Service Billing - Service Contracts: Introduction

Introduction

The Service Contract module is used to setup and track maintenance contract agreements.

Heating, ventilation and air-conditioning contractors (HVAC) often setup service contracts with their customers. However, the type of contract used is directly dependent upon the type of service the company provides.

The commercial HVAC contractor views preventive maintenance contracts as the vehicle whereby they will be called to do the entire repair work for the customer during the year. Often, these contracts have clauses binding the client to use them or have special rates set for service. In many cases these contracts are costed to break even, or generate a small profit in the hopes of generating larger profits from ongoing repair work with the customer. Rates are also dependent on the size of the customer and the expected work the account will generate. The visits may vary from a couple times a year, or as often as the contractor and his customer feel necessary. Sometimes visits will coincide with planned shutdowns.

The residential HVAC contractor views the service contract as a very substantial profit opportunity. They tend to price their contracts not in anticipation of future work, but more from the standpoint of generating revenue per visit. If there is a service call later, then that is even better. Usually, these contracts are limited to a couple of visits a year, and are limited in the scope of work. Residential contractors usually do a lot of installation work during the year and, as a selling feature, give extended warranties which stay in force only if the customer has the contractor come out and perform a maintenance check on the equipment. Frequently, these checks are billed separately from the normal maintenance contract and require separate accounting, especially for warranty repairs.

Other features of the ***Service Contracts*** module include:

- The ability to use the contract module to bill customers on a set schedule, for special services or rentals, and then track any repair work against the contract.
- Promote control over service contract revenues and costs. It is a great way to setup and track preventative maintenance agreements.

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- Integration with the General Ledger module in a way that lets you separate billings from revenues. For example, the value of an annual service contract, billed in February is $1,200. However, you may identify, for General Ledger financial statement purposes, monthly revenue of $100.
- Handling of the invoicing, deferred revenue and revenue recognition automatically.

Setup Procedures

Prior to using the Service Contract module, the Service Contract profile and other items should be completed. To review these programs, see the Setup Programs section.

Monthly Procedures

1. Billing
2. Tickets / Monthly Service Schedule / Belts & Filters Report / Technician Occupation Workload Report
3. Revenue / Revenue Forecast / Analysis of Revenue
4. Renewals / Fast Renewals

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Service Contracts

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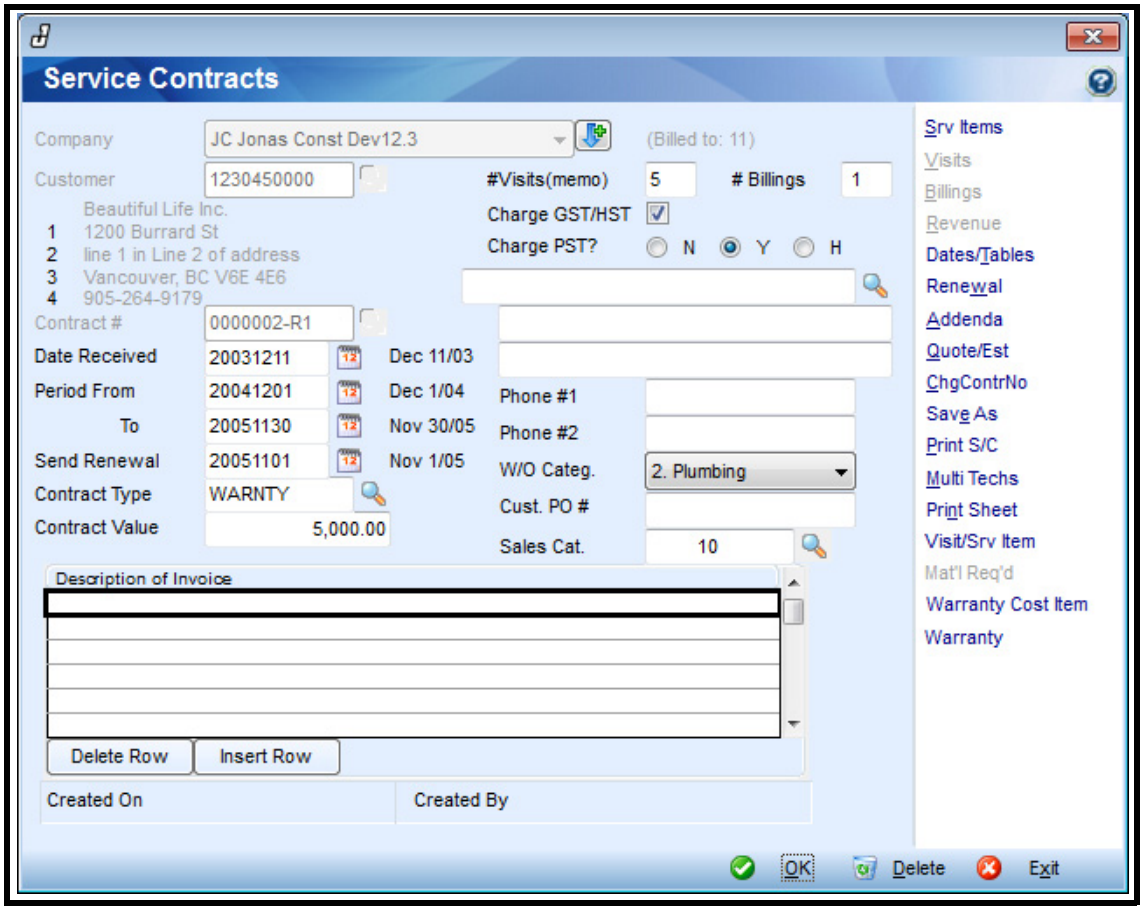
Service Billing -> Service Contract -> Setup Service Contracts

Setup Service Contracts

Now that the profiles and the standard items are all setup, you can setup the actual contract.



When you first enter on the setup option, a screen will pop up showing you the contracts on file. his window may be toggled between contracts and customer codes. Since the Speed Search always works on the column on the left, it makes it faster to find the contract or customer you are looking for. The screen defaults to “Setup a New Contract”. Press Enter and you will automatically go to the “Customer” screen. Select the customer.

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When a Customer is selected, a new screen will pop up showing any contracts and the default “create a new Contract”. Select the ‘create a new Contract’ default. If you press F9 at this point it will issue a new contract using the next sequential number.

- Enter the ***Customer*** code associated with the Service Contract or press F2 to select from a list of codes.

- Enter the ***Contract Number***. You can either put in your own contract number (can be alphanumeric) or press <**F9**> to have the system select a number. Most of our clients have their own contract number conventions that they follow; we suggest you keep unique contract numbers. In fact, there is an option to ensure the numbers are unique. This flag is in the **Service System Profile -> JSTAR Options**.

- Review the other fields and buttons on this screen that are available for entry:

Date Received

Enter the date when this Contract was received. Press <**ENTER**> to accept the displayed date or press <**F2**> to select the date from the Calendar.

Period From

Enter the starting (FROM) date to be used (ie. the Contract is active from the ***FROM*** date up to and including the TO date). You can also press <**ENTER**> to accept the displayed date or press <**F2**> to select the date from the Calendar.

Period To

Enter the ending (TO) date to be used. (ie. the Contract is active from the FROM date up to and including the TO date). You can also press <**ENTER**> to accept the displayed date or press <**F2**> to select the date from the Calendar. The default for this field is for a one year contract. Contracts can be of any length, but there is a maximum of 60 billings per contract (12 per year for 5 years). You also can enter the number of years (2-5) and press F9 to automatically calculate the end date.

Send Renewal

Enter the date when a Renewal is to be sent (The standard default is 45 days prior to termination). Press <**ENTER**> to accept the displayed date or press <**F2**> to select the date from the Calendar.

Fast Setup (button)

Prior to selecting a standard contract type the “Fast Setup” button will appear. Fast setups are used when you are not selecting a standard template or a template with visits only, and is discussed in more detail in other sections of the documentation.

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Contract Type

The ***Contract Type*** field is where you select the standard contracts you setup earlier. If you have setup a contract with the entire revenue and billing schedule filled out (for example, a Fall check up contract), enter the contract here and go to the next step. If you are a contractor who needs to setup the contract amounts (usually acommercial contractor), enter the standard contract with the visit schedule you need and click on the “Fast Setup” button.

> ***Note:***
> If you have selected a standard contract with a contract amount preset, then you will not be allowed access to the “Fast Setup” fields.

If the template you selected contained a billing schedule, visit schedule and, if required, a revenue schedule, the contract is well on the way to being setup.

Contract Value

Enter the value of this Contract in this field.

#Visits(memo)

Enter the number of Visits there will be to complete this Contract. If this a ***Cycle Contract*** (i.e. depending on when the first Visit is set for, each subsequent Visit is a certain interval apart, and occurs 'x' number of times), enter a '***C***' in this field.

You will be asked on the *Visits* screen after entering in the first visit, the number of days between visits, and the cycle length (in days). The program will then divide the cycle length by the number of days between visits to arrive at a suggested number of visits. This may not be very accurate if the end of a visit straddles a month end (you will have to manually adjust the ***From/To*** Days on each line).

#Billings

Enter the number of Billings there have been (to date) in regard to this Contract.

> ***Note:***
> During an edit of an existing Contract Billing, if the Billing Schedule screen is not changed to add/delete additional billings, the system will not save the change to the '# Billings" field.This will prevent modified contracts from displaying incorrect billings on the Contract Billing List.

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Charge Tax 2 (Canadian Clients)

Choose ‘Y’ to charge GST. If the contract is GST exempt enter "N".

Charge Tax?

Should Sales Tax be applied to this Contract?

NO (check the box) if the Contract is Tax exempt

YES (check the box) to charge Sales Tax on the Contract

HIDDEN (check the box) if the Sales Tax is already included/hidden in the Contract

This entry will override your system's parameters to charge Sales Tax or not, if set opposite to what is established by default.

If the contract is set as ***Tax = N*** AND it is ***Time of Service***, then the system will set the tax rules on the W/O to ***Exempt***. It ignores the tax rules set in the WO Category. If the contract is set to ***Taxes = Y***, then the system will look at the WO category to get the correct tax rules for that WO.

Location

Enter the ***Job address*** if different from the ***Customer address***.

If you want to use the same address as the Customer, enter:

- 1 on the (first) line,
- 2 on the (second) line, and
- 3 on the (third) line.

The computer will copy the corresponding line from the ***Customer address***. (Enter 0 to copy the Customer's name). It is rarely a different address since each location has it’s own unique customer code. The Jonas system looks at each location as an individual customer. They may all “Bill To” or roll up to a head office but each site has it’s own code in A/R.

Press ***F2*** to select from the list of Ship-To codes.

Phone #1, Phone # 2

Each contract has 2 fields for entry of phone numbers at the site where the Job is being performed. The first is pulled automatically from the customer’s file. The second is an alternate number.

W/O Categ.

When you get to the W/O category, you can choose either the default or use the pull-down button and change the W/O category. When Maintenance W/O’s are created using this contract, they will be put into this W/O Category.

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Customer P.O.

The Customer P.O. field is an *optional* field where you can put in a P.O number if the customer has given you one (mostly for commercial contractor). You may also put in any other information that you may later want to report on (for example, a service plan code).

Invoice Description

The invoice description will appear on the invoice and this is where you can use the Common Phrase codes (press <**F2**> for the lookup screen) to reduce typing.

Sales Cat.

The Customer P.O. field is an optional field where you can put in a P.O number if the customer has given you one (mostly for commercial contractor). You may also put in any other information that you may later want to report on (for example, a service plan code).

This field is very helpful if you have a large number of contracts and you only wish to bill them by a specific group or area. Setup the group or area in the sales category and you will be able to bill by that group.

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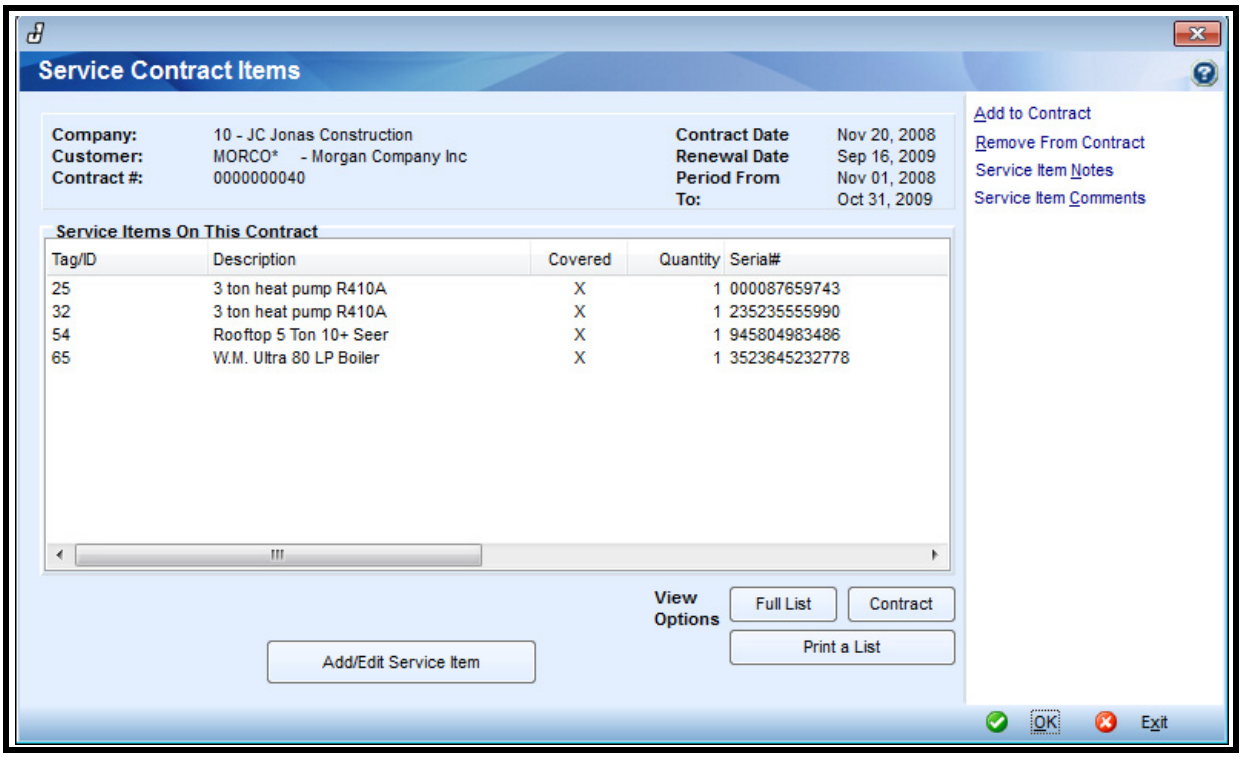
Service Billing -> Service Contract -> Setup Service Contracts ~ Service Items

Service Items

When you click the ***Service Items button*** and then click the ***Full List button*** you will see all the service items you had originally entered when you setup the customer in accounts receivable.



Note:

Service Items are setup in the Customer Master File in A/R. To launch the program from here, click the Add/ Edit Service Item button.

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- To indicate which service items are covered under this contract, click the item's tag ID and then double click or click the "***Add to Contract***" button.
- An "***X***" will show which pieces are covered under the contract or just click the "***Contract***" button to see only the covered items.
- The "***Print a List*** "button will print either all the service items at the location or just the items under contract. Whatever is selected will be the list that prints

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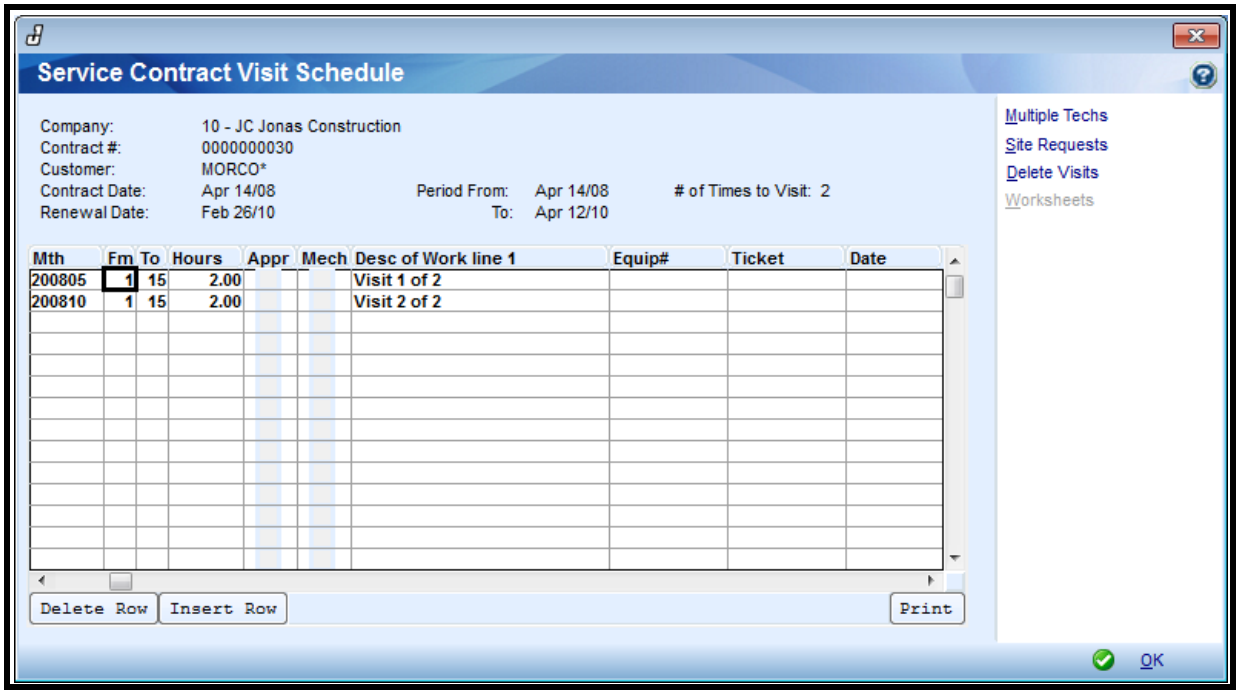
Service Billing -> Service Contract -> Setup Service Contracts ~ Visits

Setup Service Contract ~ Visits

This is where you **setup** the actual Visit Schedule. If you have used the standard contract types, the visits and description are already prefilled. You can over write if you wish and then add the individual service items.



For this example, we will enter data and assume no other entries have occurred,

- First enter the year and month of the visit (6 characters, with the format YYYYMM)
- Second fill in the Fm (from) and To dates in this way you can schedule different dates for contracts with more than one visit in the month.
- Enter the number of hours you estimate the maintenance call will take.
- Select whether an apprentice or mechanic should perform the maintenance by check-marking the appropriate box.

