows the return of products to a To Be Serviced node. Service Tickets may then be created and any associated charges to service the product may be charged to the job site. The consumable items used during servicing will be deducted from the branch consumable stock so that an accurate inventory of these items is maintained.

Once the product has been serviced or inspected the product is returned to the Branch Office stock or moved to Out of Service.

Products can be flagged for inspection or service during the return to the Branch. For products that always require servicing, servicing may be enabled in the Product Catalog to automatically flag the product for inspection or service each time the product is returned to the Branch. Products can also be moved manually from Branch Office inventory to the To Be Serviced node.

To set up Servicing in your Quantify database, follow these basic steps which are detailed in the sections below.

- Enable Servicing at the Global level, see the *Enabling the Servicing Feature* section.
- Enable Servicing for the appropriate Branch Office(s), see the *Enabling Servicing for Branch Office(s)* section. Note: the Branch Office must also have Out of Service enabled.
- Update the Product Catalog, see the *Update the Product Catalog* section

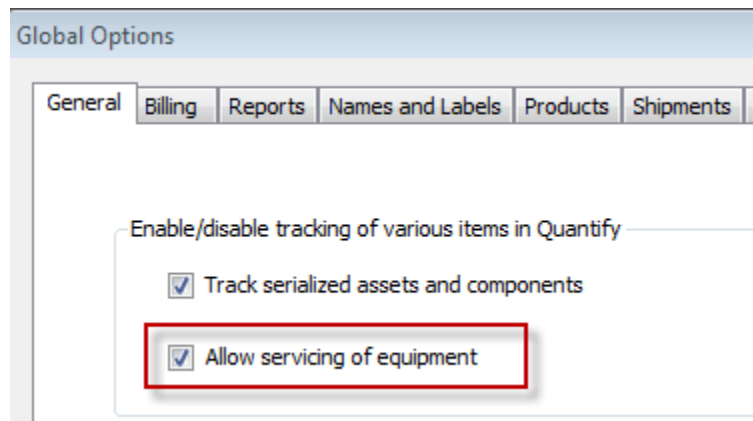
Enabling the Servicing Feature

The Servicing feature must first be enabled globally for your database. To do this, select 'Global Options' from the Tools menu.

On the General tab, enable the 'Allow servicing of equipment' checkbox.

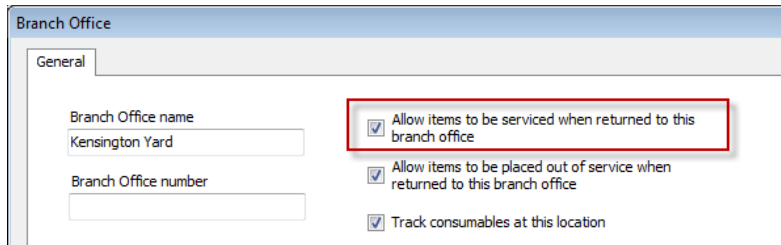
This enables the Servicing feature globally for your database.

Next, Servicing must be enabled for the appropriate Branch Office(s).



Enabling Servicing for Branch Office(s)

Servicing is enabled individually for each Branch Office that will be servicing products. The Servicing feature can be enabled at any time. Once the Servicing feature has been enabled it cannot be disabled if any products are in the To Be Serviced queue.

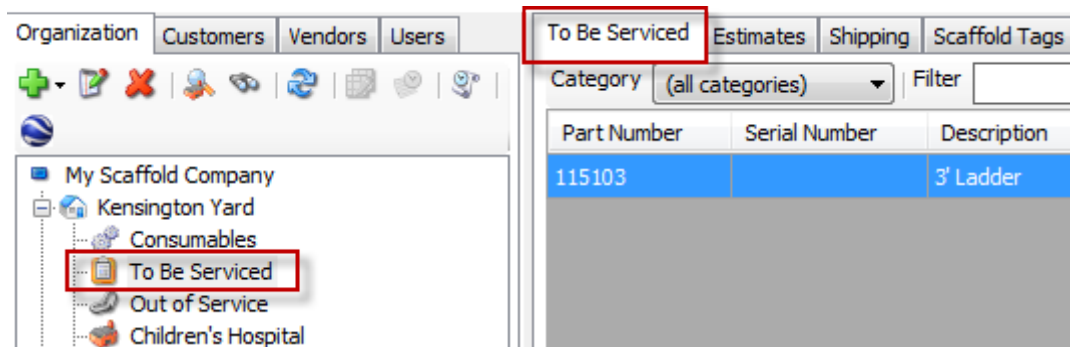


Edit the Branch Office to allow Servicing:

Check the 'Allow items to be serviced when returned to this branch office' checkbox.

