The **SRO** section allows users to create and process **Service Repair Orders**. Customers can be clairvoyantly loaded onto an SRO, product history by Serial# can be researched, warranty and exchange processes can be managed, and a single SRO can be automatically loaded onto and Invoice and/or sent to AppleOrder™ in a truly one-write manner.

The SRO section can be accessed from the **SRO** menu:

```
S.R.O.
┌─────────────────────────────────────┐
│        • SERVICE & REPAIR •         │
├─────────────────────────────────────┤
│  Create SRO Form...            ⌘S   │
├─────────────────────────────────────┤
│  List All Records...                │
│  Custom List...                     │
├─────────────────────────────────────┤
│  List All Unbilled SROs...          │
├─────────────────────────────────────┤
│  SRO Serial# Search...              │
├─────────────────────────────────────┤
│  SRO Chooser...                ⌘G   │
│  SRO Data Searcher...               │
│  Find Last SRO...                   │
├─────────────────────────────────────┤
│  Print Last SRO...                  │
├─────────────────────────────────────┤
│  Custom Report...                   │
│  Custom Graph                       │
├─────────────────────────────────────┤
│  Change Next SRO#...                │
├─────────────────────────────────────┤
│  Log Start Time...             ⌘I   │
│  Log End Time...               ⌘O   │
├─────────────────────────────────────┤
│  Display Service Part Pricing.. ⌘F  │
└─────────────────────────────────────┘
```

To create a new SRO worksheet, select **Create SRO Form...** from the **SRO** menu.

The SRO entry screen is made up of three sections:

```
Sections
┌──────────────────────────────────┐
│  1..Customer Information...  ⌘1  │
│  2..Repair Information...    ⌘2  │
│  3..Warranty Information...  ⌘3  │
└──────────────────────────────────┘
```

Section 1 is for entering the initial Customer and problem equipment information:

File   Edit   Sections   Apple™   Dup.

Service Repair Order

S.R.O.#: 002016

RECEIVED BY: RR   **DATE:** 03/14/95   **DAYS:** 0
TIME: 4:29 PM

CLIENT INFORMATION:

CUSTOMER: Anderson Hardware Corporation
USER/ATTN: Dave Smith   **CODE:** AHW
ADDRESS: 87653 South Rd.
ADDRESS 2: Building #7
CITY: Santa Monica
STATE: CA   **ZIPCODE:** 98543
HM PHONE: (213) 555-1234   **WK PHONE:** (213) 555-1234
ASSIGNED REP: Susan Longsteinburg   [Load...] [Clear]
[Choose Other Location]

☐ EDUCATIONAL   **P.O.#** 98981
☐ BUSINESS
☐ HOME USE
☐ VENDOR ASSOCIATE
☐ NOT PURCHASED HERE

[SHIPPING LABEL]
[Show Equipment Purchased]
[Scheduled Equipment]

VOICE NOTATION
[Record]
[Play]
[Clear]

EQUIPMENT IN NEED OF SERVICE:

SERIAL #	DESCRIPTION	PART #	INVENTORY HISTORY
F3333	PLUMB™ 68020 COMPUTER	P68020	History Found
724619854	14" Monitor	56423321	No Reference

SYMPTOMS: ▼   [Print SRO Label(s)]   [ADD] [DELETE]

Makes Funny Start-up Sounds

☒ Call With Estimate   ☐ "HOT Bench"

SERVICE TYPE
Inside

LOCATION: ▼

PURCHASE DATE: 00/00/00
☒ OUT OF WARRANTY
☐ MFG LIMITED PRODUCT WARRANTY
☐ Billed   [Visit Invoices]

[SAVE]   [CANCEL]   [PRINT]

The following is a description of the various fields and controls found on this screen.

SRO#:
This number is unique to the SRO File, and is assigned by P.I.M.S. Where P.I.M.S. starts numbering from can be modified by selecting **Change Next SRO#...** from the **SRO** menu. Clicking on the SRO Number itself allows a user to change that specific number to any combination of letters and/or characters desired. Caution should be used when manually altering the SRO# to avoid duplicate numbers.

RECEIVED BY:
This is the **Employee Code** of the person who is entering this initial information. This is the person "checking-in" the equipment in need of service, and not necessarily the person repairing it.

DATE & TIME:
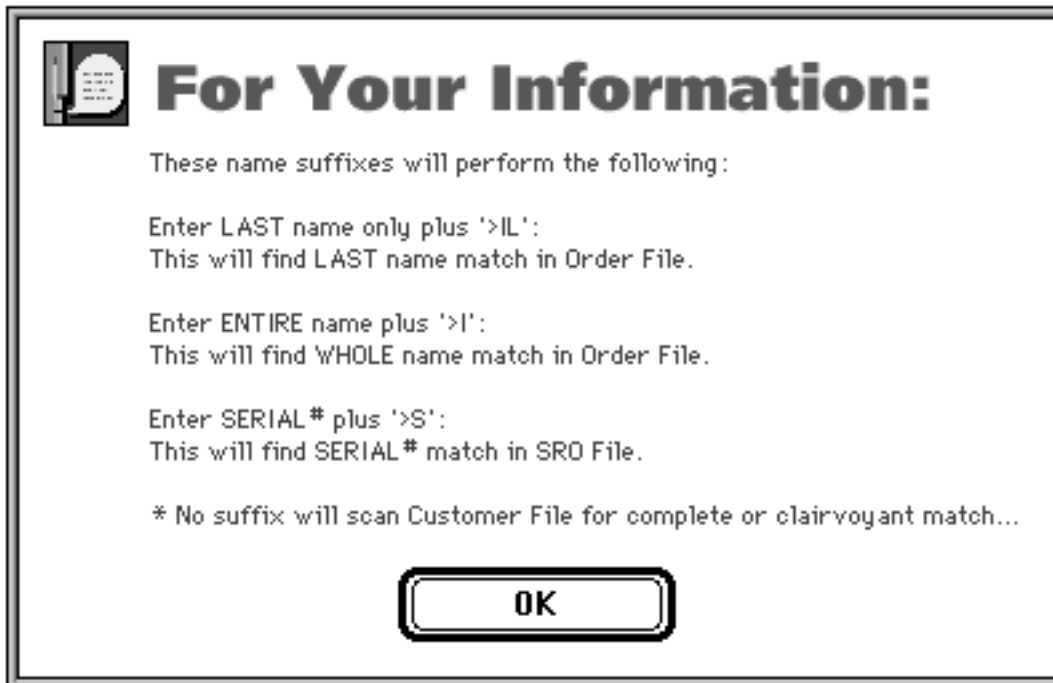This is the **Date** and **Time** the SRO was first created.

DAYS:
This is how long (in days) the SRO was active. An SRO is considered active until the PICKUP DATE (section#2) is filled in. (not equal to 00/00/00)

CLIENT INFORMATION:

This is information about the person for whom the equipment in need of servicing belongs to. There are several ways of entering Customer (Client) information into this area. Along with the usual clairvoyant look-up by **Code** or Name (**Customer** Field), these other options also exist:

- Last four digits of **HM PHONE** number
- Any of these special look-ups from the **CUSTOMER** field:

For Your Information:

These name suffixes will perform the following:

Enter LAST name only plus '>IL':
This will find LAST name match in Order File.

Enter ENTIRE name plus '>I':
This will find WHOLE name match in Order File.

Enter SERIAL# plus '>S':
This will find SERIAL# match in SRO File.

* No suffix will scan Customer File for complete or clairvoyant match...

OK

Clicking on the word "**CUSTOMER**" (in red) will display this dialog...

- Clicking on the **Load** button (only exists for compatibility reasons):

Search And Load Customer From:
○ Past SRO
○ Invoice
● New

DO IT **CANCEL**

One additional feature of this method is the ability to enter a new Customer directly from an SRO.

- If the **OPTION** key is held down while entering a Customer **Code**, the **Ship-To** address is loaded from the Customer record instead of the normal **Bill-To** address.

- **Choose Other Location** will allow a user to select a Customer's alternative **Ship-To** location. Before clicking this button, make sure that a Customer with valid Ship-To locations has already been loaded onto the SRO. The Location Chooser is displayed using the same criteria as the **Additional Locations** section of the Order entry screen. If the **OPTION** key is held down while clicking this button, the Location information is displayed as ADDRESS plus CITY, instead of the setting found on the Customer record.

