



Creating a Service Estimate as a Template

Software Development
RIMSS Business Systems Technology

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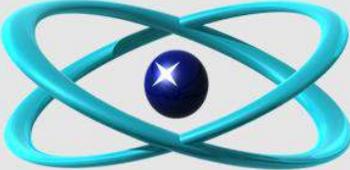
The following will show how to create a Service Estimate to be used as a Repair Order template. This process will help save time in creating one estimate to use for recurring jobs.

RIMSS.WinNetStar v7.0.0.750 Enterprise:The Enterprise Company:ABC Sales and Service (320) Location:San Antonio (321)

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

Service Home
New
Find
Preventive Maintenance
Support Lists
Utilities

1805 Wholegood
1810 Customer
1815 Service Estimate
1820 Repair Order



RIMSS WinNetStar
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

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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

Document Type: Estimate Doc. #: 0 Inv. #: 0 CC Auth. #: Completion Status: Open

Initiation Date: 1/19/2012 Customer PO #: Salesman: Carl Albor

Settlement Date: Service Writer: War. Inv. Status:

Internal Memo: MAKE READY ON 2011 PROSTAR Service Type: MAKE READY

Exp. Comp. Date: 1/19/2012 Printed Memo: Extract Date: 1/1/0001

Customer Name and Address: ABC SALES AND SERVICE - SALES DEPT

Address 1: Address 2: City: State: Zip Code:

Primary Contact:

Wholegood Information: WG ID: (621)

Make: Model: Description: MAKE READY Year: Serial #: Lic. Plate State: Lic. Plate #: Fleet Number:

Miles In: 0.0 Miles Out: 0.0 Hours In: 0.0 Hours Out: 0.0

Hide Customer Information (F9)

F2-Find Customer F6-Add Wholegood

	Items	Labor	Pre-Tax Subtotal	Tax	Deductible	Total	Taxable	Non-Taxable	Pre-Tax Subtotal
Customer	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Warranty	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Internal	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Subtotal Tax Group: Sales Tax

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.

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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	Is
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

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

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.

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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

Item Number (Ctrl+N):

F3-Add Misc. Chrgs F4-Item Search F5-Apply Core Crdts F10-Apply Discount Print Item Picklist

Drag a column header here to group by that column

Service Issue	Type	Item Number	Description	Quantity	Price	Amount	Discount	Subtotal	Tax Group	Total	Back Order	Drop Ship
INSPECT AND PERFORM RECALL 9999	Item	10456390-100-...	SWITCH	1.0	\$64.28	\$64.28	0.00 %	\$64.28	Sales Tax	\$64.28	0.0	
INSPECT AND PERFORM RECALL 9999	Core Chrg.	10456390-100-...	SWITCH (Core Charge)	1.0	\$5.50	\$5.50	0.00 %	\$5.50	Sales Tax	\$5.50	0.0	
CHECK OIL PRESSUE	Item	AF25437-100-N...	FILTER	1.0	\$42.10	\$42.10	0.00 %	\$42.10	Sales Tax	\$42.10	0.0	

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.

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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

0

[Is Void] = 'False' Edit Filter

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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.

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RIMSS WinNetStar Repair Estimate List Service Repair Estimate - 1020

Save Save and Close Save and New Save and Print Repair Order Save and Print Warranty Order Void Convert to Repair Order Capture Signature Import Picklist Export Use Fleet Part Prices

General Info Service Issues Items Labor Notes Attachments Print History

Document Type: Estimate Doc. #: 1020 Inv. #: 0 CC Auth. #: Completion Status: Open

Initiation Date: 1/19/2012 Customer PO #: Salesman: Carl Albor

Settlement Date: Service Writer: War. Inv. Status:

Internal Memo: MAKE READY ON 2011 PROSTAR Service Type: MAKE READY

Exp. Comp. Date: 1/19/2012 Printed Memo: Extract Date: 1/1/0001

Customer Name and Address: ABC SALES AND SERVICE - SALES DEPT

Wholegood Information: WG ID: (621) Description: MAKE READY

Hide Customer Information (F9)

F2-Find Customer F6-Add Wholegood

Items	Labor	Pre-Tax Subtotal	Tax	Deductible	Total	Taxable	Non-Taxable	Pre-Tax Subtotal
Customer	\$121.88	\$0.00	\$121.88	\$0.00	\$121.88	\$0.00	\$121.88	\$121.88
Warranty	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Internal	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total	\$121.88	\$0.00	\$121.88	\$0.00	\$121.88	\$0.00	\$121.88	\$121.88

Subtotal Tax Group: Sales Tax

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.

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RIMSS WinNetStar Repair Estimate List

Add New Refresh Show All Print Layouts

Completion Status: Open, Closed, Void, Settled
 Customer Invoice Status: Open, Partial, Closed, NA
 Warranty Invoice Status: Open, Partial, Closed, NA
 Customer: [Text Field]
 Doc. #: [Text Field]

Invoice #: [Text Field] Total: [Text Field] Salesman: All
 Customer PO#: [Text Field] Service Writer: All

Wholegood ID: [Text Field] Make: [Text Field] Model: [Text Field] Description: [Text Field] Serial #: [Text Field] Stock #: [Text Field]

Date Filter: Initiation Date Settlement Date
 Period: All
 Custom Date Range: From: 1/1/2001 To: 12/31/2099 Fetch

Drag a column header here to group by that column

Void	Location	Memo	Initiation Date	Doc #	Due Date	Customer	Description	Total	Service Type	Last Modified By	Last Modified Date
> False	Main Location		4/10/2009	12	4/10/2009	Cash Customer	FRONT LOA...	\$0.00		carl	4/10/2009
False	Main Location		1/7/2010	72	3/2/2010	Albor Industries, Inc.	CASE TRAC...	\$0.00		carl	1/7/2010
False	Main Location		9/1/2010	524	9/16/2010	TRAV INC	Kubota B26...	\$2,86...		carl	1/7/2011
False	Main Location		9/7/2011	629	10/30/2011	Albor Industries, Inc.	Challenger ...	\$506.55		lee	12/29/2011
False	Main Location	MAKE READY ON 2011 PROSTAR	1/19/2012	1020	1/19/2012	ABC SALES AND SERVICE - SALES DEPT	MAKE READY	\$121.88	MAKE READY	carl	1/19/2012

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.

x [Void] = 'False' Edit Filter

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