

ResellerAdvantage

Service/Work Order  
Functionality

August 8<sup>th</sup>, 2003

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## Overview

With the narrowing margins in computer hardware computer resellers are focusing on services in order to boost profits. ResellerAdvantage has a suite of products that automates the process of selling computer hardware either via sales reps or the web. Based on our market research we at ResellerAdvantage have decided to add functionality that will allow current and prospective customers to not only manage the selling of computer hardware but also to streamline the process of servicing equipment and managing projects.

Using ResellerAdvantage's base software, we have added the necessary features to allow computer resellers to automate and manage the service/work order process. The following document describes this additional functionality and how it is used in a few typical scenarios.

## A Break and Fix Scenario

### Sales Representatives/WO Entry Clerk Perspective (Start a Work Order)

1. A customer calls or comes in with a problem with a piece of equipment. The person taking the call looks up the contact and account within ResellerAdvantage and reviews the information. If the contact and/or account do not exist they are added to the system.
2. The rep asks what piece of equipment they are having problems with and proceeds to view the accounts equipment list. If the equipment was purchased from you and is in the list, the rep can quickly view the history of the item by viewing the WO list to determine when it was last serviced, view the RMA list to see if any serial number were put on an RMA, view the list of service contracts to see if it is on a service contract and view the warranty date to see whether it is under warranty or not. If the item is not in the list, the rep can add it and assign it to a service contract.
3. If the equipment is still under warranty the rep selects the equipment and creates an RMA. (See the RMA Scenario)
4. Once the equipment is found or added the rep starts a work order for the equipment. They then asks what the problem is and enter a brief service description and a long problem description, they then determine if it will be on-site or Depot, they set the priority, pick the address location for the service and then pick the work order administrator that will manage the work order click ok. This then assigns the work order to a work order administrator for processing.

### Work Order administrator Perspective (Create/Schedule Tasks and Create Sales Orders)

1. Work Order administrator periodically search for new work orders, review the new work orders and schedule reps for them.
2. The work order administrator opens a new work order, reviews the problem description and looks up the service items associated with this piece of equipment and determines if there is an existing service item for the documented problem. If there is, this service item is added to the work order along with its estimated hours, cost and parts. This provides the customer with an estimated price and you can send them a quote. If there are no service items associated with this problem then the work order administrator assigns a task for a service rep for a cost estimate. This step is optional and if under contract or for other reasons the work can be assigned and performed without an estimate.
3. If the customer wants an estimate then the tech rep receives his estimate task on his calendar, reviews the work order and enters the estimated billable and travel hours and costs. Once the rep has this estimate complete it is automatically accessible as a service item in the database for this product so that in the future this service item can be used on other work orders. They then mark the task as completed which will automatically set the work order status to estimate completed.

The WO administrator can then send the customer the estimated work order and receive the go/no go for the fix.

4. Once the WO Administrator receives the go for a fix, they have to schedule the tasks associated with this fix. They enter the skill level required for this type of task and review the calendar to see who is available. They can then select the appropriate available rep and assign them the task. The sales rep does this for each task for the fix. And marks the work order as in progress.
5. WO Administrator also search for completed WO's where they open the WO and create a sales order for the completed service items so that billing can occur.

### Technical Representatives Perspective (Perform the work)

1. Each tech rep signs into the system every morning and views their list of scheduled activities. They open their first task and view its description and estimated time, location and required parts. They do this for all their tasks and determine if they have all the necessary parts to perform the work. If they do not, they mark the task as pending parts.
2. Once the reps have all the necessary parts for the day's activities, they leave for their first activity and note their travel time.
3. Once the activity is complete they sign on to the system and enter the actual travel time, the actual billable time, the actual non-billable time, the work done and mark the task as completed.
4. The rep then moves on to the next scheduled activity.