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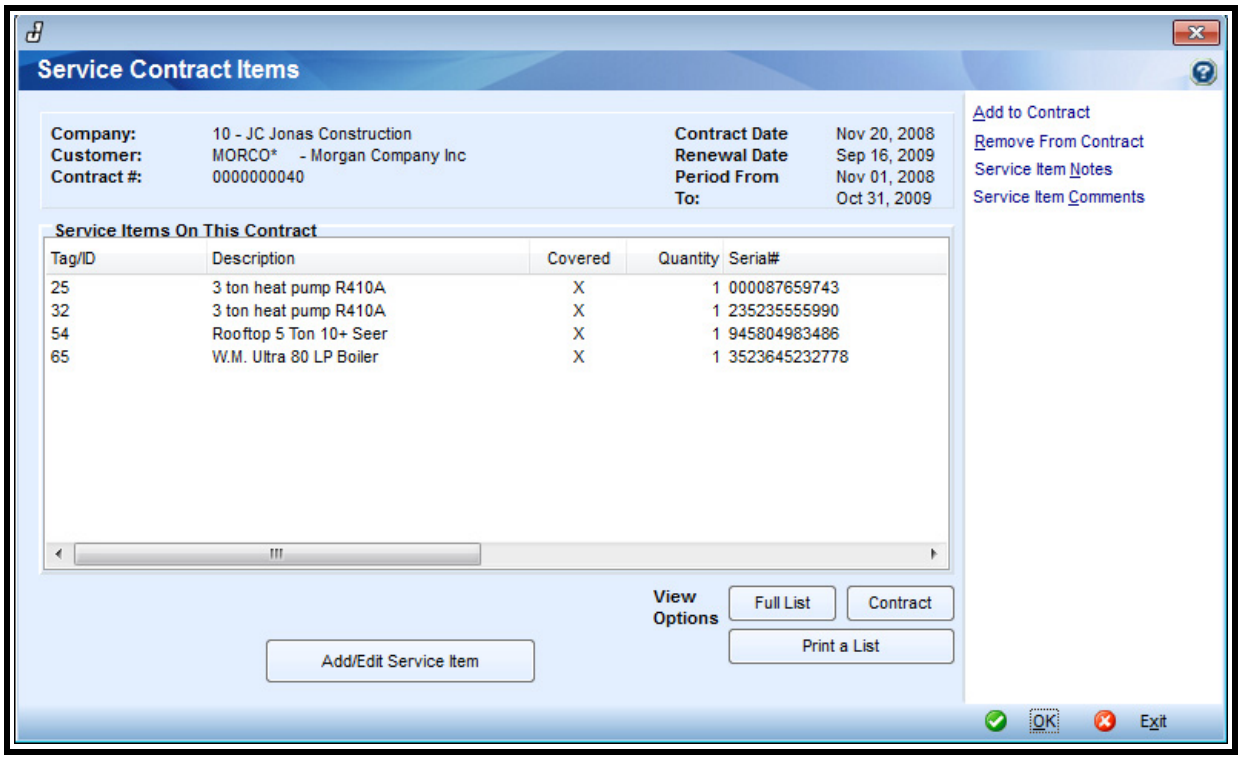
- Fill in the description field by either typing in the work to be done or by pressing ***F2*** and select one of the Svc Contract Service Codes you have already setup. This is a 180 character Field. The message is deliberately fragmented into 3 sections. Some customers use the 3rd section to record the tech's comments from the last visit. For example, if a belt were not changed on the prior visit, a note would be put into this visit on the 3rd line to make sure it was done (The note would stand out since it would be on it's own line).
- Finally, you setup the service items (Equip#) by clicking on the box. The service items screen pops up and you then click the contract button at the bottom of the screen. This will display a full list of the service items covered from which you select the items to be serviced this visit. You do this by double clicking the tag for that piece of equipment. The "X" signifies that the item is to be serviced.



> ***Note:***
> You must set the service items up in the contract before you can set them up in a visit.

When you are selecting the items to be serviced, you are also selecting the Belts & Filters package that accompanies that visit. Generally, the packages are setup in such a manner that only one package is selected per visit. For example, SPR- Spring package or FAL- Fall package. Some users may elect to have their packages governed by the type of

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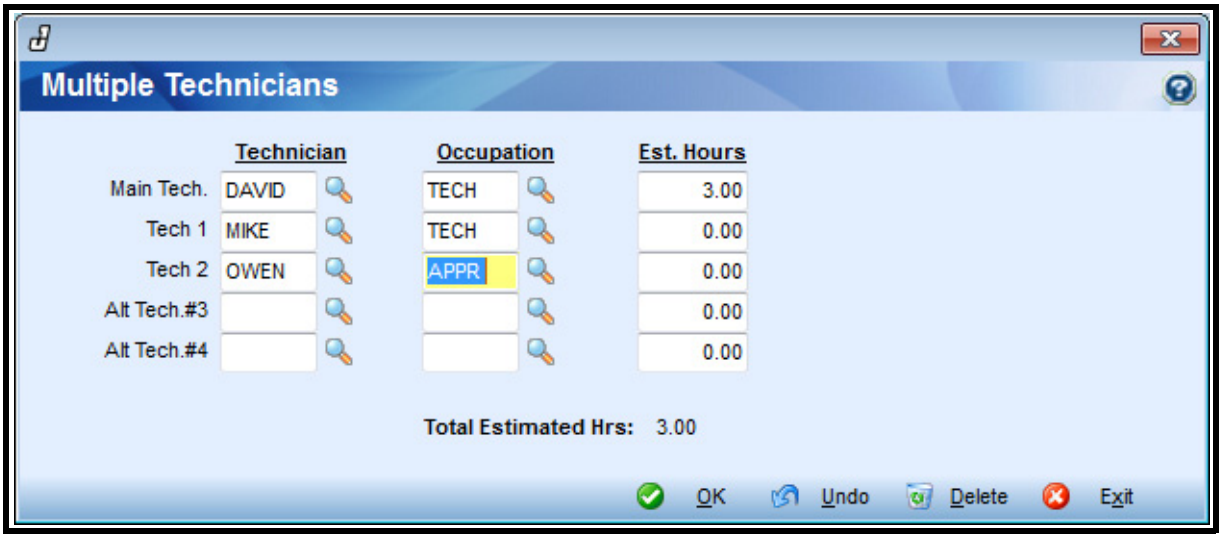
maintenance items. An example of this would be BEL - Belts package, FIL - Filter package. These users would have to select 2 equipment lines for the same piece of equipment to be serviced. If we looked at their visit schedule it would look like:

Tag	Description	Covered
T48	BEL Lennox Furnace	X
T48	FIL Lennox Furnace	X

The program is smart enough to recognize that there is only one piece of equipment on this contract but it has 2 packages of materials to identify on the W/O Ticket.

The package attached to any equipment line can be viewed by highlighting the tag # and clicking on the "***View Package Button***". These items will print out on the Standard W/O Ticket, GJB14AA print program.

Multiple Techs



If you are multi-tech, fill in the scheduleby clicking the "***Multiple Techs***" button. To use-Multi-tech (more than one technician per call) you need to have selected that option in Service Billing>Files>Service System Profile>Options>User. If you use multi tech, you can assign a specific tech or techs to a call. When the ticket is created, it will be assigned to these individuals. Alternatively you can assign an occupation code but not a specific tech. The advantage of filling out this screen is that the "Technician Occupation Workload Report" uses this information.

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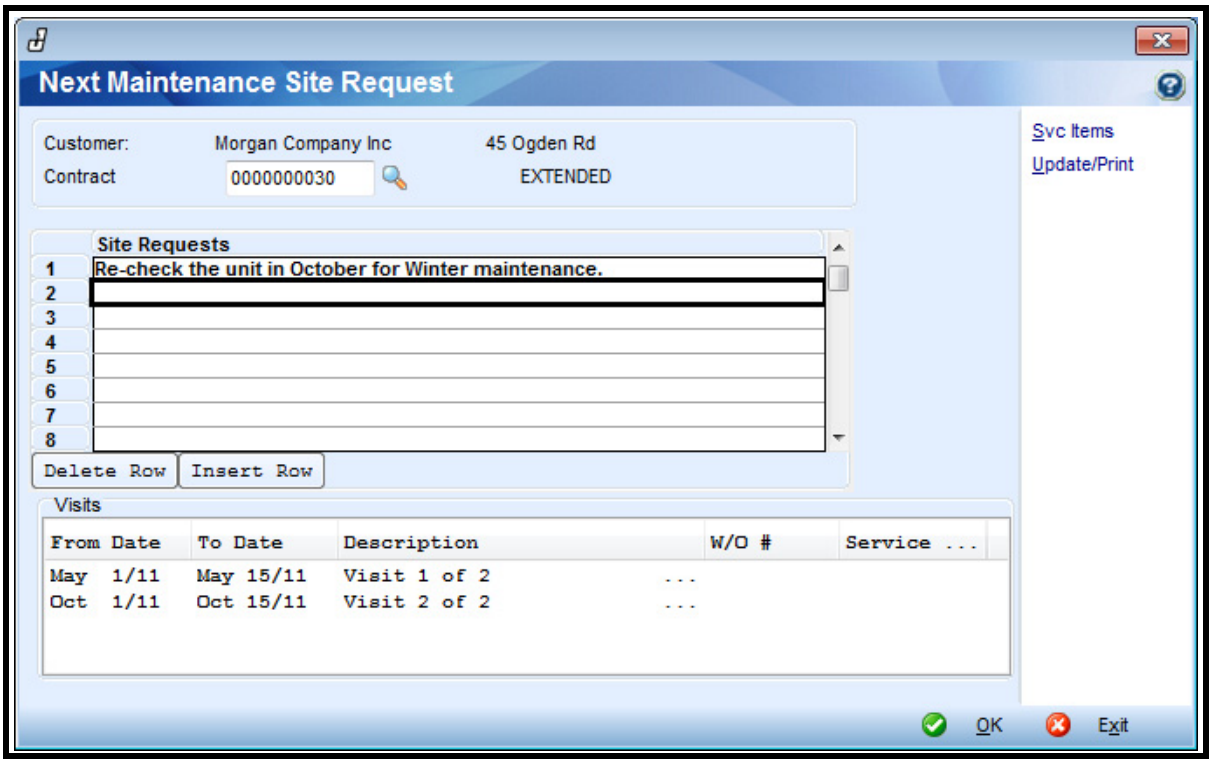
Site Requests

Use the ***Site Requests*** screen to add information about a site for future visits. You can also access the Service Items screen here via the ***Svc Items*** button.



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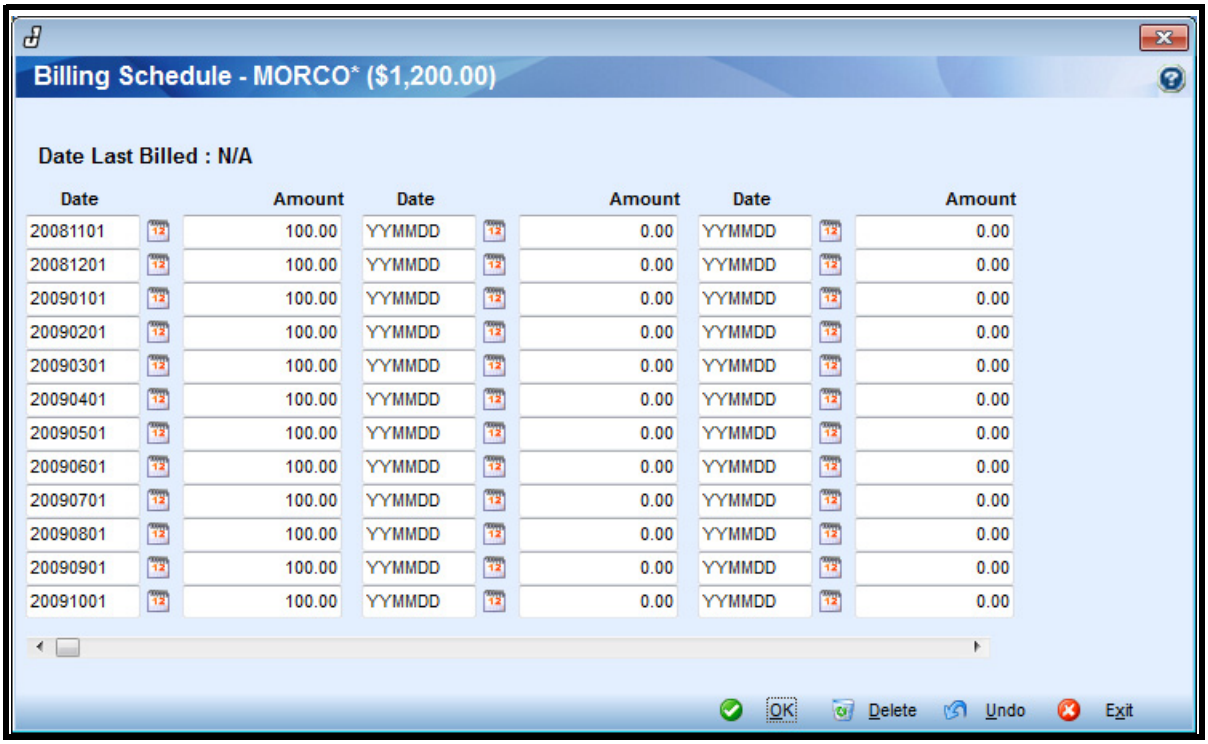
Service Billing -> Service Contract -> Setup Service Contracts ~ Billings

Billings

The ***Billing Schedule Defaults*** screen is where you will select the default month(s) when the Contract is to be billed. You can select “Now” or any month. The default amount for the billing will also be entered here.

The billing either get copied in from the template or if the template was for 0 bills / $0 the fast Setup button can be used to setup the billings. If you are setting up the “Billing Schedule” manually, you must balance the number and dollar value to what is specified on the front page of the contract.



Date	Amount	Date	Amount	Date	Amount
20081101	100.00	YYMMDD	0.00	YYMMDD	0.00
20081201	100.00	YYMMDD	0.00	YYMMDD	0.00
20090101	100.00	YYMMDD	0.00	YYMMDD	0.00
20090201	100.00	YYMMDD	0.00	YYMMDD	0.00
20090301	100.00	YYMMDD	0.00	YYMMDD	0.00
20090401	100.00	YYMMDD	0.00	YYMMDD	0.00
20090501	100.00	YYMMDD	0.00	YYMMDD	0.00
20090601	100.00	YYMMDD	0.00	YYMMDD	0.00
20090701	100.00	YYMMDD	0.00	YYMMDD	0.00
20090801	100.00	YYMMDD	0.00	YYMMDD	0.00
20090901	100.00	YYMMDD	0.00	YYMMDD	0.00
20091001	100.00	YYMMDD	0.00	YYMMDD	0.00

After a billing, the program will “gray out” a billing line.

There is a maximum of 60 lines of billing on a contract. To distribute the billing evenly over 12 months, put the full value of the contract on the first line and press **<F9>.** It will distribute the billing over the life of the contract.

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The date entered is used in the billing program when it decides when to bill this contract. You may do more than one billing run per month. For example, the 1st to the 15th and the 16th to the 31st.

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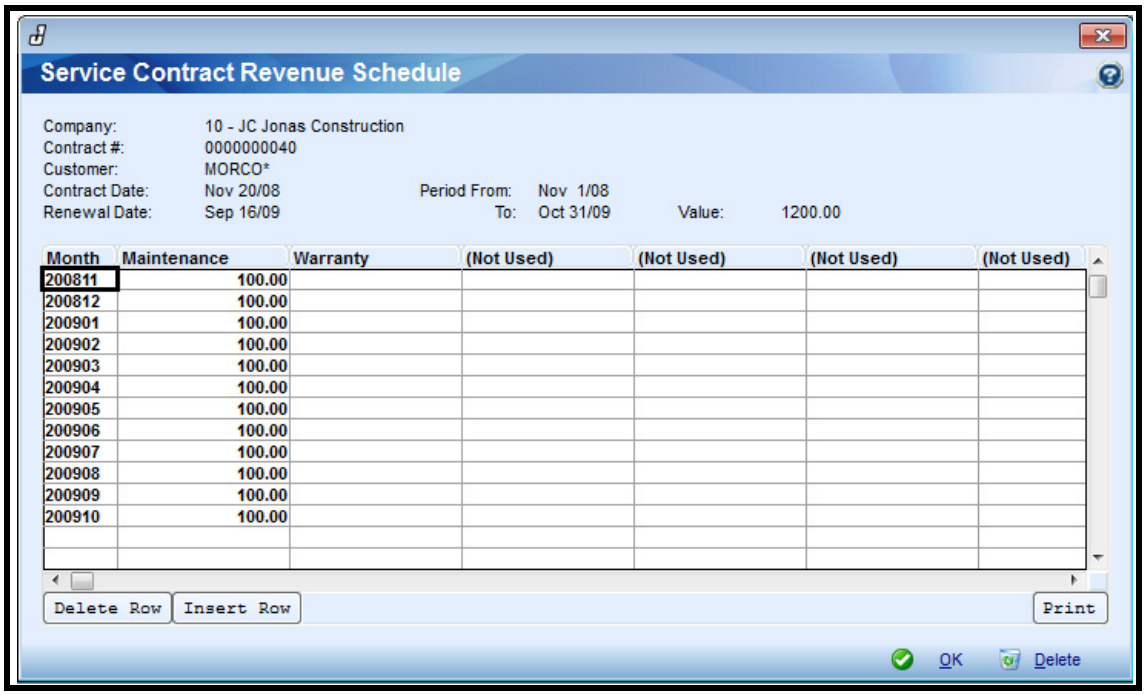
Service Billing -> Service Contract -> Setup Service Contracts ~ Service Contract Revenue Schedule

Service Contract Revenue Schedule

The revenue schedule is used to distribute the revenue (billings) to the appropriate period. Often the revenue schedule is copied in with the template. If it is a Fast Setup or you are building the Revenue Schedule manually, you may put the value of the contract on the first row and press F9 to distribute the revenue evenly over the life of the contract.



