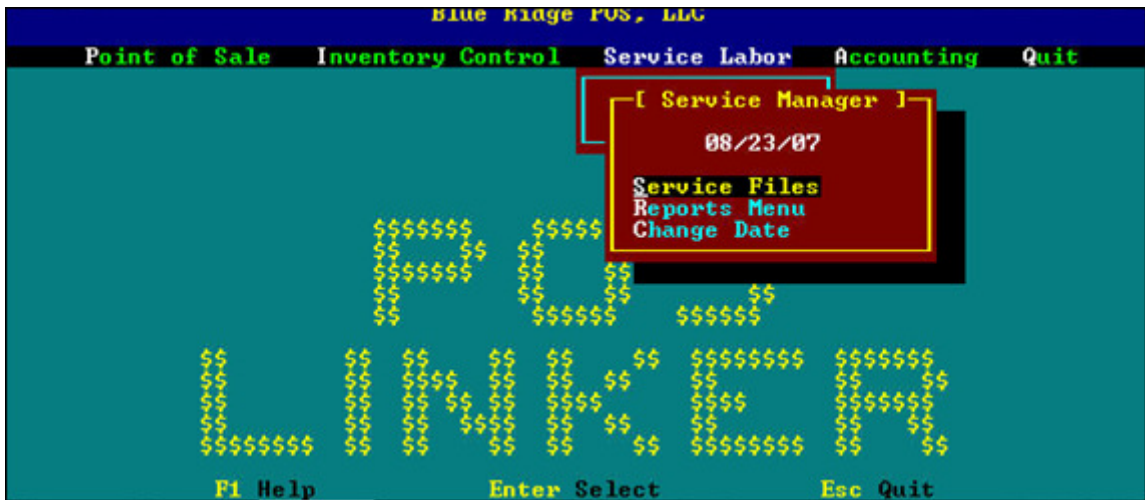# 7. Service Labor

In the above example of the POS LINKER Main Menu Screen, the highlight bar is on
Service Labor and the corresponding subtopic - Shop Control.

When Shop Control is selected from Service Labor, the Service Manager Selection
Screen appears.

Service Code File

This selection allows the user to setup time-saving codes to be entered on repair tickets for service work. Enter as complete a description as possible for each, as well as the number of hours to complete the task and the price. Codes can be created for the following categories:

- **S** - symptom reported
- **R** - requested work
- **P** - performed work

When entering information on the service order screen the user may press [F7] to display the code list for assistance. See the following sample screen.

```
                <<<<<  Service  Order  Writer  System  >>>>>
05/19/2015                              ─────────< Codes on File >─
                                        101 SHARPENED & BALANCED BLADE(S)
                                        102 SHARPENED CHAIN(S) OFF SAW
              ──────────[ Topic ]────   103 SHARPENED CHAIN(S) ON SAW
 Type P Performed service  C            104 INSTALLED TUBE
Descr _____              105 REPAIRED RECOIL STARTER
Price _____                        106 SHARPENED   MULCHING BLADE(S)
Hours _____         ___                 107 POWER WASH WALK MOWER
                                        109 POWER WASH RIDING MOWER
                                        110 POWER WASH HAND HELD PRODUCT
    Include all? _                      111 INSTALL TIRE
Service special? _                      113 SHARPENED 20"+ CHAIN(S) OFF SAW
                                        114 SHARPENED 20+ CHAIN(S) ON SAW
                                        115 PICK UP AND DELIVERY
Please type a code . . .                116 TEST COIL
                                        117 TEST SOLENOID
 Esc Quit   F1 Help                     118 CHARGE BATTERY
 End Save   F2 Delete                   119 REPLACE STARTER DRIVE NO R&R
  F3 Fwd    F4 Bwd                      121 SHARPENED BLADE(S) ON MOWER
  F6 Clear  F7 Lookup                   122 INSTALL TUBE R&R TIRE
                                        123 REPLACE BATTERY & CHECK ALTERNATOR
                                            Enter Select   PgUp / PgDn
```

Service Order reports will give a listing of service orders by status and either customer name, date received, or date promised. This report is useful in monitoring how long work orders have been in the system.