Selecting the checkbox will add a To Be Serviced node to the Branch Office.

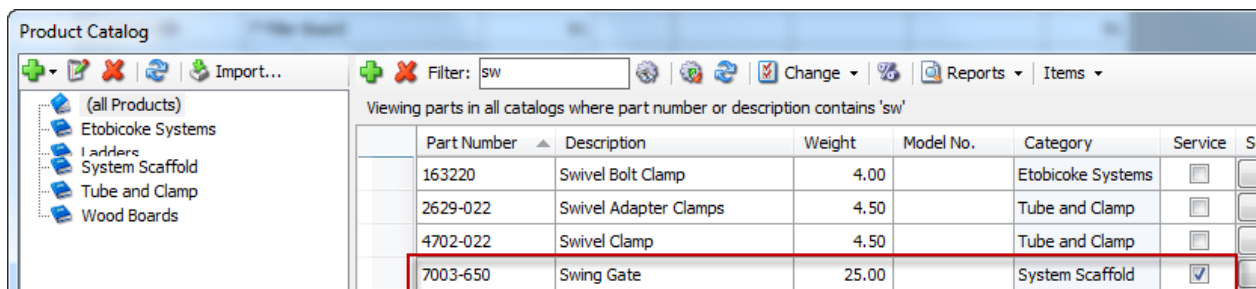
Products in the To Be Serviced queue can be viewed with focus on the To Be Serviced node and the To Be Serviced tab, as shown in the example below.



Update the Product Catalog

Once the Servicing feature has been enabled, additional fields will be available in the Product Catalog. A 'Service' checkbox can be selected for products that will always require servicing when returned from a job.

Setting the checkbox will set the default value for the 'Service' checkbox on the Return 'New Direct Ship' dialog for that product. When the shipment is completed the product will be moved to the To Be Serviced queue for servicing.



ADDITIONAL CHARGES and CONSUMABLES buttons can be used to set up and automatically associate additional charges and consumables items to service tickets for products at servicing.

Part Number	Description	Avg. Cost	Service	Serial Number	Additional Charges	Consumables	Components
7003-650	System Swing Gate		<input checked="" type="checkbox"/>
RI 1027E	Scaffold Runnie		<input type="checkbox"/>				

Placing Equipment in the To Be Serviced queue using Return Shipment

Equipment may be placed in the To Be Serviced queue at the time the equipment is returned to the branch from a job site.

On the Products tab of the 'New Direct Ship' dialog, select the 'Service' checkbox for the product that will be moved to the To Be Serviced queue. If the Service check box was checked in the Product Catalog for the product, the check box will be set by default.

In this example, the 2 3' Ladders returned from the job site will be moved to the To Be Serviced queue.

The screenshot shows the 'New Direct Ship' dialog box with the 'Products' tab selected. A table lists various parts with columns for Part Number, Serial Number, Description, Available, To Ship, Service, and Out Of Service. The row for '3' Ladder' (Part Number 115103) is highlighted with a red box, showing a quantity of 2 in the 'To Ship' column and a checked 'Service' checkbox.

Part Number	Serial Number	Description	Available	To Ship	Service	Out Of Service
0715-149		6'9" Filler Board	3	+	<input type="checkbox"/>	...
0715-150		7' Filler Board	5	+	<input type="checkbox"/>	...
0715-518		Beam Clamp w/Bolt	5	+	<input type="checkbox"/>	...
101100		2'4" x 6'6" System Arch Frame	5	+	<input type="checkbox"/>	...
101145		3' 10" x 6'6" System Arch Frame	5	+	<input type="checkbox"/>	...
115100		Starter Bracket	8	+	<input type="checkbox"/>	...
115103		3' Ladder	13	+	<input checked="" type="checkbox"/>	...
115105		5' Ladder	1	+	<input type="checkbox"/>	...
Special Shovel		Shovel	2	+	<input type="checkbox"/>	...