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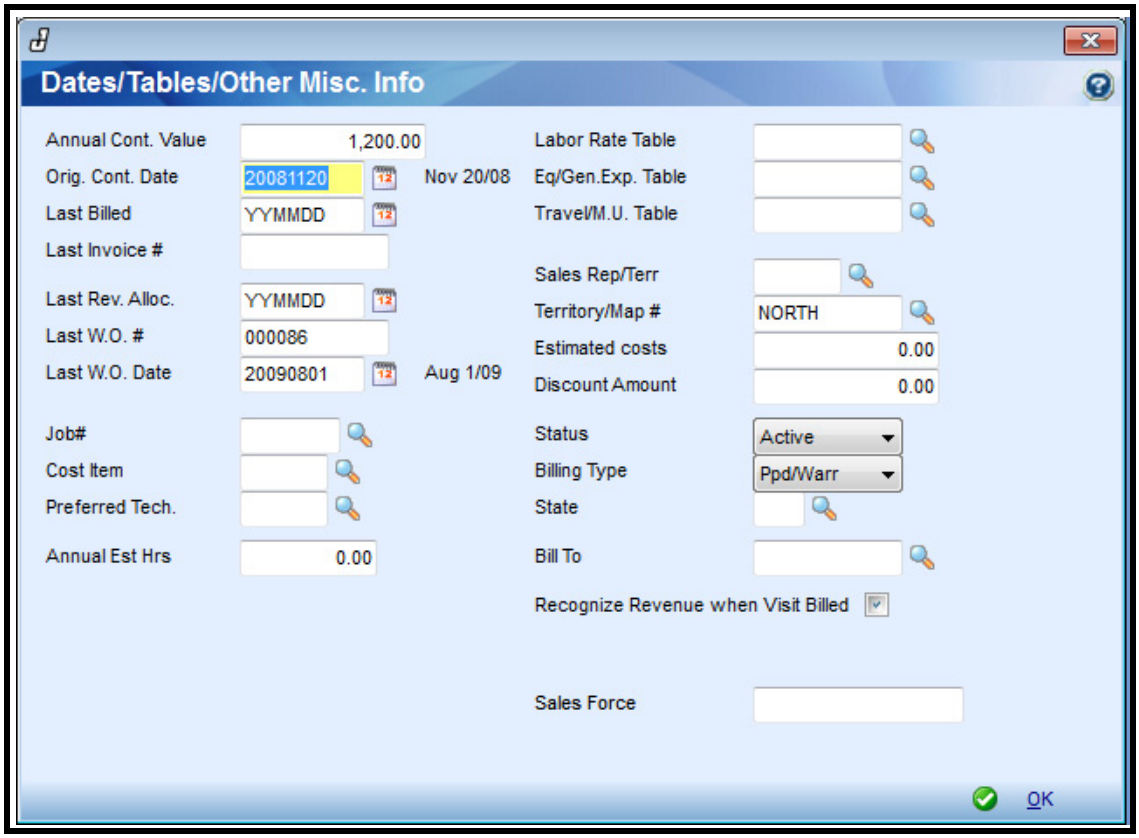
Service Billing -> Service Contract -> Setup Service Contracts ~ Dates/Tables

Dates/Tables/Other Misc. Info

When you click on this button, the following screen will pop up:



Most fields in this screen need not be changed. A detailed discussion of their function follows:

Annual Contract Value

This is a memo field for use in the report generator (available in the Service System Report Generator under the code ***@AVAL***). It is used to compare multi-year contracts to single year contracts. For example, a 1 year - $100 contract is equivalent to a 2 year - $200 contract. However, in a Report it would look as if one contract was for twice as much money as the other. This field is automatically filled in by taking the Total Contract Value from the front page and dividing it by the number of years that the contract spans but it can be changed manually.

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Orig. Contract Date

This field is filled in when the contract is established. When the contract is renewed, this date is transferred over to the renewal so you always know the date of the original contract. It may be over-ridden if the date is incorrect. You can press <**ENTER**> to accept the displayed date. Press <**F2**> to select the date from the Calendar.

Last Billed

Enter the date when this Contract was last billed. This field is filled in by the system when the contract is billed. You can also press <**ENTER**> for the current date or press <**F2**> to select the date from the Calendar.

This field can be disabled to prevent rebilling a S/C by a flag in the **User Logins -> Options screen**: '***Restrict Date Access in S/C***'.

> ***Note:***
> Changing this date to an earlier date may mean that some billing lines that were previously grayed out and unavailable for billing will be available. Similarly, advancing this date may mean some lines that were previously 'white' and available for billing are now unavailable.

Last Invoice

Enter the Invoice number associated with the last billing. This field is filled in by the system when the contract is billed.

Last Rev. Alloc

The system records the last date revenue was allocated. You can also press <**ENTER**> for the current date or press <**F2**> to select the date from the Calendar.

This date is used by the system to calculate the revenue recognized (and the balance remaining in deferred) to date. It may be over ridden but doing so may alter reports and future revenue allocations.

The field can be disabled to prevent rebilling a S/C by a flag in the User Logins, Options screen 'Restrict Date Access in S/C'.

Last W.O.

Enter the latest Work Order number.

When the system creates a W/O, based on the visit schedule, it records the number here. The date will either be the W/O Date or the Date the Work was actually performed, depending on how the flag is set in the Service Contract Profile. This same information is recorded on each visit line in the visit schedule.

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Last W.O.Date

Enter the date of the *last Work Order*.
When the system creates a W/O, based on the visit schedule, it records the number here. The date will either be the W/O Date or the Date the Work was actually performed, depending on how the flag is set in the Service Contract Profile. This same information is recorded on each visit line in the visit schedule.

Job #

Enter the *Job number* that applies to this Contract or press <**F2**> to select from a list of Jobs.
A Service Contract may be tied to Job (Job Cost Module). If this is done, the billing type would also be set to Job W/O so all W/O's created from this contract will be Job W/O's. Additionally, when the contract is billed the revenue will be transferred to the Job. This option is rarely used. You would need a set of circumstances where you need to have regular maintenance on a construction project and all costs must be reflected in the job.

Cost Item

Enter the Cost Item code that applies to this Contract or press <**F2**> to select from a list of codes.

Preferred Tech.

Enter the Technician code of the person who is automatically assigned to work on all W/O's for this contract or press <**F2**> to select from a list of codes.

Annual Est. Hours

Works exactly the same as Annual Contract Hours, it is a memo field used in the report generator for comparison purposes. It is never filled in by the system.

Labor Rate Table / Eq. Gen. Exp. Table / Travel M.U. Table

These are the tables that will be tied to all W/O's that are produced from this service contract. Since most maintenance W/O's are not billed, the mark up tables tied to them are irrelevant. If these are left blank, the system will use the tables setup in the customer's file as the default. Most users leave these blank.

Sales Rep/Terr

This Sales Rep/Terr will be tied to all W/O's produced from this contract. Like the rate tables above, it is an overview of what exists in the customer's file. Most users leave this blank.

Territory/Map #

Enter the Territory/Map code that applies to this Contract or press <**F2**> to select from a list of codes. This could be used as an override to the Territory / Map# in the customer file. Since the customer code should be unique for this location, this field would normally not be required.

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Estimated Costs
This is the total estimated cost from the Quote/Est screen. Estimates are entered in detail in the estimate screen and the total is reflected here. If you don't want to use detailed estimates you may simply enter the total estimate here. This is available in the service report generator for reporting purposes.

If you created a Quotation for this contract, then the costs on that Quotation will fill in this field.

Discount Amount
Enter the estimated Discount projected for this Contract. This is a memo field. It may be picked up using the Service Report Generator.

Status
By default, contracts are ***Active***. ***Inactive contracts*** are old contracts that must remain on file for comparative/costing purposes. ***Holds*** are generally contracts that should be active but haven't been paid for yet. When the money is received, the operator will activate the contract. The system will not issue W/O's for contracts that are inactive or on hold unless you specifically select that status.

Billing Type
From the list, select the ***Billing Type*** to be used for this Contract:

- Bill (to generate an Invoice)
- C.O.D. (if the Customer is paying on site, and no Invoice will be generated)
- Prepaid/Warranty (if the Customer has pre-paid already for work to be performed or the work is under warranty and no Invoice will be generated)
- Job Work Order (to charge directly to a Job)

State
Enter the State/Province code associated with this Contract or Press <**F2**> to select from the list of codes. This will be used for billings for this contract and will be assigned to W/O's created for this contract.

Bill To
This is an override of the Bill To that is found in the customers file.

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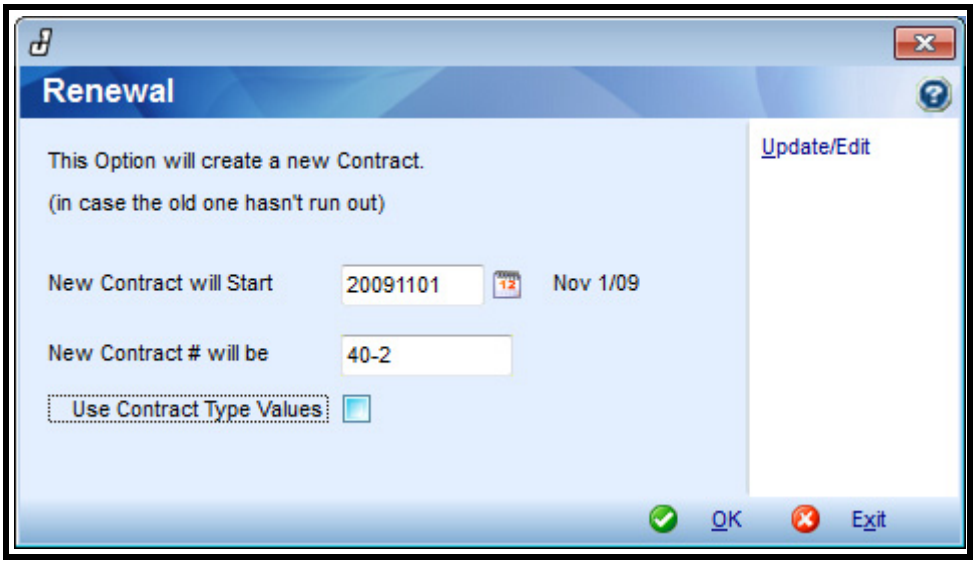
Service Billing -> Service Contract -> Setup Service Contracts ~ Renewal

Renewal

A very valuable feature of the contract module is the renewal button. By clicking on this button you can quickly renew the contract even before the current contract has expired. This gives you the ability to send out renewal notices to your customers early. Enter the new ***Start Date*** and a ***New Contract number***, usually the old number with a –1 or –2 suffixes so that you know it is a renewal, then click ***OK***. All the pertinent information is quickly copied to the new contract.



Now you can send out the renewal billing and still have the proper visit showing up from the old contract. Once the old contract is finished, you can declare it as inactive so no further W/O's can be assigned to it. If it is not required for costing information, it could be deleted. This renews the contract you are on.

New Contract will Start

Enter the date when the new Contract will take effect, or press ENTER to accept the displayed date. Press F2 to select the date from the Calendar.

New Contract # will be

Enter the new Contract number.

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Use Contract Type Values

If your Contract Types have experienced an increase, you can have this renewal pull in the Billing and Revenue settings from the Contract Type, instead of manually adjusting the renewed contract.

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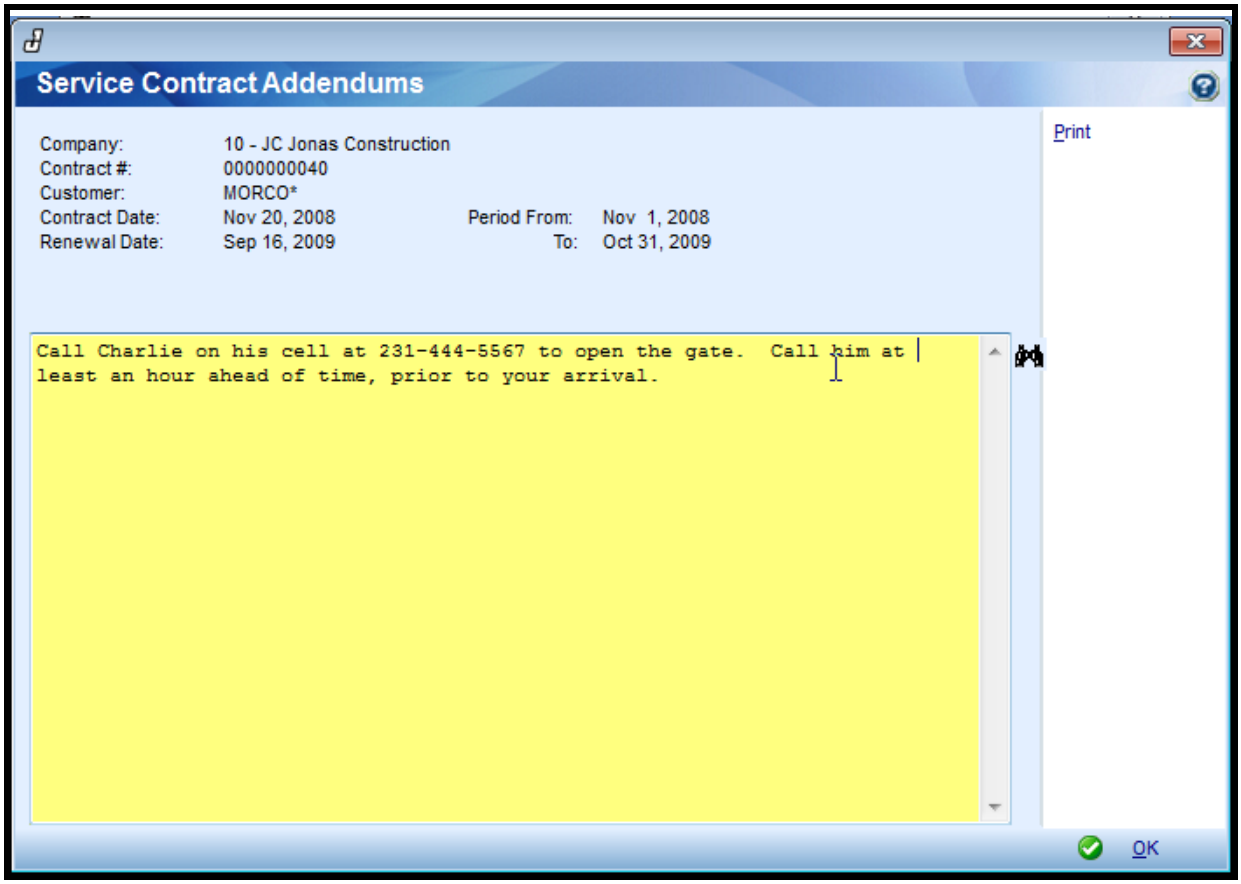
Service Billing -> Service Contract -> Setup Service Contracts ~ Addenda

Service Contract Addendums

The Addendum section is used to store information about the contract and or site. The first seven lines print on the W/O ticket (Standard GJB14AA). This would be used to describe a situation that would apply to all visits and the information will print on every ticket. You could put this information into the description on each visit line but you would have to enter it for every visit. The first seven lines are used to save you entering the same information on each visit.



Note:
Click on the “Binoculars” icon to the right to search through the text.

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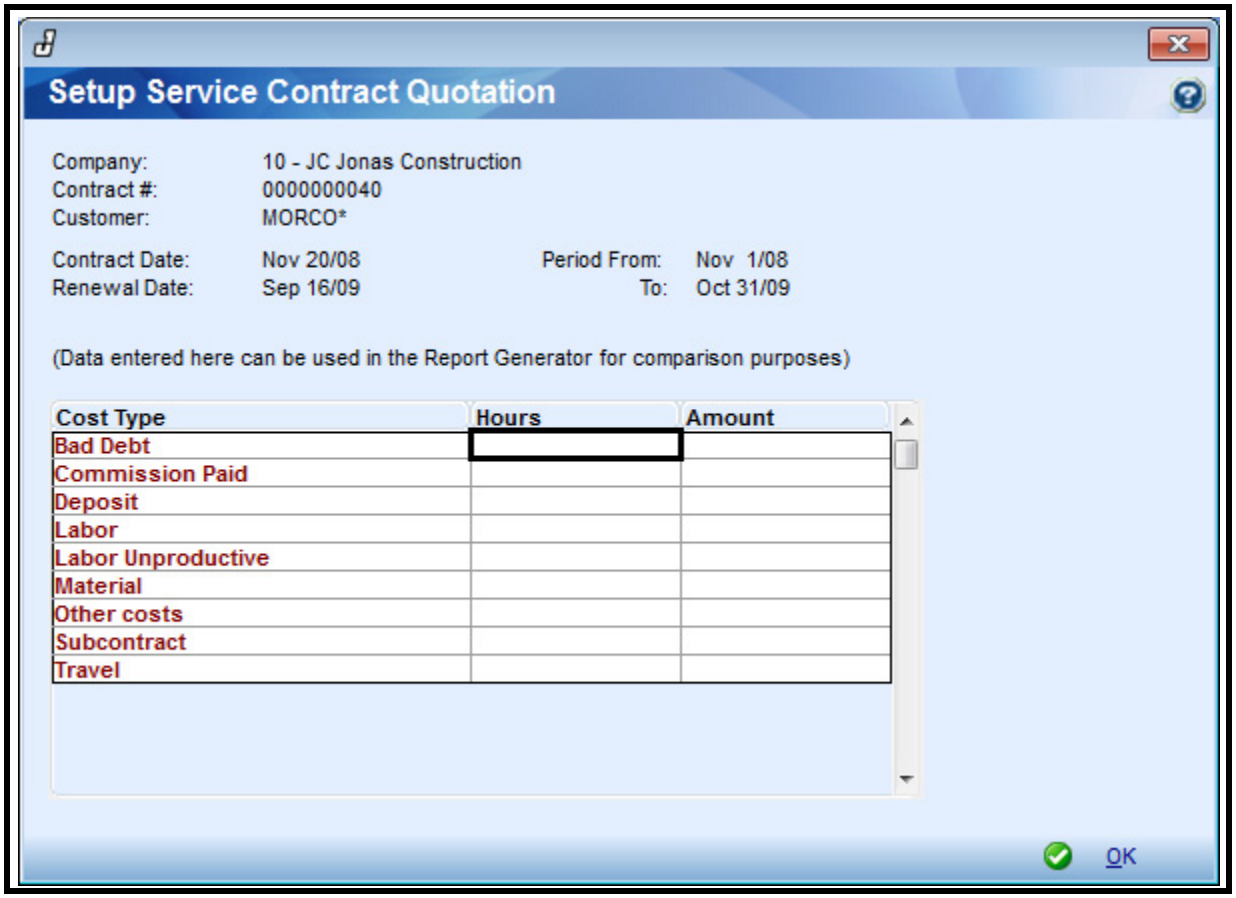
Service Billing -> Service Contract -> Setup Service Contracts ~ Quotation/Estimate

Quotation/Estimate

You have the ability to evaluate how a contract did against the estimate. Using this screen you can enter in the estimate and compare it to the actual costs by designing a report in the Report Generator. Remember that any information entered here will be displayed in the dates/tables screen as a total. Entering the data itself is straightforward following the standard W/O cost groupings.



