

Eureka Solutions

A decorative graphic consisting of a blue and orange wavy pattern made of small dots, resembling a stylized wave or a data visualization, set against a dark blue background.

Sage 200 Warranties, Service & Repairs Data Sheet

Introduction

The Sage 200 Warranties, Service & Repairs Module (WSR) is an extremely powerful and flexible module which is particularly suited to businesses that issue warranty based contracts for their products or services, and/or have a requirement for billing customers for servicing or repair costs, typically associated with a contract.

The core functionality of this module is split into 2 distinct areas:

Contract Maintenance

- Set up multiple contracts per customer.
- Track contracts by user defined warranty status.
- Assign an unlimited number of assets (stock items) to a contract either manually or during sales order entry.
- Automatically generate invoices with contract specific dates.
- Automatically generate renewal notices to warn customers of pending invoices.

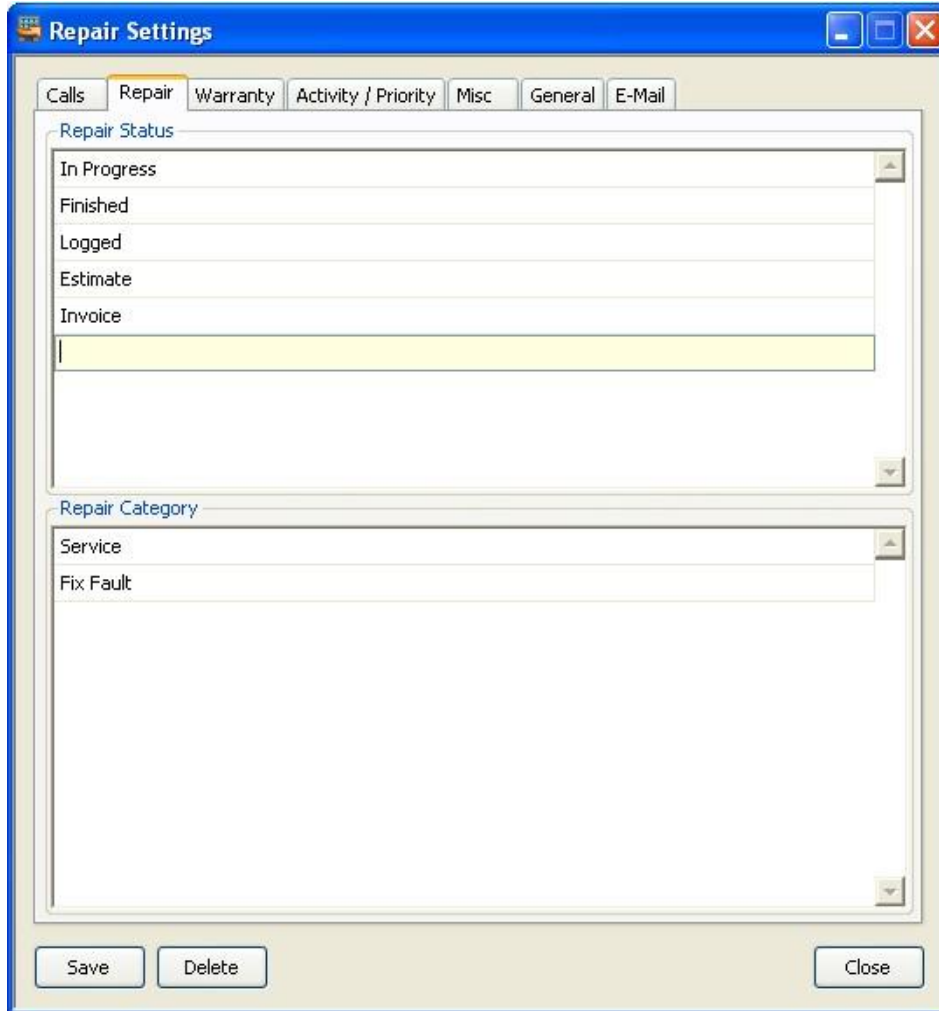
Service/Repairs

- Record & track multiple repairs against a single asset.
- Record information such as repair category, priority and condition of the item.
- Keep a log of the repair record's history over time.
- Assign repairs to a person or subcontractor held on the purchase ledger.
- Record multiple parts, labour or free text items each with values against the repair.
- Send estimates for repairs either by fax, email or print.
- Produce job cards to send to person doing the repairs.
- Create sales orders and subsequently invoices for work carried out.
- Record and track calls made against service/repair records.

In addition to the functionality mentioned, WSR comes complete with standard reports, and the ability for reports to be created/amended using the Sage Report Designer.

Note: WSR also incorporates the Sage 200 Plus Pack which contains a further 40+ addons and utilities to enhance the standard Sage 200 system.

Repair Settings



The screenshot shows a 'Repair Settings' dialog box with the following components:

- Tabs:** Calls, Repair (selected), Warranty, Activity / Priority, Misc, General, E-Mail.
- Repair Status:** A list containing 'In Progress', 'Finished', 'Logged', 'Estimate', 'Invoice', and a blank row.
- Repair Category:** A list containing 'Service' and 'Fix Fault'.