Clicking the **Clear** button will remove all Client Information from the SRO entry screen.

P.O.#:
This is the optional Customer Purchase Order Number (theirs).

MARKETING FIELDS:

- **EDUCATIONAL**
- **BUSINESS**
- **HOME USE**
- **VENDOR ASSOCIATE**
- **NOT PURCHASED HERE**

These check boxes are for searching and sorting purposes only, and serve no other purpose.

SHIPPING LABEL:
This function will create a **Shipping Record** using the **Client Information** found on the SRO. Once created, the Shipping Record will be displayed to the user for processing.

SHOW EQUIPMENT PURCHASED:
This function will produce a listing of the products purchased by the Customer (on P.I.M.S. Invoices) referenced by the SRO Customer **Code**. Selecting a line from the listing has no effect.

SCHEDULED EQUIPMENT:
This function will produce a listing of the equipment existing for the Customer, referenced by SRO Customer **Code**, in the **Periodic Maintenance** File. Selecting a line from the equipment listing and clicking **OK** (or double-clicking the line) will load that product into the **EQUIPMENT IN NEED OF SERVICE** area.

VOICE NOTATION:
If your Macintosh terminal has an Apple microphone attached and is capable of recording sounds, a user can record and play back a voice message. This is handy when the person receiving the product for servicing is different from the person performing the repair. The person receiving, and/or the Customer, can leave a more detailed message by voice to accompany the written details. It is often a benefit to hear the problem in the Customer's voice. This makes it easier to realize that the problem is with the Customer and not the equipment...

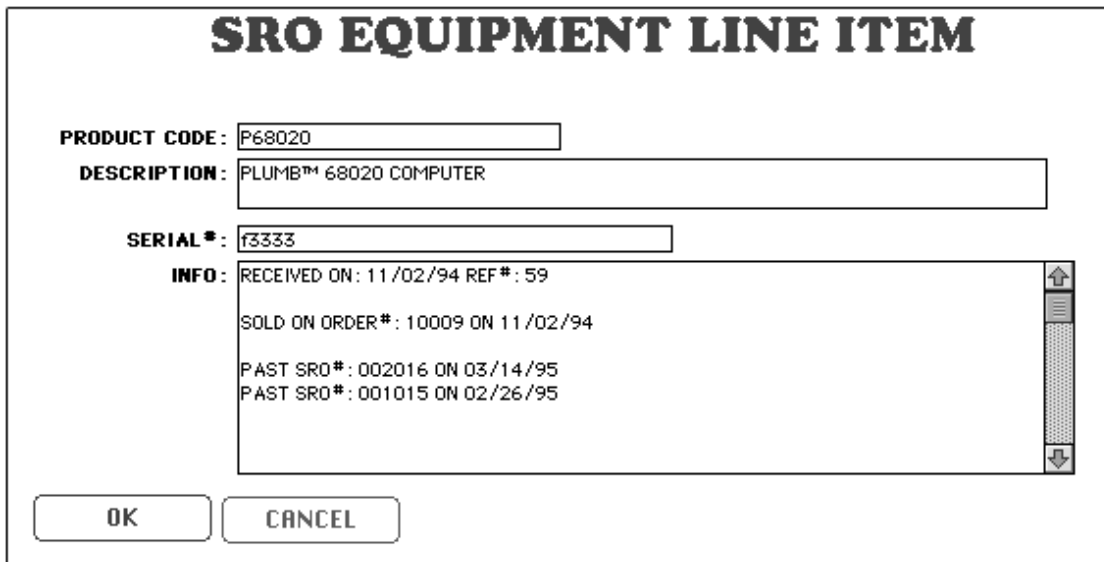**EQUIPMENT IN NEED OF SERVICE:**
This is a standard sublisting where products in need of attention are loaded. Any type of product can be entered into this section, regardless if they are in your system or not. If an item is available in your Inventory, it may be loaded by clairvoyantly entering a **PART#**. Unlike the Invoice line item, if an item does not exist in Inventory the **PART#** remains in the listing. In this way, products that have nothing to do with your product lines can be processed by your Service Dept. When (and if) a **SERIAL#** is entered, P.I.M.S. will prompt you with the following:

Please Confirm:

Do you wish to locate past history?...

    Yes   No

An affirmative answer will cause P.I.M.S. to search the Invoice, Serial Number, and SRO Files to any match to the Serial# entered. If a match is found, the **Description** and **Part#** of the item will be loaded. Also, "**History Found**" will be displayed in the **INVENTORY HISTORY** field for that item if a match is found. If this specific item is referenced somewhere in your system, double-clicking on the line will produce the following information:

SRO EQUIPMENT LINE ITEM

PRODUCT CODE: P68020
DESCRIPTION: PLUMB™ 68020 COMPUTER

SERIAL #: f3333
INFO: RECEIVED ON: 11/02/94 REF#: 59

SOLD ON ORDER#: 10009 ON 11/02/94

PAST SRO#: 002016 ON 03/14/95
PAST SRO#: 001015 ON 02/26/95

    OK   CANCEL

If desired, more information can be manually entered into the **INFO** area. — Even if there is no history found.

PRINT SRO LABEL(S):
This function will print a standard 3.5" label on a CoStar LabelWriter™ XL (or equivalent) showing the SRO# (as a barcode) along with the Customer Name, Phone#, and the name of the person who received the product. This is a handy way of marking products for tracking purposes.

SYMPTOMS: (Text Field & Pop-Menu)
This is a text area where the product symptoms may be entered. Directly above this field is the **SYMPTOMS** pop-menu. This is a faster way of entering common symptoms. Items can be entered into this pop-menu by selecting **SRO Symptoms...** from the **Sections** menu in **Company Info**. Terminals must restart to have access to any new items entered into this pop-menu.

CALL WITH ESTIMATE:
This is simply a flag for the person performing the service.

"HOT" BENCH:
This is a flag for the service person denoting that the Customer needs a "rush" job. You may handle this any way you see fit...

SERVICE TYPE:
This is a field where an optional Service Category can be entered. This is handy for reporting needs. You may enter anything you like in this field. The words "**SERVICE TYPE**" are actually a pop-menu with **Inside** and **Outside** as items.

LOCATION:
This pop-menu is for the CONNECT module only.

PURCHASE DATE:
This is the date-of-purchase associated with the item(s) in need of service.

OUT OF WARRANTY:
Check this box if the service work is not covered by warranty (either in-house or manufacturer)

MFG LIMITED PRODUCT WARRANTY:
Check this box if the service work is covered by some form of warranty.

BILLED:
When this box is checked, it tells P.I.M.S. that this SRO has been processed for payment. This flag is set automatically when an SRO is loaded onto an Invoice. (discussed later)

VISIT INVOICES:
This function will produce a listing of any Invoices associated with this SRO. (discussed later)

Section 2 is a worksheet for the servicing technician(s):

The following is a description of the various fields and controls found on this screen.

REPAIRED BY:
This is the **Employee Code** of the person responsible for the repair.

PICKUP DATE:
This is the date the equipment was received back by the Customer, or the date it was Invoiced. If this SRO was automatically loaded onto an Invoice (discussed later), this date would be automatically set to the corresponding Invoice date.

PRINTED REPAIR STATEMENT:
This is the description and account of the service(s) performed. This text area can hold a lot of information.

Remember "apple" means Apple Dealer specific...

TIME BILLING:
This is a sublisting where all time devoted to a specific SRO can be logged. When a line is added to this sublisting, the **IN** time (start) is defaulted to the current time. The **OUT** time is defaulted to 12:00am, which is the computer time equivalent of zero. Either of these times may be altered (in military 24 hour time format). Clicking the words **IN** or **OUT** (in red) will insert the current time in the field the cursor is currently in. Once an **OUT** time is entered, the total elapsed time for that entry is displayed in the **TIME** column. The **TIME** column itself is totaled at the bottom. *There is a faster and more efficient way of logging work times available from the **SRO** menu. This is discussed later.*

PARTS/SERVICES USED:

CODE	QTY	DESCRIPTION	ORDER AS	PRICE	REIMBURSE
666-5432	1	Prune™ Mother-Board Replacement	☐ Exch. ☐ Stock ☒ Cross Shipped	$395.00	☐ Warranty

This sublisting is where the items used in the servicing of the equipment received is entered. Unlike the **Equipment In Need Of Service** listing in Section#1, these items must exist in your **Inventory** File. These items usually consist of parts, or some form of billable time.

