Repairs

Contents

1 Repairs Module

This module contains all the programs required to input, edit and invoice repairs. It is accessible via the main ESM menu bar or by displaying the individual repair toolbar.
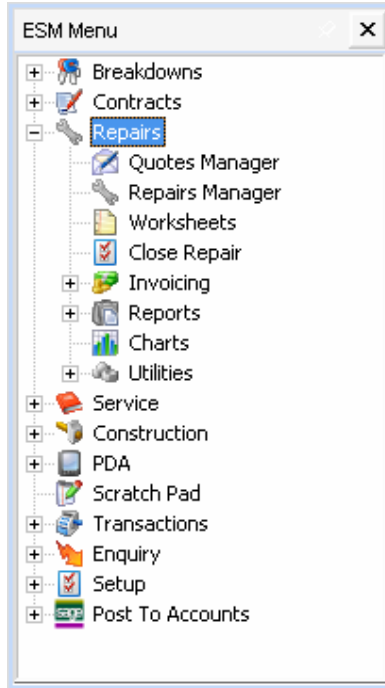
Or

1.1   New Repair & Convert Quotation to Repair

Double click on the Repairs manager option from the menu.

Click onto the "New Repair" button.

Select whether this repair is chargeable or not.

Before a call repair can be processed it must be added using the new repair option. Items on the form are described in TAB visitation order as follows:

1. **New:** select this button to add a new repair. A new call repair will be generated from the next repair number held in control settings. You will be prompted with the choice to create a comprehensive or non-comprehensive repairComprehensive repairs start with the prefix 'C' and non-comprehensive start with 'R'. The Repair number cannot be amended once it is created If you cancel a repair once it has been created, that repair number is lost.
2. **Elevator Code:** A valid elevator code must be input. A search button that activates an elevator search is providedThe elevator reference, client and site details are displayed once the elevator code is selected.
3. **Order Date:** A valid date must be input. The value in the field defaults the current system date.
4. **Finish By:** This field identifies a job deadline. The field is optional, otherwise the date is validated.
5. **Order No:** This is a compulsory field, shown on invoice layout as elevator reference.
6. **Price:** Identifies a value quoted for the job. The field is optional, if a value is input a valid currency value is required. Once a quote has been built, this value is automatically updated
7. **Repair Code:** This is a compulsory field. A search button that activates a text search facility is provided. The repair code identifies a test paragraph set-up in text definitions. If selected the text is displayed in the repair details memo field.
8. **Repair Details:** This is the details relating to the repair code, and can be amended.
9. **Comprehensive:** Identifies whether the elevator is on a repair contract.
10. **Build:** When this button is first clicked, it will ask whether or not to take the repair details from a previously entered quote. All of the quote details are then added to this repair, and the status is changed to 'Actioned' . Alternatively the repair can be built from scratchThis loads the **Repair Check** form shown below.

11. **From Quotation:** If a quotation has been raised then selecting this will import all the information entered onto the quotation.

12. **Save Button:** Select the button to save the new repair. A prompt is displayed asking to continue, select Yes to save, select No to amend the new repair.
13. **Cancel Button:** select the button to abort the new repair record. A prompt is displayed asking to continue, select Yes to abort, select No to keep the new record The repair number has already been allocated; if you do cancel the number will not get used.

Sample Usage:

1. Select New to create a new repair.
2. Use the elevator code search to pick an elevator the repair is for.
3. Fill in the order date and deadline date fields.
4. Complete the order number field (compulsory).
5. Pick an engineer using the engineer search button (will return the name automatically).
6. Pick the repair details using the details search (will return the description automatically).
7. Edit the repair details as needed. (Remember, this is just a very general description of the work being carried outThe specifics of the repair are added later.)
8. Click the build button to take you to the repair check form From here you can add/remove and edit service details, and also add new ones Finish by clicking exit.
9. Note the price generated from the repair is returned.
10. Press Save to save the repair to the database.

1.2   Edit Repair

Double click on the repair required or high light the repair then click "Edit Repair".

This will then show the following screen.

The form allows you to update any repair details to the record before a worksheet is printed. Refer to new form section for items appearing on the form but are not covered. The form functions as follows:

1. **Save Button:** Select the button to keep any changes you have made. You are prompted to continue. Select yes to continue, select no to abandon any changes.
2. **Abandon Button:** Select the button to abandon any changes you have made. You are prompted to continue. Select yes to continue, select no to amend the changes.
3. **Delete Button:** Select the button to abort the new repair record. A prompt is displayed asking to continue, select Yes to abort, select No to keep the new record. The repair number has already been allocated, if you do cancel the number will not get used.
4. **Build:** This takes you to the Repair Check form as described in New Repair.
5. **Materials:** Allows you to add materials required to complete the repair.
6. **Select Button:** Select a repair to edit. The focus is set to the repair number field. You are required to input a repair number
7. **Repair Number:** Input a valid call number. Once you have selected a call the relevant call record will be displayed. You may now edit the call.

