Efficiency

Support and Service Manual

Version 4.6

REVISED: OCTOBER 2002

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Service Module – Set up

First Steps

Prior to using the Support and Service Module please check that the following areas of Efficiency are already set-up:

Supervisor

- Operating Divisions
- Branches
- Executives
- Security
- Users
- Functional Security

Campaign

- Header
- Splits

Activities (Call Transactions)

- Result
- Reason
- Next Action
- Call Transaction Defaults

Plants (If Required)

Contracts (If Required)

Now you can set-up the Service Specific Codes and Flags. These areas are explained in full detail within this manual. For any other set-ups required please refer to the relevant manual.

- Support and Service
- Key and Faults
- Charges (If Required
- Returned Parts (If Required)

Service Module Codes and Flags

The following code and flag tables should be set up during the initial set up. Each table requires at least one record. The system will provide a default record of

Code: 00000
Description: Default record of

It is recommended to keep at least one default record in each table.

These tables (listed with their descriptive names, the database names are given on the detailed section for each item) are grouped in three categories. Some of the data in the tables relate to the whole corporation and some may be maintained at the operating division levels.

- Mandatory/Strongly Recommended
- Optional
- Site Specific

Mandatory or Strongly Recommended'	Support Status	Corporate Level
	Support Type	Corporate Level
	Support Activity	Corporate Level
	Support Line Status	Corporate Level
	Major Key Type	Corporate Level
	Major Key	Corporate Level
	Minor Key	Corporate Level
	Shared Options	Operating Division
	User Options	User Level
	<u>Charge Codes</u>	
	Charge Code	Corporate Level
	Charge Group	Corporate Level
	Charge Types	Corporate Level
	Executive Charges	Operating Division
	<u>Returned Parts</u>	
	Status	Corporate Level
	Type	Corporate Level
	Category	Corporate Level
Optional	Minor Key	Corporate Level
	Activity Task Matrix	Corporate Level
	Fault Codes	Corporate Level

Codes and Flags

Support Status

The Support Status code is used to group the Support and Service Transaction and Header records by their statuses, i.e. Open (Active), Closed etc.

Support Status Tables and Fields

The Support Status data is maintained in the Support Status (suppstat) table.

The data in this table should be designed to address the needs of the entire corporation.

Support Status fields in table SUPPSTAT

Field Name	Field Description
Status Id	A unique identification code.
Description	The description of the support status

Support Status Data Example

Support Status Codes

Status Id	Description
00000	*Default Call Status*
O	**Open**
C	**Closed**
IR	**Invoice Requested**
I	**Invoiced**
PR	**Printed**

Key

Abc: This highlights the typical recommended records.
Abc: This highlights the mandatory or system dependant records.

Support Status Hints and Tips

- The Status IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of ‘00000’ is recommended
- The system codes must exist in the table at all times.

Support Type

The Support Type codes are intended to group the Support and Service Log records into Type and Type Category classification.

Support Type Tables and Fields

The Support Type codes are maintained in the Support Type Code Table (supptype), i.e. Network Support, Operating System Support, Bug Fix etc.

These codes are grouped in the Support Type Category Table (supptypc) i.e. Phone Support, Site Support etc.

The data in these tables should be designed to address the needs of the *entire corporation.*

Support Type Category fields in table SUPPTYPC

Field Name	Field Description
Type Category Id	A unique identification code.
Description	The description of the type category

Support Type Code fields in table SUPPTYPE

Field Name	Field Description
Type Id	A unique identification code for the type
Description	The description of the type
Type Category	A unique identification code for the type category

The data in the Support Type Category table must exist before entering data in the

Support Type Code table.

Support Type Data Example

Support Type Category Codes

Type Category Id	Description
00000	*Default Support Type Category*
PH_SUPP	Phone Supports
SITE_SUPP	Site Supports
FIX	Bug Fixes and Enhancements

Support Type Codes

Type Cat Id	Type Id	Description
00000	*00000*	*Default Support Type*
PH_SUPP	PH_NW	Netware Support
PH_SUPP	PH_OS	Operating System Support
SERV	SRV_INH	Service Inhouse
SERV	SRV_SITE	Service Site
FIX	FIX_BUG	Bug Fixes
FIX	FIX_ENH	Software Enhancement

Key

Abc: This highlights the typical recommended records.
Abc: This highlights the mandatory or system dependant records**.**

Support Type Hints and Tips

- The Type IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Line Status

The Service Line Status code is used to group the Service line records by their statuses, i.e. Active, Closed, Awaiting Parts etc.

Line Status Tables and Fields

The Service Line Status data is maintained in the Service Line Status (servlnst) table.

The data in this table should be designed to address the needs of the entire corporation.

Service Line Status fields in table SERVLNST

Field Name	Field Description
Status Id	A unique identification code.
Description	The description of the Line status

Line Status Data Example

Service Line Status Codes

Status Id	Description
00000	*Default Call Status*
A	**Active**
C	**Closed**
RT	**Return Parts Awaited**

Key

Abc: This highlights the typical recommended records.
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Line Status Hints and Tips

- The Status IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended
- The codes of 'C=Closed', 'A=Active' and 'RT=Return Parts Awaited' must exist in the table at all times.

Major Key Type

The Major Key Type Codes are intended to group the support and transactions records into groups via the major key codes classification.

The major key type code also controls the plant preventative maintenance update.

The Major Key type codes are maintained in the Major Key Type Code Table (majktype), i.e. Software, Hardware, etc.

These codes are then grouped in the Major Key codes.

The data in the Major Key Type table must exist before entering data in the major keys table.

Major Key Type Tables and Fields

The Major Key type codes are maintained in the Major Key Type Code Table (majktype).

The data in this table should be designed to address the needs of the entire corporation.

Major Key Type fields in table MAJKTYPE

Field Name	Field Description
Major Key Type Id	A unique identification code.
Description	The description of the major key type
Update Plant Service	This field controls the preventative maintenance update from the support transactions. If this field for the major key value of the support transaction was checked the plant will be updated.

Major Key Type Data Example

Major Key Type Codes

Type Id	Description	Update Plant Service
00000	*Default Major Key Type*	*N*
001	Feeder	N
002	Comms	N
003	Software	N
004	Mechanical Parts	N
005	Electrical Parts	N
006	Printer	N
007	Preventative Maintenance	Y

Key

Abc: This highlights the typical recommended records.
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Major Key Type Hints and Tips

- The Major Key Type IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of ‘00000’ is recommended

Major Key

The Major Key Codes are intended to group the Support and Service Log records into Major and Minor Keys classification.

The Major Key codes are maintained in the Support Major Key Code Table (majorkey) then grouped in the Support Transaction Table (suppttran), i.e. Net Server, NT Workstation, Printer etc.

The data in the Major Key table must exist before entering data in the Support Transaction Log table.

The Major and Minor Key combinations are also used to set the Support Activity Matrix.

Major Key Tables and Fields

The Major Key codes are maintained in the Major Key Code Table (majorkey)

The data in this table should be designed to address the needs of the entire corporation.

Major Key fields in table MAJORKEY

Field Name	**Field Description**
Major key Id	A unique identification code.
Description	The description of the major key
Major key Type Id	Major Key Type Id.

Major Key Data Example

Major Key Codes

Major Key Id	**Description**	**Type Id**
00000	*Default Major Key*	*00000*
00001	Infeed	001
00002	Lubricate moving parts	004
00003	Film Feed	001
00004	Folding Plates	004
00005	Elevator	004
00006	Outfeed	001
00007	Labeller	004
00008	Console	004
00009	Wrapper Driver	005
00010	Power Supply	005
00011	AD Board	005
00012	Indicator	005
00013	Main Board	005
00014	Keyboard	006
00015	Printer	006
00016	Software	003
00017	Comms	002

Key

Abc: This highlights the typical recommended records.
Abc: This highlights the mandatory or system dependant records**.**

Major Key Hints and Tips

- The Major Key IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Minor Key

The Minor key Codes are intended to group the Support Transaction records into minor key classification. The data in the minor Key table must exist before entering data in the Support Transaction table.

Minor Key Tables and Fields

The minor key codes are maintained in the Minor key Table (minorkey), i.e. Repair, Installation, support etc.

Minor Key Code fields in table MINORKEY

Field Name	**Field Description**
id	A unique identification code for Minor Key.
Description	Description of the minor key

Minor Key Data Example

Minor Key Codes

Minor Key Id	**Description**
00000	*Default Minor Key*
CAL12	Calibration 12monthly
CAL3	Calibration 3monthly
CAL6	Calibration 6monthly
TEL12	Telarc Calibration 12monthly
TEL24	Telarc Calibration 24monthly
TEL36	Telarc Calibration 36monthly
TEL6	Telarc Calibration 6monthly
TMU	Certificate of Accuracy 12monthly

Key

Abc: This highlights the typical recommended records.
Abc: This highlights the mandatory or system dependant records**.**

Minor Key Hints and Tips

- The Minor Key IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Fault Codes

The Fault Codes are intended to group the Plant Maintenance into multiple Faults and Fault Category classification.

The fault codes are maintained in the (fault), i.e. Power Supplier, Operating System, Bug etc.

These codes are grouped under the Fault Category which is maintained in the (faultcat) table.

The data in these tables should be designed to address the needs of the *entire corporation.*

Fault Codes Tables and Fields

The fault codes are maintained in the (fault) and Fault Category codes are maintained in the (faultcat) table.

The data in the Fault Category table must exist before entering data in the Faults Code table.

Fault Category Fields in table FAULTCAT

Field Name	Field Description
Category Id	A unique identification code.
Description	The description of the Fault Category

Fault Item Fields in table FAULT

Field Name	Field Description
Fault Id	A unique identification code.
Description	The description of the Fault
Fault Category Id	The Fault Category Id

The data for the Fault and fault Category Codes are maintained on the Faults Maintenance window.