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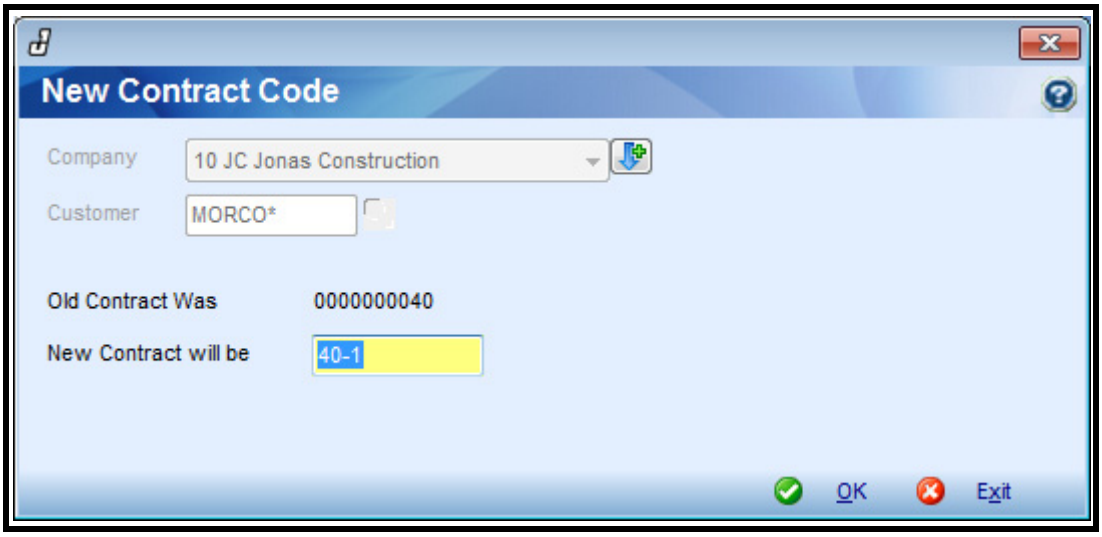
Service Billing -> Service Contract -> Setup Service Contracts ~Chg Contr No

New Contract Code

If the contract number was entered incorrectly, it may be changed. Be careful when you use this feature, or any other feature that changes the number. If a user had a W/O open on their screen the system would be unable to change the contract # on that W/O. This W/O would have the old number attached to it and would not show up on reports for this contract.



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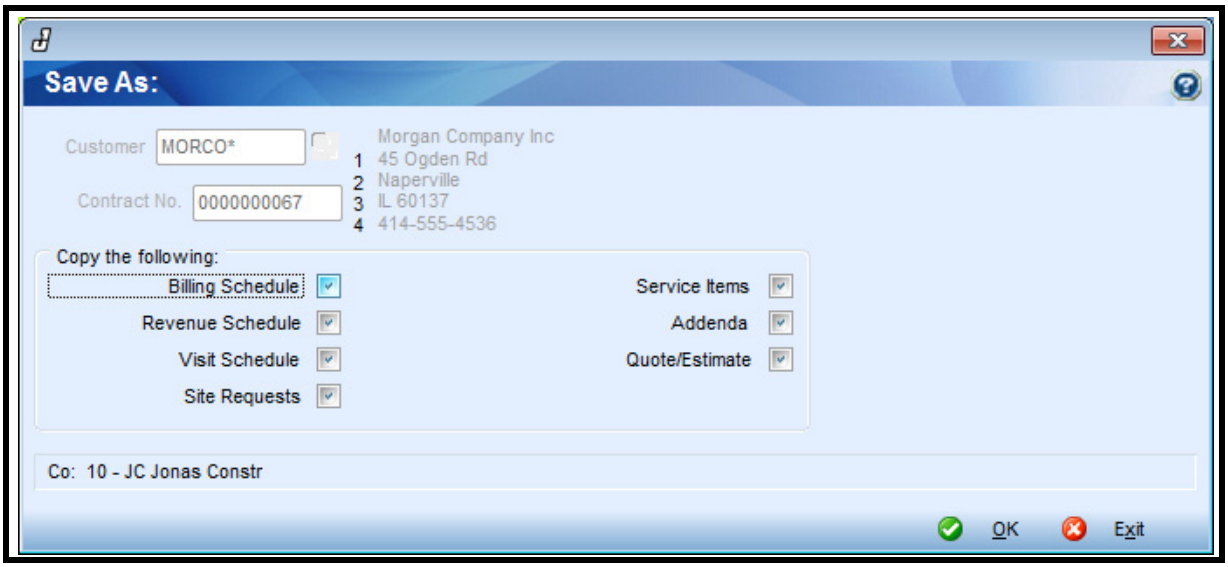
Service Billing -> Service Contract -> Setup Service Contracts ~ Save As

Save As

The ***Save As*** button will allow you to save the Service Contract as a new number and copy the components that you select into this new contract.



Contract No.

Enter the new Contract Number, or press <**F9**> to automatically create a new Contract Number. You can also press <**F3**> to select a different Customer.

Copy the Following

Check mark the boxes for the items that you wish to copy to the contract.

> ***Note:***
>
> With the *Service Items* flag is ON, if copying the Contract to a different Customer, the Service Items will be added to the new Customer (even if they are already there). If the new Customer has the Service Items already set up, turn this flag OFF, to avoid duplication.

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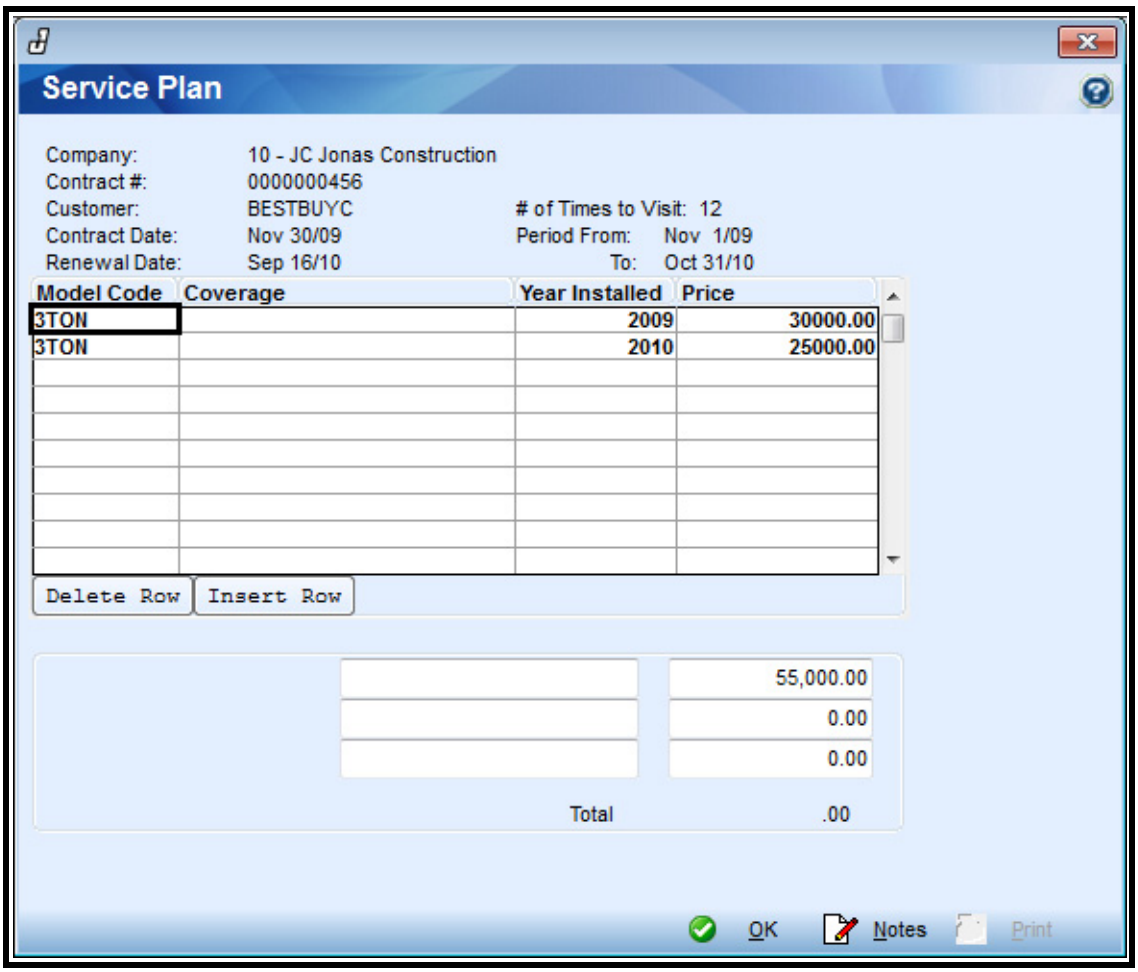
Service Billing -> Service Contract -> Setup Service Contracts ~ Print Sheet

Print Sheet

The Service Plan screen (if selected) is populated with details of the contract showing multiple years and the contract price for each of those years. If the Contract was renewed, the program will copy over the Service Plan information to the newly renewed contracts.



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Printing the contract yields the details on the contract. It is a good way to ensure that it was entered correctly. Some contractors like to print them and put them in a binder as a quick reference and source for those that are not on the network. An alternative report for reference that contains this information is the “Service Contract List”.

```
                    Service Contract Listing          Pg 1
                  Customer: Morgan Company Inc
                     Contract # 0000000040

============= Contract Information =============
Customer            MORCO*
Customer Name       Morgan Company Inc
Contract #          0000000040
Date Received       Nov 20/08
Period From:        Nov  1/08
Period  To :        Oct 31/09
Send Renewal        Sep 16/09
Contract Type       MONTHLY
Contract Value            1200.00
No. of Visits       12
# Times to Bill     12
Charge GST/HST?     N
Charge PST?         N
Location #1:
Location #2:
Location #3:
Phone #1:
Phone #2:
Category            1
Spare #2
Spare #3                  1200.00A
Orig. Contract Date Nov 20/08
Last Billed
Last Invoice #
Last Rev. Alloc.
Last W.O. #         000086
Last W.O. Date      Aug  1/09
Job#
Cost Item
Spare #6

================= Addendums to Contract ==================
 Call Charlie on his cell at 231-444-5567 to open the gate.  Call him a
 least an hour ahead of time, prior to your arrival.


================================  Equipment  ================================

 Tag  25              Desc    3 ton heat pump R410A          1st Wty  12
 Qty     1            Manu    Lennox                         Expiry  Apr  8/09
 Inst Apr 17/08       Model   R410A                          2nd Wty  24
 By                   Serial# 000087659743                   Expiry  Apr  8/10
 Type 3TON            Check L                                3rd Wty
                      Link To                                Expiry  Apr  8/08
                      Loc     Roof

 Tag  32              Desc    3 ton heat pump R410A          1st Wty  12
 Qty     1            Manu    Lennox                         Expiry  Apr 13/09
 Inst Nov 20/08       Model   R410A                          2nd Wty  24
```


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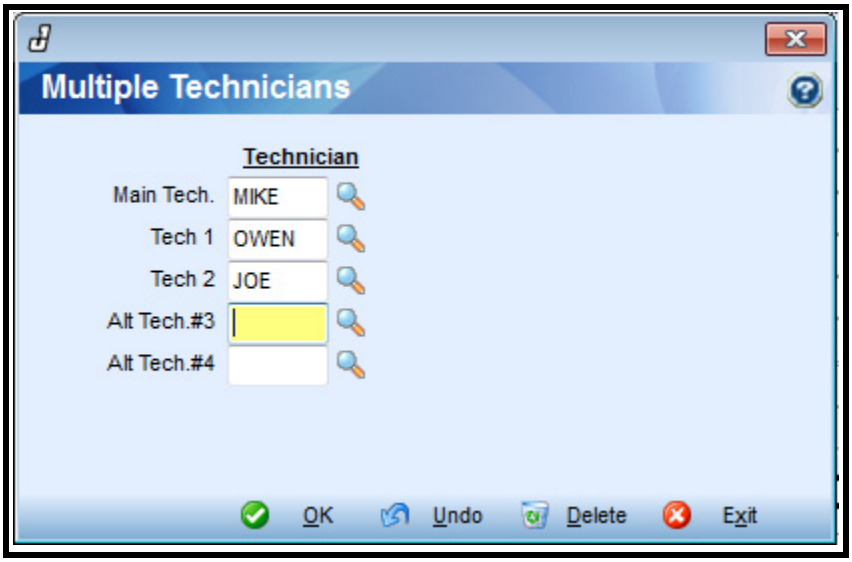
Service Billing -> Service Contract -> Setup Service Contracts ~ Multi Techs

Multi Techs

These are the preferred tech or tech's for this contract. They are available in the report generator. To get the system to assign the W/O's to a specific tech or tech's, you need to specify them in the visit schedule.



Enter the ***Technician*** code of the primary person who should work with this Customer. If the Customer has a Preferred Tech, then that code will be pre-filled in this field. Press <**F2**> to select from the list of codes.

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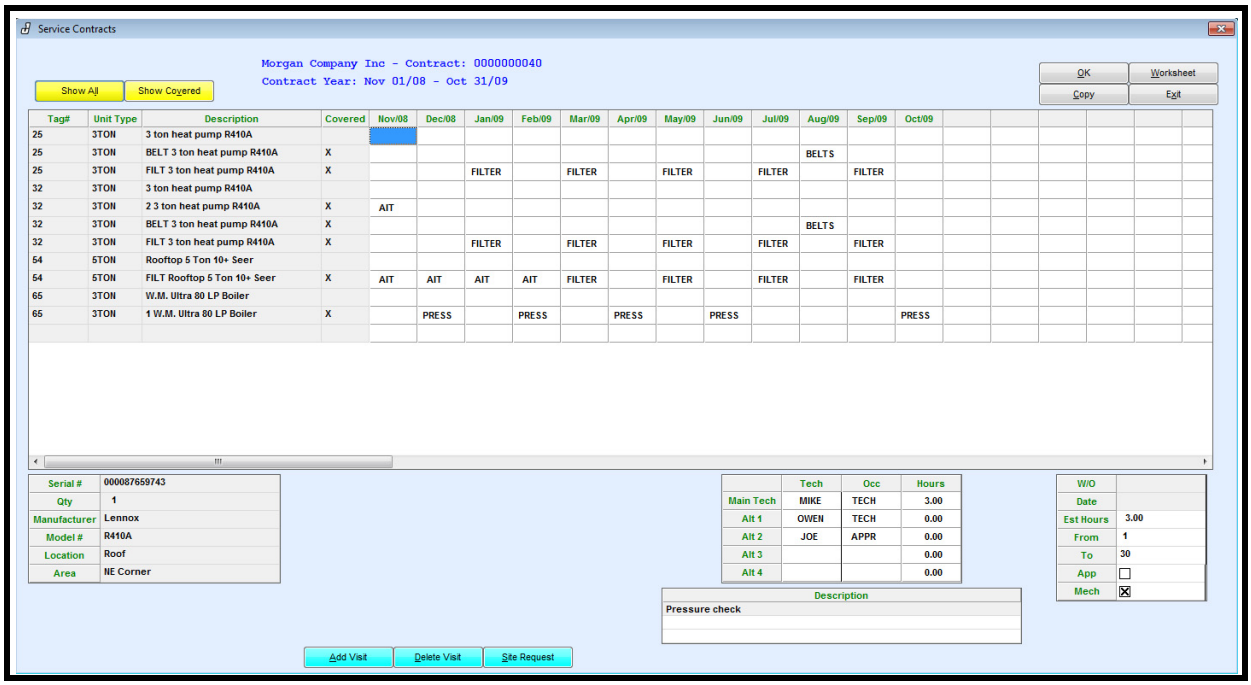
Service Billing -> Service Contract -> Setup Service Contracts ~ Visit/Srv Item

Visit/Service Item Info Screen

The ***Visit/Svr*** Item button allows you to tie visits to equipment. Your screen resolution should be 1024 X 768 or more for best results. You have the ability to ***View*** the grid, ***Print,*** or send it to ***Smartviewer***. If you right click on any cell in the top grid, you can print the entire grid.



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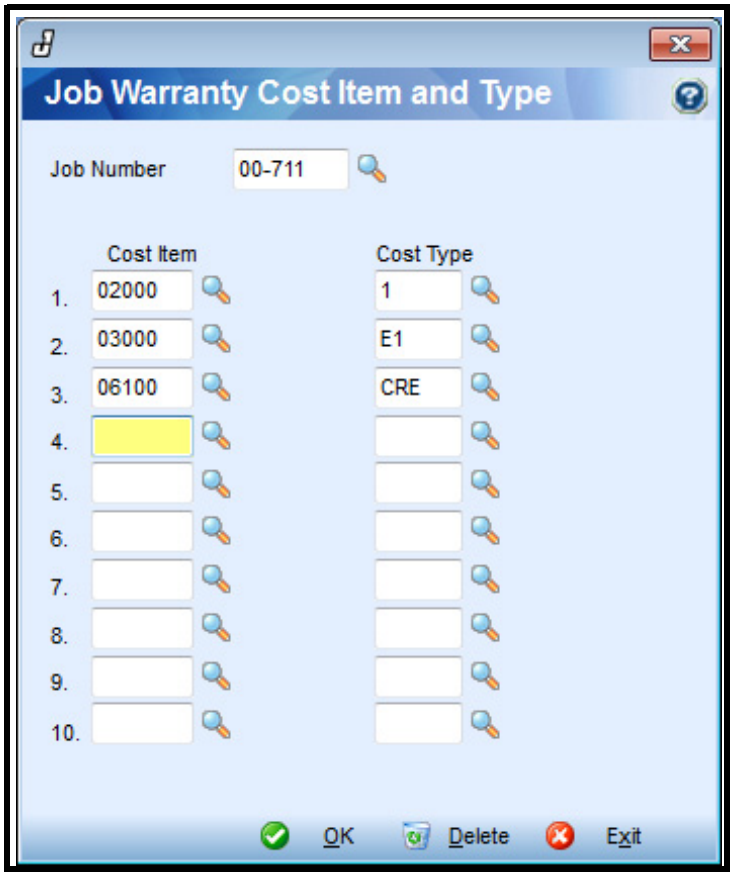
Service Billing -> Service Contract -> Setup Service Contracts ~ Warranty Cost Item

Warranty Cost Item

The *Warranty Cost Item* screen is used link Cost Items and Cost Types to specific Jobs. You can enter up to 10 Cost Items/Types here, and the debit side Warranty Costs will be posted to them.

Note:
To enable this option, a Warranty Reserve Account must be setup in **Service Billing > Service Contract > Service Contract Profile ~ Options**.