- Buttons:** Save, Delete, and Close.

There is no typical way in which a business might record repair and warranty statuses, types of activity carried out on a repair, types of call made etc...

To counter this, the WSR module has its own Settings screen allowing you to set up your own company specific fields for use.

This brings the following benefits:

- Use your own business/industry specific terminology.
- Records can have one of several or one of many statuses to account for different workflow scenarios.
- Enquiries and reports can be restricted by your very own criteria.

These fields can also be used for the recording of milestone events such as when an estimate is produced or what status should be used when a repair is completed.

Contract Maintenance

Amend Maintenance Contract

Customer Details

Contract No: 134688
A/C ref: ABB001
Short name: Abbey
Postcode: EH12 1WE
Address: 16 Church Lane, Lochside, Edinburgh, Midlothian
Post Code: EH12 1WE

Maintenance Contract Status

Status: Under Warranty
Annual Net Value: 12000.00
Sign up Date: 26/03/2009
Current Period: // To: //
Send Renewal Notice? Yes

Contact Details

Contact: Andrew Lowe
Phone: 0131 6219900
Fax: 0131 6219855

Next Invoice Details

Next Invoice Date: //
Period From: // To: //
Next Net Value: 12000.00

Last Invoice Details

Last Invoice: //
Period From: // To: //
SOP Reference: 0000000362
Net Amount: 732.83

Asset ID	Vision Tag	StockCode	Serial Number	Asset Description	Date Added	Warranty Start	Warranty End
0000000001		WW/DISHWASHER/600	Dishwash600-043	Dishwasher full size	26/03/2009 16:...	26/03/2009 00:...	25/03/2010 00:...
0000000002		WW/DISHWASHER/600	Dishwash600-042	Dishwasher full size	26/03/2009 16:...	26/03/2009 00:...	25/03/2010 00:...
0000000003		WW/FRIDGE/265/RET	Frid265203	Fridge Freezer Retro 265 Litre	26/03/2009 16:...	26/03/2009 00:...	25/03/2010 00:...
0000000004		WW/FRIDGE/265/RET	Frid265202	Fridge Freezer Retro 265 Litre	26/03/2009 16:...	26/03/2009 00:...	25/03/2010 00:...
0000000005		WW/DISHWASHER/600	Dishwash600-048	Dishwasher full size	27/03/2009 10:...	27/03/2009 00:...	26/03/2010 00:...
0000000006		WW/DISHWASHER/600	Dishwash600-049	Dishwasher full size	14/07/2009 10:...	14/07/2009 00:...	13/07/2010 00:...
0000000007		WW/DISHWASHER/600	4	Dishwasher full size	06/08/2009 09:...	06/08/2009 00:...	05/08/2010 00:...

