



## Service Types

Software Development  
RIMSS Business Systems Technology

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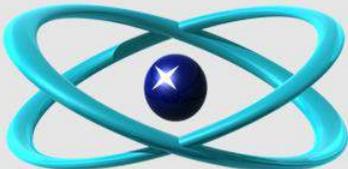
WinNetStar includes an option for the user to define an unlimited number of Service Types to be assigned to each job in the shop. Service Types can then be used to group or categorize your Service Department data. For instance, one Service Type might be created for all jobs in the shop that involve pre-delivery preparation of new equipment sold by the Sales Department. Using this Service Type would then allow you to quickly report on all jobs of that Type. For instance, you can produce reports showing Service Revenue by Service Type and Profitability by Service Type. Service Types can also be used in conjunction with Shop Miscellaneous Charges. You can choose to include or exclude the automatic shop charges based on Service Type. For instance, you can create a separate miscellaneous shop charge that always applies to the Service Type that you set up for your pre-delivery work. The following screen shots illustrate how to create and use Service Types.

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

- Operation Codes
- Rate Codes
- Accounting Codes
- Issue Codes
- Service Types**
- Misc. Shop Charges
- PM Schedules



**RIMSS** WinNetStar  
Advanced Enterprise System

To create new or edit existing Service Types, go to Service > Support Lists > Service Types. 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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File View Company CRM Suppliers Employees Banking Fixed Assets Inventory Service Wholegoods Rental Reports Web Links Windows Help

RIMSS WinNetStar Service Type

Add New Refresh Print Restore Layout

Service Type is one of several ways a user can categorize Service Orders

Drag a column header here to group by that column

Type	Inactive	Last Modified By	Last Modified Date
PDI	False	dale	10/14/2009
30k SERVICE	False	dale	10/14/2009
Service Truck	False	carl	10/15/2009
PreSeason	True	dameon	1/11/2010
2009-3456	True	carl	1/7/2010
Unit Prep	False	carl	1/19/2012
Semi	False	dale	4/27/2010
Set Up	False	dale	6/13/2010
test	False	dale	8/30/2011
TRUCK1	False	carl	9/7/2011

To edit an existing type double-click to open that field. To create a new Service Type, click on Add New.

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

Type Add

Type

Inactive

OK

Cancel

Creating a Service Type called Truck Warranty will help group all Repair Orders classified as Truck Warranty to easily group and find all Truck Warranty Repair Orders.

Service Types can be a required field on a Repair Estimate or Repair Order. Therefore, a service writer would be required to fill in the Service Type before saving the document.

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

RIMSS WinNetStar Service Type New Repair Order

Save Save and Close Save and New Save and Print Repair Order Save and Print Warranty Order Void Capture Signature Import Picklist CNH Credit Card Export Use Fleet Part Prices

General Info Service Issues Items Labor Notes Attachments Print History

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

Initiation Date: 1/19/2012 Customer PO #: Service Writer: War. Inv. Status:

Settlement Date: Internal Memo: Service Type:

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

Customer Name and Address: Albor Industries, Inc. 1234 South Main San Antonio TX 78258 Primary Contact: Albor, Carl (210) 493-3394

Wholegood Information: WG ID: (218) ABC654A Make: KUBOTA Model: B26 Year: 2004 Description: KUBOTA B26 TRACTOR Serial #: D872 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
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	\$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

- Description
- Service Truck
- Unit Prep
- Semi
- Set Up
- test
- TRUCK1
- TRUCK WARRANTY
- x

Service Types are added to a Repair Order by clicking on the drop down and selecting the appropriate Service Type.

RIMSS.WinNetStar v7.0.0.750 Enterprise:The Enterprise Company:RIMSS Training Company (2) Location:HOBBITON (3)

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

RIMSS WinNetStar Repair Estimate List Wholegood Master List Service Type Repair Order List

Add New Refresh Show All Print Layouts

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

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

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

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	Completion Status	Initiation Date	Doc #	Invoice #	Customer	Make	Model	Serial Number	Service Type	Total	Item Cost	Warranty Remaining	Customer Remaining	Misc Cost
									TRUCK WA...					
False	Open	8/17/2011	11729	0	BCM LANDWORKS	INTERNATI...	TERRASTAR	1HTJSSKK1CJ538877	TRUCK WA...	\$200.34	\$186.58	\$0.00	\$0.00	\$0.
False	Open	9/20/2011	11932	0	INDIAN VALLEY TRUCKING	CASE IH	3230	YBT029733	TRUCK WA...	\$984.66	\$96.25	\$0.00	\$0.00	\$0.
False	Open	11/3/2011	12219	0	INFLUANCE HAIR CARE	CASE	2162	YBZN14397	TRUCK WA...	\$344.37	\$237.13	\$0.00	\$0.00	\$0.
False	Open	11/10/2011	12273	0	INDIAN VALLEY TRUCKING	CASE IH	3230	YAT028161	TRUCK WA...	\$811.47	\$469.42	\$0.00	\$0.00	\$0.
False	Open	12/16/2011	12512	0	JOHN BRIGMAN	INTERNATI...	4300	3HAMMAALXCL666581	TRUCK WA...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.
False	Open	12/16/2011	12513	0	JOHN BRIGMAN	INTERNATI...	4300	1HTMMAAN7CH610329	TRUCK WA...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.
False	Open	1/9/2012	12618	0	OWENS & MINOR	INTE	7300	1HTWAAAR6BJ369746	TRUCK WA...	\$679.45	\$206.30	\$0.00	\$0.00	\$0.
False	Open	1/12/2012	12655	0	CENTURY CONCRETE	INTERNATI...		3HSCUAPR5AN248966	TRUCK WA...	\$1,800.16	\$914.75	\$0.00	\$0.00	\$0.
False	Open	1/16/2012	12669	0	NAVFAC MIDATLANTIC LITT...	INTERNATI...		3HSDJSJR4BN423611	TRUCK WA...	\$405.50	\$5.00	\$0.00	\$0.00	\$0.

In the Service > Find > Repair Order, selecting the Completion Status of Open and changing the Period to All will create a list of all open repair orders. From there, selecting the Service Type of Truck Warranty has now produced a list of all Open, Warranty Repair Orders.

9 9 5,225.95 0.00

[Void] = 'False' And [Service Type] = 'TRUCK WARRANTY'

User: SuperUser Role: Administrator Workstation: SUPPORT2 Server: V3TRAIN Database: WinNetStarApp Key Stroke Entry