Items can be entered in the same fashion as on an Invoice, clairvoyantly by **Code** or **Description**. The **Code** must exist in the system to be valid, but the **Description** can be any desired text. Both a **Description** and **Price** may be entered without a **Code**, but this is <u>not</u> a recommended practice. When an item is loaded from Inventory, the **Price** field is set equal to the **Price** from the associated **Inventory** record. The **Price** may be manually overwritten if desired.

LINE ITEM CONTROLS:
There are four different controls present on each line item that

☒ Exch. ☐ Stock ☐ Warranty
☐ Cross Shipped

can effect the product loaded in any of the following manners:

- Zero-out line item Cost and Price
- Flag item for reimbursement, and calculate that reimbursement amount
- Flag item for Vendor exchange, and calculate exchange Cost and Price
- Flag item as stock item, and prepare it for transfer to unprocessed P.O.
- Flag item as being in "Transit" as a Vendor cross-ship

Before discussing these controls in detail, it is best to start by discussing the **SRO Information** section of the **Inventory** record. To access this information, open a service related Inventory record and select **SRO Information** from the **Service** menu (far right-hand menu in menu bar at top of Inventory entry screen):

Service
SRO Information...

☰ **File Edit Sections Barcode Service**

ADDITIONAL SRO INFORMATION:

EXCHANGE COST: $90.00	EXCHANGE PRICE: $135.00	LABOR REIMBURCEMENT VALUE: $75.00

AppleOrder™ LINK INFORMATION:

CODE	FAMILY DESCRIPTION	CLASS
4035	Apple IIc Plus	CPU'S
4085	Macintosh 128K/512K/512Ke	CPU'S
4090	Macintosh Plus	CPU'S
4095	Macintosh SE	CPU'S
4109	Macintosh II	CPU'S
6060	Macintosh Disk Drive	DISK DRIVES
6100	UniDisk 3.5	DISK DRIVES
6110	Apple 3.5 Drive	DISK DRIVES

[NEW LINE] [DELETE LINE]

This section is where you enter information for an Inventory record that applies only to the SRO.

EXCHANGE COST: ("Core" charge)
This cost is the amount charged to you by your Vendor when a product is sent back to them for exchange of a new one. If no **Exchange Cost** exists, the regular **Book-Cost** is used as a costing figure.

EXCHANGE PRICE:
This is the amount charged to a Customer when they are receiving an exchanged item as opposed to an out-right purchase of a new one. This price is substituted for the normal Inventory record **Price**.

LABOR REIMBURSEMENT VALUE:
If a Vendor pays an additional amount for the repair of a qualified product under warranty, that figure is entered here.

 AppleOrder™ LINK INFORMATION:

This data represents the "Family" information that is associated with a given Apple Service Part. It exists for the sole purpose of giving a seamless once-entered path to AppleOrder™.

 If you are an **Apple Service Provider**, all of the information on this screen is entered and updated monthly from a simple text file. This information need never be entered manually, as it currently represents over 8700 Apple service parts consisting of 17,000± Family combinations.

```
☒ Exch.  ☐ Stock    ☐ Warranty
☐ Cross Shipped
```

Now that you are familiar with the **SRO Information** contained on the Inventory record, these controls will make more sense.

If the **Exch.** (Exchange) flag is checked, the SRO line item **Price** will be set to the associated Inventory record's **Exchange Price** figure for that item. The **Exchange Cost** figure also replaces the SRO line item **Cost** for that item, which defaults to the Inventory record **Book-Cost** amount when first entered. If no **Exchange Price** exists for that line item, then the user is warned and the check box is un-checked.

 Checking **Exch.** will also flag that item for exportation to AppleOrder™

If the **Stock** (Stocking Item) flag is checked, the SRO line item **Price** and **Cost** figures are reset to the **Price** and **Book-Cost** of the associated Inventory record. Checking **Stock** will also flag that this item may be sent to an unprocessed Purchase Order for automatic ordering from the Vendor as a replacement for stock.

Exch. and Stock can not be selected at the same time.

If **Warranty** is checked, both the SRO line item **Price** and **Cost** are set to zero. If it is then unchecked, the line item will be reset to its default figures. **Warranty** may be checked regardless of **Exch.** or **Stock**.

 A line item is available for export to AppleOrder™ if either the **Warranty** or **Exch.** flags are checked.

Cross Shipped is a simple flag that shows that an exchange part has been sent off to the Vendor, and a replacement is still expected and not received yet. This helps prevent the problems of forgetting to send off an exchange part and thereby creating a needless charge to your account, and/or accidently sending the same exchange part more than once!

Double-clicking on an SRO line item will display a more detailed account of that line item.

> **+** ***If "Warranty" is checked on any line item (even if it is then unchecked), the "MFG LIMITED PRODUCT WARRANTY" button will automatically be checked as well...***

End Of Parts/Services Used

LABOR REIMBURSEMENT EXPECTED:

This field shows the figure that P.I.M.S. has calculated as the maximum reimbursement amount available for the items listed. P.I.M.S. arrives at this figure by scanning the line items entered for those that are flagged as **Warranty**. Once gathered, P.I.M.S. checks their associated Inventory records for the largest **Labor Reimbursement Value** available. Once found, this figure is entered into this field.

TOTAL VENDOR BALANCE EXPECTED:

This field represents the monies either owning to or expected from your Vendor. These monies might include:

- Labor Reimbursement
- Exchange Part Charge
- Stock Part Cost Under Warranty Reimbursement

A Positive number means money owed to the Vendor, while a Negative number means reimbursements expected from the Vendor.

 Labor Reimbursement Expected and **Total Vendor Balance Expected** both follow Apple Computer guidelines and parameters. Depending on how generic your relationships are with other Vendors, these fields should also work for Vendors other than Apple.

ORDER STOCK ITEMS:

This function will scan the **Parts/Services Used** listing for any items flagged as **Stock**. Once gathered, these items will be sent to any open/unprocessed Purchase Orders for their respective Vendors. If no Purchase Order exists in the system for a Vendor, it will be created. On newly created Purchase Orders, **Service Order** is placed in the Purchase Order **Reference** field. This allows for the automatic ordering of "Stock" items. These items may be received like any other items on a **Receiving Record** and the Vendor Invoice (Billing Statement) can be cross-checked with the **Vendor Reconciliation** worksheet like any other Vendor Invoice.

SCREEN COMMENT:

This is a text area for internal viewing only, as it does not print on the Customer SRO form.

 AppleOrder™ Family:

The **AppleOrder Family** information exists for the sole purpose of allowing Apple Service Parts to be transferred intact to AppleOrder without the user having to enter any further product information once in AppleOrder. A single AppleOrder transaction can only belong to one Product Family at a time. Therefor this must also be the case for a P.I.M.S. SRO. When a product is loaded onto an SRO line item, P.I.M.S. checks to see if the Inventory record associated with that line item has any Family information available. If Family information exists for that product and the SRO **AppleOrder™ Family** information is blank, a dialog box similar to the following is displayed:

Select One Item Only:

CODE:	DESCRIPTION:	CLASS:
6110	Apple 3.5 Drive	DISK DRIVES
4035	Apple IIc Plus	CPU'S
4085	Macintosh 128K/512K/512Ke	CPU'S
6060	Macintosh Disk Drive	DISK DRIVES
4109	Macintosh II	CPU'S
4090	Macintosh Plus	CPU'S
4095	Macintosh SE	CPU'S
6100	UniDisk 3.5	DISK DRIVES

[Cancel] [[**Select Item**]]

This will allow you to choose which Family this SRO will be associated with, as it relates to AppleOrder. Once Family information exists for an SRO, this dialog box will no longer appear for that SRO when items are loaded. ONLY ONE FAMILY PER SRO. If you wish to change Family information, click the eraser icon (upper right-hand corner of AppleOrder™ Family area) to remove the information. Once removed, new information can be added by selecting another product.