Fault Codes Data Example

Fault Category Codes

Category Id	Description
00000	Default Fault Category
POWER	Power Supplies
BUG	Bugs
MOTHER	Mother Biards

Fault Codes

Category Id	Fault Id	Description
00000	00000	Default Fault
POWER	PW_1	No Power
POWER	PW_2	Power Supply burnt
POWER	PW_3	Faulty cable
BUG	BUG_1	Operating System
BUG	BUG_2	Application Software

Key

Abc: This highlights the typical recommended records.

Abc: This highlights the mandatory or system dependant records**.**

Fault Codes Hints and Tips

- The Fault Category and Item IDs should be created manually.
- The Tables must contain at least one record.
- Default records with the IDs of '00000' is recommended

Returned Parts Category

The Returned Parts or Return Authorisation (RA) Category code is used to group the Returned Parts (RA) by their categories, i.e. Warranty, Repair, and Shop Soiled etc.

Returned Parts Category Tables and Fields

The Returned Parts Category codes are maintained in the Returned Parts Category Code (rtrncat) table.

The data in this table is usually designed to reflect the requirements of *all Operating Divisions.*

Returned Parts Category Code fields in table RTRNCAT

Field Name	Field Description
Category Id	A unique identification code for the category
Description	The description of the category

Returned Parts Category Data Example

Returned Part Category Codes

Category Id	Description
00000	*Default Category*
WARR	Warranty
SHOPSOIL	Shop Soiled
REPAIR	Repair

Key

Abc: This highlights the typical recommended records.
Abc: This highlights the mandatory or system dependant records**.**

Returned Parts Category Hints and Tips

- The Category IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Returned Parts Type

Their types, i.e. Back To Stock, New Part, and New Serial Number etc, use the Returned Parts or Return Authorisation (RA) Type code to group the Returned Parts (RA).

Returned Parts Type Tables and Fields

The Returned Parts Type codes are maintained in the Returned Parts Type Code (rtrntype) table. The data in this table is usually designed to reflect the requirements of *all Operating Divisions.*

Returned Parts Type Code fields in table RTRNTYPE

Field Name	Field Description
Type Id	A unique identification code for the type
Description	The description of the type

Returned Parts Type Data Example

Returned Parts Type Codes

Type Id	Description
00000	*Default Type*
BACKINV	Back to Stock
NEWSN	New Serial Number
NEWPART	New Part

Key

Abc: This highlights the typical recommended records.

Abc: This highlights the mandatory or system dependant records**.**

Returned Parts Type Hints and Tips

- The Type IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of ‘00000’ is recommended

Returned Parts Status

The Returned Parts or Return Authorisation (RA) Status code is used to group the Returned Parts (RA) by their statuses, i.e. Open (Active), Closed, Return Required etc.

Returned Parts Status Tables and Fields

The Returned Parts Status data is maintained in the Returned Parts Status (rtrnstat) table.

The data in this table should be designed to address the needs of the entire corporation.

Returned Parts Status fields in table RTRNSTAT

Field Name	Field Description
Status Id	A unique identification code.
Description	The description of the returned parts status

Returned Parts Status Data Example

Returned Parts Status Codes

Status Id	Description
00000	*Default Call Status*
O	**Open**
C	**Closed**
R	**Return Required**

Key

Abc: This highlights the typical recommended records.
Abc: This highlights the mandatory or system dependant records**.**

Returned Parts Status Hints and Tips

- The Status IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of ‘00000’ is recommended
- The codes of ‘C=Closed’, ‘O=Open’ and ‘R=Return Required’ must exist in the table at all times.

Charge Code

The charge code values are used to build the executive support charge matrix.

Charge Code Tables and Fields

The charge codes are maintained in the Charge Code (chrgcode) table.

The data in this table is usually designed to reflect the requirements of *all Operating Divisions.*

Charge Code fields in table CHRGCODE

Field Name	Field Description
Charge Code id	Charge Code id: Enter a unique a charge code id.
Description	Description of the charge code
Charge Unit	The fractions of the hour as the unit eg, enter 0.25 for 15 minutes charge or 3 for 3 hours charge.
Unit Description	The description of the unit, eg 15 minutes or 3 hours.
Unit Value	The money value for the unit, eg 30 dollars for 15 minutes ($120 for an hour) or $360 for three hours

($120 for an hour) or $360 for three hours

Charge Code Data Example

Charge Codes

Code Id	Charge Code Description	Unit	Unit Desc	Unit Value
00000	*Default Charge Code*	*0.2500*	*15 Min*	*25.00*
M30_2	30 Min Charge, In House	0.5000	30 Min	50.00
M30_1	30 Min Charge, Site	0.5000	30 Min	55.00
M15_2	15 Min Charge, Site	0.2500	15 Min	30.00
M15_1	15 Min Charge, In House	0.2500	15 min	25.00
M6_2	6 Min Charge, Site	0.1000	6 Min	12.00
M6_1	6 Min Charge, In House	0.1000	6 Min	10.00
M60_2	One Hour Charge, Site	1.0000	Hour	120.00
M60_1	One Hour Charge, In House	1.0000	Hour	100.00
H6	Six Hour charge	6.0000	Hour	600.00

Key

Abc: This highlights the typical recommended records.
Abc: This highlights the mandatory or system dependant records**.**

Charge Code Hints and Tips

- The Charge Code IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

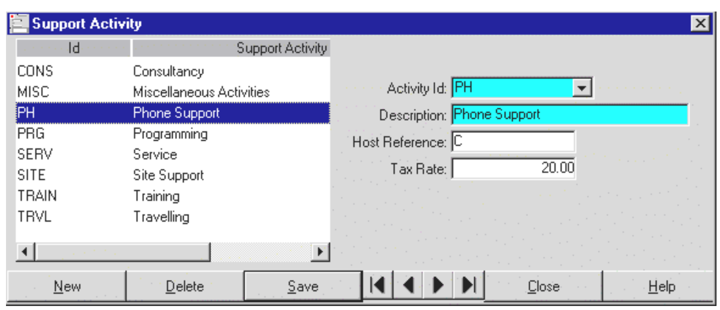
Support Activity

The Support Activity Codes are intended to group the Support and Service Log Transaction Item records into an activity classification. The Support Activity records are the basic building blocks for the Executive Charges matrix.

The Support Activity codes are maintained in the Support Activity Table (suppactv), i.e. Customer Email, phone Support, Onsite Support etc.

The data in the Support Activity Table must exist before entering data in the Support Line Maintenance Table.

The following Screen is used to maintain the Support Activity Codes. You can access this window from the Prepare – Module Codes – Codes and Flags of the Support & Service Module Bar Menu.



Data Fields

The user can maintain the following fields:

Activity Id: A unique identification code for the Activity.

Description: The description of the Activity.

Host Reference: The host Reference, usually GL, if applicable.

Tax Rate: The Sales or VAT tax rate if applicable.

Support and Service Maintenance

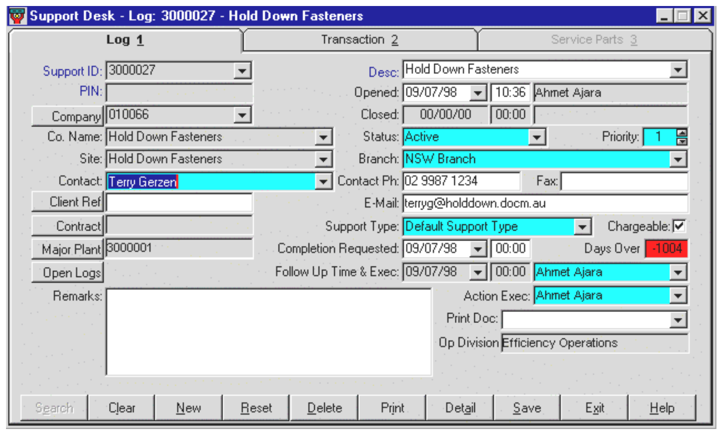
Support and Service Log

The Support and Service Module Tab Folder has the following 3 tab sheets:

- Log
- Transaction
- Service Parts

Although each tab performs various different functions they are fully integrated.

When you open the tab folder, only the log and transaction tab sheets will be active.



Transactions are recorded against the Support and Service log header. Multiple transactions can be recorded against any one header. Each transaction can have a different executive assigned to it, as well as start and close date and times. Transactions can be logged against different plant ids and be marked separately as chargeable or not.

The transactions are closely linked to the Activity (Call) Transaction module. The first Support or Service transaction will automatically create an activity transaction to the applicable executive. This will then allow for the escalation process to take place. Activity transactions will be closed when the Support or Service transaction is closed.

Subsequent Support and Service transactions offer the user the ability to log activity transactions so as follow up can occur via the activity transaction module.

How to Find an Existing Log Record?

There are three ways of finding an existing record:

1. On Screen Search
2. Search by Standard Search Engine
3. Search by Enhanced Search Engine

On Screen Search

You can find the existing Log record using any combination of the following fields:

- Operating Division
- SCR Log Status
- SCR Log Type
- Executive
- PIN

You should always type in at least 2 or 3 letters of the search name. Click on the drop down arrow or press the <F4> key.

The pre-keyed in letters will act as an instant filter and the system will display you a drop down pick list of the logs starting with the entered letters. The more you had typed in the field before attempting the search will make the list presented so much more precise.

Highlight the required log and either click on it or press the <Tab> key. If you had used the tab key, the empty spaces on the window will be filled with the log's data. On the other hand, if you had clicked on the pick list then the selected data will be displayed on the field. Now either clicks on any other field at the top section of the window or simply press the tab. The log's data will be displayed as a previous selection.

Note: Your access to some contacts may be limited by your current access privileges

Search by Standard Search Engine

When one of the following buttons was clicked the search engine window is displayed:

- Search
- Client Ref
- Open Logs

There are two sections on this window. You can enter any selection criteria in the top Query section. When the Find button is clicked the matching results set will be displayed in the second window. Highlight the required record and click on the OK button to return to the Log window with the selected log record.

If a log description fully or partially was entered, in the log screen before clicking on the search button the search engine will be seeded with this value and the corresponding result set will be displayed automatically.

Search by Enhanced Search Engine

If the Log Search Engine Stays Open' entry was set to Yes in the Support section of the user options system will change the standard behaviour of the search engine to a continuous pick list.