Buttons: Save, Add Asset to Contract, Remove Asset from Contract, Close

When a contract is created or amended, specify a user defined status, how much is to be invoiced for the contract and when.

All assigned assets are listed against the contract meaning it is possible to see at a glance when an item was added to a contract and when its warranty period ran from and to. An asset can be viewed in more detail by double clicking it. Assets can also be added and removed easily.

Contact details are inherited from the customer record but can be changed to be contract specific.

Asset Maintenance

The screenshot shows the 'Amend Asset' window with the following fields:

- Asset Details:**
 - StockItem Code: WWW/DISHWASHER/600
 - StockItem Name: Dishwasher full size
 - Serial Number: Dishwash600-048
 - Asset ID: 0000000005
 - Tag No: [Empty]
 - Asset Description: Dishwasher full size
- Owner:**
 - Current Owner: Abbey Retail Ltd
 - A/C Ref: ABB001
 - Location: Invoice Address
 - Address: 16 Church Lane, Lochside
 - Change Owner:
 - Use Invoice Address
 - A/C ref: [Dropdown]
 - Short name: [Dropdown]
 - Postcode: [Dropdown]
 - Change Address button
- Additional Details:**
 - Date of Ownership: 27/03/2009
 - Additional Notes: [Text Area]
- Details:**
 - Manufacturer: [Text]
 - Manufacturer Part No: WS-1600-66655/44
 - Manufacturers Start Date: 27/03/2009
 - Manufacturers End Date: 26/03/2010
 - Location: [Text]
 - Condition: [Text]
 - Remarks 1: [Text]
 - Remarks 2: [Text]

Buttons: Save, Cancel

The WSR module allows for traceable items to be tagged as assets against contracts, taking advantage of powerful functionality offered in the standard product to track items by serial number and batch.

It is possible to switch ownership of the asset from one customer to another; which is particularly useful if you sell to retail establishments & you need to track which of their customers has purchased one of your products.

Record additional information such as the condition of the item, and any other remarks which may be useful in maintaining a warranty/contract.

View Repairs

Display Repairs

Filter By

Repair No: [] Tag: [] Code: [] Date From: [/ /]

A/C ref: [] Status: In Progress Name: [] Date To: [/ /]

Short name: [] Priority: high Serial No: []

Del. Address: [] Tag ID: [] Hide Archived

Show All Filter

Repair No.	Repair Date	Vision Tag	Customer	Contact	Asset Desc.	Model No	Repair Comment	Sub-Con. AC No	Sub-Con. Name	Status
134821	26/03/2009 16:54		Abbey Retail Ltd	Andrew Lowe	Fridge Freezer R...	Ret-265-4455...	broken again - same fa...	ERN001	Ernie Swinton W...	In Progress
134965	27/03/2009 10:34		Abbey Retail Ltd	Andrew Lowe	Dishwasher full...	WS-1600-666...	Door seal has perished	ERN001	Ernie Swinton W...	In Progress

View Repair Amend Repair Close

Lookup repairs using a number of different filter values created by you.

Amend Repair - WW/DISHWASHER/600 - Dishwasher full size

Repair Details | Equipment / Activity Details | Repair History

Contact details

Serial: [6]

Asset ID: [0000000017] Find

Tag: []

Manufacturer: [] Part No: WS-1600-66655/44

Asset Desc.: Dishwasher full size

Condition: [] Location: []

Site PPM Detail: []