### Sales Representatives Perspective (Monitor the Work)

1. Periodically the sales rep needs to view the status of in process work orders to determine if the customer needs to be made aware of hold ups or to communicate back with the customer.
2. From the ResellerAdvantage accounts tab the rep can find an account and list all their open work orders and view the current status. Any work orders that are pending an action can be viewed and the sales rep can determine if they need to contact the customer..

### Order Administrators Perspective (Bill the Customer)

1. Periodically the order administrator views their list of new sales orders and verifies/updates the order information and exports the sales order to the accounting system for accounts receivable processing.
2. On work order sales orders there may be a contract associated with it and the system will either deduct the amount if a block contract or will use the actual cost that was based on the contracts hourly rate and will send the sales order to the accounting system.

# Hardware and Software Purchase with Installation Scenario

## Sales Representatives Perspective (Start a Deal/Quote)

1. A customer calls or comes in with a request for a quote. The person taking the call looks up the contact and account within ResellerAdvantage and reviews the information. If the contact and/or account do not exist they are added to the system.
2. The rep asks what hardware, software and installation they require. The sales rep then builds a quote by selecting the hardware and software from the electronic products catalog and selects the necessary installation service items from the electronic service catalog.
3. Once the quote is completed it can be sent to the customer via, e-mail, fax or regular mail.
4. Once the sales rep gets the customers approval the quote is turned into a sales order with the product items and a work order using the service items and they are routed to the selected order administrator and work order administrator.

## Order Administrator Perspective (Process Sales Order)

1. The order administrator reviews the sales order and exports the product items to the accounting system for purchasing and invoicing.

## Work Order Administrator Perspective (Process Work Order)

1. Work Order administrators periodically search for new work orders, review the new work orders and schedule reps for them.
2. The work order administrator opens the work order and assigns the tasks to the correct tech rep using the reps skills settings and reviewing their calendar for availability.
3. Once the tasks are assigned the work begins.
4. WO Administrator also search for completed WO's where they open the WO and create a sales order for the completed service items so that billing can occur. Once all tasks for a service item on a work order are completed that service item can be billed.

## Technical Representatives Perspective (Perform the work)

1. Each tech rep signs into the system every morning and views their list of scheduled activities. They open their first task and view its description and estimated time, location and required parts. They do this for all their tasks and determine if they have all the necessary parts to perform the work. If they do not have all parts, they mark the task and work order as pending parts.
2. Once the rep has all the necessary parts for the day's activities they leave for their first activity and note there travel time.
3. Once the activity is complete they sign on to the system and enter the actual travel time, the actual billable time, the actual non-billable time, the work done and mark the task as completed.
4. The rep then moves on to the next scheduled activity.

## Order Administrator Perspective (Bill for Completed Work Orders)

1. Periodically the order administrator views their list of new sales orders and verifies/updates the order information and exports the sales order to the accounting system for accounts receivable processing.

2. On work order sales orders there may be a contract associated with it and the system will either deduct the amount if a block contract or will use the actual cost that was based on the contracts hourly rate and will send the sales order to the accounting system.

## **Consulting Project Scenario**

### **Sales Representatives Perspective (Start a Deal/Quote)**

1. A customer calls or comes in with a request for a quote on a consulting Project. The person taking the call looks up the contact and account within ResellerAdvantage and reviews their information. If the contact and/or account do not exist they are added to the system.
2. The rep asks what the scope of the project is and enters the description of the project work and assigns it to a Work Order Administrator (Project Manager).
3. Once the estimate is completed it can be sent to the customer via, e-mail, fax or regular mail.
4. Once the sales rep gets the customers approval the quote is turned into a work order and routed to the work order administrator.

### **Work Order Administrator Perspective (Process Work Order/Provide Estimate)**

1. The work order administrator reviews the work order and assigns the tasks to the correct tech reps using the reps skills settings and reviews their calendar for availability. If the work order is for an estimate then the administrator either assigns it to a tech rep for an estimate or estimates it himself or herself.
2. If an estimate is required and the estimate is completed, the work order administrator updates the status as estimate completed and returns ownership back to the sales rep for quoting to the customer.
3. If not an estimate then once the tasks are assigned the work begins.