The Search Engine window is now resizable and movable on the screen to a suitable location.

Make your query and selection as usual and click on the Find button. Double click on the selected line or click on the OK button will display the details of the selected record on the Log Entry Tab Sheet.

This allows the user to search the database and freely move up and down on the selected list.

How to Edit an Existing Log Record

You can alter any information on the window that is also regulated by the edit privileges which had been granted to you.

Once the editing is finished simply click on the <SAVE> button.

How to Create a New Log Record?

When you are ready to create a new record click on the <NEW> button.

If the system was set to an "AUTOMATIC" id creation mode (which is recommended practice for this module) a system generated sequential number will be displayed in the ID field

Your cursor will be moved to the Description field so that you can start entering the new data.

Log Defaults

If there was a Log default was assigned to the user, the Log default values will populate some of the fields.

If there is more than one default record, a pick list can be activated by selecting the

<Defaults> item from the pop up menu to select another set of default values.

Invoice To

In some cases the organisation may be acting as a service contractor to another organisation, i.e. to service internet connections to Telstra. In these case each service call may be invoiced to the service provider.

To activate this function a set of entries are included in Shared Options.

LogInvoiceToCompanySelectionOn: Set this option to Yes to activate an entry in the Log window to record the Company (site) to which the invoice will be printed.

If the invoice to be printed to the service site than this field must be left blank.

LogInvoiceToCompanyType: Set a company type to group all the Company Sites to be used for the service invoicing. Assign the Company Sites concerned to this Company Type at the Company Profiles Maintenance utility.

Enter against this Shared Option item the related company type.

This company type will filter the dropdown field on the Log Entry and on the Use Log Fixed Price Matrix windows.

Data Field Attributes

The data fields may carry various attributes:

Key Fields

The labels for these fields are presented in dark blue.

Mandatory Fields

You must enter a value in such fields and they are presented with a very distinctive colour (usually in light blue).

Functional Fields

The point will change from “Arrow’ to a “Cross’ when the cursor is on such a field. Double clicking on these fields will usually pop up a related utility, such as the calendar, clock or link to another module by using values obtained from the clicked field (or even the whole row).

Audited Fields

There is no visual attribute to tell you that the field is being audited. However, if you have such a field, simply double click on it. You will see a detailed table showing the complete change audit for the values that had been altered in this field.

No Enter fields

Displayed in grey colour. The grey colour indicates that the data entry on the field is disabled. In some cases, this is a temporary situation, such as entering an address for the very first time; in other cases, it is permanent, such as the profile details of a contact on the main tab.

Data Fields

Log Id: The log id, a unique identification code for the support or service log. When the NEW button is clicked system assigns the next sequential number as the Log Id.

Description: The description of the log.

Pin Number: The customer’s support and service pin number. When the NEW button was clicked this field is enabled. Enter a valid PIN and click on tab button or in another field. System will display the details of the company and employee(s) that were attached to the PIN and display a pop up window listing all the plants that were attached to the PIN.

Company and Contact

Each log belongs to a Company Site and assigned to a contact (employee) of this site.

You can click on the Company button to activate the company search engine or use the dropdown look up list to locate the company.

Company: The company id.

Co Name: The company name.

Site: The Company site for this log.

Contact: Company Contact.

Client Reference: The client reference to this log, normally another log number to be referred to. Click on the button to activate the search engine to find the logs by the client reference.

Contract: The company’s contract if exists. Click on the button to activate the search engine to find company’s contracts.

If the search engine was used during a new log creation the returned contract value populates the related company details in the log window.

Major Plant: The major plant for this log if exists. Click on the button to activate the search engine to find company’s plants.

If the search engine was used during a new log creation the returned plant value populates the related company details in the log window.

If the Plant Search engine was activated after selecting a valid contract id only the plants that belong to the contract will be available to select.

Opened: Date and time when this log was entered.

Closed: Date and time when the log was closed.

Status: The status of this log.

Priority: The priority of this log 1-9

Branch: The branch of this support log.

Contact’s Communications

Ph, Fax, Email: The contact’s communication numbers are displayed from the database and they may be overwritten with the after hour values..

Support Type: The support type of this log.

Chargeable: If box is ticked this log will be chargeable.

Completion Requested: The client’s requested completion date for this log.

Days Over: How many days that this log has been opened. If the resolution request date was exceeded the value is shown in red to indicate the days of delay.

Follow up time and Exec: The next follow up date and executive's name.

Action Exec: The executive's name who will action this log.

Print Doc: The report object to use to print this log.

Op Division: Operating division of this log.

Remarks: Comments and remarks about this call

Command Buttons

Search
This button is for activating the search engine.

Clear
Clears the entire window so that a new search can be initiated. If this button was pressed during the new record creation or editing, the "save yes-No?" dialogue box will require a confirmation of the action.

New
Creates a unique system number for the service log, and sets the cursor on the Description field so that the new data can be entered.

Reset
This is a 'Bail Out' button. If you are not happy with what you have been entering on the window, this button will reset the data back to the original state. You must respond to the confirmation dialogue box for save or reset.

Delete
If you click on this button one of many things may happen depending on the configuration of your system and your current privileges.

Nothing happens, You do not have enough privileges to delete the record.

Systems response to request with a confirmation dialogue box. When confirmed one of many things may happen:

A. If the "Soft Delete" option was put on by the supervisor, a dialogue box will capture your reason for requesting the deletion of the record and sets the colour red on the text so that all the other users will know that this record is going to be deleted by the supervisor.

B. If the standard delete function was enabled, based on your privileges system will attempt to delete the record and also all of its children records.

C. If the service log has an open transaction or activity deletion will be rejected.

Print: Allows the printing of this log information onto a preformatted card or selected reports on a plain paper. Please refer to the section How to Print a Service Log for further details on how to perform this function

Save: Saves the log.

Exit: Closes this screen and returns to the main tab folder after the confirmation.

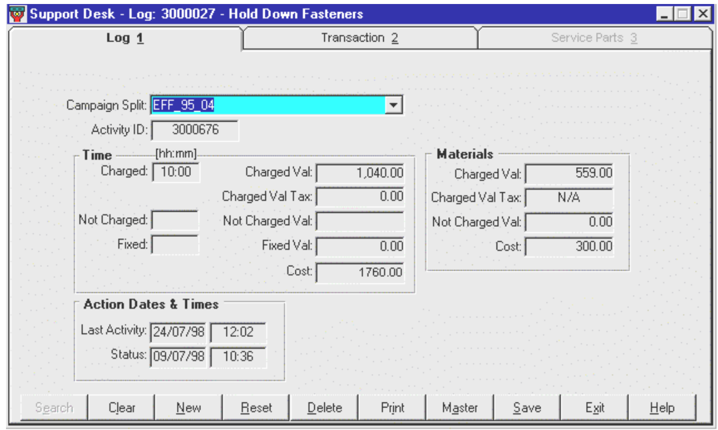
Help: Activates the Help screens relevant to this section.

Detail: This button is for access more details related to the log.

Log Details Screen

This screen holds information about campaign split, the log activity, cost and usage analysis and parts' warehouse.

analysis and parts' warehouse.



Fields

Campaign Split: Campaign split which is assigned to the log..

Use Rounding: This option is for using a rounding for service parts costs.

Rounding Unit: The unit to which the service parts cost to be rounded.

Activity Id: The current activity id which relates to the log..

Ware Houses.

Issues: The warehouse from where the parts will be issued.

Returns: Warehouse to where the faulty parts are returned.

Time and Value

Charged: Time charged.

Charged Val: Charged value.

Charged Value Tax: Charged value tax.

Not Charged: Not charged time.

Not Charged Value: Not charged value.

Fixed: Fixed changes.

Fixed Value: Fixed value charges.

Cost: Charges costs.

Materials

Charged Value: Charged Value:

Charged Value Tax: Tax for charged value.

No Charged Vauel: No Charged value.

Cost: Materials cost.

Action Date & Times

Last Activity: Last activity date and time.

Status: Status date and time.

Click on the Master button to display the Log Header.

Estimates

Three estimates fields are available to the Log details area. These are;

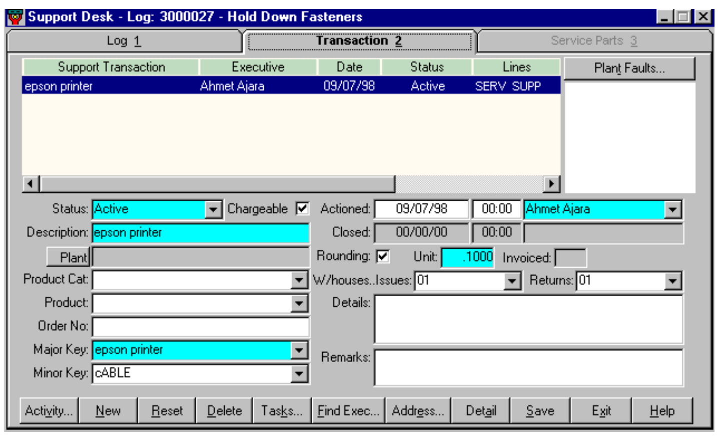
- Total Estimated Time
- Total Estimated Time Value
- Total Estimated Parts Value

Support and Service Transactions

The transaction tab is for creating transactions for the support and service logs.

Transactions are recorded against the Support and Service log header. Multiple transactions can be recorded against any one header. Each transaction can have a different executive assigned to it, as well as start and close date and times. Transactions can be logged against different plant ids and be marked separately as chargeable or not.

When the log record was created the first transaction record was also created automatically.



Data Fields

Status: Transaction status.

Chargeable: Select this box to activate the charges.

Description: The default description is the description of the Major Key and it can be overwritten.

Plant: If the log is for a plant this will have the plant number. Click on the Plant button to activate the plant search engine for this company site.

Product Category and Product: If the plant was linked to a Product these three fields will be populated by the system.

If there was no plant entry, these two fields can be used to record the Product details to which this log transaction relates.