Status selections:
- R Ready
- H on Hold
- P in Progress
- S Scheduled
- C Closed

Select Y in the "All except"? Field to print all but Closed service orders

```
                         R E P O R T S

                S  (R)egular or (S)hort form

                1   by status + customer name
                2   by status + date received
                3   by status + date promised
                4   Labor summary by employee

                1 < enter choice
                                              (blank values = all)
          Status Code _           All except? N
                                                    Begin       End
  Heading _____  Order number _____1_  9999999Z
                                              Employee     __        __
                                              Reason Code  __        __
  STATUS: Select . . .                        Completed date __/__/____  __/__/____

                Esc     F1     F5      F7      Ctrl + C
                Quit   Help   Print  Lookup   Halt Printing
```

Warranty Accounts:

Many service orders are completed through manufacturer warranties. POS Linker allows you to set up warranty accounts to better track your receivables and service orders. This feature is only available if you license the service order module.

Setting Up Warranty Accounts:

a) The Warranty Accounts screen appears similar to the customer file screen - setup account information, name, address, etc. Terms = Invoice, and Service Charges = NO.
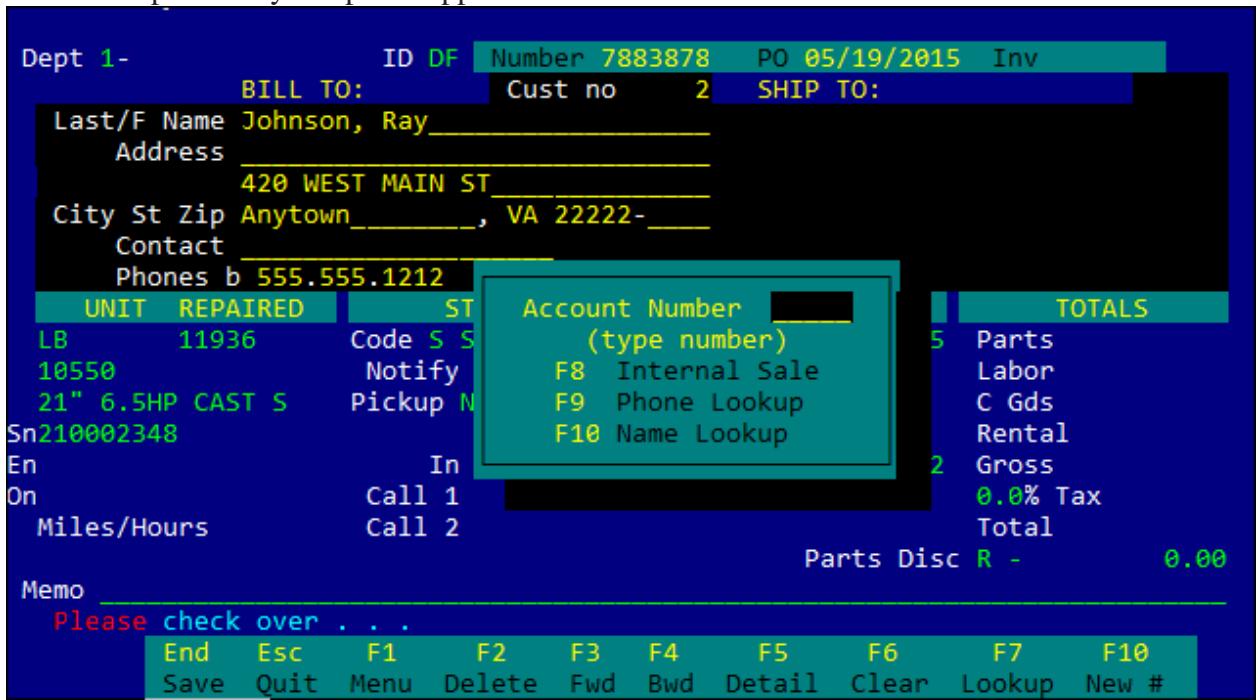

b) Under the POS menu, choose POS Setup. Select Forms/GL Linkage.

c) On the right hand side of the screen, under "General Ledger Accounts", indicate the GL account for which your Warranty Receivables will be posted - hit [END] to save.

Processing Service Orders Under Warranty:

a) Under POS menu - select Invoicing, enter operator initials.

b) Choose Lookup/Install Customer - lookup customer information or enter customer number.

c) Menu selection appears - select Service Orders, Service Order screen appears with customer information.

d) Enter the Order Number, or hit `F10` for the system to assign a new number.

e) Enter PO# if one is used.

f) At Last/F Name, select `F7` and choose Change Customer - you will now have another lookup screen.