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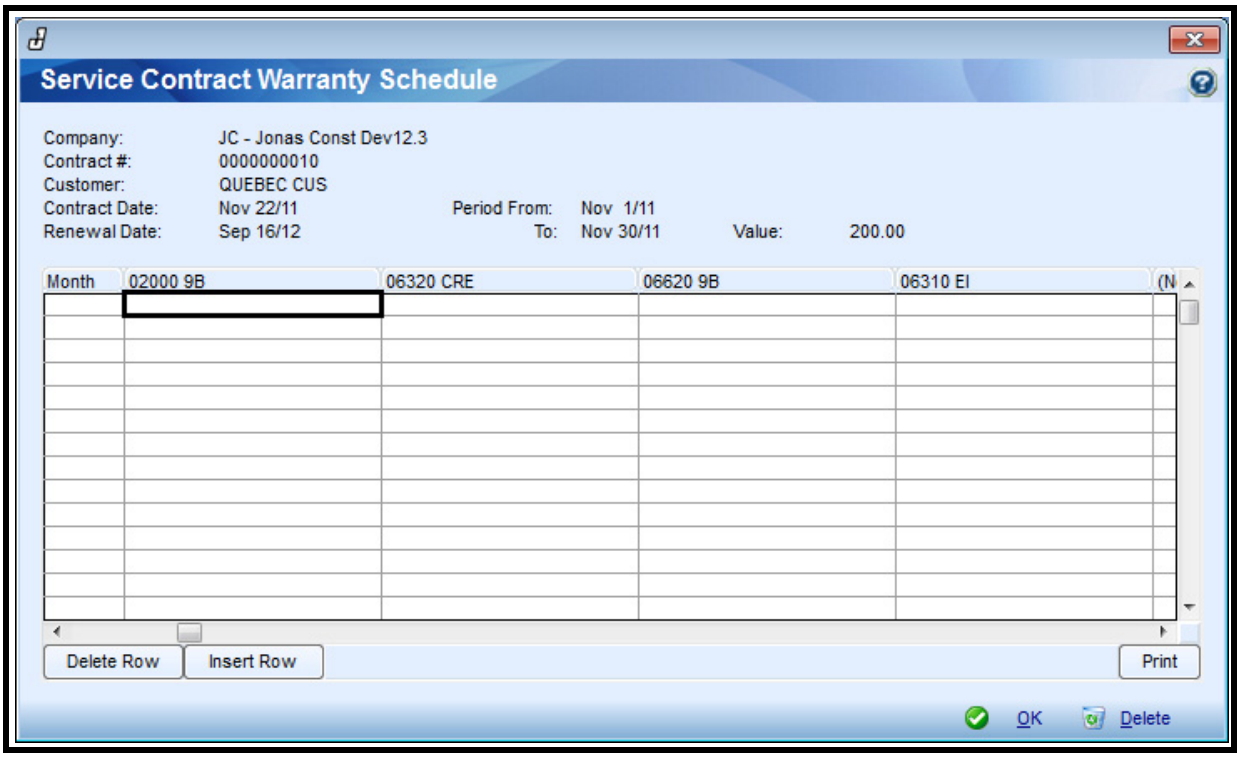
Service Billing -> Service Contract -> Setup Service Contracts ~ Warranty

Warranty

The *Warranty* screen is used to enter separate dollar amounts for the Cost Item/Type combinations that were entered in the *Warranty Cost Item* screen.

> ***Note:***
> To enable this option, a Warranty Reserve Account must be setup in **Service Billing > Service Contract > Service Contract Profile ~ Options**.



Press <**F2**> in the Month column to select the date from the calendar window. Enter in the amounts that you want allocated to each Cost Item/Type. Each Cost Item and Cost Type that was previously entered on the Warranty Cost Item screen will be displayed in headings across the top of the entry grid.

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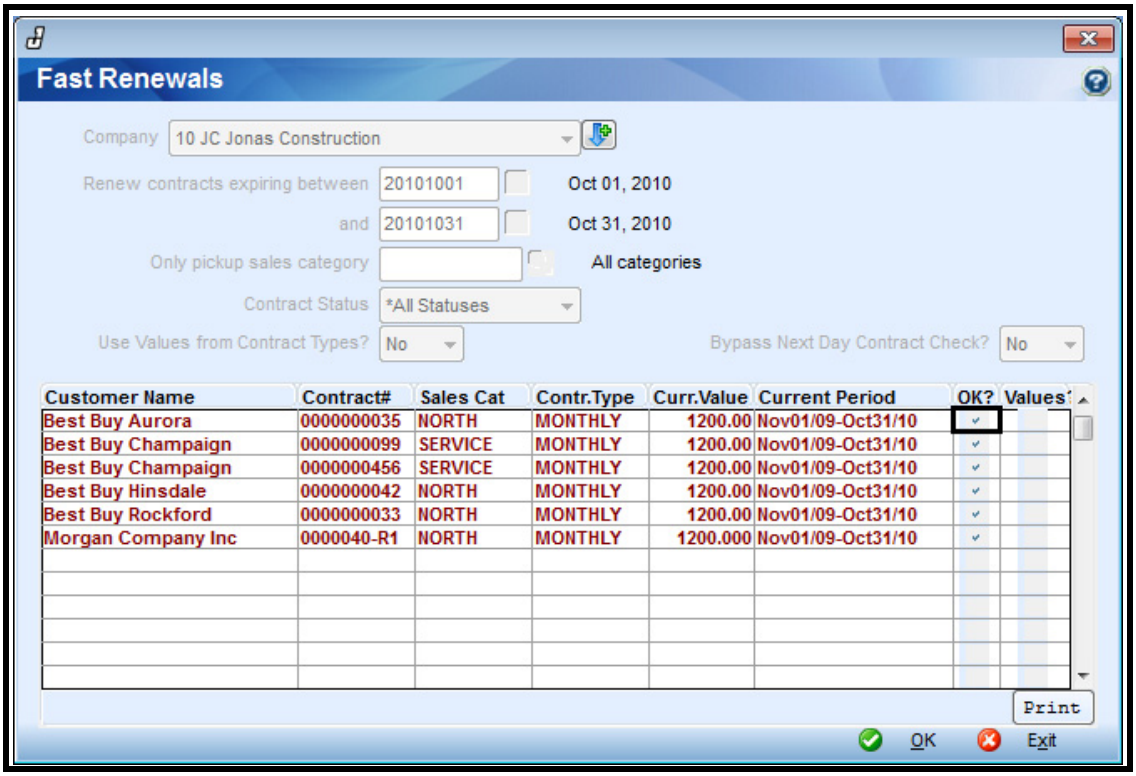
Service Billing -> Service Contract -> Fast Renewals

Fast Renewals

Fast Renewals allows you to concurrently renew a group of contracts. Select the date range and the system will present you with a list of contracts that are expiring. The default is to renew the contract, so 'de-select' the one's that are not renewing.



Once you click "***Ok***", the contracts are renewed and a new number is assigned.

Renew Contracts Expiring Between/And

Enter the starting (***BETWEEN***) or ending (***AND***) date to be used (ie. Contracts expiring between the BETWEEN date up to and including the AND date will be included). Press <ENTER> for the current date, or press <**F2**> to select the date from the Calendar.

Only Pickup Sales Category

If you want to restrict the renewal to a specific Sales Category, enter the Sales Category

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code. Press <**F2**> to select from a list of codes or press <**ENTER**> to include all Sales Categories.

Contract Status

If you want to restrict the renewals to a specific Contract Status, select it from the drop down list:

- All Statuses
- Active
- Inactive
- Hold
- Quote

Press <**ENTER**> to include all Statuses.

Use Values from Contract Types?

To create the Billing and Revenue schedules from the Service Contract Types, select '***Yes***'. Each Contract can be individually controlled by the '***Values***' flag on each line. Select '***No***' to use current Contract value.

Bypass Next Day Contract Check?

Select '***Yes***' to disregard the check if a contract exists for the customer starting the next day.

Ok?

Do you want to renew this Contract?

YES (check the box) or ***NO*** (do not check the box)

Once your contract selections have been made, you will see the following screen:

Enter the amount that you want all the contracts increased by.

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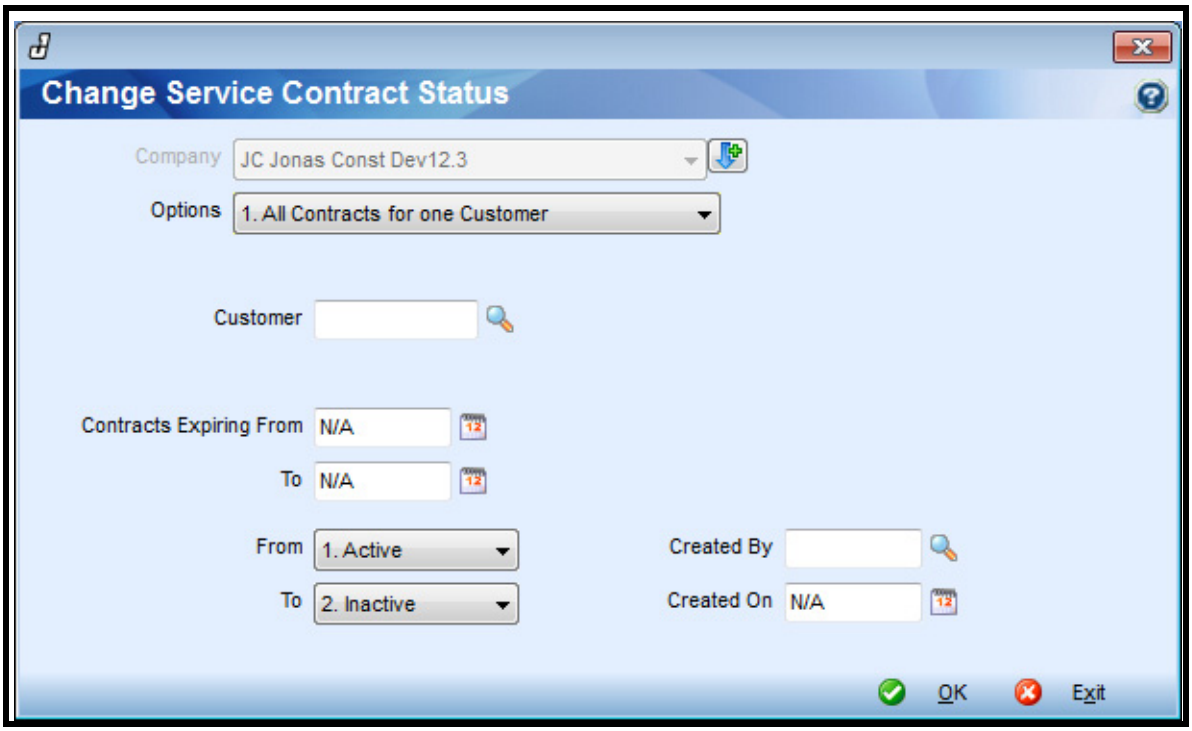
Service Billing -> Service Contract -> Change Contract Status

Change Contract Status

This program allows you to change the status (Active, Inactive, Hold, Quote) of many Service Contracts at one time according to certain conditions you choose.



Options

From the drop-down list, select the option for the Contracts that you wish to change or use the Small Down Arrow to select from a list of Options.

Customer

Press <**F2**>, click on the Lookup button, or type in the desired Customer Code.

Contracts Expiring From

If you wish to filter the list of Contracts generated by their Expiry Date, enter the From/To range desired. If you would like to pick up ALL Expiry Dates, press <**ENTER**> to have the system go from the beginning.

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Contracts Expiring To

If you wish to filter the list of Contracts generated by their Expiry Date, enter the From/To range desired. If you would like to pick up ALL Expiry Dates, press <**ENTER**> to have the system go to the end.

From

Indicate the Contract Status you wish to change FROM or use the Small Down Arrow to select from the list of Statuses.

To

Indicate the Contract Status you wish to change TO or use the Small Down Arrow to select from the list of Statuses.

Created By

Enter or press <**F2**> or the lookup icon to select a User Id. When entered, service contracts created by this user (and matching any other criteria entered on this screen) will be changed.

Created On

Enter or press <**F2**> or the lookup icon to select a date. When entered, service contracts matching this Created On date (and any other criteria entered on this screen) will be changed.

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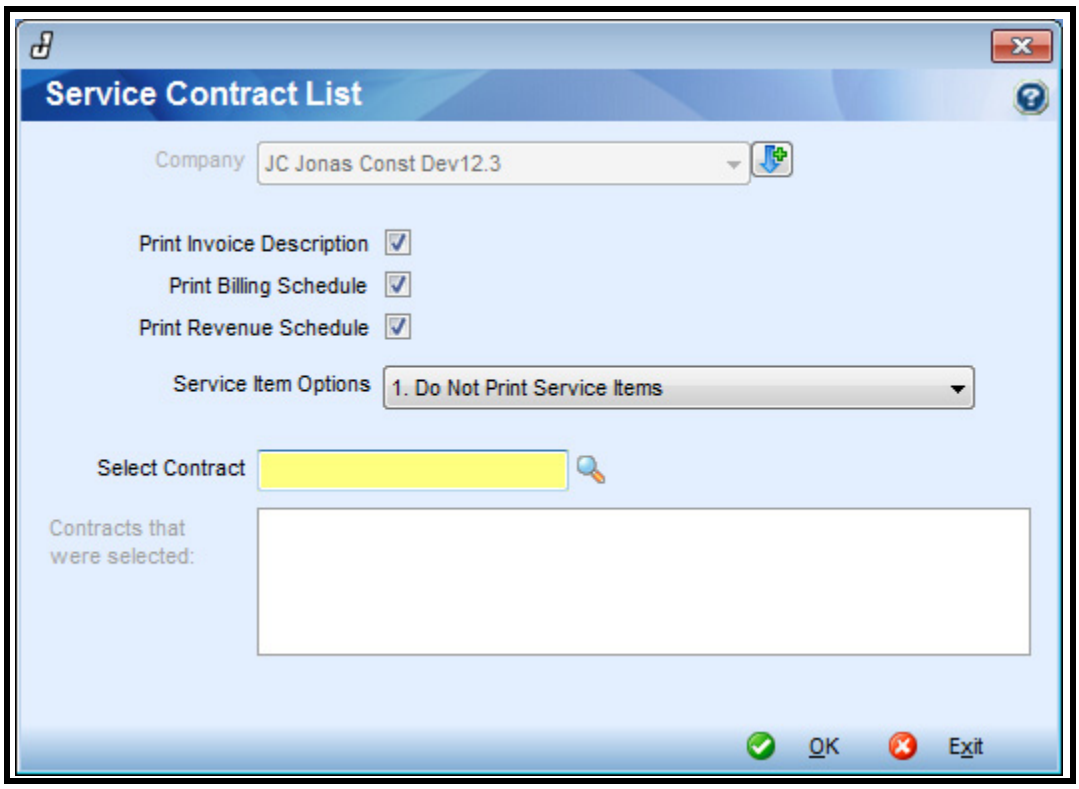
Service Billing -> Service Contract -> Service Contract Lists -> Service Contract List

Service Contract List

This program allows you to print a list of all the major details of the Service Contracts selected.



Print Invoice Description

Do you want the computer to print the Invoice description?

YES (check the box)

NO (do not check the box)

Print Billing Schedule

Do you want the computer to print the Billing schedule?

YES (check the box)

NO (do not check the box)

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Print Revenue Schedule

Do you want the computer to print the Revenue schedule?

YES (check the box)

NO (do not check the box)

Service Item Options

From the list, select the Service Items you want to print:

1. Do Not Print Service Items

- or -

2. Print Service Items Per Visit

- or -

3. Print Service Items + Belts & Filters Per Visit

Select Contract

Press <**ENTER**> to include all Contracts. If you want to restrict the List to (a) specific Contract(s), enter the Contract number(s). Each Contract you enter/select will be shown in the box at the bottom of the screen or press <**F2**> to select from the list of Contracts.

To Remove a Selected Contract:

If you select a Contract, then decide that it is not the one you want, you may remove it from the "selected" list by double clicking the one you want to remove from the box at the bottom of the screen (the computer will ask you to confirm that you want to remove it from the "selected" list).

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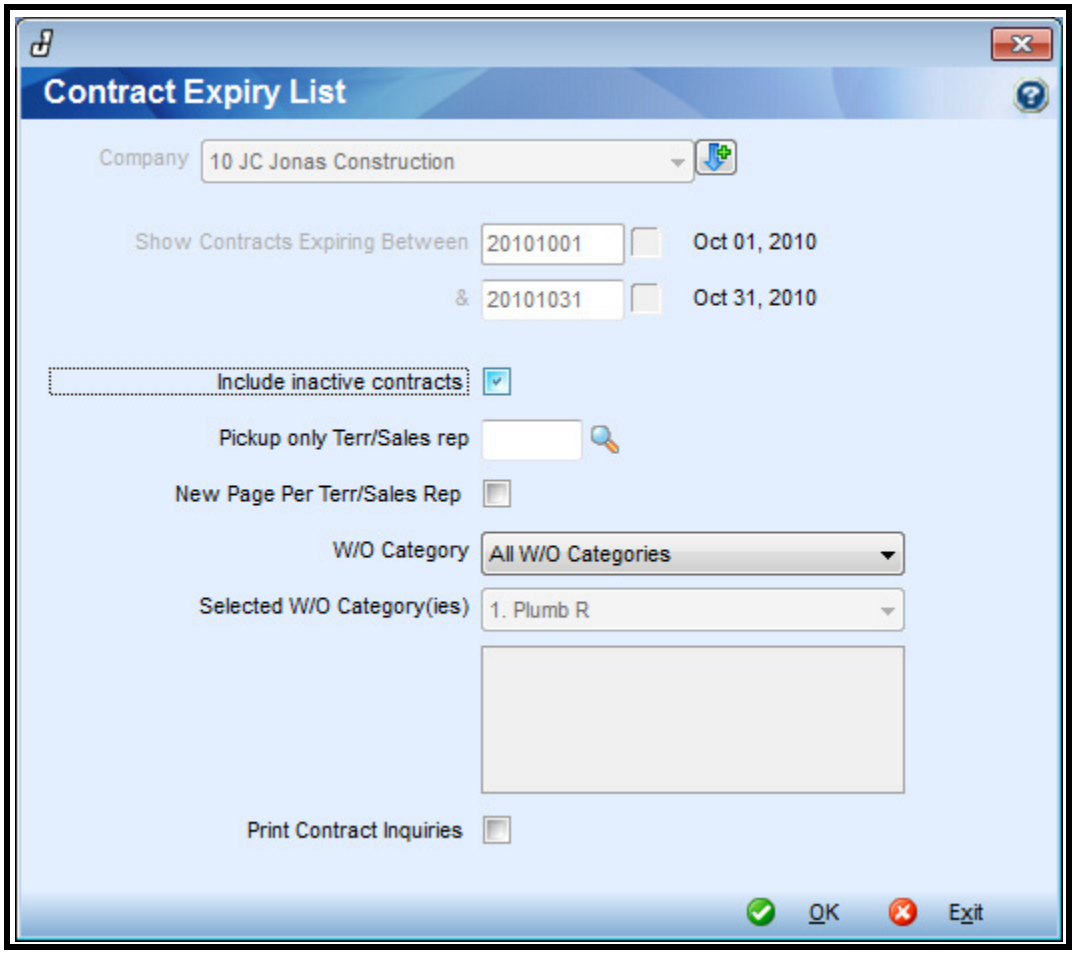
Service Billing -> Service Contract -> Service Contract Lists -> Contract Expiry List

Contract Expiry List

Renewing the contracts as a group is a much more common method than doing them individually. This process begins before the contracts expire with the “Contracts Expiry List”.