Order No: Customer's original Purchase Order number to relate the log transaction to the order entry system.

Major Key: The Major Problem key.

Minor Key: The minor Problem Type.

The major and minor key combination can activate the Activity Task Matrix.

Actioned: Date of the transaction is actioned.

Closed: Closed date.

Rounding: Unit value rounding.

Unit: The rounding unit for the value.

Invoiced: System displays ‘YES’ if this transaction had been invoiced.

Ware Houses

Issues: The warehouse id from where the parts are issued.

Returns: The warehouse id where the faulty parts are returned to.

Details: Fault description of the transaction which is usually printable on the reports.

Remarks: Internal remarks about the transaction.

Command Buttons

Activity
The activity button is for creating an activity for the transaction to record the time worked and cost on the transaction.

New
To create a new transaction.

Reset
This is a ‘Bail Out’ button. If you are not happy with what you have been entering on the window, this button will reset the data back to the original state. You must respond to the confirmation dialogue box for save or reset.

Delete
To delete the transaction.

Tasks
Activate the Task Matrix.

Find Executive
This button is to find the Executives that have the best skills related to the problem.

Address
Support transaction site address detail.

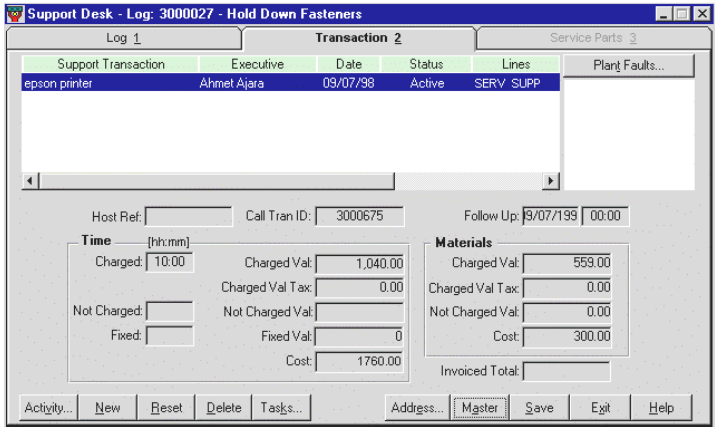
Save
Saves the transaction.

Help
Will activate the help screen relevant to this section.

Details
This button will display the transaction detail screen.

Log Transaction Details Screen

This screen displays the information about the log transaction activity, follow up, cost and usage analysis.



Fields

Host Reference: Host reference if applicable.

Activity Id: The current activity id which relates to the transaction

Follow Up: The follow up date for the activity.

Time and Value

Charged: Time charged.

Charged Val: Charged value.

Charged Value Tax: Charged value tax.

Not Charged: Not charged time.

Not Charged Value: Not charged value.

Fixed: Fixed changes.

Fixed Value: Fixed value charges.

Cost: Charges costs.

Materials

Charged Value: Charged Value:

Charged Value Tax: Tax for charged value.

No Charged Value: No Charged value.

Cost: Materials cost.

Invoiced Total: The invoice total up to date.

Click on the Master button to display the Transaction Header.

Subcontractors

The details option of the support transaction tab holds the information about the subcontractor and its invoice details.

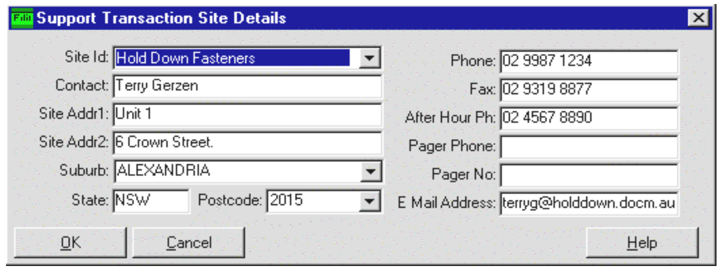
Estimates

Three estimates fields are available to the Support details area. These are;

- Total Estimated Time
- Total Estimated Time Value
- Total Estimated Parts Value

Support Transaction Site Details

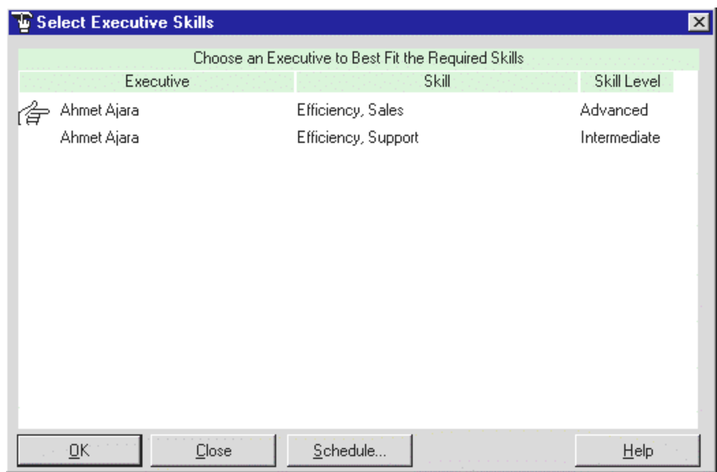
This option can be accessed from address button on the Support Transactions window.



The information of this screen can be modified to record the actual address for the site service call.

Find Executive

This screen is used to assign an appropriate executive to the support log transaction based on the matching executive skills to the Major Key skills.



This screen can be accessed from Find Exec button in transaction screen.

Preventative Service Auto Logging

Under the following conditions a future dated Service Log and Transaction will be created for a plant for the purpose of preventative maintenance.

1. The following items were set in the Shared and User Options: CreateAutoSupplogforPreventativeMaintenance = Yes PreventativemaintenanceSupplogDefaultId = Default Id
2. Service Interval field has a value as days in the plant table.
3. The Support Transaction record for the plant has a major key value of which related major key type's Update Plant Service field was set to Yes.

As soon as the support transaction was closed a new support log and transaction will be created for the plant's preventative maintenance. There will be no activity transaction for the preventative service logs.

Support Lines

The Support and Service Activities (Actions) are recorded including the time and the cost values, the progress of these activities can be inquired and reported on.

Each Service Transaction can have unlimited number of Support and Service Lines. A Support and Service line record holds various information including:

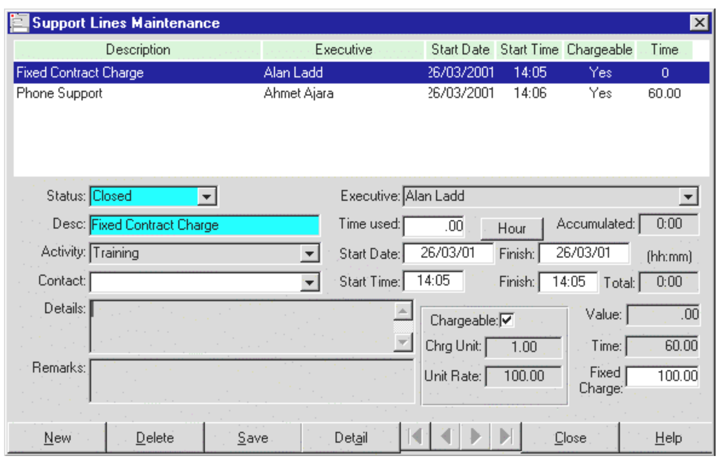
- The start time for the task
- The activity type
- Service Executive who was assigned to this specific task
- The times spent on the task, accumulative or finish time stamp
- Cost and charge of the task, calculated automatically by the system.
- Details of the task, which is printable on the Client reports.

Service Activities are accumulated in the related CSR, Plant and the Contract records with the accumulated 'Time and Cost' totals of the Service Activities.

If the Host System is used and the Service Transaction Activity Codes are valid item codes in the Inventory system, a Batch Update program will transfer and update all the related fields, values and files in the Host system, ready to invoice.

The Log record may not be closed if any of the related 'Service Activity' records are still 'Open'

The Support and Service Lines (Activities) window is used to record the time taken to fix the call.



There are two parts to this screen, the top part is to list the activities for the transaction, and the bottom part is to enter or update the activities.

<u>Executive Charges</u>

If the Executives Charges were set up as described under the Executive Charges topic as soon as the Activity and the Executive were entered the related charges will populate the screen

Data Fields

Status: The activity status. The activity must be closed in order to be invoiced

Description: Activity description and the default value can be overridden.

Activity: The activity for this line.

Contact: Site contact which relates to this activity.

Details: Activity details or fault description. These lines are usually printed on the reports.

Remarks: Activity remarks. This lines may be used as private (non printable) remarks.

Executive: Name of Executive who will be responsible for this activity. The executive charges (if it was set) is calculated for this executive for the nominated activity.

Time used: Time used to complete this activity. Click on the Hour/Minute button to set the entry unit.

Accumulated: The time accumulation for this activity if time entry field was used.

Start /Finish Date: Starting and the finishing dates for the activity.

Start/Finish Time: Starting and Finishing times for the activity. Entering data in this fields will automatically close the activity.

Total: Total time is taking to complete the activity.

Chargeable: If selected this activity be charged for.

Charge unit: Time to be charged for, i.e. 1.00 hour, 0.15 minutes etc displayed by the system.

Unit Rate: Dollar amount to be charged for unit/hour displayed by the system.

Time: Time spend on the activity to be in minutes.

Fixed Charge: Fixed dollar amount to be charged for a specific time unit.

Service Lines

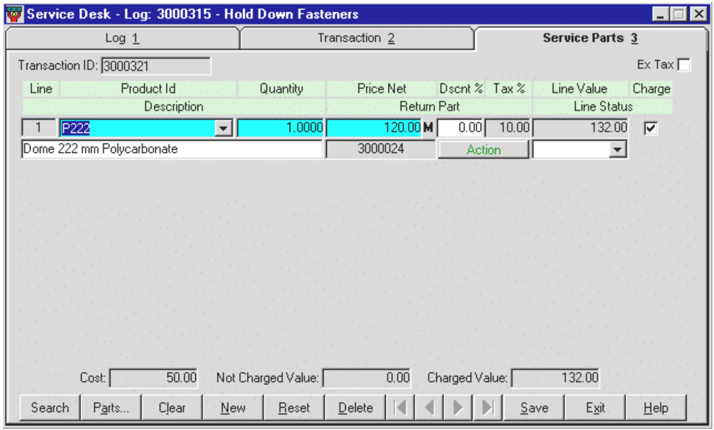
Service Parts are accessible where a plant has been attached to the Service Log Transaction. It allows for tracking of parts used for the service log. These parts can subsequently be charged and invoiced and if required by Contract, automatically deduct from the specified contract.