REIMBURSEMENT RECONCILED & DISPUTED:
These check boxes are discussed later.

Section 3 is for entering additional information as related to warranty repairs and legal requirements:

The following is a description of the various fields and controls found on this screen.

🍎 The warranty information fields and controls provided follow Apple Computer guidelines and policies. This information is used primarily by AppleOrder, and is also displayed on the printed SRO form. If you are an Apple Service Provider, you already understand these fields. If not, you may adapt these fields as you see fit.

CUSTOMER PRIOR AUTHORIZATION INFO:
This area exists to conform with the changing requirements of service organizations. It allows for the following information to be entered onto an SRO (transferred to an Invoice if loaded):

AUTHORIZED BY & THEIR PHONE#: This is the person who has verbally authorized the repair of the items in question. You should make sure that this person has such authority.

RECEIVED ON & BY: This is the date and time (actually any text you prefer) the authorization was received. It defaults to the current date and time when the **AUTHORIZED BY** text is entered. **BY** is the person who witnessed the authorization. This field is clairvoyantly linked to the **Employee Name** in the **Employee** File.

AUTHORIZATION CONTINGENT ON: This is a text field where terms and conditions of the authorization, as set forth by the Customer, may be recorded.

SAVING AN SRO:

When saving an SRO (by clicking Save or Print), P.I.M.S. will check for the following:

1) Was the **SRO#** manually changed to an existing number, causing a duplicate. If so, save is aborted.

2) Is the **Received By** field filled in. If not, save is aborted.

3) Is **Client Information** entered. If not, save is aborted.

4) If **Repaired By** is blank and there is information entered into either the **PRINTED REPAIR STATEMENT** or **PARTS/SERVICES USED** areas, save is aborted. **Repaired By** is only mandatory if these areas are used.

5) If a valid Customer **Code** exists on the SRO along with repair information and there is a match (by Serial# and Part Code) for a product being serviced in the **Periodic Maintenance** File (discussed later), the user will be prompted with the following dialog box:

Process Conformation:

Would you like to add this information to AHW's product file?...

[**Yes**]   [No]   [Cancel]

An affirmative answer will add the repair information to the specific product's service log, on the matching Periodic Maintenance record.

PRINTING AN SRO:

An SRO can be printed from three different locations in the program:

• Directly from an entry screen
• From an SRO listing (PRINT SELECTED)
• From the **Print Last SRO...** item under the **SRO** menu

The SRO will print to the printer that is designated as the **SROs** Printer in **Company Info**, if **Auto-Choose Printer** is selected. If Auto-Choose Printer is not selected, the SRO will print to what ever is currently selected in the Macintosh Chooser.

The standard SRO output template is designed to be printed on a pre-printed form (artwork available free of charge from ExecUtron), from an Apple LaserWriter printer. Here is an example of what this template might look like:

Obviously, your template would not have our logo on it...

This template not only offers the Customer a claim check, but there is also a small information tab suitable for using with any standard magnetic tracking board.

There is an alternative SRO template available in the system. To gain access to this template, select **Company Headers & Footers** from the **Sections** menu in **Company Info**:

🍎 **File   Edit   Sections**

Company Headers & Footers:

ALTERNATIVE SRO LAYOUT FOOTER:

Not responsible for equipment left after 30 days...

ALTERNATIVE SRO LAYOUT: SRO2

Currently, there is only one other template available: "**SRO2**" To activate this template, type "SRO2" into the **ALTERNATIVE SRO LAYOUT** field. The field labeled **ALTERNATIVE SRO LAYOUT FOOTER** is a text field for entering information that will print towards the bottom of this template. Once an **Alternative SRO Layout** is entered, **Company Info** must be saved and all terminals must be restarted to take advantage of the change.

The "SRO2" template prints on plain paper (LaserWriter only), and looks something like this:

SRO LISTING:

The standard listing for the SRO File is self explanatory:

 File   Edit

SRO LISTING:

NUMBER OF ITEMS LISTED: 3   **LISTING TYPE:** All Records...

SRO#	DATE	NAME	PURCHASE ORDER#	DAYS	PU DATE
002016	03/14/95	Anderson Hardware Corporation/Dave Smith	98981	2	03/16/95
002015	02/26/95	Anderson Hardware Corporation/Dave Smith		18	00/00/00
002020	03/16/95	Anderson Hardware Corporation/Dave Smith		0	00/00/00

[DONE] [PRINT LIST] [DELETE SELECTED] [PRINT SELECTED] [SEARCH]
[SHOW SUBSET] [PRINT COMPLETE FORM]

"PU" stands for Pick-Up

There is, however, an additional button for printing a more detailed SRO form for internal use only: **PRINT COMPLETE FORM**.

OTHER MISCELLANEOUS SRO FUNCTIONS (S.R.O. MENU):

The following is a description of some of the other functions and controls available from the **S.R.O.** menu:

LIST ALL UNBILLED SROs... :
This function will pull a listing of every SRO whose **Billed** check box is unchecked.

SRO SERIAL# SEARCH... :
This function will prompt the user for a Serial Number, and then search all SRO records for that Serial Number in both the **Equipment** and **Parts/Services** sublistings. If found, those SROs are listed.

LOG START TIME... & LOG END TIME... :
These functions allow a technician to quickly and effectively log starting and ending times for a specific SRO work period. When a Tech is ready to jump to another SRO job, they simply select **Log Start Time...** (Command-I) and enter the **SRO#** when prompted. P.I.M.S. will log the current time in the next available **IN** field in the **Time Billing** sublisting for that SRO. If **Log End Time...** (Command-O) is selected and an **SRO#** is entered, P.I.M.S. will finish the **Time Billing** line entry by assigning the current time to the **OUT** field in the **Time Billing** sublisting. The user will be warned if no **IN** time is available for that SRO, or if an **OUT** time was already assigned prior to a new **IN** time. A Tech can even scan the barcode at the top of the SRO to enter it when prompted. This is more efficient than opening up an SRO and adding times to the **Time Billing** area manually.

DISPLAY SERVICE PART PRICING...:

One of the most frequent areas for costly mistakes is having technicians quote parts pricing over the phone. This is especially a problem if there are exchange figures to juggle. This function displays a simple calculator that is tied directly into the **Inventory** File for the purpose of calculating quoting figures:

```
┌─────────────────────────────────────────────────────────┐
│         SERVICE PRODUCT PRICE LOOK-UP                    │
│ CODE:│661-0345│  DESCRIPTION:│800K MECHANISM, APPLE 3.5 DRIV│
│                                                          │
│                          PURCHASE PRICE:│    158.40│     │
│                    CUSTOMER "CORE" VALUE:│  - 23.40│     │
│                           EXCHANGE PRICE:    + 135.00     │
│                             TAX ON PART:     + 10.13      │
│   │0.50 Hours│ @ │$75.00 Per Hour│ = LABOR:  + 37.50      │
│   ┌──────────┐                                           │
│   │  Done    │              TOTAL:         + 182.63      │
│   └──────────┘                                           │
└─────────────────────────────────────────────────────────┘
```

A product can be loaded onto this screen clairvoyantly by either **Code** or **Description**. Once loaded, pricing figures are calculated automatically including a synthetic "Core" value. **PURCHASE PRICE** and **CUSTOMER "CORE" VALUE** are both user modifiable. A repair time and rate may also be added to the mix if desired.

DUPLICATING AN SRO:

An SRO record can be duplicated by selecting **Duplicate SRO, In Part...** from the **Dup.** menu at the top of the SRO entry screen:

```
┌──────────────────────────┐
│ Dup.                     │
├──────────────────────────┤
│ Duplicate SRO, In Part...│
└──────────────────────────┘
```

Only Customer and Equipment information remains the same on the duplicate SRO. All other information and controls are set to their default value.

LOADING AN SRO ONTO AN INVOICE:

One of the best features when working with the SRO section is the ability for an SRO to be loaded automatically onto an Invoice with all of its permanent information. Not only is this a time saver and a truly one-write process, but a non-technical retail clerk can now enter a service & repair transaction correctly and completely with only one step. This can free up the Technician to move on to other work.