g) Select `F8` - Internal Sale, then select Warranty. A list of Warranty Accounts you previously setup will appear.

```
Dept 1-                    ID DF  Number 7883878    PO 05/19/2015  Inv
                    BILL TO:          Cust no     2   SHIP TO:
   Last/F Name Johnson, Ray_____
        Address   _____
                  420 WEST MAIN ST_____
   City St Zip Anytown_____, VA 22222-____
        Contact   _____
        Phones b 555.555.1212
     UNIT   REPAIRED         ST    Account Number  _____            TOTALS
   LB       11936      Code S S      (type number)      5  Parts
   10550               Notify     F8   Internal Sale       Labor
   21" 6.5HP CAST S    Pickup N   F9   Phone Lookup        C Gds
  Sn210002348                     F10  Name Lookup         Rental
  En                     In                            2  Gross
  On                    Call 1                            0.0% Tax
   Miles/Hours          Call 2                            Total
                                             Parts Disc R -        0.00
   Memo _____
     Please check over . . .
            End   Esc   F1     F2    F3    F4    F5     F6     F7     F10
            Save  Quit  Menu  Delete  Fwd   Bwd  Detail  Clear  Lookup  New #
```

Highlight/select the warranty company the service order is being run under. The customer information will now include the warranty company's name and address.

```
Customer                                        Phone      Balances
Nbr ____1 Name BRIGGS & STRATTON, WARRANTY      800.955.0123      5.27
─────────────────────── O P E N   I N V O I C E S ───────────── 5.27
Number   Date    SC    Total      Tax    Payment    Balance   PO Number
578272 08/11/2008 N    200.89                 0     200.89 07/18/2008
146893 08/16/2008 N    164.70             164.70   -200.89 Payment Ck# 22651
578612 05/19/2015 N      5.27      .00         0       5.27 05/19/2015














       Esc Quit   Enter Select   Any Key Position  PgUp/PgDn New Page
```
1245

h) Process your service order as normal.

Invoices run through the warranty accounts will post to the Warranty Receivables account you selected for your GL linkage (if one) and to the Warranty Account itself. You can review the invoices on the overview screen of each Warranty Account.

Receiving payments on Warranty Account
a) Select Warranty Accounts menu selection under Service Labor.

b) Enter customer account number or F7 to lookup.

c) Select F5 for menu.

d) Enter "P" or highlight "Payments", payment screen will appear.

e)

f) System will default to current date, you must use the "Change Date" option in the Accounts Receivable sub-menu, to alter the date if you wish to post another date.

g) Enter reference information ex: Check #

h) Enter payment & discount amounts - the system will default to the account balance as the payment amount. Your payment amount is **ALWAYS** going to be the amount of the check/credit in your hand. If the invoice amount is different than the check/credit amount, the difference is the discount amount. *For example*:

   a) **Invoice: $100.00 Check: $95.00 Discount would be $ 5.00**
            or
   b) **Invoice: $100.00 Check: $105.00 Discount would be $-5.00**

i) Enter through to pop-up menu, choose "Lookup Invoices" - this will display a listing of open invoices under this warranty account.

```
───────────────────────[ Warranty Receipts ]───────────────────────
  Transaction  148515            Paid from  WARRANTY BRIGGS & STRATTON
  Date 05/19/2015 Ck# 1245_____    Cust #
    PO Ref Payment Ck# 1245____          1   P O BOX 702
    Amount        5.27 Disc 5.27             MILWAUKEE        WI 53201-9935
   Applied             Payment type                5.27 balance
  To apply      10.54 by Invoice          Total receipts  $

   ──── Invoice ──── Date ──── Reference ──────── Amount ── Org Amount ────
        578272    08/11/2008  07/18/2008                200.89      200.89
        146893    08/16/2008  Payment Ck# 2265108      -200.89      164.70
        578612    05/19/2015  05/19/2015                  5.27        5.27



              Esc=quit       Enter=select      PgUp      PgDn

   Esc Quit    F1 Help    F4 Pay All    F6 Clear    F7 Lookup    F10 Process
```

j) Use arrow keys to select the invoice or invoices you wish to pay. Making sure that the amount of invoices matches the amount of the payment. You may verify this in the upper portion of the screen in the "Applied" field.

k) Enter through to pop-up screen, or press F10 and choose "Process Payment" - select payment type:

- **Cash**
- **Check**
- **Credit Card**
- **Note** - Customer is paying off account with finance note (very seldom used)
- **A/P Clearing**

```
┌──────────────────────────[ Warranty Receipts ]──────────────────────────┐
  Transaction  148515            Paid from  WARRANTY BRIGGS & STRATTON
  Date 05/19/2015 Ck# 1245_____      Cust #
    PO Ref Payment Ck# 1245____          1   P O BOX 702
    Amount         5.27 Disc 5.27            MILWAUKEE        WI 53201-9935
   Applied         5.27 Payment type              5.27 balance
  To apply         5.27 by Invoice            Total receipts  $

   ──── Invoice ──── Date ──── R │ Payment          ──── Amount ── Org Amount ────
        578612    05/19/2015  05│  type?                   5.27          5.27
                                 │
                                 │ Cash
                                 │ cHeck
                                 │ cRedit Card
                                 │ Note
                                 │ A/P Clearing
                                 └──────────────┘




    Esc Quit    F1 Help    F4 Pay All    F6 Clear    F7 Lookup    F10 Process
```

Once payment type is selected, the system will ask if you are ready to post the payment.
Answer "yes" if everything looks correct.