Parts can be either replaced with new components or reissued new serial numbers. The return part action updates the plant parts record and thus a history of parts within the plant item is maintained.

Return Parts Maintenance

Spare Part Management extends beyond the initial replacement of the part for a service job. This includes returning parts to suppliers for repair or replacement as well as tracking the parts during the course of its movement. This is achieved with Returned Parts Maintenance.

The service lines (spare parts) are maintained on the following tab sheet



Data Fields

Transaction Id: Transaction id number is displayed by the system.

Ex Tax check box: If box is ticked, Subtracts the tax value from line value.

Line: Line number is assigned by the system.

Product Id and Description: Use the dropdown to select a valid product when the cursor is in the Id field. Alternatively, click on the Search button to select the product as described under the Search Engine topic.

Warning: If Host system is used and the Host Invoicing is the preferred method of invoicing the selected product must exist in the Host's Inventory Management System

Quantity: Line product quantity. Double click on this field to activate the Available Quantities pop up window.

Price Net: Line item's selling price. Double click on this field to activate the Line Prices window.

Discount%: Discount Percent if applicable.

Tax%: Tax percentage.

Line Value: Total line value figure.

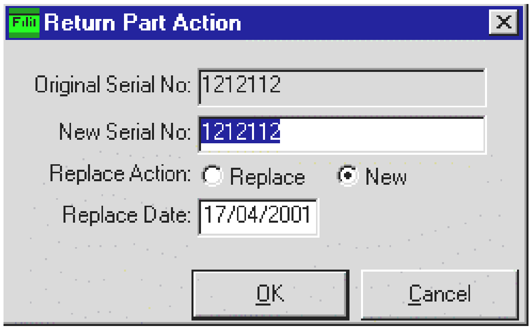
Line Status: Line status, i.e. ordered, completed or on hold.

Warning: If the status relates to the Active Returned Parts (R) the Support Transaction for the spare parts may not be closed.

Description: The main line description. This could be the product description or free text.

Action: Click on this button to record the returned part action

Parts can be either replaced with new components or reissued new serial numbers. The return part action updates the plant parts record and thus a history of parts within the plant item is maintained.



Charge Box: To enable the charges for this product. If the box is unchecked the sell price will not be used in the invoicing function nor it will be used in the Support Transaction, Log and contract accumulators.

Cost: Product cost price displayed by the system.

Not Charged Value: Product not charged values displayed by the system.

Charged Value: Product charged values displayed by the system.

Command Buttons

Search
Activates product search engine screen.

Parts
This option will activate the plant parts screen. Click on the Select Button on the Plant Parts window to return with the selected product item to populate the service line.

New
Adds a new line.

Reset
Resets the service line to the original status.

Delete
Deletes the service line.

Left and Right Arrows
These buttons are used to switch from one service line to another in the list.

Save
Saves the service line.

Exit
Exits out of service module.

Product Search Engine for Line Entry

When the Search button was clicked for a new line entry the following window is displayed

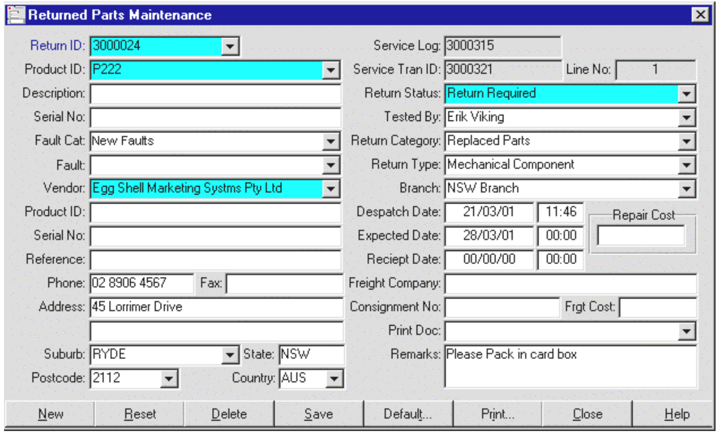
You can make multiple selections using the query and the list displayed on the left side of the window. After the selection is made click on the > button to move the selected the product item to the right side of the window where you can enter the quantity against each item. Once the selection was completed click on the OK button. The selected items and quantities will be transferred to the line entry window.

For a new selection criteria click on the Reset button. To clear the selected product items on the list click on the Clear button.

Returned Parts

Returned Parts is synonymous with the Return Authorisation (RA).

Any parts of any plant can be recorded for a return authorisation as long as it exists in the Efficiency's product module. The access to the RA window is either from the prepare menu of the Service Module or a double click on the service line item of the Service Module Tab.



If the window is accessed via the service line item and if this is a new RA then system will assign a unique id and populates the window with the available Customer, Product and Vendor details by using the RA default values for the other fields. If it was an existing RA then the existing record will be displayed.

If the window was accessed from the menu the create, edit and search functions must be carried out manually.

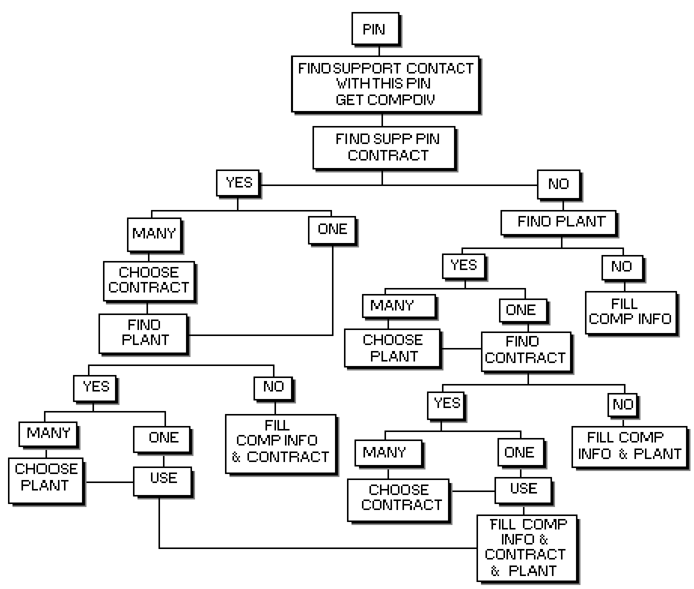
Use the Default command button to select another default option. Click on

Note: If the service line status was set to Return Pats (RT) the line cannot be closed nor it can be invoiced.

Support PIN

The following flow chart details the information that has been linked to the Support PIN.

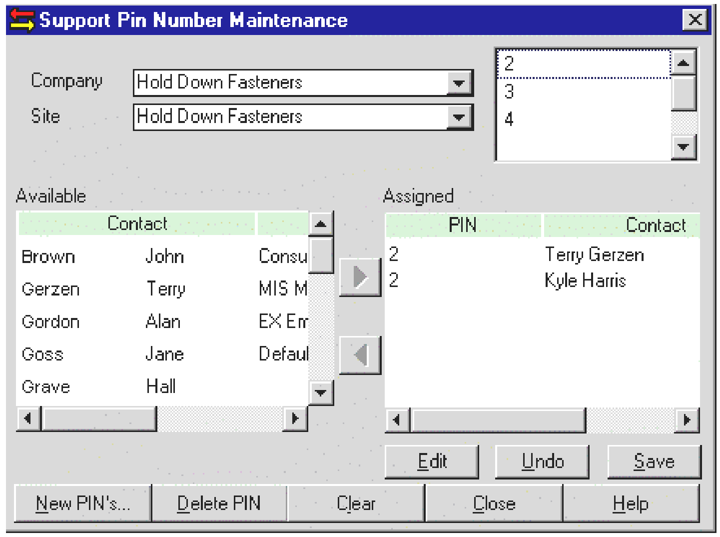
SUPPORT PIN FLOW CHART



Support PIN Maintenance

The support Pin Maintenance screen is used to assign pin number(s) to companies.

Support pin maintenance screen can be accessed from Prepare – Preparation – Support pin maintenance menu option.



How to Assign Contacts Exclusively to PINS?

The pin number screen has four parts:

Top right part, is where the Pin numbers will be selected from.

Top left side is for selecting a company that you wish to assign the number to

Bottom right is where the assigned pin numbers appear.

Bottom left is where the company contacts can be selected to along with the pin number to be assigned.

Select a PIN and drag the related contacts from the left bottom window to the right bottom window. Click on the SAVE button to apply the assignment.

If there were no contacts assigned to a PIN then it can be used by any contact from the Company Site.

Command Buttons

New PIN's

This button is for creating a new pin number. Click on this button and accept the total number of the PINs that is to be created on the Support PIN Creation window. System will assign the next available PINs automatically and list in the top left window.

Delete PIN

This button is to delete an existing pin number.

Clear

This button is for clearing the screen so a new pin number can be assigned.

Close

This is to close the pin number screen.

Help

This is to activate the help screen relevant to the section.

Edit

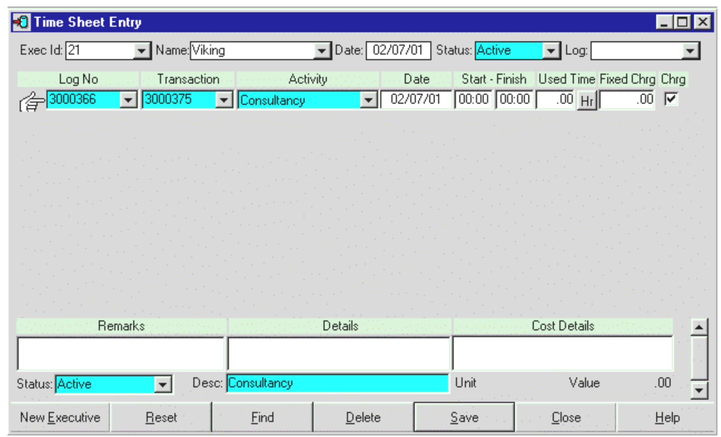
This button is for editing

Support PIN Creation

Enter the number of Support PINs to be created.