To automatically load an SRO onto an Order, create a new Order by selecting **Create New Order...** from the **Orders** menu. Once the Order entry screen is displayed, type "SRO" plus the **SRO#** into the **Customer Code** field on the Order (ie: SRO002016) and press **TAB**. Doing so will load the following information onto the Order:

The most efficient way of loading an SRO onto an Order is to click the cursor into the **Customer Code** field and barcode-scan the **SRO#** (found at the top of the SRO form) into it. A complete Order can be created with just one flick of the wrist!!

- Complete Customer information. If a **Customer Code** exists on the SRO, the Customer information is checked for completeness from the Customer record.

- Order line items are created for every piece of equipment listed in the **EQUIPMENT IN NEED OF SERVICE** sublisting. The name of the items and their serial numbers are placed in these Order lines with a heading of **ITEMS SERVICED**.

- Order line items are created for every item listed in the **PARTS/SERVICES USED** sublisting. The correct costing of these items is determined by the SRO line item controls. The **SRO#** is added to the end of the Order line item **Description** field. If the **Exch.** button is checked for that SRO line item, "(With Exchange)" will be added to the Order line item **Description**. If the Warranty button is checked for that SRO line item, "Replaced Under Warranty" will be added to the Order line item **Description**. If a Serial Number exists for an SRO line item (entered by double-clicking the SRO line item) it is added to the **Memo** field of the associated Order line item.

- If the **Printed Repair Statement** field is not blank on the SRO, an Order line item is created and that text is placed in it. A header of **ACTION TAKEN** is added to the top of this line item.

- If **Customer Prior Authorization Information** exists on the SRO, an Order line item is created and that information is placed in it.

- An Order line item is created and "**Repaired By**" followed by the **Employee Code** of the repair person is placed in it.

Automatically loading an SRO onto an Invoice is the only way to insure that correct costing is obtained. This fact only applies if SRO line item controls are used...

When the Invoice is saved (or printed), the SRO that was loaded onto it (there should only be one per Invoice) will have its **PICKUP DATE** field set to the current date and its **Billed** check box checked.

The following page shows an example Invoice printout (LaserWriter_1) with service information automatically loaded onto it. Only three steps were performed to create and print this Invoice:

> **1) Create New Order...** selected.
> **2) SRO#** barcode-read into **Customer Code** field.
> **3) Print** button clicked.

It doesn't get any simpler than that!

Waycool Computer Center

INVOICE

1111 First Street
SantaRosa, CA 95403
(707) 555-1212   [FAX: (707) 555-1313]

INVOICE#: 10023

DATE: 03/16/95

PAGE: 1

BILL TO:

PURCHASE ORDER#:   98981

Anderson Hardware Corporation
Dave Smith
87653 South Rd.
Building #7
Santa Monica, CA 98543
(213) 555-1234

ACCT#: AHW

SHIP TO:

Anderson Hardware Corporation
Dave Smith
87653 South Rd.
Building #7
Santa Monica, CA 98543
(213) 555-1234

SALESPERSON: Susan Longsteinburg   SHIP VIA:

QTY	SHP'D	BO'D	DESCRIPTION	MEMO	PRICE	EXTENSION
1	1		ITEMS SERVICED: PLUMB™ 68020 COMPUTER - SN: F3333 14" Monitor - SN: 721619894 1800K MECHANISM, APPLE 3S DRIV (With Exchange) - SRO#: 002016 ACTION TAKEN: The drive mechanism was replaced with a factory part. AUTHORIZED BY: Mr. Tegard Frumpy [(707) 555-1212] AUTHORIZATION RECEIVED BY: Bruce Childrun ON 03/16/95 @ 8:11 AM REPAIRED BY: BC		$135.00	$135.00

Net 30: $145.13

	SUBTOTAL:	$135.00
	TAX:	$10.13
	FREIGHT:	$0.00
	TOTAL:	$145.13

This invoice is your billing statement. Please pay in full no later than 04/15/95

HAVE A NICE DAY!

SIGNATURE: _____   DATE _____

BY: _____
(please print)

🍎 🍎 🍎 P.I.M.S. AND APPLEORDER™ 🍎 🍎 🍎

If you are not an **Authorized Apple Service Provider** and have never heard of AppleOrder™, skip this section. If you are an **Authorized Apple Service Provider** and have never heard of AppleOrder™, you have bigger problems!

AppleOrder is used to order both Apple Service Exchange Parts and Service Stocking Parts. It is also used to process Warranty information and claims. It is not the scope of this document to train you on the general usage and operation of AppleOrder. We assume that you already have a good working knowledge of it. If not, please refer to the AppleOrder documentation prior to transferring information from P.I.M.S.

Information can be exported from P.I.M.S. to AppleOrder from two different P.I.M.S. sections:

> • SRO Entry Screen
> • Purchase Order Entry Screen

🍎 APPLEORDER AND SROs:

P.I.M.S. sends information to AppleOrder via an Export -> Import process. When information is exported from P.I.M.S. to AppleOrder, the default is to place it into a folder at the same root-level as the P.I.M.S. S/U or Client application called **SRO EXPORT**. This folder will reside on the terminal the export was performed from. Because AppleOrder is currently not multi-user, many export folders on various terminals is not practical. Because there is generally only one AppleOrder application running (for your Service Dept.), it is best to have all Service Terminals export information into a single shared folder. —Usually on the Macintosh running AppleOrder. This generally means that the first step in setting up a relationship between your P.I.M.S. Service Terminal(s) and AppleOrder is to create a shared folder on the AppleOrder terminal. Once this is done, you must make each P.I.M.S. Service Terminal aware of this folder. To do so, go to each P.I.M.S. Terminal and select **Change SRO Export Path...** from the A.D. Module **File** menu. This will prompt you to select the shared folder:
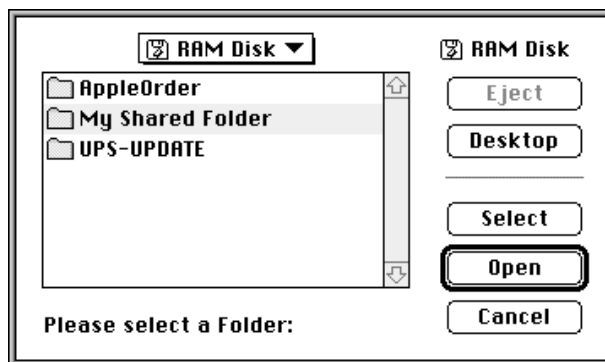
Select your folder and click **Select**. The final step in setting up your P.I.M.S. to AppleOrder compatibility is to enter your **Area Code** and **Apple Dealer Number** into **Company Info**: (page one)
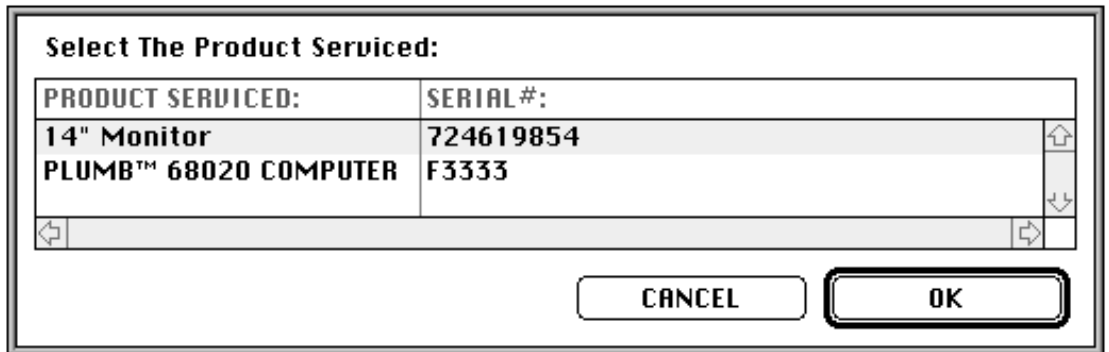
Once your configuration is complete, you may export information directly from an SRO entry screen by selecting **AppleOrder™ Export...** from the **Apple** menu at the top of the SRO entry screen:

Apple™

AppleOrder™ Export...