Click OK when ready. The Ladders are now viewable in the To Be Serviced queue with focus on the To Be Serviced tab.

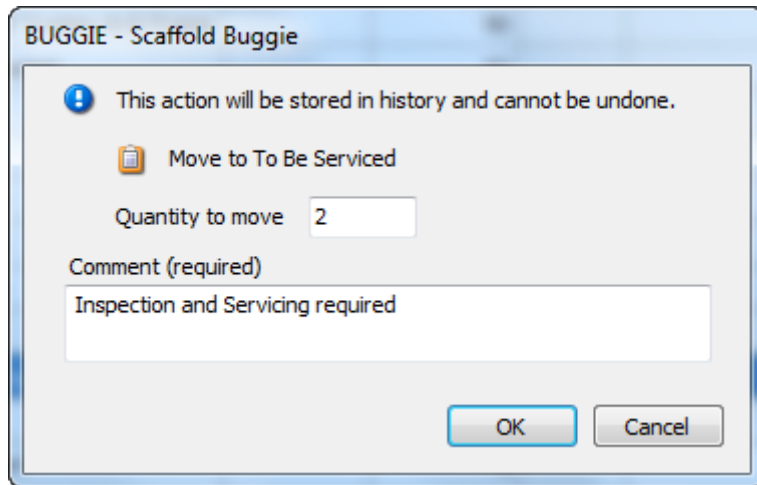
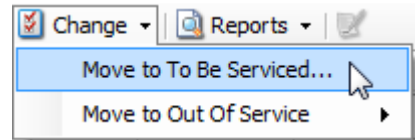
The screenshot shows the software interface with the 'To Be Serviced' tab selected. A table displays the items in the queue, including the '3' Ladder' (Part Number 115103) with a quantity of 2 and shipment number RET-000038.

Part Number	Serial Number	Description	Quantity	Shipment No.
115103		3' Ladder	2	RET-000038

Moving Products to the To Be Serviced Queue from the Products Grid

Products can be moved to the To Be Serviced queue for servicing directly from the Product grid.

From the Branch Office Products tab, focus on the product in the grid to be moved. From the **Change** menu drop down, select 'Move to To Be Serviced...



This launches the 'product number – product description' dialog.

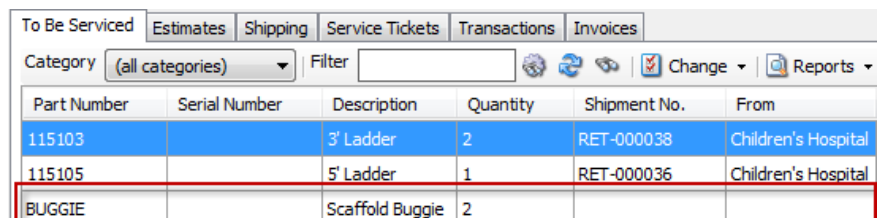
In this example, 2 Scaffold Buggies will be moved to the To Be Serviced queue.

Note: The 'Quantity to move' field will default to the total count of the product available in inventory. Update to reflect the count of products to be moved to the To Be Serviced queue for servicing.

A comment is required.

Click OK when ready.

The Scaffold Buggies are now viewable on the To Be Serviced tab. Note that because these were not sent to the queue through a shipment, they are not associated with a Shipment No. and From location.



Part Number	Serial Number	Description	Quantity	Shipment No.	From
115103		3' Ladder	2	RET-000038	Children's Hospital
115105		5' Ladder	1	RET-000036	Children's Hospital
BUGGIE		Scaffold Buggie	2		

Service Tickets

Once a product has been moved to the To Be Serviced queue, create a Service Ticket to track the servicing of the product. The service ticket is used to specify any Additional Charges that were needed and Consumables items that were used to repair or maintain the product. In this way the job site can be billed for the servicing of the product.

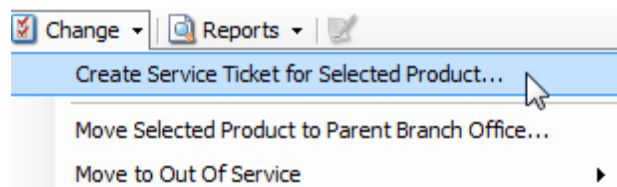
Consumables used in the servicing of the products will be removed from the Branch Office consumable stock so that accurate inventory of these items is maintained. Service Tickets can be created from either the Service Tickets tab or on the To Be Serviced tab.