Using POS Linker as a Time Clock

1. Setup your POS Linker system to use it as a time clock for payroll:
   A. Start at the "black screen menu" with "Multiuser Business Solutions" in yellow print
      - [ENTER] 2 times (POS Setup)
      - Internal Departments
      - [ESC]
      - Type "TIME"
      - Type "*Time Sheet - Internal"
      - Type [N] under Tax
      - Type a GL Account if you are using the POS Linker General Ledger
      - [END] to save

   B. Setup employees for time clock.
   Note: Each employee that will use the time clock for payroll should be added into the system in a unique way from how you bill labor for them.
      - Start at the "black screen menu" with "Multiuser Business Solutions" in Yellow print
      - [ENTER] 2 times
      - POS Setup
      - Employee File
      - Initials
      - Name
      - [END] to save

   C. Setup SO calendar assignments
      - Start at the "black screen menu" with "Multiuser Business Solutions" in Yellow print
      - [ENTER] 2 times
      - Service Labor
      - Shop Control
      - Service Files
      - [F9] Service Codes
      - [F7]
      - Hold Reason
      - [ENTER]
      - [A] + <First Initial> <Last Initial> + "Assigned"
      - [ENTER]

2. Set up a new SO (Service Order) for a pay week or pay period:

- Start at the "black screen menu" with "Multiuser Business Solutions" in Yellow print
- **[ENTER]** 3 times
- Type your initials
- Select "Service Orders"
- Press **[F10]** for a new SO number
- **[ENTER]**
- **[T]**
- **[ENTER]**
- **[F7]**
- Change Customer...
- **[F8]** (Internal)
- **[0]**
- **[↓]** - Arrow down to "TIME" for Sheet
- **[ENTER]**
- **[F1]**
- Unit Info
- **[ENTER]** 4 times
- Enter SO# including the T (1332T)
- **[ENTER]** 4 times
- **[P]** "In Progress"
- **[F7]** to add to SO calendar an assignment of responsibility
- **[ENTER]** 6 times
- Enter first day of payroll week or period in the "Order Started On" field
- Estimated or Promised for: Use date that you want the SO to display on the Service Calendar & Service Order Report by Promise Date for completion

Note: Date fields shortcuts + **[8]** *in this field will add 8 days to today's date.* **[F7]** *will type in today's date.*

- Order Finished On: Use date which is the last day of your payroll week or period
- **[ENTER]** 5 times
- **[F5]** to save

3. Prepare for next payroll period and close the previous one.

NOTE: At or near the end of your payroll period, you will start a new "T" Service Order. After everyone has punched off the clock for the last pay period day, change the old "T" SO status to "D" status.

- Start at the "black screen menu" with "Multiuser Business Solutions" in Yellow print
- **[ENTER]** 3 times
- Type your initials
- Select "Service Orders"
- **[F7]**
- *
- **[ENTER]** 2 times
- **[I]** (In Progress)
- Select the time SO you want to change
- **[ENTER]** 4 times
- **[F5]**
- **[F1]**
- Mgmt Review
- Type password if you have one or continue...
- **[ENTER]**
- **[F1]**
- Change Status
- **[D]**

     To review time punches for accuracy, run the SO report described below on another channel first and then come back to this channel to review. After making any necessary adjustments, Close the SO.

- **[ESC]**
- **
- Type Date, initials + "Reviewed" (i.e. 1.17.06 jpb Reviewed)
- **[END]**
- Process Only

4. Run the payroll period end report to obtain accumulated time clock punches.
- Start at the "black screen menu" with "Multiuser Business Solutions" in Yellow print
- **ENTER** 2 times
- Shop Control
- Reports Menu
- **4**
- **D** (or current status of SO that you want to see)
- **N**
- **ENTER** 3 times
- Range of initials that you want the report for
- **F7**
- Type correct date for the SO payroll period
- **F5**
- Completed Date
- Choose "Screen" or the printer you want