### **Technical Representatives Perspective (Perform the work)**

1. Each tech rep signs into the system every morning and views their list of scheduled activities. The rep's 1<sup>st</sup> activity is to review estimate tasks and provide estimates as required. They then open their first task and view its description and estimated time, location and required parts. They do this for all their tasks and determine if they have all the necessary parts to perform the work. If they do not they mark the task and work order as pending parts.
2. Once the rep has all the necessary parts for the day's activities they leave for their first activity and note their travel time.
3. Once the activity is complete they sign on to the system and enter the travel time, the actual work time, any non-billable time, any comments and update the status.
4. The rep then moves on to the next scheduled activity.

### **Order Administrator Perspective (Bill for Completed Work Orders)**

1. Once all tasks for the work order are completed. The order administrator is notified and they then export the actual service costs to the accounting system for invoicing. If on a block contract the actual costs are deducted from the block service contract.

# New Service/WorkOrder Features

## Tech Reps (User Enhancements)

- ResellerAdvantage user security will now have a Tech Rep Check box. Denoting that the user is a tech rep.
- Each user will now have a skills list where you can add pre-defined skills for use in determining whom to schedule for a task.
- Each User will have up to 3 different billing rates based on the skill required.

The screenshot shows the 'Reseller Advantage Security' application window with the 'User Details' tab selected. The 'Tech Rep Details' sub-tab is active. The form includes fields for 'User Id', 'Password', 'PWD Expires every 1 Days', 'Approval Amount', and 'Commission %'. Below these is a section for 'Is a Member of These Groups' with an empty list. To the right, the 'Access Rights' section contains a list of permissions with checkboxes: 'Super User', 'System Administration', 'Product Administration', 'Attachment Administration', 'Contact Administration', 'Account Administration', 'Deal Administration', 'Order Administration', 'Work Order Administrator', 'Tech Rep', 'Buyer', and 'Change Cost'. At the bottom, there is a 'Territory' field and an 'Assign Territory' button. The bottom-most controls include a 'Remove' button, an 'Add to Group' dropdown menu, and an 'OK' button.

This screenshot shows the same 'Reseller Advantage Security' application window, but the 'Billing Rates' and 'Skills' sections are visible. The 'Billing Rates' section contains three input fields: 'Billing Rate 1: \$50.00', 'Billing Rate 2: \$100.00', and 'Billing Rate 3: \$150.00'. Below this is the text 'Has the following Skills:' followed by an empty list box. At the bottom, there is a 'Remove' button, an 'Add Skill' dropdown menu currently showing 'Network Specialist', and an 'OK' button.

## Calendaring enhancements

- ResellerAdvantage Calendaring will now provide access to a new dialog for service activities that will show the estimated time and cost and will have a place to enter actual time, travel time, non-billable time.
- The Activity page will have a link back to a work order so a rep can view the entire work order.
- There is a new list view of activities with groupings by Work Order or Customer for easier viewing.
- You have access to Activities from a web browser for viewing and updating.

**Activity for BGADDIS**

Details | Work Done | **Costs**

Estimated                      Actual

Completion Date:  8 / 4 / 2003                       8 / 12 / 2003

at: 3:32 PM                      at: --: --: --

**Billable**

Duration: 2.5 Hours                      0.0 Hours

Price: \$250.00                      \$0.00

**Non-Billable**

Duration: 0.0 Hours                      0.0 Hours

Price: \$0.00                      \$0.00

**Travel**

Duration: 1.0 Hours                      0.0 Hours

Price: \$0.00                      \$0.00

**Totals**

Price:	250.0	0.0
Cost:	0.0	0.0
Gross Profit	250.0	0.0

**Rates**

Skill Level: Basic Skill                      Shift: Reg Shift

Billing Rate: \$100.00 per Hour                      Travel Rate: \$0.00 per Hour