To import properly into AppleOrder™, your Macintosh's date format must be set to:

"**00/00/00**"

The default is:

"0/0/00"

Adjust this by selecting "leading zeros" in the **Date & Time** Control Panel:

Date & Time

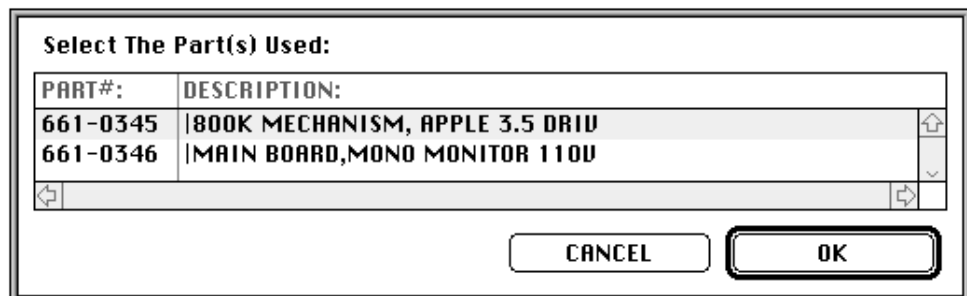The following SRO data is required before an export is granted:

1)	Family Code
2)	At least on piece of equipment requiring service, along with its serial#
3)	At least one valid Apple Service Part:
	— Checked as an Exchange
	— Check as a Warranty
	— Checked as both
4)	Areacode & A.D. Number in Company Info

Only one piece of equipment serviced and its serial# are allowed to transfer to AppleOrder. If more than one choice exists, the user will be asked to choose:

Select The Product Serviced:

PRODUCT SERVICED:	SERIAL#:
14" Monitor	724619854
PLUMB™ 68020 COMPUTER	F3333

CANCEL   OK

Because of this, it is good practice to create an individual SRO for every piece of equipment requiring service.

If more than one line item exists that qualifies for an AppleOrder transfer, the user will be asked to choose the desired product(s) to transfer:

Select The Part(s) Used:

PART#:	DESCRIPTION:
661-0345	|800K MECHANISM, APPLE 3.5 DRIV
661-0346	|MAIN BOARD,MONO MONITOR 110V

CANCEL   OK

More than one part can be selected by the general Macintosh principal of Shift-click or Command-key selection.

If all goes well, a document similar to this one will be sent to the folder you have designated as your export folder:

```
┌─────────────────────────────────────────────────┐
│ ▣  ══════════ My Shared Folder ══════════  ▣   │
├─────────────────────────────────────────────────┤
│ 1 item          15.9 MB in disk    22.9 MB available │
├─────────────────────────────────────────────────┤
│                      📄                     ⇧   │
│                                                 │
│           SRO Export-002016|03/16/95            │
│                                             ⇩   │
│  ◁═══════════════════════════════════════▷  ▣  │
└─────────────────────────────────────────────────┘
```
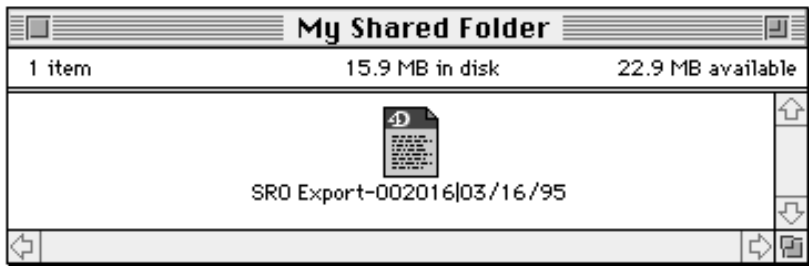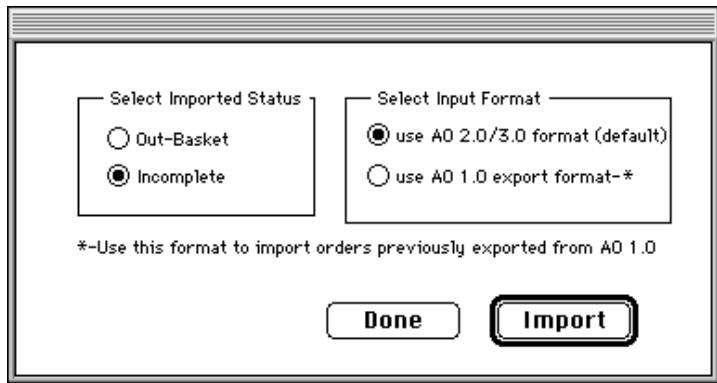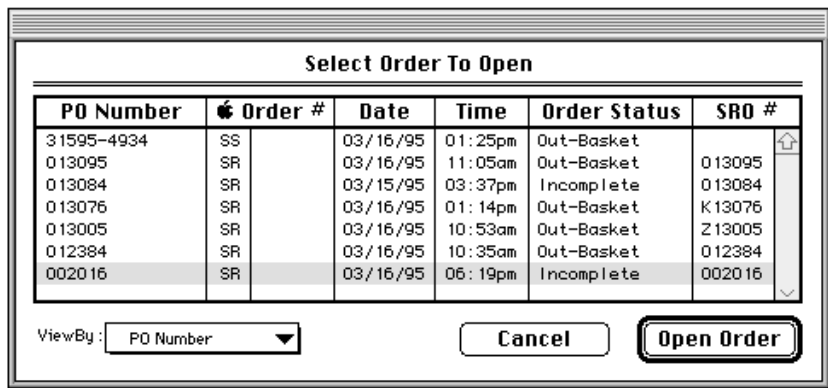
The name of the document consists of the SRO# and Date. Before exporting, the SRO is automatically saved. If an attempt is made to export an SRO more than once, the user is warned but may proceed.

To import an exported P.I.M.S. SRO document into AppleOrder, select **Import Orders** from the AppleOrder **File** menu:

```
┌──────────────────────────────────────────────────┐
│                                                  │
│  ┌─ Select Imported Status ─┐ ┌─ Select Input Format ─┐ │
│  │  ○ Out-Basket            │ │ ◉ use AO 2.0/3.0 format (default) │ │
│  │  ◉ Incomplete            │ │ ○ use AO 1.0 export format-* │ │
│  └──────────────────────────┘ └──────────────────┘ │
│                                                  │
│   *-Use this format to import orders previously exported from AO 1.0 │
│                                                  │
│              ┌─ Done ─┐   ┌─ Import ─┐           │
└──────────────────────────────────────────────────┘
```

It is wise, even though not mandatory, to import your information as **Incomplete**. This allows management to review an SRO and assign possible error codes before shooting this job off to Apple. This just makes more sense!

Once imported, you may select **Open Order** from the AppleOrder **Orders** menu to see a listing of unprocessed SROs:

Select Order To Open

PO Number	Order #	Date	Time	Order Status	SRO #
31595-4934	SS	03/16/95	01:25pm	Out-Basket	
013095	SR	03/16/95	11:05am	Out-Basket	013095
013084	SR	03/15/95	03:37pm	Incomplete	013084
013076	SR	03/16/95	01:14pm	Out-Basket	K13076
013005	SR	03/16/95	10:53am	Out-Basket	Z13005
012384	SR	03/16/95	10:35am	Out-Basket	012384
002016	SR	03/16/95	06:19pm	Incomplete	002016

ViewBy: PO Number ▼   ┌─ Cancel ─┐   ┌─ Open Order ─┐

To review your SRO in AppleOrder, simply double-click the line item:

None of this information was entered manually into AppleOrder, making for a true one-write combination!

P.I.M.S. A.D. Module is compatible with AppleOrder™ version V3.0 - ©Copyright - Apple Computer, Inc.

AppleOrder
Version 3.0
©1990-94 Apple Computer, Inc.

This program was written using:
MacApp®, ©1986-92 Apple Computer, Inc.
Inside Out II™, ©1992 Sierra Software, Inc.

Part	Description	Qty	Price
	Designed & Programmed		
	by :		
	Apple USA IS&T		

Service Repair Order

Entered By: BC

PO Number: 002016

Bill To: SZ009X30
EXECUTRON COMPUTERS
ATTN: ACCOUNTS PAYABLE
1831 GUERNEVILLE ROAD
SANTA ROSA   CA
                  95403

Ship To: 1
EXECUTRON COMPUTERS
1831 GUERNEVILLE ROAD
ATTN: SERVICE DEPT.
SANTA ROSA   CA
                  95403

☐ **Mark Order For Review** [Message]

SRO Number: 002016

Customer Information

Last Name Smith **First** Dave **MI**

Company Name Anderson Hardware Corp.