Service Tickets may be edited or voided until they have been invoiced. Products on voided Service Tickets will be returned to the To Be Serviced queue.

Create a Service Ticket on the To Be Serviced tab

With focus on the 'To Be Serviced' node, select the product in the 'To Be Serviced' tab. In this example a Service Ticket for the 5' Ladder from RET-00036 will be created.

Part Number	Serial Number	Description	Quantity	Shipment No.	From
115103		3' Ladder	2	RET-000038	Children's Hospital
115105		5' Ladder	1	RET-000036	Children's Hospital
115105		5' Ladder	10	RET-000039	Korean Church



Select 'Create Service Ticket for Selected Product...' from the **Change** menu drop down.

The 'Service Ticket – Product number – product description' dialog will launch.

The dialog box is titled 'Service Ticket - 115105 - 5' Ladder'. It has two tabs: 'General' and 'Service Details'. The 'General' tab is active. It contains the following fields:

- Number:** ST-0000002
- Service date:** 11/10/2011
- Serviced by:** Administrator, Default (Administrator)
- Item to service:** Serial Number | []

Below the 'Item to service' field, there is a search instruction: 'To search for an item, enter a serial number and press the tab key, or press the search button'.

On the General tab, the Service Ticket will be assigned a sequential ST number. The Service date will default to the current date, but may be changed if necessary. The 'Serviced by' field will default with the login of the end-user creating the ticket, but other end-users may be chosen from the drop down.


This is a close-up of the top three fields of the dialog box:

- Number:** ST-0000002
- Service date:** 11/10/2011
- Serviced by:** Administrator, Default (Administrator)

Item to service section



If the product to be serviced is serialized, the Serial Number of the item will populate the Serial Number field. This is blank if the product is not serialized. The quantity of the product is shown in the 'Qty' field along with the Shipment number and From Location. Select any Order number that needs to be associated to the Service Ticket for the Customer using the 'Order' field drop down.

Item to service

Serial Number  To search for an item, enter a serial number and press the tab key, or press the search button

Product
115105 - 5' Ladder

Serial Number Qty 1

Order (select item)   Shipment RET-000036

From Location Children's Hospital

Setting the Service Result

The Service result section of the Service Ticket is used to indicate the result of the servicing of the product.

Service result

Normal (return to stock)
 Damaged (billable)
 Scrap (billable)


Damage charge


Total \$0.00

OK Cancel

The default choices in this section are set up globally for the database in Global Options on the Products tab. In this example the labels of Damaged and Scrap are used to indicate items that are no longer usable.

Names for items that are no longer usable


 These names are also used in the accounting item types on the billing tab.

Out of Service  Out of Service

Damaged (repairable) Damaged Default to billable


Damaged (not repairable) Scrap Default to billable


Lost or Missing Lost/Missing Default to billable

 Billing defaults only apply to service tickets

To enable the 'Damage charge' field in the Service result section of the Service Ticket, check the appropriate 'Default to billable' check box. With these set, the Replacement Cost from the Rate Profile will pull into the 'Damage charge' field.

Names for items that are no longer usable


 These names are also used in the accounting item types on the billing tab.

Out of Service  Out of Service

Damaged (repairable) Damaged Default to billable

Damaged (not repairable) Scrap Default to billable

Lost or Missing Lost/Missing Default to billable

 Billing defaults only apply to service tickets

Set the Service result section of the Service Ticket as appropriate for the product on the ticket. Damaged and Scrap choices both move the product(s) to the Out of Service queue. Both allow entries for Additional Charges and Consumables to be added to the Service Ticket and charged back to the job site.

- Normal (return to stock) Additional Charges and Consumables may be added and charged back to the job site through the Service Ticket. The product is returned to available stock at the Branch Office.
- Damaged Additional Charges and Consumables may be added and charged back to the job site through the Service Ticket. The product is moved to the Out of Service queue.
- Scrap Additional Charges and Consumables may be added and charged back to the job site through the Service Ticket. The product is moved to the Out of Service queue.
- Billable Charges the Replacement Cost of the Product as set up in the Rate Profile as a 'Damage charge'. The entry in the 'Damage Charge' field may be overwritten as needed.
- Not Billable The 'Damage Charge' field is disabled.