Billing Cost: \$0.00 per Hour                      Travel Cost: \$0.00 per Hour

Percent Complete: 0 %

Clear | Print w/O | Add Comnt | Split Task | OK | Help

WO Item Status -

**Activity for BGADDIS**

Details | Work Done | Costs

Type: Task                      BGADDIS

Date: 8 / 13 / 2003                      Time: 9:30 AM

Total Duration: 210 Minutes                       Timeless

Private

**Alarm Information**

Set Alarm For 0 Minutes Before

With Harbor Information Systems (518) 877-                      Edit

For Work Order 01013W                      Edit

Description                      Preset Desc's:

Task for 01013W - Initial Network Planning Session

Clear | Print w/O | Add Comnt | Split Task | OK | Help

WO Item Status -

## **Service Item Enhancements**

- Service items that are added to the product catalog will now allow you to enter suggested parts for the service, a list of tasks that need to be performed, an estimated cost for the service, and a place to add attachments with documentation about the service.
- The main tab allows for entering basic categories of service information.
- The Distributors tab allows you to enter the estimated cost of the service.
- The attachments tab allows you to add Word Documents, PDF files or pictures on what the process entails. (If necessary)
- The Associated products tab is where you will find the suggested parts that are assigned for the service.
- The Associated Tasks list, lists all tasks that are necessary in order to complete the service. Each task can be edited and estimated time, costs and descriptions can be entered.

**Product Maintenance**

Mfg Part # (SKU)  Part Type

Mfg Part Name

Key Information | Distributors | Attachments | Associated Products | Associated Tasks | Contract Prices

Manufacturer Information

Manufacturer  Mfg Price

Where Product Belongs in Product Hierarchy

Product Top-category  Product Category

Product Sub-category  Product Sub-Sub-category

**Product Maintenance**

Mfg Part # (SKU)  Part Type

Mfg Part Name

Key Information | Distributors | Attachments | Associated Products | Associated Tasks | Contract Prices

Product Pictures, Spec Sheets, Etc...

Type	Name	Date Added
Technical Specifications	PDF File	06/28/2000 03:09:00 PM

**Unknown Format**

**Product Maintenance**

Mfg Part # (SKU)  Part Type

Mfg Part Name

Key Information | Distributors | Attachments | Associated Products | Associated Tasks | Contract Prices

Type	Feature Description	Web Sequence	Kit Flag	Required	Web Default Selecto
1 Configuration Part	HIGH DUTY OIL ROLLER FORMAGICOLOR		1 N	N	

**Product**

Mfg Part # (SKU)  Part Type

Mfg Part Name

Key Information | Distributors | Attachments | Associated Products | Associated Tasks

Task List

Task Type	Description	Skill Level	Estimated # of Hours	Hourly Rate	Estimated Cost
1 Project Item	Fix Accordion Paper Jam	Basic One	1.5	100.0	\$150.00
2 Project Item	Install new Rollers Into Printer	Skilled	1.0	125.0	\$125.00

## Quote Enhancements

- Ability to add new service items to quote.
- New quote bookmarks for additional service item information.
- Ability to add an account's equipment to a service item within a quote
- Ability to search for service items using a broad range of search options including searching for service items using equipment part numbers

## Contracts (New Feature)

- Reseller will now have a new contracts tab that will show for contract administrators, which will be a new security.
- Contracts processing will allow for the creation of contracts that will contain type of contract, block, fixed, hourly, as well as rates, time frames billing cycle and equipment covered.
- Ability to assign contracts to accounts.
- Notification on the calendar of contracts that have hit the low threshold, or need to be renewed, etc.
- Export of invoice information to an accounting system for accounts receivable processing.