1.3 Work Sheets

From the repairs menu select 'work sheets'.
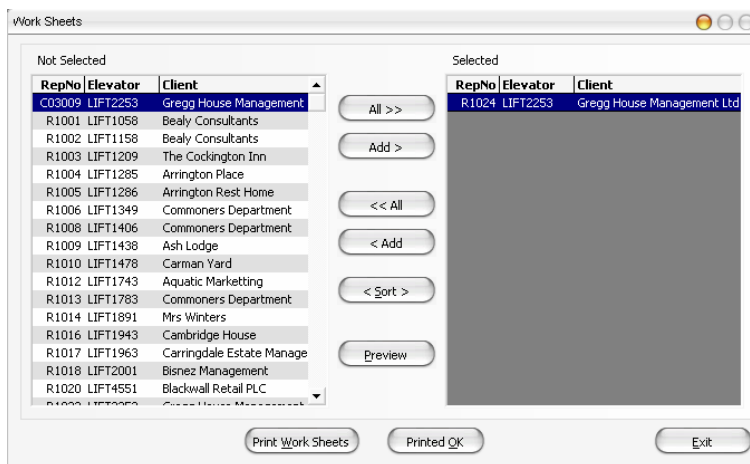
Select the button 'Worksheets' to produce worksheets. Once the form is activated a list of repairs that have been input are displayed. There are two lists, 'Not selected' and 'Selected', the program will produce worksheets for repairs displayed in the selected list only. The program functions as follows:

1. **All Buttons:** select this button to put all the repairs in one list. A Button is available for each list.
2. **Add Buttons:** select this button to toggle the highlighted repair from the current list to the other list. You may also use the mouse to double click on the highlighted repair, or use the enter key to toggle.
3. **Sort Button:** select this option to sort both lists in repair number sequence.
4. **Preview Button:** select this option to activate a preview window of the work sheet layout. A prompt displays the number of worksheets ready to print, select Yes to continue, No to abort. Only repairs listed in the selected list are processed.
5. **Print Worksheets Button:** select the button to print work sheets to the printer. One copy is printed. A prompt displays the number of invoices ready to print, select Yes to continue, No to abort. Only repairs listed in the selected list are processed.
6. **Printed OK:** select the button to update repairs in the selected list, the process flags each repair to a printed work sheet. You may no longer produce a worksheet for a repair once it has been selected.

1.4 Close Repair

From the Repairs Manager select the required repair and then click on "Close Repair".

The form allows you to input invoice details for a repair. A repair must be processed before an invoice can be raised. You may only process repairs that have a worksheet printed OK. The form functions as follows:

1. **Invoice Details Button:** Select to input invoice details. This loads the Repair Invoice Details form, which is described below.
2. **Ready To Invoice Button:** select to allocate the next invoice number, you are prompted to continue. Select yes to continue, select no to abort. A message box with the allocated invoice number is displayed, select OK, the repair is now ready to be invoicedNote you cannot allocate an invoice number to a repair with a zero net value. You may select and edit any invoice details on a repair where the invoice number is already allocated. In this case the button caption will show Save. You may not process a repair that has been invoiced.
3. **Withdraw Button:** in some cases no invoice is required. Select the withdraw button to complete the repair. You are prompted to continue. Select yes to continue, select no to abort. Once withdrawn a repair cannot be invoiced, it is completed. The value of the invoice must be zero before you can use the withdraw button.
4. **Abandon Button:** select the button to abort and clear the current record. You are prompted to continue. Select yes to continue, select no to abort.

If you wish to continue then carry out the following and repeat 1 - 5

5. **Select Button:** select a repair to edit. The focus is set to the repair number field. You are required to input a repair number.

6. **Repair Number:** Input a valid repair number. Once you have selected a repair the relevant call record will be displayed. You may now select the following buttons;

1.5   Repair Invoice Details

The purpose of this screen is to allow a repair to be edited from the previously entered repair details. New entries can be made at this point. These can be from the service text definitions or new codes. This form also shows the layout of the invoice that will be printed. The details of this form are shown below:

1. **New:** The new button is for adding new entries from the list of service text definitions, or new custom codes.
2. **Select:** Select will show all the available problems associated with this elevatorAll the listed items are either 'Entered' (new problems) or 'Pending' (associated with a quote)If the status is pending, the quote number is also shown.
3. **Edit:** This will show the edit dialog where details and price can be changed.
4. **Remove:** This will remove the selected entry from the repair.
5. **Up:** This will move the selected entry up one position.
6. **Down:** The will move the selected entry down one position.
7. **Date Ascending/Descending:** Quickly sorts the entries by date.
8. **Price Ascending/Descending:** Quickly sorts the entries by price.
9. **VAT Information:** This shows the VAT information for the invoiceA VAT code can be selected, which loads its rateThe total values are then updated.