Navigate to the 'Service Details' tab to add Additional Charges and Consumable items to the Service Ticket.

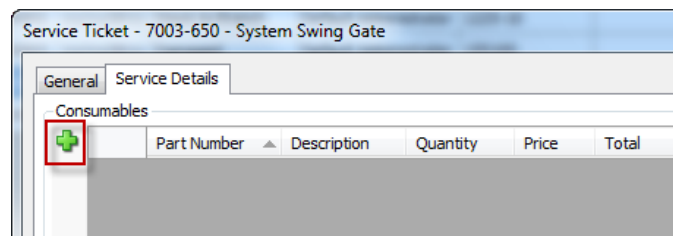
Service Details Tab

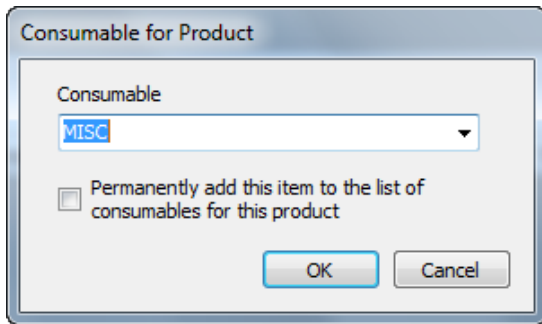
Consumable items used and Additional Charges needed to service the product are added to the Service Ticket on the Service Details tab. Entries made here will be added to the 'Total' of the Service Ticket.

Consumable Items

To add a Consumable item to the Service Ticket, click on the ADD button in the Consumable section of the Service Details tab.

This launches the 'Consumable for Product' dialog.



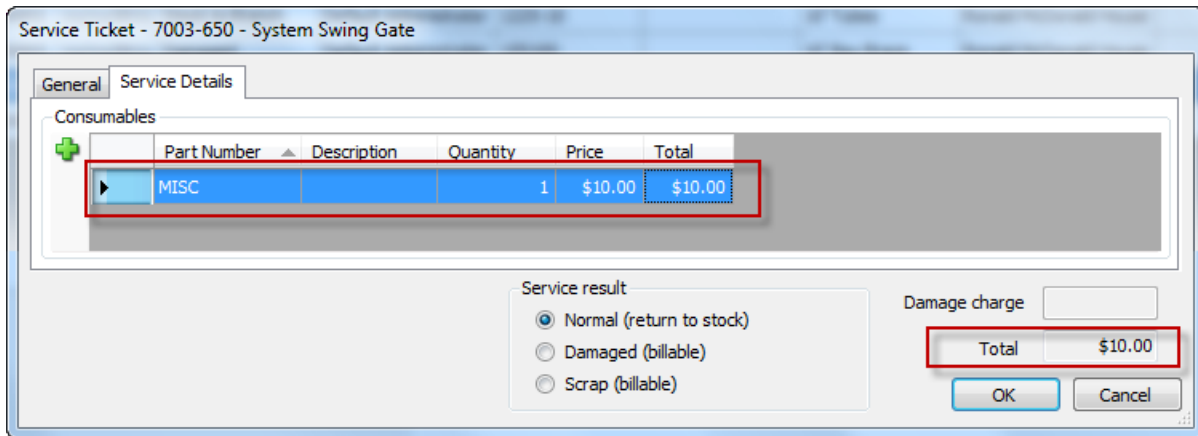


Select the Consumable item from the drop down. Click OK when ready.

Note: checking the 'Permanently add this item to the list of consumables for this product' will default this consumable item to all future Service Tickets created for this product. This information would also be added to the Product Catalog for the item. See the *Update the Product Catalog* section.

The item is added to the Consumables section on the Service Details tab. The price shown is pulled from the Rate Profile, but may be overwritten if necessary. Enter the quantity of the consumable item used for this Service Ticket.