The screenshot shows the 'Reseller Advantage' application window. The menu bar includes 'File', 'Reports', and 'Help'. Below the menu is a navigation bar with tabs for 'Schedule/Mail', 'Contacts', 'Accounts', 'Deals', 'Sales Orders', and 'Work Orders'. A secondary row of tabs includes 'Products', 'Service Contracts', 'Attachments', and 'RMA's'. The main area is titled 'Search for Contracts By...' and contains several search criteria fields: 'Status' (set to 'All'), 'Number' (empty), 'Account' (empty), 'Type' (set to 'All'), 'Owner' (set to 'BGADDIS'), and 'Serial #' (empty). There are 'Search', 'Clear', and 'More ...' buttons. Below this is a 'Date Searching' section with 'Type' (set to 'Created'), 'Begin' and 'End' date fields, and a 'Select Dates From' section with 'Periods' and a calendar icon. At the bottom, a table titled 'Contracts Matching Search Criteria ...' is shown with 0 results. The table has columns for 'Accounts', 'Description', 'Number', 'By:', 'Status', 'Type', 'Start Date', and 'End Date'. Below the table are buttons for 'New', 'Edit', 'Copy', and 'Delete', along with a 'Contract Alerts' section.

The screenshot shows the 'Contract Workbook' application window for contract #01005C. The title bar reads '#01005C - \$10K LAN, WAN and Firewall 4 Hour'. The menu bar includes 'File', 'Reports', and 'Help'. The interface is divided into several sections. On the left, the 'Contract' details are shown: 'Description' is '\$10K LAN, WAN and Firewall 4 Hour', 'Type' is 'Fixed Price', 'Number' is '01005C', 'Date Created' is '05/03/2003', 'Start Date' is '6 / 2 /2003', 'End Date' is '6 / 2 /2003', 'Status' is 'In-Active', 'Current Owner' is 'BGADDIS', and 'Created By' is 'BGADDIS'. On the right, the 'Associated Accounts' section shows a table with columns for 'Account Name', 'Account Phone #', and 'Default Bill-To Address'. The table lists two accounts: 'Harbor Information Systems' with phone number '(518) 877-1022' and address '123 Main Street, Alba', and 'ResellerAdvantage.com' with phone number '(518) 872-2011' and address '56 Nash Road, Deler'. There are 'Assign', 'Edit', and 'Remove' buttons next to the table. At the bottom, there is a 'Contract Details' section which is currently empty.

**Contract Workbook - #01005C - \$10K LAN, WAN and Firewall 4 Hour**

File Reports Help

**Contract**

Description: \$10K LAN, WAN and Firewall 4 Hour

Type: Fixed Price

Number: 01005C

Date Created: 05/03/2003

Start Date: 6 / 2 / 2003

End Date: 6 / 2 / 2003

Status: In-Active

Current Owner: BGADDIS

Created By: BGADDIS

**Accounts Pricing Products WO's Activities Comments Attachmer History**

**Pricing**

Basis: Block General Contract Amount: \$6,870.78

Rate: \$120.00 Billed to Date: \$120.00

Per: Hour Remaining: \$6,750.78

Travel Rate: \$0.00 Threshold: \$1,000.00

Travel Per: Incident Billing Cycle: Annually

Response Hours: 4.0 Assigned Rep:

Deduct From Contract Amount

**Contract Details**

## Work Orders (New Feature)

- ResellerAdvantage now has a new Work Orders Tab that will list work orders for a work order administrators, which will be a new security.
- Work orders can be created 2 ways, one a rep has work that needs to be done that does not need to be quoted and does not go along with other purchased products, the rep just starts a new work order. Two, a rep is producing a quote for a customer that contains service items and the customer approves the quote. The quote is then turned into a sales order that contains the products and the service items are included in a work order and associated with the sales order and quote.