1.6   Process Invoices

To obtain access to the window below open the Repairs module select
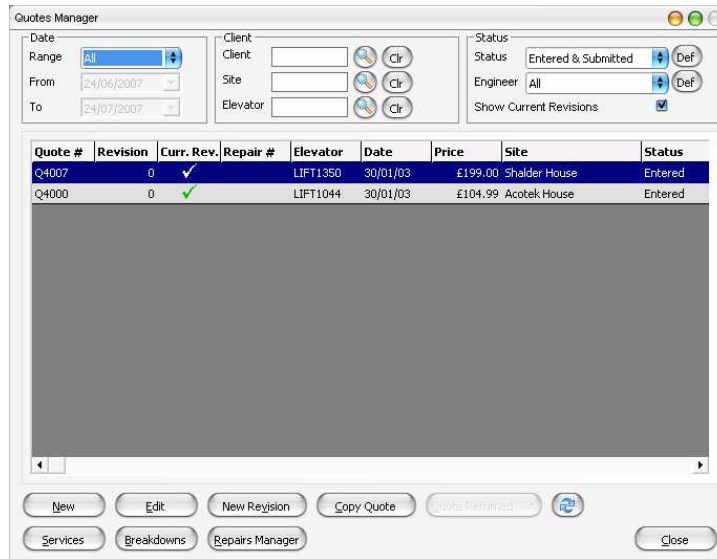Invoice and the window below will open.

Select this option to produce invoices. Once the form is activated a list of
repairs ready to be invoiced are displayed. There are two lists, not selected
and selected, the program will produce invoices for repairs displayed in the
selected list only. The program functions as follows:

1. **All Buttons:** select this button to put all the invoices in one list. A
   Button is available for each list.
2. **Add Buttons:** select this button to toggle the highlighted invoice from
   the current list to the other. You may also use the mouse to double
   click on the highlighted invoice, or use the enter key to toggle.
3. **Sort Button:** select this option to sort both lists in invoice number
   sequence.
4. **Set Inv. Details:** Select this button to change the address the invoice
   is to be sent to.
5. **Preview Button:** select this option to activate a preview window of the
   invoice layout. A prompt displays the number of invoices ready to print,
   select Yes to continue, No to abort. Only invoices in the selected list
   are processed.
6. **Print Invoices Button:** this option outputs the invoices to the printer.
   A prompt displays the number of invoices ready to print, select Yes to
   continue, No to abort. Only invoices in the selected list are processed.
7. **Printed OK Button:** once the invoices have been printed and checked
   select this option to complete the print process. The process will
   update the status of the invoice to 'Invoice is printed' and will be ready
   to be posted to the accounts. Only invoices that have been printed are
   displayed in the selected list will be updated. A prompt displays the
   number of invoices ready to be completed, select Yes to continue, No
   to abort. On completion of the process the records updated will be
   cleared from the selected list.
8. **Set Print Date:** This allows you to set the printed date on the invoice.

1.7 Quotations
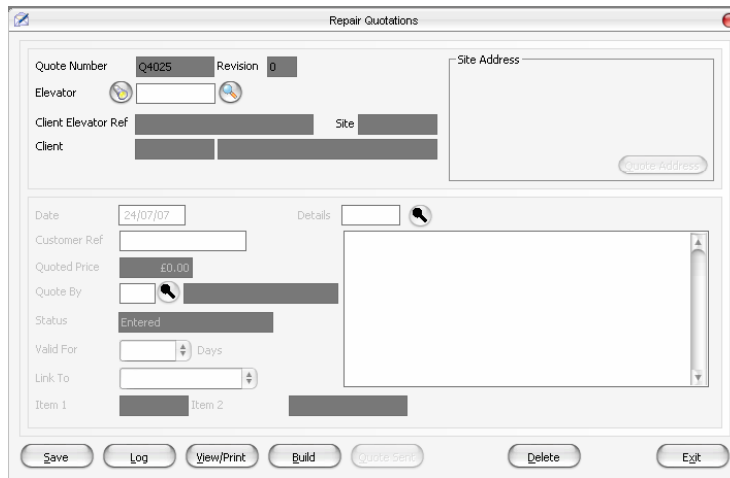
From the repairs menu select Quotation Manager.

If New is selected the following screen will appear.

Before a quotation can be processed it must be added using the New button. There are two modes this form can work in, which are adding new quotes and editing previous quotes. The items on the form remain the same, and are described below in TAB order:

Select the magnifying glass and then select the site the elevator is on.