Time Sheet Entry

In order to enter the time sheets in a Bulk Mode the following window is provided.



This window is accessed from the Transaction menu option of the Prepare menu of the Service and Support Module Tab.

Although the fields are same as of the fields already used in the Support Lines Utility the following differences exist between the two.

The time sheet entry is designed to capture only the actual total time. On the other hand on the Support Lines (Activities) option from the Support Transactions Tab allows the user to enter partial times for the same Executive and Activity type and system will automatically accumulates them.

The time sheet entry will not allow to overwrite the system calculated cost and charge values. These functions are available on the Support Lines maintenance utility.

If the entry line was not closed (status was not set to closed) you can re enter the time values. This is possible until the line is closed.

How to Enter and Edit the Time Sheet ?

The time sheet is entered for an executive for a specific date. Alternatively you can limit the entry to a selected Support or Service Log.

Select an executive and enter the time sheet date.

If there are any previous entries matching these values system will display them. Otherwise a new entry line will be displayed.

If the Date, Status and Log fields were entered then you must click on the Find button to display the matching previous time sheet entries.

The bottom section is designed to enter notes and remarks for each line.

Log No: Type in and click on the Tab key or use drop down list to select the Log and then click on the Tab Key.

Transaction: After entering the Log use the dropdown list to select the related transaction for the entry. If there was only one transaction for the selected Log it will be displayed automatically.

Activity: The activity for this line.

If the Executives Charges were set up as described under the Executive Charges topic as soon as the Activity was entered the related charges will be displayed on the bottom section.

Start /Finish Date: Starting and the finishing date for the activity. Only one date can be entered in this utility

Start/Finish Time: Starting and Finishing times for the activity. Entering data in these fields will automatically close the activity.

Time: Time used to complete this activity. Click on the Hour/Minute button to set the entry unit.

Fixed Charge: Fixed dollar amount to be charged for a specific time unit.

Chargeable: If selected this activity be charged for.

The following fields are displayed on the bottom window for each line entry.

Status: The activity status. The activity must be closed in order to be invoiced.

Description: Activity description and the default value can be overridden.

Details: Activity details or fault description. These lines are usually printed on the reports.

Remarks: Activity remarks. This lines may be used as private (non printable) remarks.

Cost Details: The details of the cost and charge if required.

Charge unit: Time to be charged for, i.e. 1.00 hour, 0.15 minutes etc displayed by the system.

Unit Rate: Dollar amount to be charged for unit/hour displayed by the system.

How to Close the Time Sheet Lines ?

The Support or Service Log record may not be closed if any of the related 'Service Activity' records are still 'Open'.

Select “Closed” value for the status field at the bottom section to close the related entry.

To close all the Open entries click on the “Bulk Close” command button.

Host Link

The following global (shared) option entries will configure the options to update host (supported systems only).

HostFilesLocation

Set the directory path where the Efficiency generated text files for Host update are to be created.

HostTextFilesExtension

The file extension to be used for the Efficiency created text files for the host update.(.txt is the default)

HostARInvoiceFilePrefix

The file prefix to be used for the Efficiency created AR Invoice text files for the host update.(AR is the default)

HostSalesOrdersFilePrefix

The file prefix to be used for the Efficiency created Sales Orders text files for the host update.(OE is the default)

HostPRTransactionsFilePrefix

The file prefix to be used for the Efficiency created Payroll Transaction text files for the host update.(PR is the default)

HostAPInvoiceFilePrefix

The file prefix to be used for the Efficiency created AP Invoice text files for the host update.(AP is the default)

HostCreatePRTransactionsFile

Yes = Service or Support Lines will create the Payroll transactions text file.

HostCreateAPTransactionsFile

Yes = Service or Support Transaction will create the Contractor (Creditor) invoice transactions text file.

Note:
All the text files have the following format

Prefix + ddmm + . + extension

The content of each file varies based on the Host system requirements.

ServiceInvoiceDestination

Depending on the host system one of the following options can be available:

- Service Invoice to Sales Orders
- Service Invoice to AR Invoices

ServiceLineStatusNotToCopyToHost

The service lines with this status will not be transferred to Host

HostTransferNonChargeableSupportLines

No = Stops the transfer of the Non Chargeable Support lines to the Host System

HostTransferNonChargeableServliceLines

No = Stops the transfer of the Non Chargeable Service lines to the Host System, as a result the inventory will not be updated

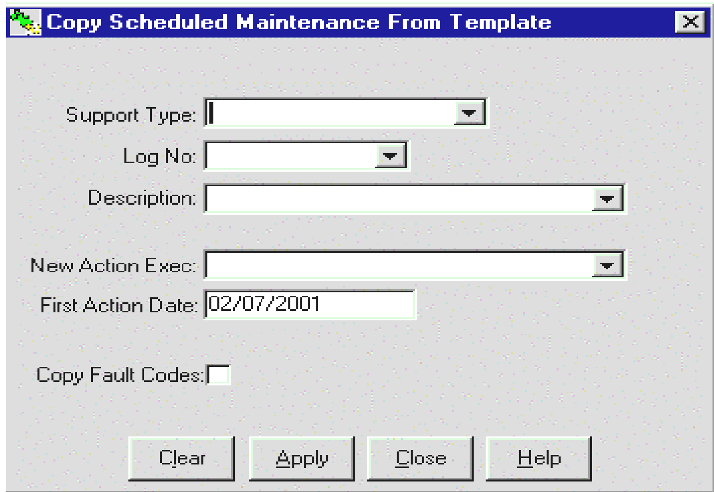
Scheduled Maintenance

You can set any number of planned maintenance templates by setting the Support Log and future dated transactions with or without the pre determined Fault Codes to establish the maintenance points.

The “Copy Scheduled Maintenance From Template” utility is available from the

Options menu item of the pop up menu at the Service and Support Module tabs.

Create the new service log and attach the plant and contract as usual. Select the Copy From Template menu item from the Options of the pop up menu. The following window is displayed.



Support Type: Select the support type for the templates.

Log No: Select the template log by using either No or Description fields. Click on Tab key.

New Action Exec: Select the technician who will be responsible of the site calls.

First Action Date: Enter the date of the first action (site call). System will set all the following dates in line with the date gap between the template transactions.

Copy Fault Codes: Check this field if the fault codes of the template are to be copied over.

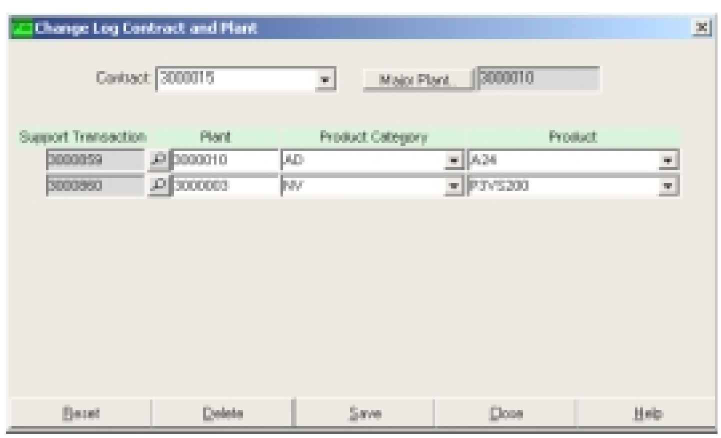
Change Log Contract and Plant

This option from the Options section of the Pop Up menu in order to allow the user to change the contract of the Log Header and the related plant or product values in the Support Transactions of the Log.

The following conditions will disable the use of this function:

Log was closed (status = C)

There were Support Line or Service Lines under the log



Change Contract: If you wish to change the contract select a new contract from the drop down list.

Change Major Plant: If you wish to change the major Plant (the plant that was recorded in the Log as well as the first support transaction) click on the Major Plant button. System will display all the available plants for the selected contract. Selected plant will replace the plant value on the log and the first support transaction.

Change Support Transaction Plant: Click on the magnifying glass icon on each line (Not the first support transaction) and select an appropriate plant for the transaction. The product information will be displayed automatically.

Change Support Transaction Plant: If there was no Plant assignment on the support transaction the product details can be changed or added to the support transaction line.

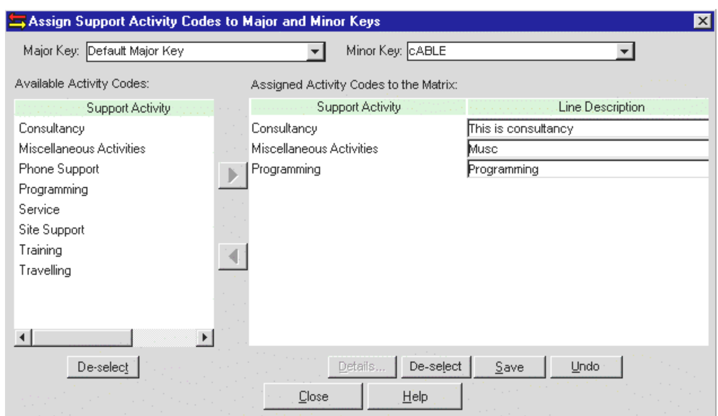
Activity Task Matrix

The activity matrix is a tool enabling you to predefine a list of Activities for a set of Major and Minor Key combination. This will reduce operator data entry as well as ensure that certain activities are performed for the set Major and minor Keys.

Where required the user can activate the matrix and populate the activities automatically based on the major and Minor keys selected for the transaction. Users still have the ability to add and remove activities if required.

The data in the support activity table must exist before assigning data in activity task matrix

The following Screen is used to maintain the Support Activity Matrix.