Show Contracts Expiring Between

Enter the starting (***BETWEEN***) date to be used (ie. Contracts expiring between the ***BETWEEN*** date up to and including the ***AND*** date will be included). Press ***ENTER*** for the current date or press ***F2*** to select the date from the Calendar.

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Show Contracts Expiring (&)

Enter the ending (***AND***) date to be used (ie. Contracts expiring between the ***BETWEEN*** date up to and including the ***AND*** date will be included). Press ***ENTER*** for the current date or press ***F2*** to select the date from the Calendar.

Include Inactive Contracts

Do you want to include inactive Contracts in the Expiry List?

YES (check the box)

NO (do not check the box) to include only active Contracts

Pickup only Terr/Sales Rep

If you wish to only pick up the expired contracts of a specific Rep, enter their code here or press ***F2*** to select from available reps.

New Page Per Terr/Sales Rep

If you select all Terr/Sales Rep and want to print a separate page by Terr/Sales Rep, turn the flag on here (place check mark on). If you want all items on 1 page, do not turn the flag on.

W/O Category

Choose how you want the W/O categories selected:

- **All W/O Categories**
- **Include Only Categories**
- **Exclude Categories**

Selected W/O Category(ies)

If you select to either include or exclude certain W/O Categories, the “Selected W/O Categories” option will become available for entry. Select categories from the drop down list. If you wish to remove a selected category, double click it and a confirmation screen will display.

Print Contract Inquiries

To print Contract Inquiries, select the checkbox.

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The ***Date Range*** report provides a list, by sales category if necessary, of contracts expiring:

```
                    10 - JC Jonas Construction          Pg 1
              List of Service Contracts that will expire
                     between Oct01/10 & Oct31/10

                                                Expires              Sales
Customer / Name                       Contract  on Date       Amount Cat

BESTBUYA   Best Buy Aurora            0000000035 Oct31/10    1,200.00 NORTH
BESTBUYC   Best Buy Champaign         0000000099 Oct31/10    1,200.00 SERVICE
BESTBUYC   Best Buy Champaign         0000000456 Oct31/10    1,200.00 SERVICE
BESTBUYH   Best Buy Hinsdale          0000000042 Oct31/10    1,200.00 NORTH
BESTBUYR   Best Buy Rockford          0000000033 Oct31/10    1,200.00 NORTH
MORCO*     Morgan Company Inc         0000040-R1 Oct31/10    1,200.00 NORTH
                                                            ----------
 6 Contracts expiring                                          7,200.00

                        ===== End of Report =====
```

This list is used to phone customers, send renewal notices / invoices / preliminary invoices, for whatever your company policy requires. Once you know which contracts to renew, proceed to the Fast Renewals screen.

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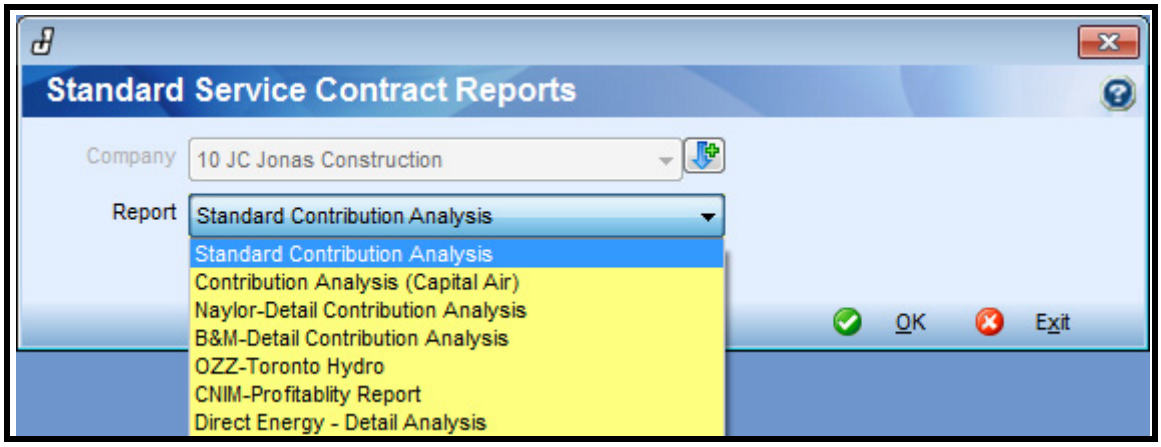
Service Billing -> Service Contract -> Service Contract Lists -> Std Service Contract Reports

Std Service Contract Reports

There are currently seven reports in this group, the ***Jonas Standard*** and seven others that were customized for specific clients. All provide similar costing information and can be run in a multitude of ways. Summary, detail, by month, all customers, selected customers; all contract types, selected types, categories, salesperson etc. There are literally hundreds of combinations.



Note:

You must run the Report using the same parameters, to ensure one period is directly comparable to another. Our suggestion is to print the screen the way you want it to run and paste that print screen into any Word processing software. Print it out so you have a record of the configuration you have chosen to use.

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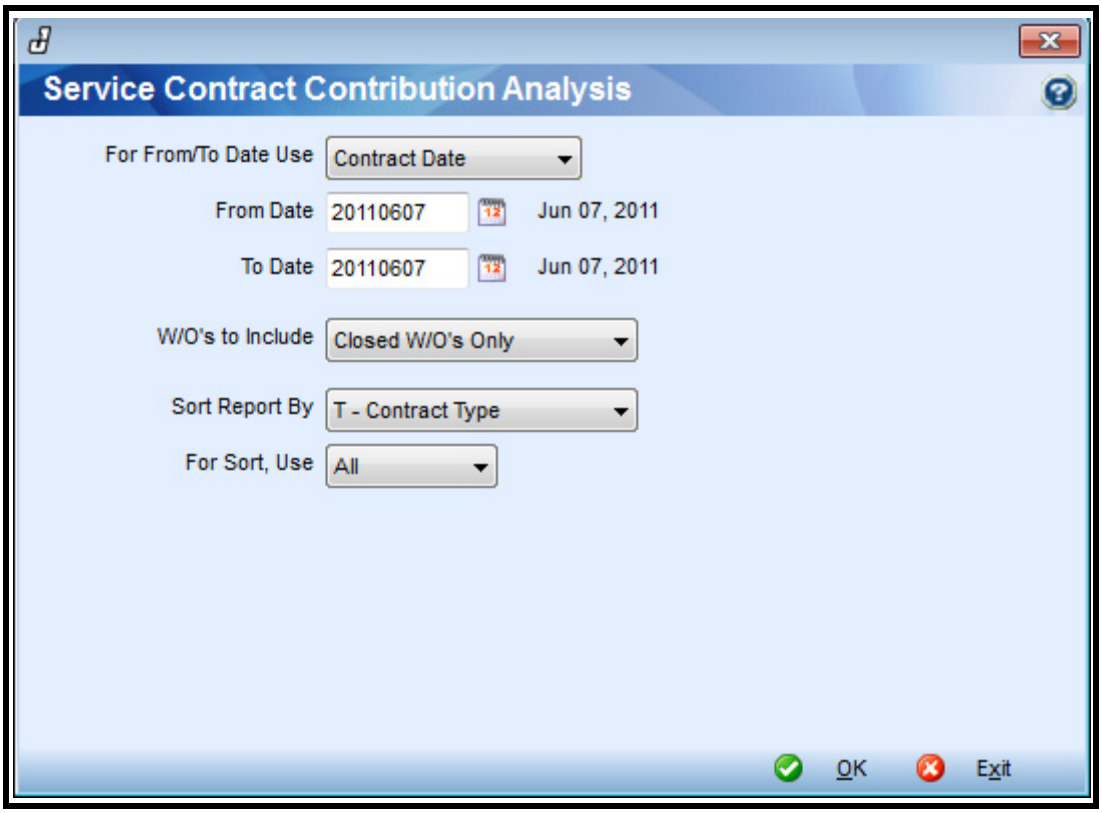
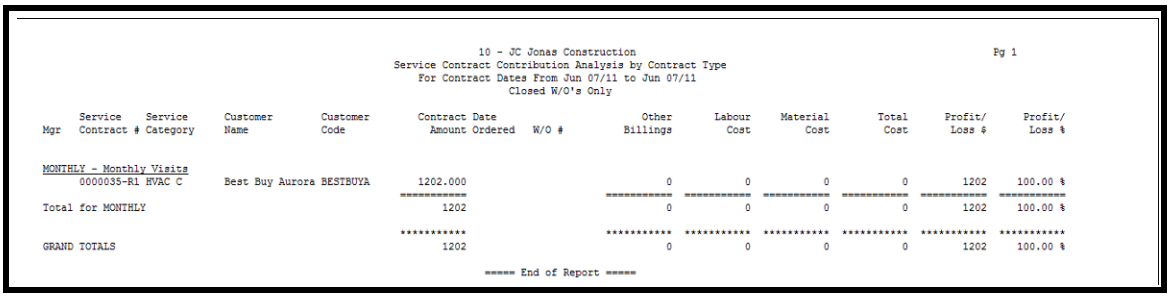
When you select the type of report you wish to print, a selection window will appear that will allow you to enter in criteria. The screen you see will vary depending on the report chosen. For the Standard Contribution Analysis report, you will see the following:



A sample report is shown below:



10 - JC Jonas Construction
Service Contract Contribution Analysis by Contract Type
For Contract Dates From Jun 07/11 to Jun 07/11
Closed W/O's Only

Pg 1

Mgr	Service Contract #	Service Category	Customer Name	Customer Code	Contract Date Amount Ordered	W/O #	Other Billings	Labour Cost	Material Cost	Total Cost	Profit/ Loss $	Profit/ Loss %
MONTHLY - Monthly Visits												
	0000035-R1	HVAC C	Best Buy Aurora	BESTBUYA	1202.000		0	0	0	0	1202	100.00 %
					==========		==========	==========	==========	==========	==========	==========
Total for MONTHLY					1202		0	0	0	0	1202	100.00 %
					**********		**********	**********	**********	**********	**********	**********
GRAND TOTALS					1202		0	0	0	0	1202	100.00 %

===== End of Report =====

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Service Billing -> Service Contract -> Service Contract Lists -> Clients without Svc Contracts

Clients Without Svc Contracts

This option will produce a list of all customers in your Service System Profile > A/R Subledger that don't have a service contract setup.

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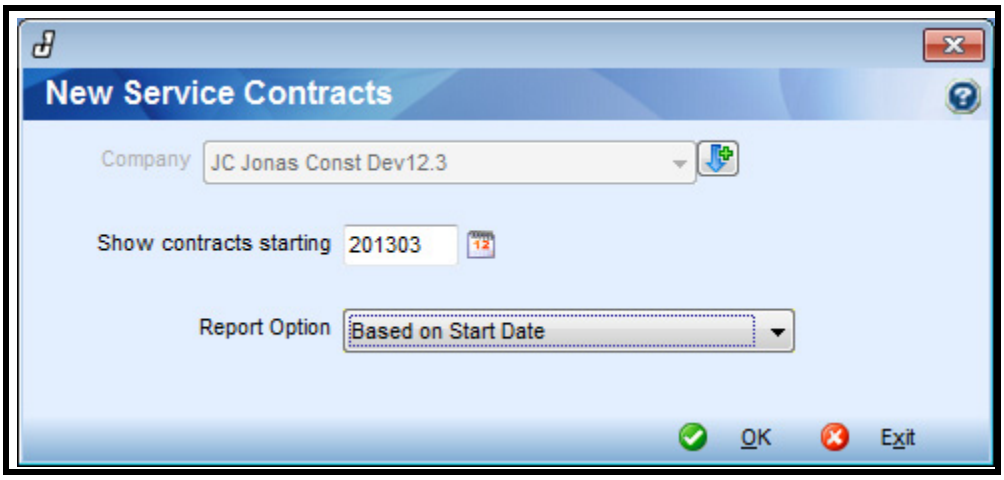
Service Billing -> Service Contract -> Service Contract Lists -> New Service Contracts

New Service Contracts

This option will produce a list of new service contracts setup that start on a specified date.



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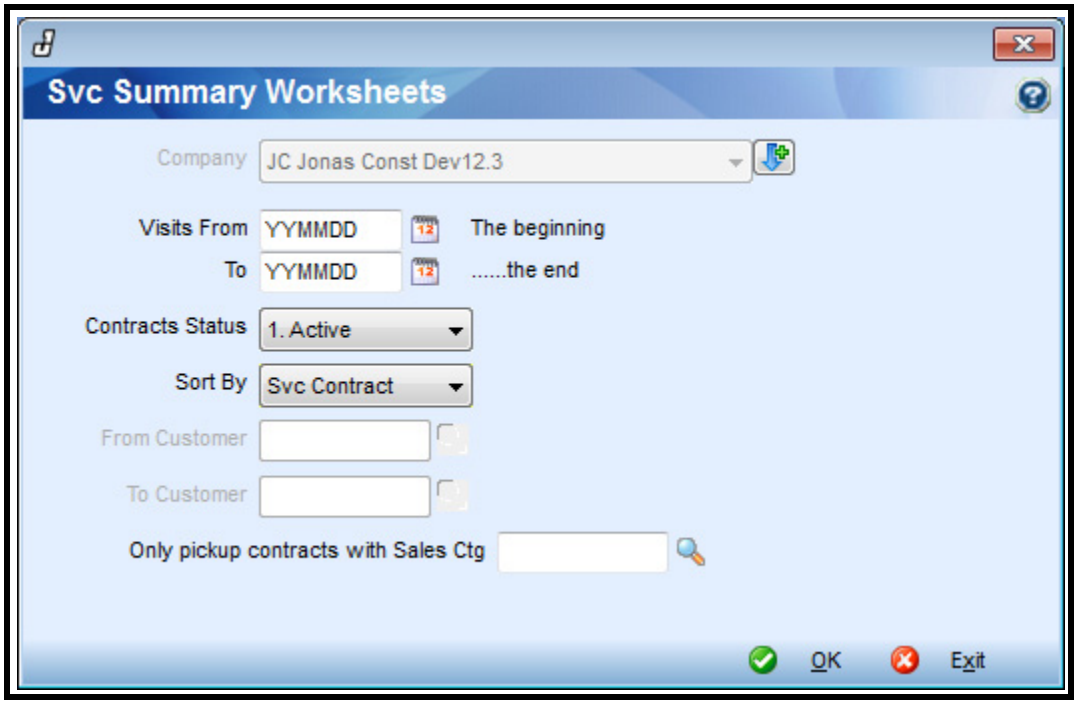
Service Billing -> Service Contract -> Service Contract Lists -> Service Summary Worksheets

Service Summary Worksheets

This option will print worksheets for upcoming service contract visits in a date range that can be filtered or conditioned in different ways.



Visits From

Enter the starting (**FROM**) date to be used (ie. only Visits from the ***FROM*** date up to and including the ***TO*** date will be included). Press <**ENTER**> to start at the first date on file or press <**F2**> to select the date from the Calendar.

Visits To

Enter the ending (**TO**) date to be used (ie. only Visits from the ***FROM*** date up to and including the ***TO*** date will be included). Press <**ENTER**> to start at the first date on file or press <**F2**> to select the date from the Calendar.

Contracts Status

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From the drop-down list, select the status of contracts that you wish to view.

Sort By

From the list, select the sequence in which the report is to be printed:

- Service Contract
- Technician
- Customer
- Range of Customers

From Customer

If a *Range of Customers* was selected in the *Sort By* field above, enter the starting (**FROM**) customer code to be used (ie. only customers from the ***FROM*** customer up to and including the ***TO*** customer will be included). Press <**ENTER**> to start at the first customer on file or press <**F2**> to select from existing customers on file.

To Customer

If a *Range of Customers* was selected in the *Sort By* field above, enter the ending (**TO**) customer to be used (ie. only customers from the ***FROM*** customer up to and including the ***TO*** customer will be included). Press <**ENTER**> to start at the first customer on file or press <**F2**> to select from existing customers on file.

Only pickup contracts with Sales Ctg

If you wish to only select contracts with a specific Sales Category, enter one here or press <**F2**> to select from Sales Categories on file.

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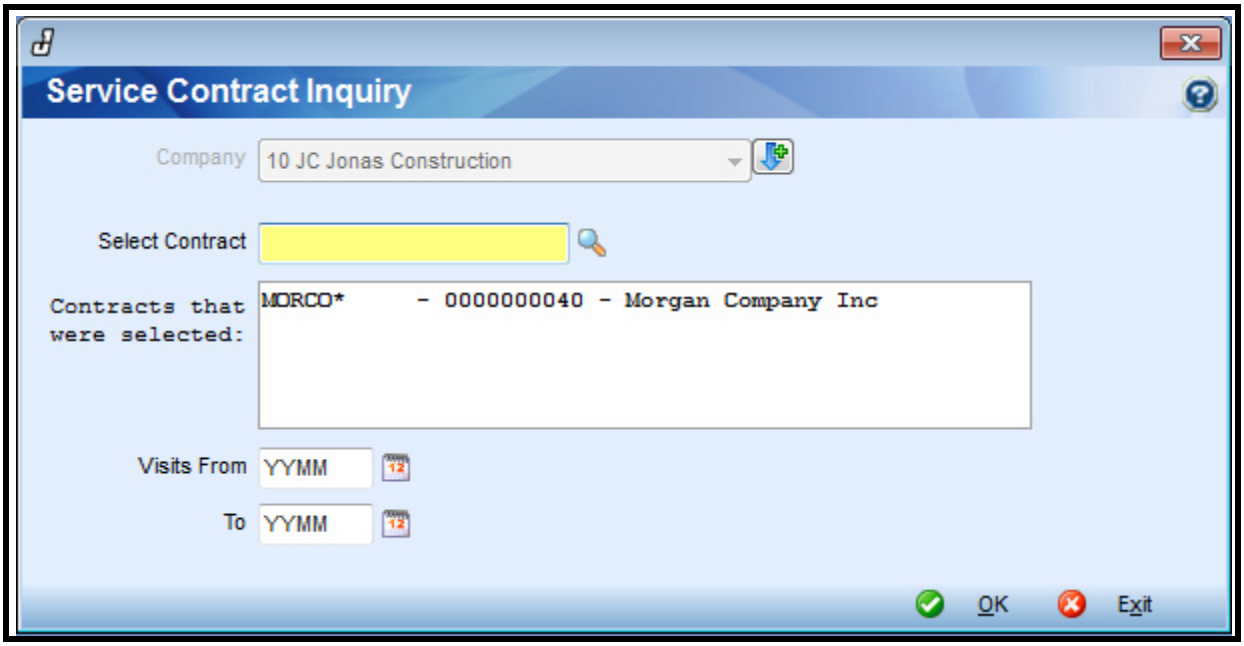
Service Billing -> Service Contract -> Service Contract Inquiry

Service Contract Inquiry

It is important to know how you have performed on past contracts and to make projections on how you are doing on current contracts. The Service Contract Inquiry is good tool for both scenarios. It is viewed on screen with a drill down to the individual W/O's. It may be printed as well.