Customer: Cherrie Ltd

Contact: Nicola Buchan

Telephone: 01698 443300 Fax: 01698 443299

Email: info@cherrie.com.uk

Address: 2 Marion Way Larkhall Lanarkshire

Postcode: ML4 9PE

Return Address

Address: Birmingham Depot 349 Bath Road Birmingham West Midlands

Postcode: B22 9TG Use Invoice Address Change

Repair Details

Repair No: 135734 First Time Repair Archived

Document Date: 06/08/2009 Date Requested: 07/08/2009

Date Received: 06/08/2009 Date Complete: 06/08/2009

Logged By: REPAIRS1

Repair Category: Service

Sales Order No: 0000000370

Priority: low Respond By: 07/08/2009 09:45

Tag No: []

Warranty Type: []

Start Date: 06/08/2009 End Date: 05/08/2010

Comments

Broken handle

Repair Assigned To

User: [] Subcontractor: ERN001

Estimate Details

Calculated Estimate: 50.00 Calculate History

Method Sent: Print/Fax

Date Sent: 06/08/2009 Date Responded: [/ /]

Customer PO Ref: []

Save Send Estimate Create Sales Order Print Job Card Print Full Job Card Close

Record all the detail required in order to successfully track and maintain the repair record.

Produce Estimates & Sales Orders

Amend Repair - WW/FRIDGE/265/RET - Fridge Freezer Retro 265 Litre

Repair Details | Equipment / Activity Details | Repair History

Equipment Details: Powered By: Electricity | Repair Status: In Progress

Date	Type	Subcontractor	Details	Labour Activity	Quantity	Unit Price	Add Job	Add SO	I...	SO Num
26/03/2009 16:54	Repair		same repair	LABRATE1	1.00	0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No	

Part Type: Stock Item Free Text Comment

Parts Used: Comment: no charge same fault | Cust Doc: | Add to SO: | I...: No

Buttons: Delete Activity, Delete Part, Show All Parts, Save, Send Estimate, Create Sales Order, Print Job Card, Print Full Job Card, Close

Activities are recorded against repairs in a similar way to adding sales order lines. Stock, free text and comment lines can all be added.

Product groups are used to distinguish labour from parts. Product codes can then be set up to assign different labour types/rates.

Repair Estimate

Andrew Lowe
Abbey Retail Ltd
16 Church Lane
Lochside
Edinburgh
Midlothian
EH12 1WE

Tel: 0131 6219900
Fax: 0131 6219855
Estimate No:

HomeStyle Kitchens Ltd
Unit 12B
Western Park
Rishopton

Dear Andrew Lowe,
Following our recent service call to attend to your catering estimate to carry out the additional work as identified by our

Logged	Tag	Manufacturer	Description
06/08/2009			Dishwasher gjlj

Fault Reported: FG,MXDLJGL

Item Number	Description
LABRATE1	Standard Rate: 05HISDPH

Please note the following in relation to this estimate:

JOB CARD

Sub-Contractor	Job Details
Abbey Retail Ltd 16 Church Lane Lochside Edinburgh Midlothian EH12 1WE	Repair No: 135888 Date Logged: 06/08/09 12:21 Attend By: 07/08/09 04:21 Contact: REPAIRS1
Site Details	
Contract: 134688 Contact Name: Andrew Lowe Telephone: 0131 6219900 Fax: 0131 6219855	
Item Details	
Tag: Manufacturer: Asset Description: Dishwasher slimline	Manu Part No: WS-1600-66655/44 Serial No: 123458 Warranty Expiry: 05/08/2010
Fault Details	
Date:	Activity Details:
Site Notes	

Produce professional looking estimates in Microsoft Word and detailed job card information using the Sage Report Designer.

Contact Us

Eureka Solutions have worked successfully with many Sage 200 customers over the past 5 years. In addition to WSR and other modules we have written, we are happy to engage in bespoke/customisation work.

To download a 30 day trial of Sage 200 Stock Plus and for all up to date information and details of our modules, please refer to our website www.eurekaaddons.co.uk

If you wish to discuss a specific project or pricing, please call Alistair Livingstone on 07887 547642 or 01355 581 960. Alternatively please email development@eurekasolutions.co.uk.