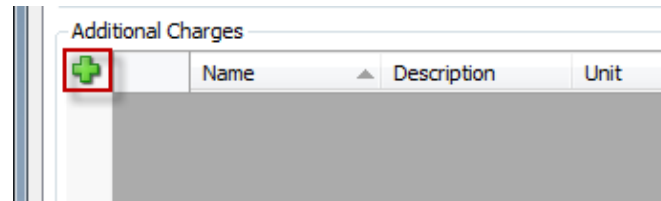
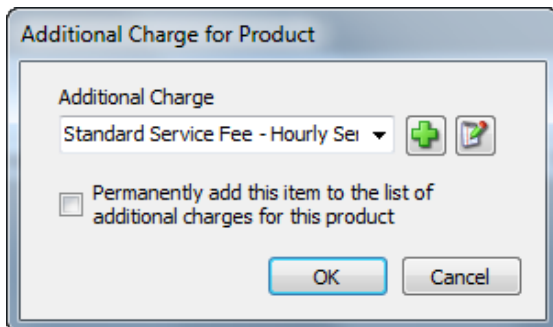
Repeat for additional consumable items required for this ticket. Note: the 'Total' field updates and tracks the total on the ticket.



Additional Charges

To add an Additional Charge item to the Service Ticket, click on the ADD button in the Additional Charges section of the Service Details tab.

This launches the 'Additional Charge for Product' dialog.



Select the Additional Charge item from the drop down. Click OK when ready.

The ADD button may be used to add an Additional Charge to the Quantify database.

Note: checking the 'Permanently add this item to the list of additional charges for this product' will default this additional charge item to all future Service Tickets created for this product. This information would also be added to the Product Catalog for the item. See the *Update the Product Catalog* section.

The item is added to the Additional Charges section on the Service Details tab. The price shown is pulled from Additional Charges, but may be overwritten if necessary. Enter the quantity of the additional charge item used for this Service Ticket.

Repeat for other additional charge items required for this ticket. Note: the 'Total' field updates and tracks the total on the ticket.

Additional Charges

	Name	Description	Unit	Quantity	Price/Unit	Taxable	Total
	Standard Service Fee	Hourly Service Fee		1	\$50.00	<input type="checkbox"/>	\$50.00

Click OK on the 'General' tab to complete the Service Ticket when ready.

Service Ticket Invoicing

Service Tickets with charge entries will be invoiced to the job site at the next billing cycle following the date the service ticket was created.

ST-0000012	11/12/2011	Service Ticket Damaged (not repairable) Charge	7003-650	System Swing Gate	1	\$100.00	\$100.00
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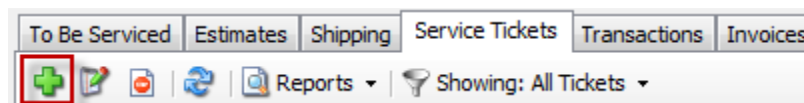
Once the Service Ticket has been associated with an invoice the associated invoice number will appear in the Service Ticket grid.

Number	Date	Service Result	Serviced By	Shipment	Order	Invoice
ST-0000001	11/11/2011	Damaged	Default Administra	RET-000015		
ST-0000002	11/11/2011	Stock to Branch	Default Administra	RET-000016		INV-0000141
ST-0000003	11/11/2011	Damaged	Default Administra	RET-000017		INV-0000141
ST-0000004	11/11/2011	Scrap	Default Administra	RET-000018		INV-0000141
ST-0000005	11/11/2011	Damaged	Default Administra	RET-000019		

Create a Service Ticket on the Service Tickets tab



On the 'Service Tickets' tab, click the ADD button. This will launch the 'Service Ticket –product number – product description' dialog.



On the General tab, the Service Ticket will be assigned a sequential ST number. The 'Service date' will default to the current date, but may be changed if necessary. The 'Serviced by' field will default with the login of the end-user creating the ticket, but other end-users may be chosen from the drop down.

Item to service section

Use the SEARCH button in the 'Item to service' section to select the To Be Serviced product for this Service ticket.



In the Item to Service section, click the SEARCH button. This will launch the 'Choose Product' dialog, which will list all current To Be Serviced items in the queue.

Part Number	Serial Number	Description	From Location	Shipment Number
1225-10		10' Tubes		
<input checked="" type="checkbox"/>	7003-650	System Swing Gate	Ronald McDonald House	RET-000023

Put focus on the product in the To Be Serviced queue for this Service Ticket. Click OK when ready.

This will populate the Item to service section of the Service Ticket. In this example, the Service Ticket is for a Swing Gate from RET-000023. Complete the ticket as shown above in the *Create a Service Ticket on the To Be Serviced tab* section.