To drill down to the Comprehensive W/O Inquiry, double click on the W/O number.

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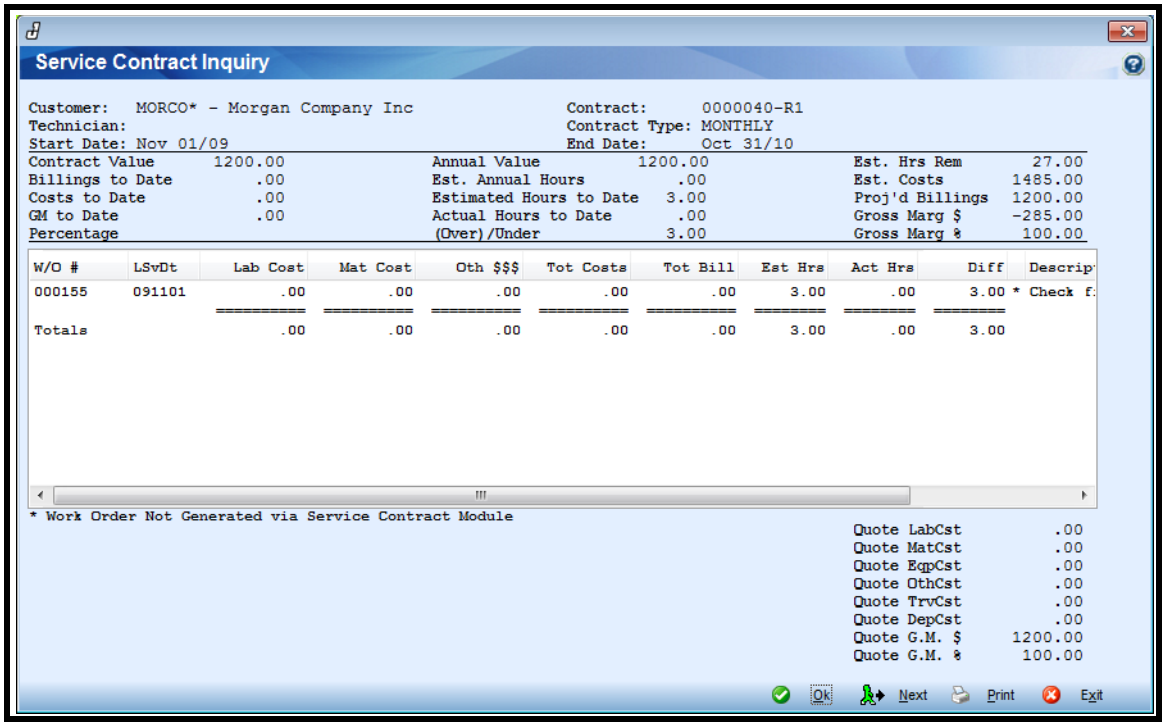
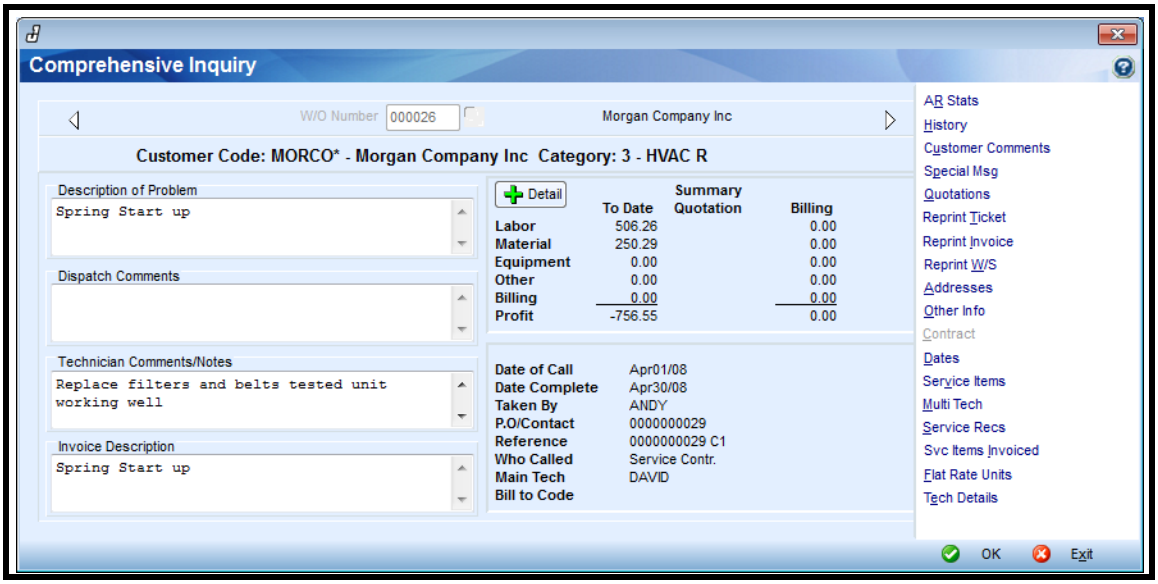


This inquiry shows your current position and projected gross margin. If the contract has a low or negative gross margin, clients want to have that information as soon as possible.



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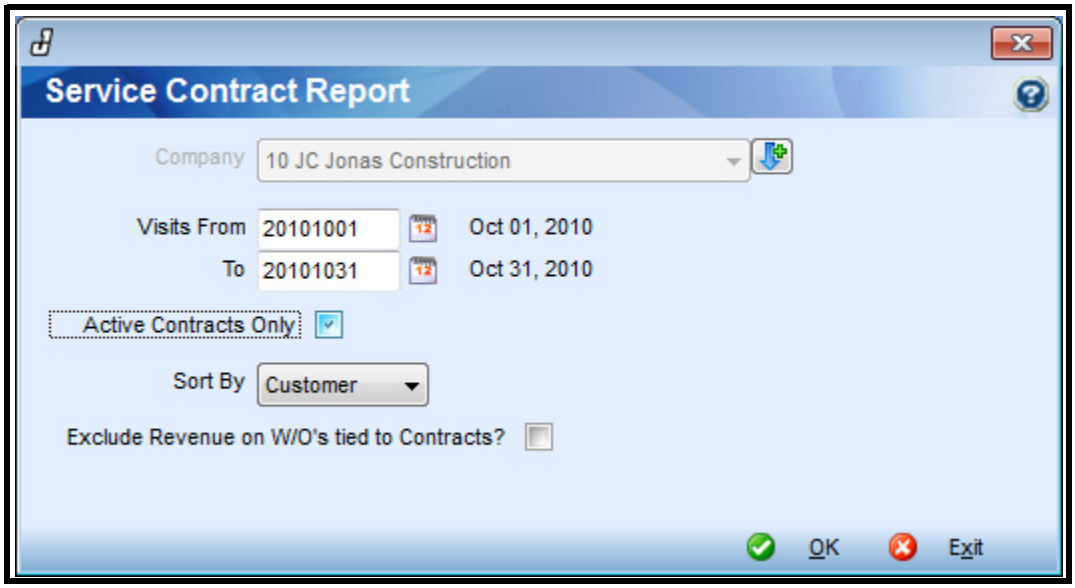
Service Billing -> Service Contract -> Service Contract Report

Service Contract Report

The ***Service Contract Report*** shows current position and projections. It will show all contracts at one time, by customer or sales representative. This report can be used to find poorly performing contracts and the Service Contract Inquiry will help investigate what went wrong.



Visits From

Enter the starting (***FROM***) date to be used (ie. only Visits from the ***FROM*** date up to and including the ***TO*** date will be included). Press <**ENTER**> to start at the first date on file or press <**F2**> to select the date from the Calendar.

Visits To

Enter the ending (TO) date to be used (ie. only Visits from the ***FROM*** date up to and including the ***TO*** date will be included). Press <**ENTER**> to start at the first date on file or press <**F2**> to select the date from the Calendar.

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Active Contract Only

Do you want to include only active Contracts in the report?

YES (check the box) or ***NO*** (do not check the box) to include all Contracts, whether active or not.

Sort By

From the list, select the sequence in which the report is to be printed:

- sorted by Customer code, or
- sorted by Salesperson code.

Exclude Revenue on W/O's tied to Contracts?

When the Flag is checked, only revenue billed through Contract Billing will be included on this report.

A sample report is shown below:

10 - JC Jonas Construction Pg 1
Service Contract Report
Visit Date From : Oct 01, 2010 to : Oct 31, 2010
Sort By Customer, Active Contracts Only

Customer Name	Sales Rep	Contract Type	Contract Number	Start Date	End Date	Contract Value	Billings to Date	To Date Costs to Date	G.M. to Date	G.M. %	Hrs Remain	Projected Cost to Complete	Gross Margin	G.M. %	Lab Costs	Quoted Mat Costs	G.M.$	G.M.%
Best Buy Aurora		MONTHLY	0000000035	Nov 01/09	Oct 31/10	1,200	0	0	0	0	2	110	1,090	91	0	0	1,200	100
Best Buy Champaign		MONTHLY	0000000099	Nov 01/09	Oct 31/10	1,200	0	0	0	0	2	110	1,090	91	0	0	1,200	100
Best Buy Champaign		MONTHLY	0000000456	Nov 01/09	Oct 31/10	1,200	0	0	0	0	2	110	1,090	91	0	0	1,200	100
Best Buy Hinsdale		MONTHLY	0000000042	Nov 01/09	Oct 31/10	1,200	0	0	0	0	2	110	1,090	91	0	0	1,200	100
Best Buy Rockford		MONTHLY	0000000033	Nov 01/09	Oct 31/10	1,200	0	0	0	0	2	110	1,090	91	0	0	1,200	100
Morgan Company Inc		MONTHLY	0000040-R1	Nov 01/09	Oct 31/10	1,200	0	0	0	0	2	110	1,090	91	0	0	1,200	100
						7,200		0		0		660		91		0		100
							0		0		12		6,540		0		7,200	

===== End of Report =====

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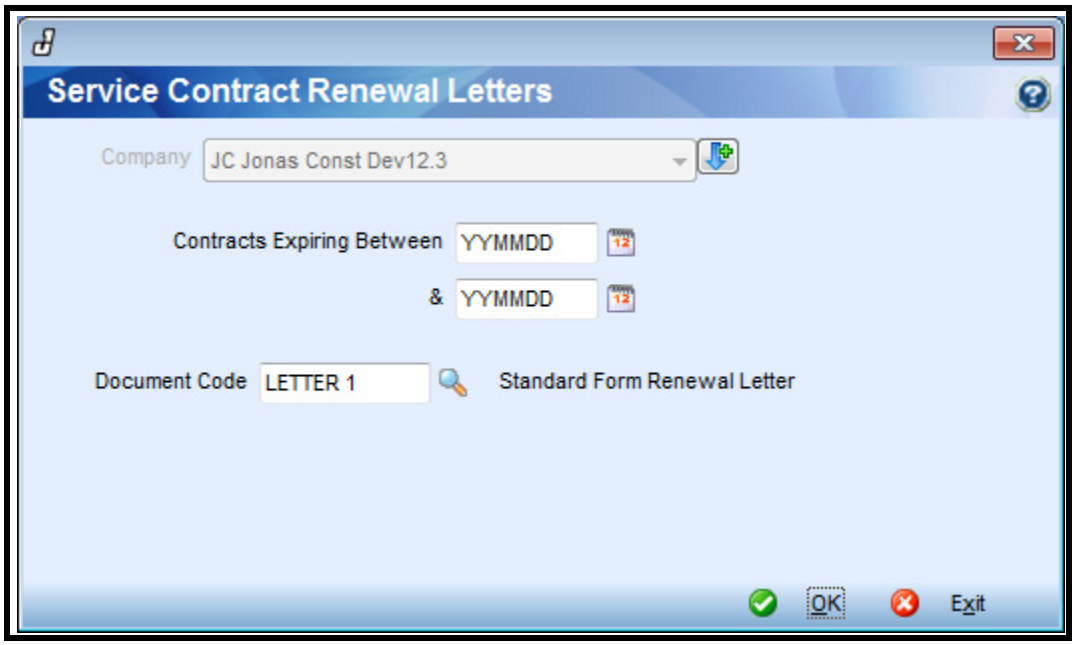
Service Billing -> Service Contract -> Svc Contract Renewal Letters

Svc Contract Renewal Letters

This program will print renewal letters for service contracts expiring within the specified date range using the template set up in the Admin. menu option under Letter Designer.

This template will be designed by the user.



Contracts Expiring Between (From)

Enter the starting (**FROM**) date to be used (ie. only Contracts expiring from the ***FROM*** date up to and including the ***TO*** date will be included). Press <**ENTER**> to start at today's date or press <**F2**> to select the date from the Calendar.

Contracts Expiring Between (To)

Enter the ending (**TO**) date to be used (ie. only Contracts expiring from the ***FROM*** date up to and including the ***TO*** date will be included). Press <**ENTER**> to start at today's date or press <**F2**> to select the date from the Calendar.

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Document Code

Enter the renewal letter to print or hit <**F2**> to select one from a list. To design a renewal letter, go to **Administration > Letter Designer**.

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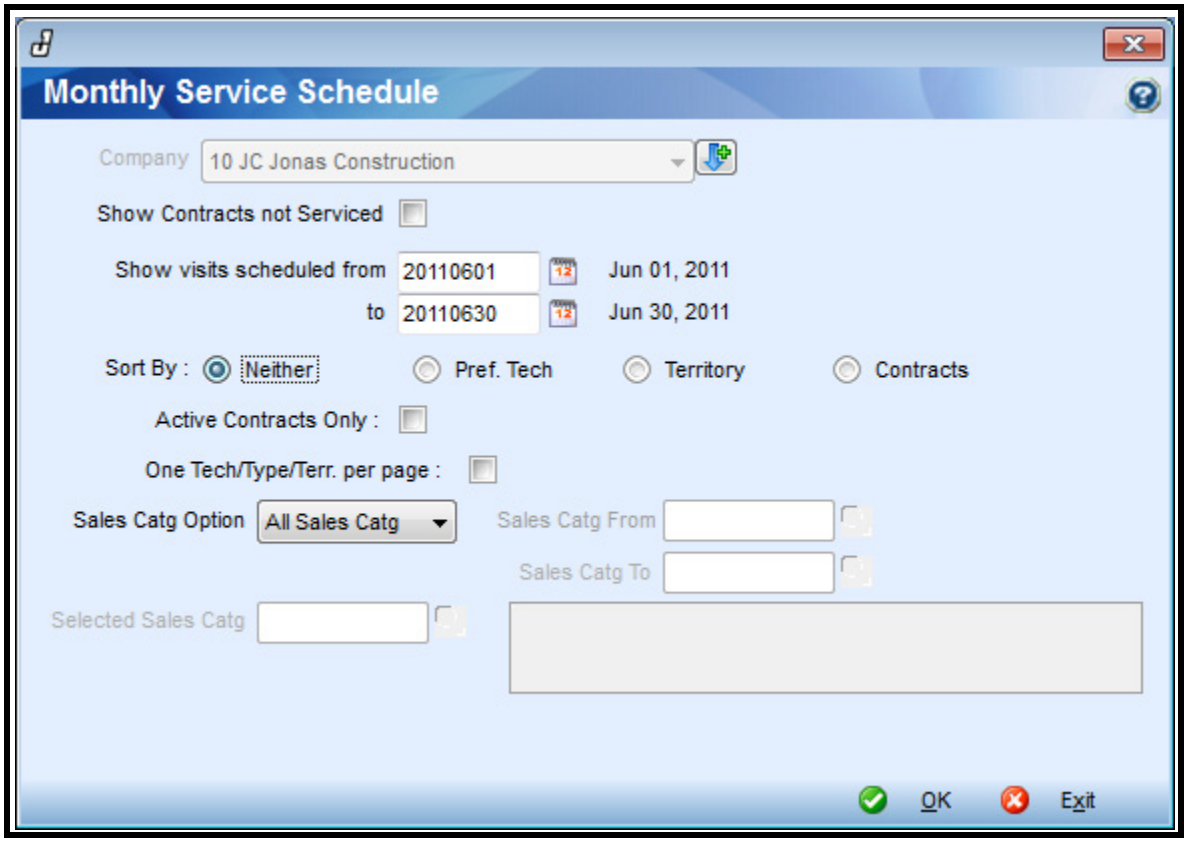
Service Billing -> Service Contract -> Mthly Service Schedule

Monthly Service Schedule

This report provides a list of the work to be done this month, or for any date range to help you schedule manpower and material requirements. Sorting by territory helps organize the maintenance work by area. Sorting by technician shows the number of pre-assigned calls. The Report should be run prior to the running of the tickets. To ensure that no contracts have been missed put a tick in the box “Show Contracts not Serviced”. This adds the contracts with no scheduled visits to the report. Review these to make sure there are none included in this group that should be serviced. If you find any, check the visit schedule to see why they are not included.



Company

Press <**ENTER**> to accept the default Company whose information you wish to see or use the Small Down Arrow to select from a list of Companies.

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Show Contracts not Serviced

Do you want the computer to show Contracts that have not yet been serviced? This will include dispatch tickets that have not been completed.

YES (check the box)

NO (do not check the box) to include only Contracts that have been serviced

> ***Note:***
> The "Finished" date field is updated when you change your ***Work Order*** status to "complete."

Show visits scheduled from

Enter the starting (***FROM***) date to be used. Only Visits from the FROM date up to and including the TO date will be included. Press <**ENTER**> to accept the displayed date. Press <**F2**> to select the date from the Calendar.

Show visits scheduled to

Enter the ending (**TO**) date to be used. Only Visits from the FROM date up to and including the TO date will be included. Press <**ENTER**> to accept the displayed date. Press <**F2**> to select the date from the Calendar.

Sort By:

In which sequence do you want the Schedule to be printed?

- **Preferred Technician** (check the box) to sort by Technician code
- **Territory** (check the box) to sort by the 3rd shipping address line and NOT the field TERRITORY
- **Contract Type** (check the box) to sort by Contract type
- **Neither** (check the box) for no sorting

Active Contracts Only

Do you want to include only active Contracts in the Schedule?

YES (check the box)

NO (do not check the box) to include all Contracts, whether active or not

One Tech/Type/Terr. per page:

Do you want each Technician/Contract Type/Territory to start on a separate page?

