Creating a Service Estimate as a Template

Software Development

RIMSS Business Systems Technology

The following will show how to create a Service Estimate to be used as a Repair Order template. This process will help save time in creating one estimate to use for recurring jobs.

File View Company CRM Suppliers Employees Banking Fixed Assets Inventory Service Wholegoods Rental Reports Web Links Windows Help

RIMSS WinNetStar

Service Home
New ▶
Find ▶
Preventive Maintenance
Support Lists ▶
Utilities ▶

1805 Wholegood
1810 Customer
1815 Service Estimate
1820 Repair Order
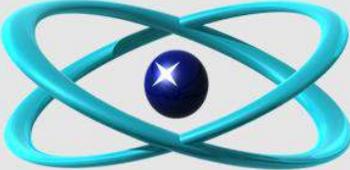
RIMSS WinNet×Star
Advanced Enterprise System

To create a Service Estimate, go to Service > New > Service Estimate. This is a permission based option. Please contact your system administrator for access.

User: carl   Role: Administrator   Workstation: SUPPORT2   Server: V3Test   Database: WinNetStarApp   Key Stroke Entry

In this instance, an estimate will be created for a PDI or Make Ready for an International truck. The key for a useful estimate is to fill in as much information as possible to eliminate the need to re-enter the data for each job.

The customer has been set to our company's Sales Department so that any work can be capitalized against the cost of the unit. A generic Wholegood ID has been created. Once the Repair Estimate is converted to a Repair Order you will need to change it to the actual unit that is being worked on. We have set the Service Type to MAKE READY to easily find this Estimate. Also, an Internal Memo has been used to help in locating this Estimate.

File View Company CRM Suppliers Employees Banking Fixed Assets Inventory Service Wholegoods Rental Reports Web Links Windows Help

RIMSS WinNetStar   New Repair Estimate

Save   Save and Close   Save and New   Save and Print Repair Estimate   Save and Print Warranty Estimate   Void   Capture Signature   Import Picklist   Export

General Info   Service Issues   Items   Labor   Notes   Attachments   Print History

| Add New Service Issue | Add Standard Service Issue |

Drag a column header here to group by that column

Service Issue Type	Description	Cause	Fix	Warranty	Total	Warranty Customer	Engine	Electrical	TestCode3	Iss
Customer	INSPECT AND PERFORM RECALL 9999				0.00					
Customer	CHECK OIL PRESSUE				0.00					
Customer	CHECK FOR ANY LEAKS				0.00					
Customer					0.00					

Add/Edit Service Issue

Type Customer

Warranty Deductible $0.00

Warranty Customer

Description INSTALL SLEEPER BED

Cause

Fix

Engine ...

Electrical ...

TestCode3 ...

IssueCode4 ...

☐ Ignore on Misc. Shop Charge Calculations

OK   Cancel

Creating a useful estimate can include as many Service Issues as needed. Once converted to a Repair Order, Service Issues can be deleted or more can be added if necessary.

Parts and Miscellaneous Charges can be added to the Service Estimate so that they are populated once the estimate is converted to a Repair Order. You can also import Parts Picklists that may contain the list of parts required to complete this work.

File   View   Company   CRM   Suppliers   Employees   Banking   Fixed Assets   Inventory   Service   Wholegoods   Rental   Reports   Web Links   Windows   Help

RIMSS WinNetStar | New Repair Estimate

Save   Save and Close   Save and New   Save and Print Repair Estimate   Save and Print Warranty Estimate   Void   Capture Signature   Import Picklist   Export

General Info   Service Issues   Items   Labor   Notes   Attachments   Print History

| Add New Labor | | Bill Standard Hours | Bill Actual Hours | Apply Discount |

Drag a column header here to group by that column

	Service Issue	Technician	Op Code	Description	Rate Code	Std. Hours	Actual Hours	Billed Hours	Rate	Hourly or Fixed	Discount	Subtotal	TaxGroupId	Total
>	⊞ INSPECT A...	TEMP TECH ▾	Perform A-PM Inspection	Perform A-...	Labor	0	0	0	$0.00	Hourly	0.00 %	$0.00	Sales Tax	$0.00
	⊞ INSPECT A...	TEMP TECH	AIR CONDITIONING	AIR CONDI...	Labor	1.25	0	0	$0.00	Hourly	0.00 %	$0.00	Sales Tax	$0.00

0

Drag a column header here to group by that column

	Time Slip #	Service Issue	Technician	Op code	Description	Date In	Time In	Date Out	Time Out	Total	Notes	Last Modified By	Last Modified Date	Is Void	⊤
⊤															

Labor can be added if there are certain Opcodes that you would like to define for a technician to use when logging into the Repair Order.

0

× ☑ [Is Void] = 'False'   Edit Filter

User: carl | Role: Administrator | Workstation: SUPPORT2 | ⚙ Server: V3Test | Database: WinNetStarApp | Key Stroke Entry [   ]

Once a Repair Estimate has been saved, you can convert to a Repair Order multiple times. You also have the option of printing a hard copy to produce an Estimate for a customer if needed.

If an estimate is no longer needed, you have the option to Void this estimate so that it no longer shows in the list.

Once you have completed your Service Estimate you can find it in Service > Find > Service Estimate. In the list, there are many way to find the estimate you created. By using the pre-fetch filter fields or by searching in the filter toolbar you will find the estimate you created. Double-click on the estimate to open it.