Data Maintenance

You can access this window from the Prepare – Module Codes – Codes and Flags – Support Activity Matrix of the Support & Service Module.

Data must exist in support activity, major key and minor key tables before using support activity matrix screen.

Enter the required Major and Minor Keys at the top of the window. The available Activities will be displayed in the left window. The right window contains the activities which were already assigned to the selected Major-Minor keys combination.

Use the drag drop or Left and Right arrows to assign or delete the activities.

Line Description: The description of the Activity specific to this assignment.

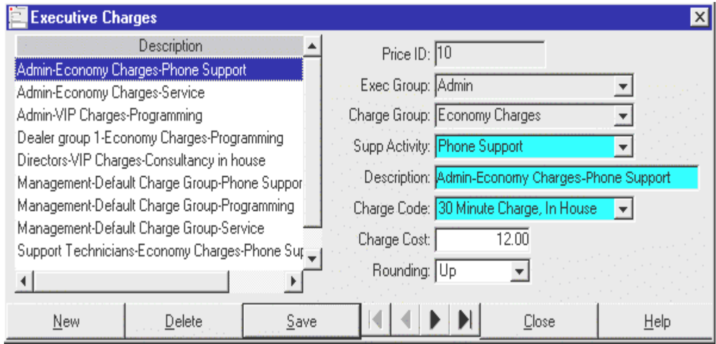
Executive Charges

Each contract will have charges set up for each executive group.

This option can be accessed from menu option Prepare - Module Codes –Charges -

Executive Charges in Contract or Support Modules.

When this option is selected you will be presented with the following screen, this screen contains two parts, left side views the list of existing charges, right side is used to create a new charges or update the existing once.



Data Fields

Price Id: A unique number for the charge group.

Exec Group: The executive group.

Charge Group: The charge group id which applies to this set.

Support Activity: Support action activity id.

Description: Description of the charge price set.

Charge Code: Charge code id.

Charge Cost: Cost of charge cost if available.

Rounding: Rounding up direction for the charge calculations i.e. up, down or exact; etc.

Command Buttons

New
Create a new charge code.

Delete
Delete an existing charge code.

Left and Right Arrows
Switch from one code to another in the list side.

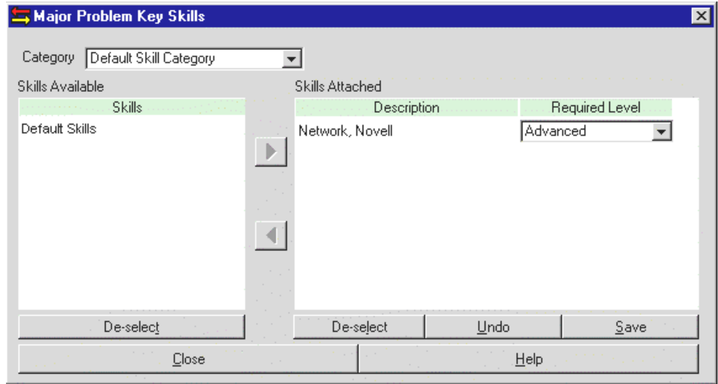
Close
Close the Executive charge window.

Help
Activate the help screen relevant to this section.

Major Problem Key Skills

Click on the Skills button on the Major Key Maintenance window.

The top section of the window allows the user to select a suitable Skill Category. The skills under this category are displayed on the left side of the window.



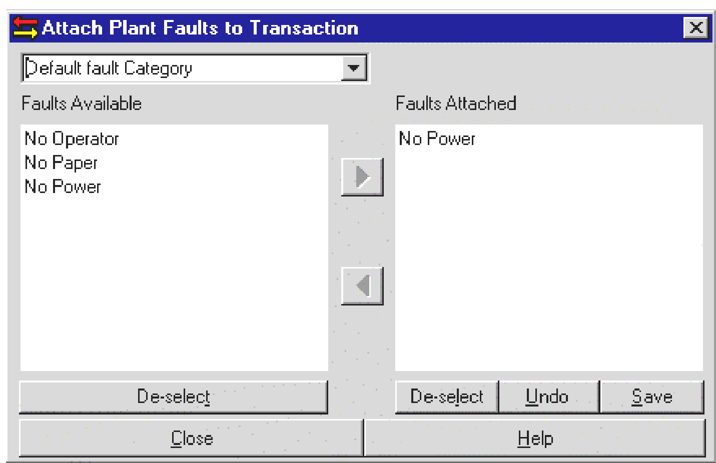
Use drag drop or click on the skills to move them between the two windows by using the direction arrows. Enter the required skill level.

This information is used to match the executives by the skills against the major problem keys.

Attach Plant Faults to Transaction

When a plant was assigned to a support/service transaction the Plant Faults button on the top right side of the window is enabled. Click on this button to activate the following window.

The top section of the window allows the user to select a suitable Fault Category. The faults under this category are displayed on the left side of the window.



Use drag drop or click on the faults to move them between the two windows by using the direction arrows.

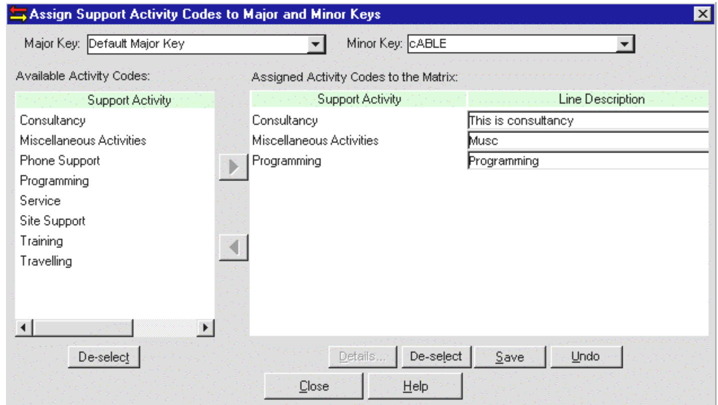
Support and Service Profiles

You can add as many user defined Profile Groups and Items to the Support and Service Log records.

Assign Support Activity Codes to Major and Minor Keys

A Set of support activity codes can be assigned to a major and minor key combination. This matrix then is used as a template to create the support lines for the support transaction.

Select the Activity and Task matrix option from the prepare menu item of the Support or Service Module Tab menu.



The top section is used to select the Major and Minor keys.

The left side of the window displays all the available support activities and the right side displays all the activities that were attached to the major-minor key combination.

Click on the available activity or assigned activity then click on the direction arrow or use the drag and drop to assign new codes or remove the existing assignment.

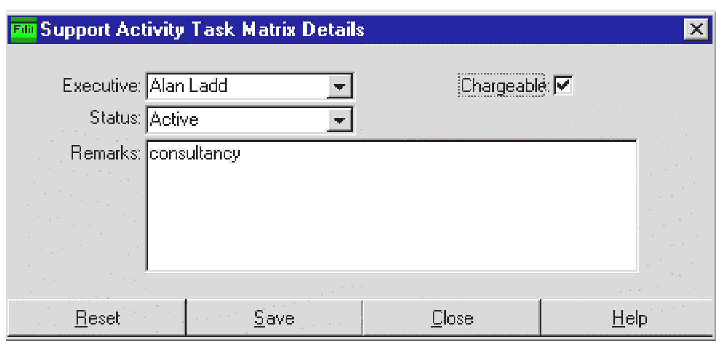
Line Description

The line description is displayed from the activity description and can be overwritten.

Click on the Details button to enter the details for the selected line item.

Matrix Details

You can enter further details on each matrix line on the following window.



Executive: Select a valid executive who will be responsible for the support line.

Status: Select a valid status, i.e. Active.

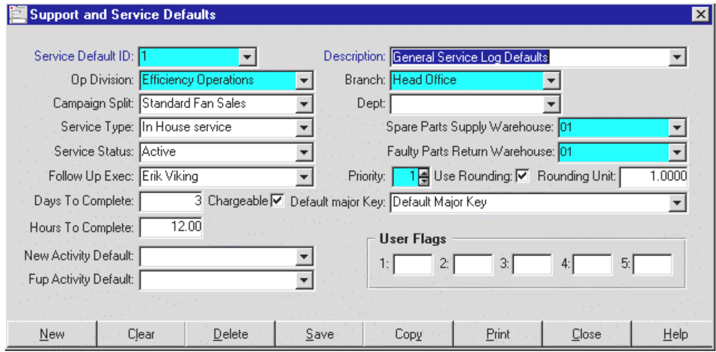
Remarks: Enter remarks if applicable.

Chargeable: Check box if this service line item will be charged.

Support and Service Defaults

The Support and Service defaults are preset log field values; these values fill in the empty fields when a new log is created. To use default values, the supervisor have to enable it from user options.

If there was a module default assigned to the user, the module default values will populate some of the data fields.



Data Fields

Service Default Id: A unique identification code for the default.

OP Division: Operating Division this default.

Campaign Split: Campaign split id for the default.

Service Type: Service type id for the service log.

Service Status: The service status id for the service log.

Follow Up Exec: The executive who follows up the service log.

Days To Complete: How many days to complete after the log date.

Chargeable: Check box, if default support is chargeable.

Hours to complete: Number of hours taken to complete after the log date.

New Activity Default: An activity default used during a new log record creation.

Follow Up Activity Default: An activity default used during the log follow up.

Description: The service default description.

Branch: Default branch id.

Dept: The default department id.

Spare Parts Supply Warehouse: The warehouse for the supplied parts.

Faulty Parts Return Warehouse: The warehouse for the returned parts.

Priority: The log priority.

Use Rounding: Check box, if the rounding to be used.