**Account Processing - Harbor Information Systems**

File Window Help

**Key Account Information**

Name: Harbor Information Systems

Phone: (518) 877-1022 Fax: (518) 898-7765

Type: Suspect Pricing Profile: General 10% De

Territory: Owner: BGADDIS

Accounting Customer # 5188771022

**Additional Account Information**

Tax Code: T06 % 6

Sic Code: Chemicals

Source: Direct Mail

Candidate for: Server

Internet Home Page

**Alert - See Comments**

Account Provides

Manufacturing

Distribution

Comments Attachments Deals/Orders/POs Sales Reps/Credit Contract/Equipment History Contract Prices

Number	Description	Status	Type
01003C	Emergency Service Contract	Active	Onsite Se
01005C	\$10K LAN, WAN and Firewall 4 Hour	In-Active	Fixed Pric

Part # /SKU1	Description	Serial/Tracking/Invoice #s	Cont
386192-007	Deskpro EN Pentium	1019-A / / 101-999	010C
386179-007	Deskpro EP Pentium	1011 / /	
205103-005	DP EN SFF 810	123-abc / 1234567890123456789012345 /	
EM-500-RD-L	CASSIOPEIA EM-500	101999 / /	
293822-002-C	64MB MODULE FOR	9098773 / /	
F2120W/THAI	OMNIBOOK XE3 P3-650	987115-P-998 / 02-99P-9 /	
LCS-CSC	CASE SOFT FOR	1011988232 / 123123 /	
M832001	KINGSTON 32MB	14450 / /	
80400U	Palm V Aluminum Case	12345 / 111 /	
230538-001	22IN/20V 24MM		

Click Show button to list all equipment

0

Start New WorkOrder Start New RMA

Equipment is added to an account once the ordered products have been received by the account. There is a set status function for each product on a sales order and purchase order and once set to product invoiced an equipment record is created for the product and is associated with the account.

**Workorder Workbook - #01013W - Harbor Information Systems - Network Install**

File Reports Help

Service Information | Service Items | Billing Information

**Service**

Name: Network Install  
 Number: 01013W  
 Date Created: 07/21/03  
 Created By: BGADDIS  
 W/O Administrator: BGADDIS

**Schedule**

Expected: 9/25/2003 at 3:17 PM  
 Closed: 8/12/2003 at --:--:--

Type: Project  
 Status: New Work Order  
 Priority: Medium

Account/Contact | Contract/Price | Activities | Comments | Attachments | History

**Main Account**

Name and Address

Harbor Information Systems  
 123 Main Street  
 Albany, NY 12053  
 Phone: (518) 877-1022  
 Fax: (518) 898-7765  
 Type: Suspect  
 Customer #: 5188771022

Assign Edit

Created By BGADDIS on 02/02/2002  
 This is an alert comment that has many lines.

**Contacts**

Name	Role	Bus. Phone
Mr. Brian Gaddis	Internal-Sales-Rep	(518) 872-201
Mr. Fred Hartinger	Key Contact	(518) 877-102
Damon Curtis	Technical-Rep	(260) 407-647

Assign Edit Remove Set as Customer

**Workorder Workbook - #01013W - Harbor Information Systems - Network Install**

File Reports Help

Service Information | Service Items | Billing Information

Service Description	Status	Parts \$	Base \$	Est. Labor	Act. Labor	Est. Total	Act. Total	Act. Cost	Gr Profit	Part # (SKU)
Network Planning Session		0	0.0	1075.0	575.0	1075.0	575.0	0.0	575.0	NETW/ORK-IN\$
Network Design		0	0.0	800.0	200.0	800.0	200.0	0.0	200.0	NETW/ORK-IN\$
Network Design Review		0	0.0	750.0	300.0	750.0	300.0	0.0	300.0	NETW/ORK-IN\$
Network Post Install		0	0.0	750.0	300.0	750.0	300.0	0.0	300.0	NETW/ORK-IN\$
Network Cable &		0	0.0	1500.0	300.0	1500.0	300.0	0.0	300.0	NETW/ORK-IN\$