Address 87653 South Rd.
Building #7

Day Phone 2135551234 **Night Phone** 2135551234

City Santa Monica **State** CA **Zip** 98543

Warranty and Part Information: [Enter]

AppleOrder™ - Page #1

Service Repair Detail

Warranty Type

OUT OF
APPLE LIMITED PRODUCT WARRANTY
APPLECARE
Global Warranty
OTHER
REPAIR EXTENSION

Warranty Information

Date Received: 3 | 14 | 95
Date Purchased: 1 | 7 | 95
☐ **Inoperable upon first use**

Product Requiring Service
Apple 3.5 Drive

Serial Number: F3333

[Select Part]		Description	Exch Price	Qty	Observed Condition
1	661-0345	800K MECHANISM, APPLE 3.5 DRIV	90.000	1	

Exchange Prices are based on meeting requirements outlined in the SSCD.
Prices do not include taxes, freight charges, and insurance, if applicable.
Non-Exchange parts will not ship on a SRO, must be ordered on a Service Stocking Order.

AppleOrder™ - Page #2

P.I.M.S. Professional Inventory Management System

 APPLEORDER AND PURCHASE ORDERS:

P.I.M.S. sends information to AppleOrder from P.I.M.S. **Purchase Orders** in a fashion similar to the SRO export.

To export Apple Service Parts from a Purchase Order containing those items (exclusively), select **AppleOrder™** from the **Export** menu at the top of the **Purchase Order** entry screen:

Purchase Order line items are first grouped together by **Description** to consolidate multiple product occurrences, and then an export document is created and placed at the same location as your predesignated SRO exports:
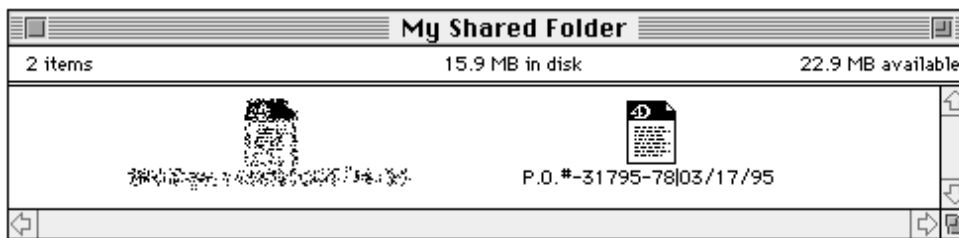
This document should also be imported into AppleOrder as **Incomplete**. Once again, this is just good practice.

When this document is imported into AppleOrder, it is automatically treated as a "Service Stocking Order":


 PLEASE NOTE:

If you will be placing both **Finished Goods** and **Service Stocking Orders** to Apple Computer from P.I.M.S. Purchase Orders, you should have two Apple Vendor records. Make one something like "Apple - Retail" and the other maybe "Apple - Service". Associate your Service Parts with one Apple, and your Finished Goods (Performas, etc.) with the other. This will insure that the two different product types are placed on different Purchase Orders, and never combined...
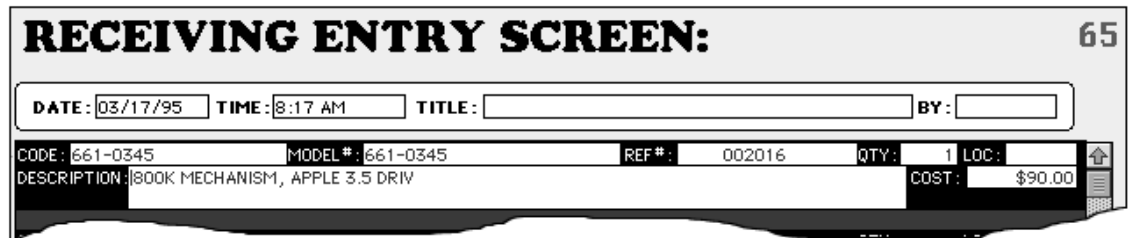
RECEIVING PARTS ORDERED WITH APPLEORDER (FROM EXPORT):

Normal Service Stock Orders are placed from standard P.I.M.S. Purchase Orders, and therefore can be received like any other product. Exchange parts exported from SROs to AppleOrder have no internal P.I.M.S. Purchase Order reference. However, they can be received on P.I.M.S. Receiving Records and linked back to the originating SRO for the purpose of reconciling their receipt.

To link a newly received shipment of Service Exchange Parts to their respective SROs, hold down the **OPTION** key while clicking **LOAD P.O.** on a Receiving Record. This will cause P.I.M.S. to prompt you for an SRO# instead of a Purchase Order Number:

```
Please enter an SRO number...

            002016

      OK            Cancel
```
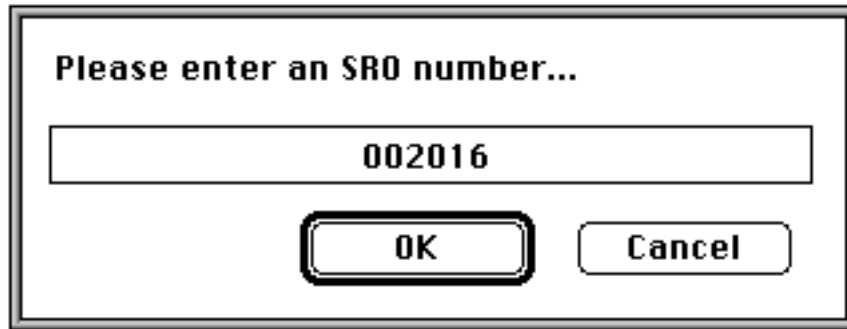
When selected, the associated SRO line items that are flagged as **Exch.** (Exchange) and have not yet been received will be loaded onto the Receiving Record:

RECEIVING ENTRY SCREEN: 65

| DATE: 03/17/95 | TIME: 8:17 AM | TITLE: | BY: |

CODE: 661-0345   MODEL#: 661-0345   REF#:   002016   QTY: 1 LOC:
DESCRIPTION: 800K MECHANISM, APPLE 3.5 DRIV   COST: $90.00

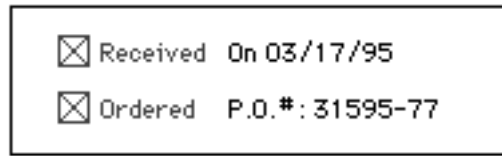The reference (REF#) is set to the SRO# loaded.

When the Receiving Record is Posted, the associated SRO line items will be marked as "Received" and the date received will also be placed on that line item. NO PARTIAL LINE ITEM QUANTITY SHIPMENTS ARE TRACKED. Each item is either totally received or not.

On an SRO entry screen, line items show as being received by the word "Received" appearing under the Part Code:

CODE	QTY	DESCRIPTION	ORDER
661-0345 Received	1	800K MECHANISM, APPLE 3.5 DRIV	☒ Exch. ☐ ☐ Cross Sh

SRO (Service Repair Orders)

SERVICE ITEMS NOT RECEIVED:

PRINTED ON 03/17/95

SRO #	PART #	DESCRIPTION	A.O. DATE	P.O. REF#	A.O. OUT	QTY	COST			
002025	661-0546	13XXX MECHANISM, APPLE 3.5 DRIV	03/14/95		3	1	690.00	☒ Exchange	☐ Stock	☐ Warranty
002025	661-0546	MAIN BOARD, MONO MONITOR 110V	03/17/95	31595-77	0	1	694.50	☐ Exchange	☒ Stock	☐ Warranty
002027	661-0546	MAIN BOARD, MONO MONITOR 110V	03/16/95		7	1	690.00	☒ Exchange	☐ Stock	☒ Warranty
002027	661-0546	MAIN BOARD, MONO MONITOR 110V	03/16/95	31595-77	1	1	694.50	☐ Exchange	☒ Stock	☐ Warranty

OUTSTANDING SERVICE LABOR REIMBURSEMENTS:

PRINTED ON 03/17/95

SRO#	DATE		AMOUNT		
002026	03/17/95	☒ AppleOrder™ Transfer	$75.00	☐ Reimbursement Received	☐ Disputed
002027	03/17/95	☒ AppleOrder™ Transfer	$75.00	☐ Reimbursement Received	☐ Disputed
002028	03/17/95	☐ AppleOrder™ Transfer	$75.00	☐ Reimbursement Received	☐ Disputed
		TOTAL:	**$225.00**		

 SRO Reconciliation:

Pulling this report will produce a listing of all SROs transferred to AppleOrder that have not been marked as "Reconciled":

 File   Edit

SRO INVOICE RECONCILIATION REPORT:

NUMBER OF SROs LISTED: 3

SRO NUMBER	SRO DATE	TOTAL PART CHARGES	TOTAL PART CREDITS	LABOR REIMB.	WENT TO AppleOrder™	FIGURE DISPUTE	RECONCL'D & CLOSED	BALANCE DUE
002025	03/17/95	$90.00			YES	YES		$90.00
002026	03/17/95			$75.00	YES			$75.00-
002027	03/17/95	$75.60	$75.60	$75.00	YES			$75.00-

| DONE | PRINT LIST | PRINT SELECTED | SHOW SUBSET | SORT LIST | RECONCILE | TOTAL |

"Reconciled" means that you agree with the **BALANCE DUE**. If you do agree with a line item, you may select it (or select many) and click the **RECONCILE** button. This will mark the **Reconciled** check box on the SRO screen for every SRO selected. Items marked as Reconciled will no longer show on this report when it is re-pulled. If you disagree with the Balance Due, you may double-click the item to view the SRO entry screen where you can check the **Disputed** button. Checking this simply flags the SRO for visual reference as a possible problem.

The **TOTAL** button will display a Balance Total for any selected lines.

 There is a special feature that will print out a very specific report that mirrors, almost exactly, Apple's monthly Service Invoice. This report can be compared to Apple's report for the purpose of finding discrepancies. To print this report, hold down on the **CONTROL** key while clicking on the **PRINT LIST** button from the **SRO INVOICE RECONCILIATION REPORT**:

P.I.M.S.

P.I.M.S.™ SRO RECONCILIATION REPORT (Alternative)

THIS IS YOUR: SERVICE REPAIR ORDER INVOICE

Page	Customer Number	P.I.M.S.™ Print Date
1	52001000	3/17/95

The Total Balance For These 33 SROs Is $1,559.60-

This is not an Apple document, and is for reconciliation purposes only.

Product Number	Product Description	Qty	Unit Price
☐ **SRO: 008127**		**SRO-DATE: 9/16/93**	
661-0474	|Apple SuperDrive 1.4 MB Drive Mechanism		
	PART CHARGE	1	120.600
			120.600
☐ **SRO: 008562**		**SRO-DATE: 11/11/93**	
661-0474	|Apple SuperDrive 1.4 MB Drive Mechanism		
	PART CHARGE	1	120.600
			120.600
☐ **SRO: 010664**		**SRO-DATE: 6/12/94**	
661-0708	|LOGIC BOARD,M/BD,PWREK		
	PART CHARGE	1	258.300
	PART CREDIT	1	258.300-
922-0376	|POWER ADPTR, 24WATTS,DOM/JAPAN		
	PART CREDIT	1	48.600-
	LABOR CREDIT	1	75.000-
			123.600-
☐ **SRO: 011091**		**SRO-DATE: 9/2/94**	
661-1663	|Plus Display, 14'' Color Monitor, .29 Dot		
	PART CHARGE	1	229.500
	PART CREDIT	1	229.500-
	LABOR CREDIT	1	50.000-
			50.000-
☐ **SRO: 011224**		**SRO-DATE: 9/19/94**	
			N/A
☐ **SRO: 011260**		**SRO-DATE: 9/21/94**	
661-0820	|I/O CONTROLLER		
	PART CHARGE	1	536.700
	PART CREDIT	1	536.700-
	LABOR CREDIT	1	75.000-
			75.000-
☐ **SRO: 011545**		**SRO-DATE: 10/22/94**	
661-0140	|Logic Board, Motherboard - ON ORDER		
	PART CHARGE	1	242.100
	PART CREDIT	1	242.100-
	LABOR CREDIT	1	75.000-
			75.000-
☐ **SRO: 011551**		**SRO-DATE: 10/24/94**	
076-0563	|CRT ASSY,ANTI-GLARE,ANTI-STAT		
	PART CREDIT	1	538.200-
661-1635	|VIDEO BOARD		
	PART CHARGE	1	246.600
	PART CREDIT	1	246.600-
	LABOR CREDIT	1	75.000-
			613.200-

- 1 -

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Apple® Service Parts Update:

As mentioned earlier, there are over 8700 Apple Service Parts. Most of those parts have a half dozen or so Family listings to go with them. This makes for a lot of information that seems to change monthly!!

P.I.M.S. has a function for automatically importing new and/or updated Apple Service Parts when ever needed. This is accomplished by a special import procedure:

Selecting this function will display the following control screen:

There are three distinct import options to choose from:

1) **FULL SERVICE PART IMPORT/UPGRADE**
This import is the default. It will import data (as specified by the **IMPORT TEMPLATE** description) from a text document into a holding File. From the holding File, new Inventory records will be created if they do not exist and existing records will be updated with the information imported. This update includes adding Family information to the Inventory record Family sublisting. The best place to get this information as a text document is from an export from AppleOrder™. From that export you need only add your pricing, Category, and Vendor Codes. This makes for a very accurate update.

2) **SIMPLIFIED SERVICE PART IMPORT**
This import option is set by clicking the **Exclude SRO Info.** button. It imports a much smaller set of data. This is not the recommended Service Import, and exists for compatibility reasons only.

3) **WARRANTY LABOR REIMBURSEMENT UPDATES**
This import option is set by clicking the **Labor/Warranty Only** button. It imports Service Part Number and Warranty Labor Reimbursement Values. Existing records are updated with this information. No new records are created.

THE IMPORT PROCESS:

FULL SERVICE PART IMPORT/UPGRADE & SIMPLIFIED SERVICE PART IMPORT

Because both of these imports can create new records, it is very important to prepare complete and accurate import data.

Step one is to choose the document to import from. This is accomplished by clicking the **Choose File** button. When a document is chosen, P.I.M.S. checks to see if the correct number of fields exist with the proper field and record delimiters. A document is not chosen if it does not match the template. If a field is left blank it will be skipped, as opposed to setting the corresponding P.I.M.S. field to blank.

Checking either **No Post Adjust** or **Exclude From Reorder** will cause any newly created records to have those same buttons checked on their Inventory records. **Description Prefix** is an optional parameter that will take anything entered into that field and add it to the front of the **Description** of any newly added Part. This exists for the simple reason that many Service Parts share a common name with Finished Product Goods (ie: "Apple Mouse"). An Invoice user might accidently load the wrong product if they are loading clairvoyantly by **Description**. It is often a good idea to add a "|" (shift + "\") to the beginning of your Service Parts. There will be no "mis-loads" this way. If you check **Don't Add New Records**, any data that is imported with no match in your Datafile will be skipped. **Skip First Record** will do just that. This option should be used if the top of your import data is a header row.

Once your selections and parameters are set, click **Process** to start importing. After the data is loaded into the temporary holding File, you will be asked if the import process should continue. An affirmative answer will cause your Inventory to be adjusted at that point. After the process is completed, there are a couple of "SETS" files created that can be loaded to list both updated and new records. This is stored in your **SETS** folder.

WARRANTY LABOR REIMBURSEMENT UPDATES

This is a much simpler import that merely updates the **Labor Reimbursement Value** field on matching Service Part Inventory records. No new records are added to the system from this import. To start, click the **Labor/Warranty Only** button and then click the **Choose File** button. Your import document should start with a reimbursement value, followed by a valid Part Code. Any other trailing fields will be ignored. No other controls or parameters are applicable to this import. When you are ready, click **Process** to update your records. After the process is complete, there will be a text document called **Skipped Lab/Warr Reim.** at the same root-level as your program. This document contains all of the Part Codes found in the import document, but missing in your P.I.M.S. Datafile.

P.I.M.S. filters out "*" (asterisks), "N/A", and any other alpha characters from number fields automatically...

SPECIAL NOTE:
From time to time, ExecUtron has these import documents available on our **Support Server BBS**...