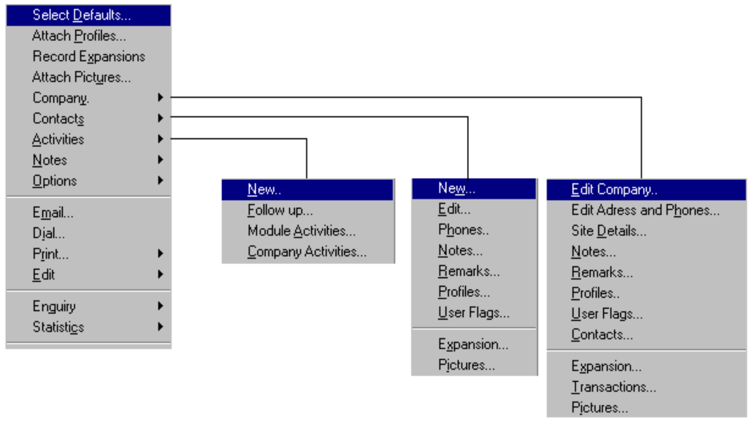
Rounding Unit: Rounding unit value.

User Flags 1 – 5: The service default user flags.

Print Doc: The default service print report.

Log Pop Up Menu Options

From the Log Module the user may right mouse click in any gray area on any Tab to obtain a list of additional functions or enquiries available:



Select Defaults

Information as set up in the selected default will be updated into the current order record automatically during a new log entry record creation as detailed under the Module Defaults topic.

Attach Profiles

Each log record can have many profile items attached to it as described under Profiles topic.

Record Expansions

Additional information can be created for each Log Record and accessed instantaneously as described under the Module Expansions topic.

Attach Pictures

Each log record can have pictures, documents, audio and video objects as described under the Pictures topic.

Company Sub Menu

Edit the company and its various features and attributes, which have the order.

Edit Company

Edit Log's company module.

Company – Address and Phones

Edit the company address and phones.

Company – Site Details

Edit company site details.

Company – Notes

Edit the company notes

Company – Remarks

Edit the company remarks

Company – Profiles

Edit the company profiles

Company – User Flags

Edit company user flags

Company – Contacts

List and edit company contacts

Company – Expansion

Access and edit company expansion records if they have been set-up

Company – Transactions

Access and edit company transactions

Company – Pictures

List and Edit the company pictures

Contacts Sub Menu

Edit the employee (contact) and its features and attributes assigned to this Log.

Contacts – New

Create a new contact

Contacts – Edit

Edit the current contact.

Contacts – Phones

Edit company contacts phone numbers.

Contacts – Notes

Edit the company contacts notes.

Contacts – Remarks

Edit the company contacts remarks

Contacts – Profiles

List and edit the company contacts profiles

Contacts – User Flags

Edits the company contacts user flags

Contacts – Expansion

List and edit the company contacts expansion records

Contacts – Transactions

List and edit the company contacts transactions records

Contacts – Pictures

List and edit the company contacts pictures

Activities Sub Menu

Activities – New

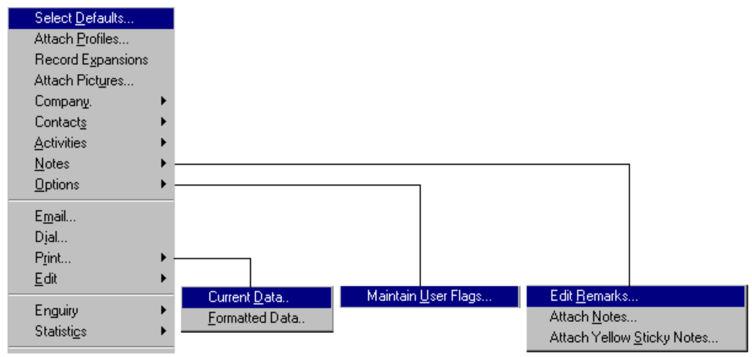
Create a new activity for the company

Activities – Company Activities

List company activities.

Activities – To Do List

Edit to do list for the company



Notes Sub Menu

Edit Remarks

Remarks attached to each Log Record can be edited, added or deleted as described under the Module Remarks topic.

Attach Notes

Unlimited number of secured, date time stamped and sorted notes can be attached to each Log Record as described under the Module Notes topic.

Attach Yellow Sticky Notes

Yellow Sticky Notes that can be automatically displayed when finding the record can be attached to each Log record as described under the Yellow Sticky Notes topic.

Options Sub Menu

Maintain User Flags

Up to 5 User Flags can be added to each Log record as generally described under the topic of User Flags Maintenance.

Email

This will activate the Email facilities. Refer to the Email topic for general information.

Print Sub Menu

The screen print or to print a pre-designated report can be processed here.

Print Current Data

Click on this to print the active data window. The Print Function details how to print and the available options.

Print Formatted Data

Click on this to print a pre-determined format (which should have been set up by the supervisor) using the current log record. The Print Function details how to print and the available options.

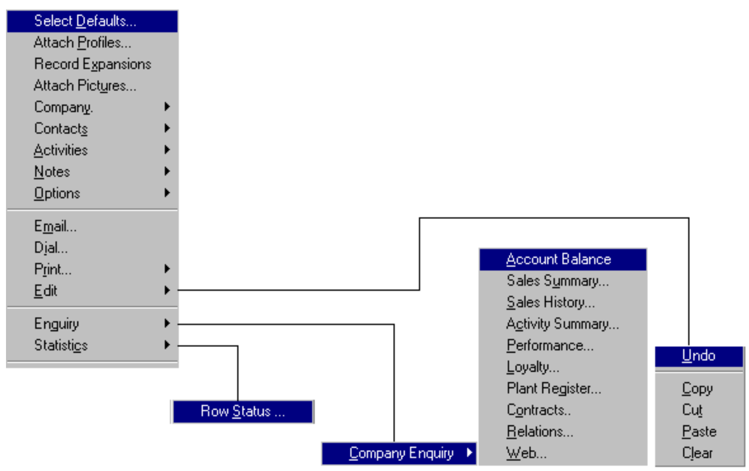
Edit Sub Menu

Selecting the appropriate option can perform the Undo, Copy, Cut, Clear and Paste functions at the field level.

Statistics Sub Menu

Statistics – Row Status and Row Count

Click on one of the above menu entires display the status of the record.



Enquiry Sub Menu

Depending on the site requirements many enquiries can be displayed here.

Company Enquiry

Account Balance

Activates account balance screen for the company

Sales Summary

Activates sales summary screen for the company

Sales History

Activates sales history for the company.

Activity Summary

Activates company activity summary screen.

Plant Register

Activates the company plant registry search screen.

Contacts

Activates company contacts search screen.

Relations

Activates company relation screen

Web

Activates Internet explorer screen.

Support Desk Reports and Enquiries

Efficiency basic system is provided with various Support Desk reports.

User can design any number of support reports using the InfoMaker report writer. A blank report library named 'SUPPRPTS.PBL' is provided under the 'Reports' subdirectory of the each client.

Standard Support and Service Reports

The following reports are some of the typical support desk reports supplied with the system based on the site licence and the module selections.

User can design any number of Support and Service reports using the InfoMaker report writer. A blank report library named 'SUPPRPTS.PBL' is provided under the 'Reports' subdirectory of each client.

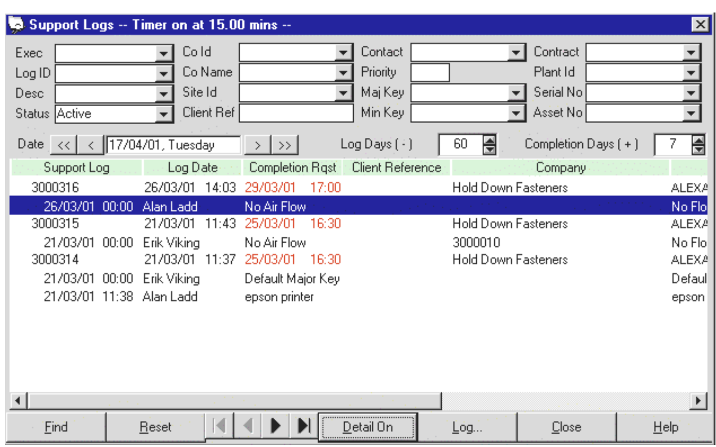
How to set up reports in InfoMaker is found under the InfoMaker Reports Set Up topic.

Log Reports	Support Log Data Page Support Log Details Support Log List by Log Id Support Log List by Status Support Log List by Executive Support Log List by Company Support Log List by Type Support Log List by PIN Support Log List by Plant Id Support Log List by Plant Model Support Log List by Product Category Support Log List by Product Id Support Log List by Major Key Support Log List by Minor Key Support Log List by Profiles
Activity and Cost Reports	Response Analysis Report Escalations Analysis Report Cost Analysis Report Executive Activities Report

Support and Service Log Enquiry

Support Logs Enquiry (Service Log Enquiry is very similar) Window allows the user to access the selected support logs for one or for all companies. Once the logs are listed, the pop up menu will lead the user to access to all the related information and functions of Efficiency.

This window contains two data windows one is used for Query and the other is used for Listing of the results.



When the window is started the query data window is populated with the default values that were set in the User's preferences.

Once the selections were entered click on the Find button to display the new result set or click on the Reset button to initialise a new search

Command Buttons and Functions

Detail On
Click on this button to display the details of each log transaction.

Log
Click on this button to start the Support Desk module for the selected line item.

Pop Up Menu
Right mouse click on a selected line item or pressing Alt+F1 will pop up the Pop Up Menu. Depending on the content of the site licence user can access all the functions and options of Efficiency. The following are typical.

Module
Access to the options and functions of the entire Support Desk module.

Contact
Access the details, functions, and options of Employee (Company Contacts) of the selected log.

Company
Access the details, functions, and options of Company and Site of the selected log.

Activity
Access the details and attachments of the selected activity as well as drilling down the specific activities of the Company, Contact, or the module record. The TO Do lists for the log is also accessed from this option.

Email
Start Email session the email the email address of the contact of the log.

Filter, Sort
Start Filter or Sort functions.

Print
Print current window, formatted data or save as functions can be selected.

Dial
The auto dial window is displayed by listing all the available phone numbers for the contact of the log.

Enquiry
Depending on the content of the activity record Contact or Company sub menus are displayed from which all the standard enquiries are accessible.

Transaction Activities
The <Activity> button allows the direct access to the Transaction Activities (Time Sheet) maintenance window.