1. **Quote No.:** The current quote number or the new quote number. Selected automatically
2. **Elevator Code:** Click on magnifying glass and select site the elevator is on.
3. **Client Elevator Ref:** The clients reference for this elevator which is for display only.
4. **Client:** The client's code, which is for display only. Selected automatically
5. **Client Name:** The clients full name. Selected automatically
6. **Site:** The site number this elevator is associated with. Selected automatically
7. **Site Details:** The address of the site. Selected automatically
8. **Date:** The date the quote is for. Defaults to the current date.
9. **Quoted Price:** The price returned from building a quote.
10. **Quote By:** The person supplying the quote
11. **Status:** The status for this quote. Changes from "Submitted" to "Won" if the quote is accepted.
12. **Details:** Brief details of the type of work to be carried out.
13. **Select Button:** To select a previous quote for editing.
14. **View/Print:** To produce a quote for viewing or printing.
15. **Build:** Loads the Quote Builder screen for adding service details to the elevator.
16. **Save:** To save any changes to the database.
17. **Abandon:** This will abandon any changes made.
18. **Delete:** This will delete the current quote.

1.7.1 Quote Builder

The quote builder is provided as a quick and efficient way to build your quotes from either previously entered service information (entered in the Elevator Details screen from the Service module). It also provides a way of ordering the entries as you require for your quotation printout using the up, down and quick sort buttonsThe elements of this screen are described below in TAB order.

1. **New:** Displays the new entry dialog box. A new entry, which is not part of the service details can be added here.
2. **Select:** If service details exist for this elevator, then they are displayed on the screen. They can be added individually.
3. **Edit:** Edits the currently selected entry.
4. **Remove:** Removes the currently selected entry.
5. **Exit:** Exits the screen
6. **Up:** Moves the selected entry up one position.
7. **Down:** Moves the selected entry down one position.
8. **Date Ascending/Descending:** Sorts the entries by date.
9. **Price Ascending/Descending:** Sorts the entries by price.

1.8   Utilities

1.8.1 Change Repair Status

From the repair menu select "Change Repair Status", then click on "select", click the magnifying glass next to the repair number field for a complete list of all repairs, then highlight the repair you wish to change the status of.

It is possible to change the status of the repair outside the main operational programs using the change repair status utility. It is expected that the need to change a call status will be minimal. The form works as follows:

- **Select Button:** Select the option to input a job number. The focus will be set to the job number field.
- **Job Number:** Input a valid job number. Once you have selected a job the relevant job record will be displayed. You may now change the repair status.
- **Repair Status:** Provides a choice of 4 statuses described below in relevant order.
  - ○ Entered: The job has been entered.
  - ○ Allocated: The job has been processed and is ready to be invoiced.
  - ○ Invoiced: The invoice has been printed and finished and is ready to be posted to the sales ledger.
  - ○ Completed: Withdrawn, or invoice posted to the sales ledger.
- **Delete Repair:** Select the button to delete the repair from the system. Once done the job is lost.
- **Save Button:** Select the save button to keep a status change. You are prompted to continue. Select yes to continue, select no to abandon and clear the record.
- **Cancel Button:** Select this button to abandon a status change and clear the record.

1.8.2 Delete Completed Repairs

From the Repair menu click on Utilities and in the drop down select Delete Completed Repairs

Completed repairs remain on the current live repair file. Over time the overhead will become more apparent. To compensate for the overhead the delete completed repair routine is provided.

It is assumed that once a repair has been completed it is no longer required on the live file, it has been archived, although it may be beneficial to keep several months for emergency purposes. The program functions as follows:

- **Delete Up To Date:** Select the date to delete all completed repairs up to. A valid date is required.
- **Delete Button:** Select to begin the clear down process. You are prompted, select Yes to continue, No to abort the clear down. A progress bar is displayed as the clear down program is processing. On completion a display box provides you with the amount of records that have been deleted.

1.8.3 Archive Completed Quotation

From the Repair menu click on Utilities and in the drop down select Archive Completed Quotations
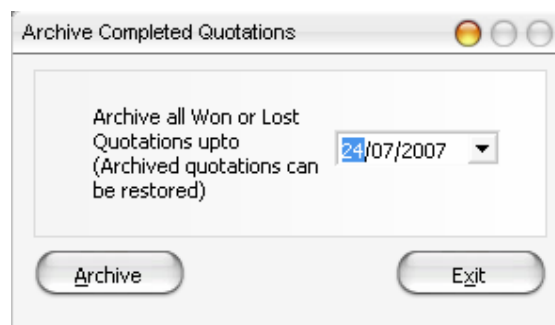
- It is assumed that once a repair has been completed it is no longer required on the live file, it has been archived, although it may be beneficial to keep several months for emergency purposes.

1.8.4 Delete Repair History

From the Repair menu click on Utilities and in the drop down select Delete Repair History

- It is assumed that once a repair has been completed it is no longer required on the live file, it has been archived, although it may be beneficial to keep several months for emergency purposes.