Assign Service	Attachments	Part Price	Labor Price	Base Price	Total Price	Total Cost	Gross Profit
New	Remove	\$0.00	\$4,875.00	\$0.00	\$4,875.00	\$0.00	\$4,875.00
		Act: \$0.00	\$1,675.00	\$0.00	\$1,675.00	\$0.00	\$1,675.00

**Service Details**

Problem/Unit: \_\_\_\_\_ Tasks: \_\_\_\_\_ Parts: \_\_\_\_\_

Unit: \_\_\_\_\_ History Serial #: \_\_\_\_\_

Service Description: Initial Network Planning Session

Base Price: \$0.00 Cost: \$0.00 Status: \_\_\_\_\_

Problem  Taxable Resolution

Click the Assign Service button to add service items. You can view Service items for a specific piece of equipment or items can be searched for using a product number or other search criteria. Once the Service item is selected you can set the Unit from a list of account equipment or you can add new equipment. Once a piece of equipment is selected to view the equipment details and service history click the History button

Click on a service item to display the specifics for that service item. Such as the description of the service, the tasks to perform the service and the necessary parts required for the service. Costs are calculated using the total of the task costs and the parts costs.

Workorder Workbook - #01013W - Harbor Information Systems - Network Install

File Reports Help

Service Information Service Items Billing Information

Service Description	Status	Parts \$	Base \$	Est. Labor	Act. Labor	Est. Total	Act. Total	Act. Cost	Gr Profit	Part # (SKU)
Network Planning Session		0	0.0	1075.0	575.0	1075.0	575.0	0.0	575.0	NETWORK-INS
Network Design		0	0.0	800.0	200.0	800.0	200.0	0.0	200.0	NETWORK-INS
Network Design Review		0	0.0	750.0	300.0	750.0	300.0	0.0	300.0	NETWORK-INS
Network Post Install		0	0.0	750.0	300.0	750.0	300.0	0.0	300.0	NETWORK-INS
Network Cable &		0	0.0	1500.0	300.0	1500.0	300.0	0.0	300.0	NETWORK-INS

Assign Service Attachments

New Remove

Parts Price	Labor Price	Base Price	Total Price	Total Cost	Gross Profit
\$0.00	\$4,875.00	\$0.00	\$4,875.00	\$0.00	\$4,875.00
Act: \$0.00	Act: \$1,675.00	Act: \$0.00	Act: \$1,675.00	Act: \$0.00	Act: \$1,675.00

Service Details

Problem/Unit Tasks Parts

Unit: ... History Serial #: ...

Service Description: Initial Network Planning Session

Base Price: \$0.00 Cost: \$0.00 Status: ...

Problem  Taxable Resolution Create from Notes

Select the Parts tab to display all required parts for this service item. You can add or remove required parts. You can also create a replenishment order to order parts not in stock.

Workorder Workbook - #01013W - Harbor Information Systems - Network Install

File Reports Help

Service Information Service Items Billing Information

Service Description	Status	Parts \$	Base \$	Est. Labor	Act. Labor	Est. Total	Act. Total	Act. Cost	Gr Profit	Part # (SKU)
Network Planning Session		0	0.0	1075.0	575.0	1075.0	575.0	0.0	575.0	NETWORK-INS
Network Design		0	0.0	800.0	200.0	800.0	200.0	0.0	200.0	NETWORK-INS
Network Design Review		0	0.0	750.0	300.0	750.0	300.0	0.0	300.0	NETWORK-INS
Network Post Install		0	0.0	750.0	300.0	750.0	300.0	0.0	300.0	NETWORK-INS
Network Cable &		0	0.0	1500.0	300.0	1500.0	300.0	0.0	300.0	NETWORK-INS

Assign Service Attachments

New Remove

Parts Price	Labor Price	Base Price	Total Price	Total Cost	Gross Profit
\$0.00	\$4,875.00	\$0.00	\$4,875.00	\$0.00	\$4,875.00
Act: \$0.00	Act: \$1,675.00	Act: \$0.00	Act: \$1,675.00	Act: \$0.00	Act: \$1,675.00

Service Details

Problem/Unit Tasks Parts

Type	Item Description	Part # (SKU)	Qty	Cost (ea)	Ext Cost	+	Uplift	List Price	Discount %	Bid Price	Ext Bid	Gr Profit	# Avail

# Parts: 0 Parts Cost: \$0.00 Avg Uplift: 0.0 Parts Price: \$0.00 Gross Profit: \$0.00 %

Replenish Assign Remove Done

Select the Tasks tab to view all tasks associated with this service item.  
 You can add/remove tasks from the service item.

**Workorder Workbook - #01013W - Harbor Information Systems - Network Install**

File Reports Help

Service Information Service Items Billing Information

Service Description	Status	Parts \$	Base \$	Est. Labor	Act. Labor	Est. Total	Act. Total	Act. Cost	Gr Profit	Part # (SKU)
Network Planning Session		0	0.0	1075.0	575.0	1075.0	575.0	0.0	575.0	NETWORK-INS
Network Design		0	0.0	800.0	200.0	800.0	200.0	0.0	200.0	NETWORK-INS
Network Design Review		0	0.0	750.0	300.0	750.0	300.0	0.0	300.0	NETWORK-INS
Network Post Install		0	0.0	750.0	300.0	750.0	300.0	0.0	300.0	NETWORK-INS
Network Cable &		0	0.0	1500.0	300.0	1500.0	300.0	0.0	300.0	NETWORK-INS

Assign Service Attachments

Part Price	Labor Price	Base Price	Total Price	Total Cost	Gross Profit
\$0.00	\$4,875.00	\$0.00	\$4,875.00	\$0.00	\$4,875.00
\$0.00	\$1,675.00	\$0.00	\$1,675.00	\$0.00	\$1,675.00

Service Details

Description	Start Date	Est. Duration	Tech Rep	% Complete	Act. Duration	Labor Price
Task for 01013w - Initial Network	08/05/2003 09:30:00 AM.0	3.5 Hours	BGADDIS	100	4.0 Hours	\$300.00
Task for 01013w - Initial Network	08/13/2003 09:30:00 AM.0	3.5 Hours	BGADDIS	0	0.0 Hours	\$0.00
Task for 01013w - Initial Network	07/21/2003 03:12:00 PM.0	2.0 Hours	NOUSER	0	1.0 Hours	\$0.00
Task for 01013w - Initial Network	07/21/2003 03:12:00 PM.0	2.0 Hours	NOUSER	0	1.0 Hours	\$0.00

New Edit Clear Delete Schedule

Using the Schedule button you can list all Technicians with the required skill level. The list shows all the technicians skills and when they are available next and for how long. For a calendar view of a rep you can right click and select the calendar view menu item. To select a rep for this service item right click and select the assign menu item. If the rep does not have the required time available a warning will be displayed and a confirmation will be asked. Tech will receive an e-mail notification and a task on his RA calendar. The task will have the associated work order for quick access to the Work Order.

**Schedule Tech Rep**

Tech Rep	Skills
ASTUART	Network Engineer - \$100.00
BGADDIS	Basic Skill - \$100.00
FRED1	Cable Installer - \$100.00
NOUSER	

Schedule

**Daily Schedule for Tuesday, August 12, 2003**

08:00 AM	
08:30 AM	
09:00 AM	
09:30 AM	
10:00 AM	
10:30 AM	
11:00 AM	
11:30 AM	
12:00 PM	
12:30 PM	
01:00 PM	

August 2003

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

8/12/2003

Show only Reps with skill Network Engineer

Schedule Cancel Edit Re-Schedule