YES (check the box)

NO (do not check the box) to print everything with no separate page breaks

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Sales Catg Option

Select the Sales Categories that you want printed and the corresponding entry fields will become available on screen:

- All Sales Catg
- Selected Sales Catg
- Range of Sales Catg

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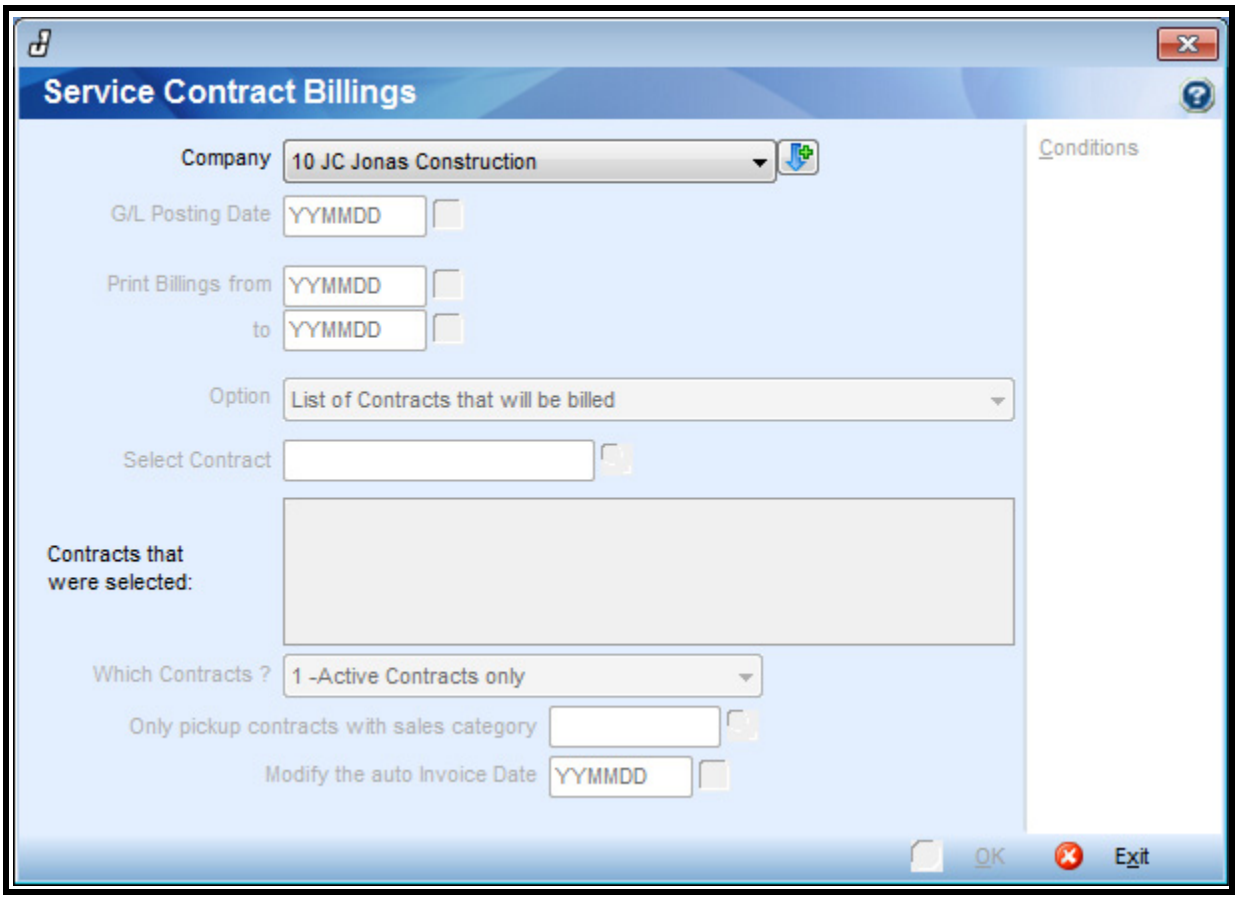
Service Billing -> Service Contract -> Service Contract Billings

Service Contract Billings

To create invoices for the month, the computer will go through the billing schedules that were established for the contracts. It looks for billings in the date range requested.



Before printing the actual invoices it is a good idea to print a list of the contracts that will be billed. It gives you a chance to scrutinize your list. Once you are satisfied that the bills that will be sent are correct, you are ready to print your invoices. Often, this is a very large run so you can do the following to break it up into smaller batches:

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1. ***The billing schedule of the contract itself (The date to bill was established).*** It could be any date. When you run the bills you may want to run from the 1st to the 15th and in another run, from the 16th to the 31st.

2. ***The Sales Category filter.*** You may want to run invoices for each Sales Category individually or, do one Sales category and then bill all the rest.

> ***Note:***
> The system will not "double bill" a contract. You can run one sales category then at another time do the entire file. The original sales category that was billed will not bill in the second run.

3. There is a ***customer filter*** that allows the billing of select customers or a range of customers. You could print A - F, G - M & N - Z to break up the printing into more manageable segments.

Residential contractors have a different challenge than the commercial contractors. In residential contracting there often are a large number of contracts expiring and an uncertainty of whether the contract will be renewed. To help overcome this dilemma, some residential contractors will renew all contracts and print preliminary invoices. These renewed contracts are put on "Hold" to prevent any work being done prior to the money being received. The preliminary invoices are mailed with a note to pay the invoice in order to renew the contract. When the money is received, the invoice is printed "Actual" and posted to the customers account. The contract is taken off hold and visits scheduled with the customer. The advantage of this method is that there aren't a lot of credits to post when customers don't renew as the Sale/AR is only recognized when the cash is received.

G/L Posting Date

Enter the date to be used for posting.

Press <**ENTER**> for the current date. Press <**F2**> to select the date from the Calendar.

Print Billings From

Enter the starting (FROM) date to be used. Only Billings from the FROM date up to and including the TO date will be included. Press <**ENTER**> for the current date or press <**F2**> to select the date from the Calendar.

Print Billings To

Enter the ending (TO) date to be used. Only Billings from the FROM date up to and including the TO date will be included. Press <**ENTER**> for the current date or press <**F2**> to select the date from the Calendar.

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Option

From the list, select one of the options:

- list of Contracts that will be billed
- W/O category list of Contracts that will be billed
- preview (print the Invoices for checking only)
- actual (actual Invoices and update the A/R and G/L files)
- selected actual Invoices (selected Contracts)
- type of Contracts that will be billed
- Billing Schedule only (selected Contracts)

Select Contract

If you selected an option that allows you to select individual contracts for billing, enter the Contract number(s). Each Contract you enter/select will be shown in the box below the field. Press <**F2**> to select from the list of Contracts.

To remove a selected contract:

If you select a Contract, then decide that it is not the one you want, you may remove it from the "selected" list by double clicking the one you want to remove from the box below the field (the computer will ask you to confirm that you want to remove it from the "selected" list).

Which Contracts?

Select which contracts you want to bill from either:

- Active Contracts Only
- All Contracts
- Quotes Only

Only pickup contracts with sales category

If you want to restrict the Billing to a specific Sales Category, enter the Sales Category code. Press <**F2**> to select from a list of codes or press <**ENTER**> to include all Sales Categories.

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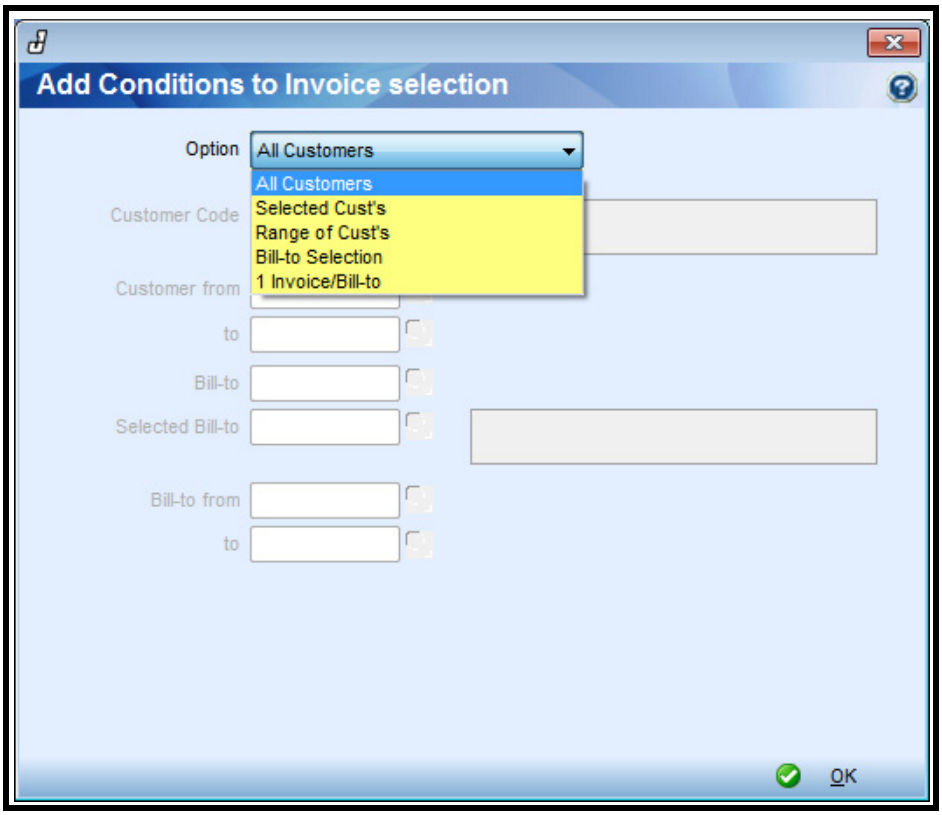
Conditions Button

This button displays a screen that allows you to enter in additional conditions for invoice selection.



Option

Choose if you wish to select:

- All Customers (default)
- Selected Customers
- Range of Customers
- Bill-to Selection
- Invoice Bill/To

Customer Code

Press <**F2**>, click the ***Lookup Button***, or type the ***Customer Code*** to select from the list of customers.

Customer From/To

Press <**F2**>, click the ***Lookup Button***, or type the ***Customer Code*** to select the ***FROM*** and ***TO*** customer.

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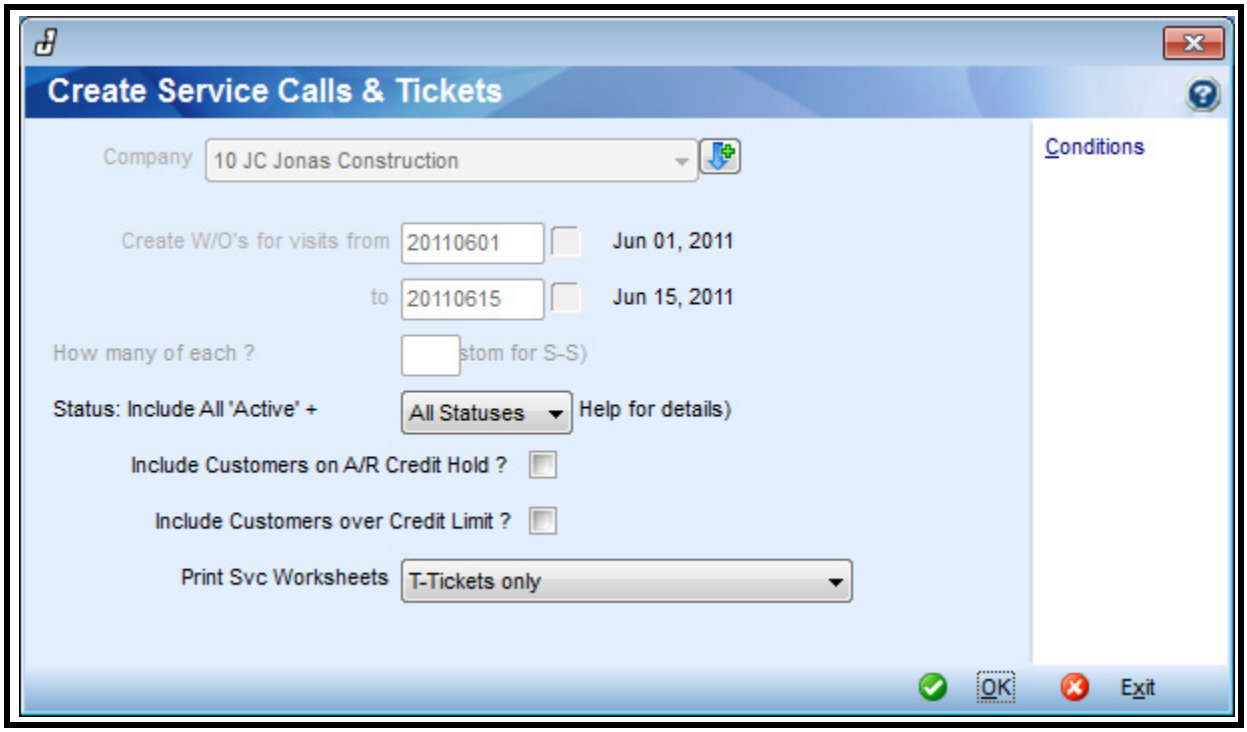
Service Billing -> Service Contract -> Create Svc Calls & Tickets

Create Service Calls & Tickets

The ticket program is similar to the billing program in that it goes through the schedules, in this case the visit schedules, to find calls in the date range requested. You can print all your tickets or just select specific date ranges. Tickets are usually printed one or two weeks before the month begins. It's best to have the tickets printed. If the technician is called to the site on a T & M call he can perform the scheduled maintenance at the same time and possibly save an extra trip.



Company

Press ***ENTER*** to accept the default Company whose information you wish to create, or use the ***Small Down Arrow*** to select from a list of Companies.

Create W/O's for visits from

Enter the starting (***FROM***) date to be use. Only Visits from the FROM date up to and including the TO date will be included. Press ***ENTER*** for the current date or press ***F2*** to select the date from the Calendar.

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Create W/O's for visits to

Enter the ending (***TO***) date to be used. Only Visits from the FROM date up to and including the TO date will be included. Press ***ENTER*** for the current date or press ***F2*** to select the date from the Calendar.

Status: Include All 'Active' +

You can decide on the basis of the Service Contract Status (found on the Dates/Tables screen in Setup Service Contracts) which Service Contracts to create Service Calls/Tickets for.

The default is to include all Service Contracts that are set to '**Active**' status and nothing else. To choose this option, leave the drop box blank.

If you wish to include all '***Active***' status contracts AND ones that are '***Hold***', '***Inactive***', or '***Quote***' statuses, then choose Hold, Inactive, or Quote from the drop box list.

If you wish to include ***ALL*** contracts (whatever their status), then choose 'All Statuses' from the drop box list.

Include Customers on A/R Credit Hold?

Do you wish to create Service Calls for those Customers who's Credit Limit has been set to 9.99 (on hold)? Check the flag if ***YES*** or leave the flag unchecked if ***NO.***

Include Customers over Credit Limit?

Do you wish to create Service Calls for those Customers who have exceeded their Credit Limit? Check the flag if YES or leave the flag unchecked if NO.

Print Svc Worksheets

Select from the list how you would like the Svc Worksheets printed:

- **T** - Tickets
- **W** - Worksheets Only
- **B** - Both Tickets and Worksheets
- **C** - Checklist and Tickets
- **A** - Worksheets and Checklist
- **E** - Tickets, Checklist and Worksheets
- **N** - No Paper, just create Calls

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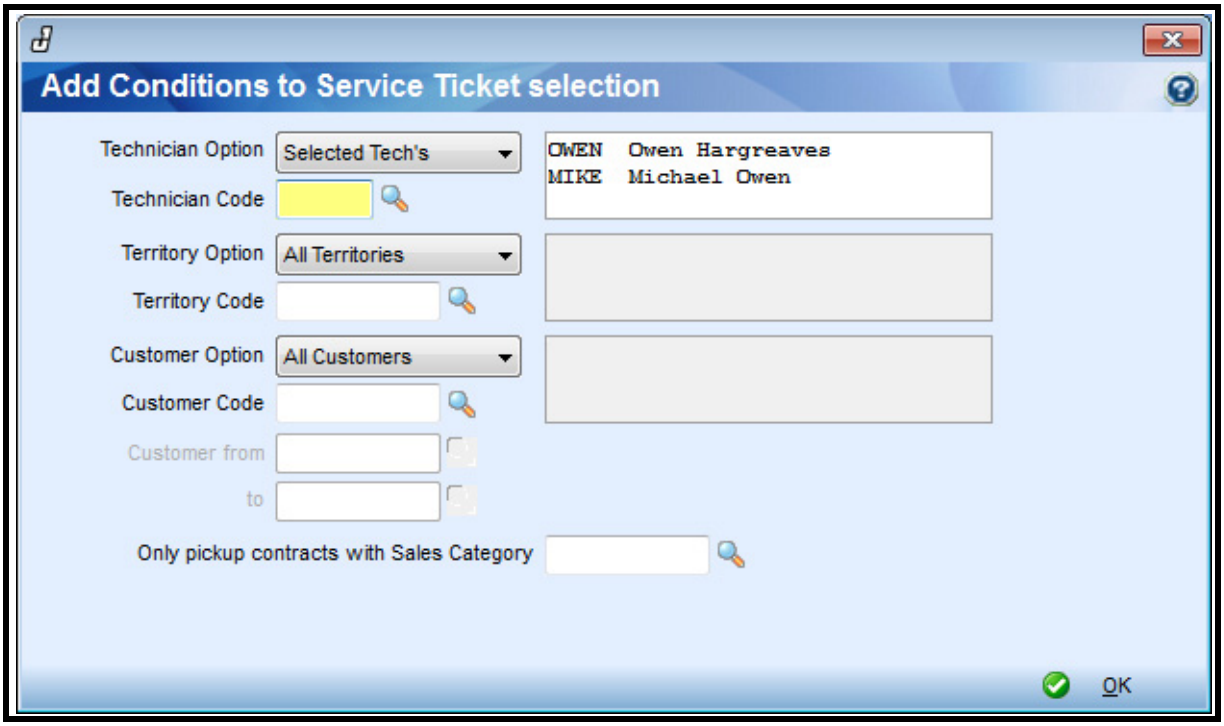
Conditions Button

If using a date range is insufficient to segment your batches, click on the "**Conditions**" button and select additional criteria. You can print for selected territories, technicians, customers or, a range of customers. Additionally you can further condition or filter the run to use only a specific Sales Category.



Technician Option

You may print tickets for only these Tech's or select All. This is the Main Tech in the visit schedule.

Territory Option

Select the territories that you would like to print tickets for or pick "All" for all territories.

Customer Option

Select the Customer(s) you would like tickets for.

Only Pickup Contracts with Sales Category

To condition by Sales Category, enter it here. Leave it blank to ignore Sales Categories.

> ***Note:***
> The system will not issue two tickets for the same call. It will ignore contracts where a ticket has already been printed for that visit.

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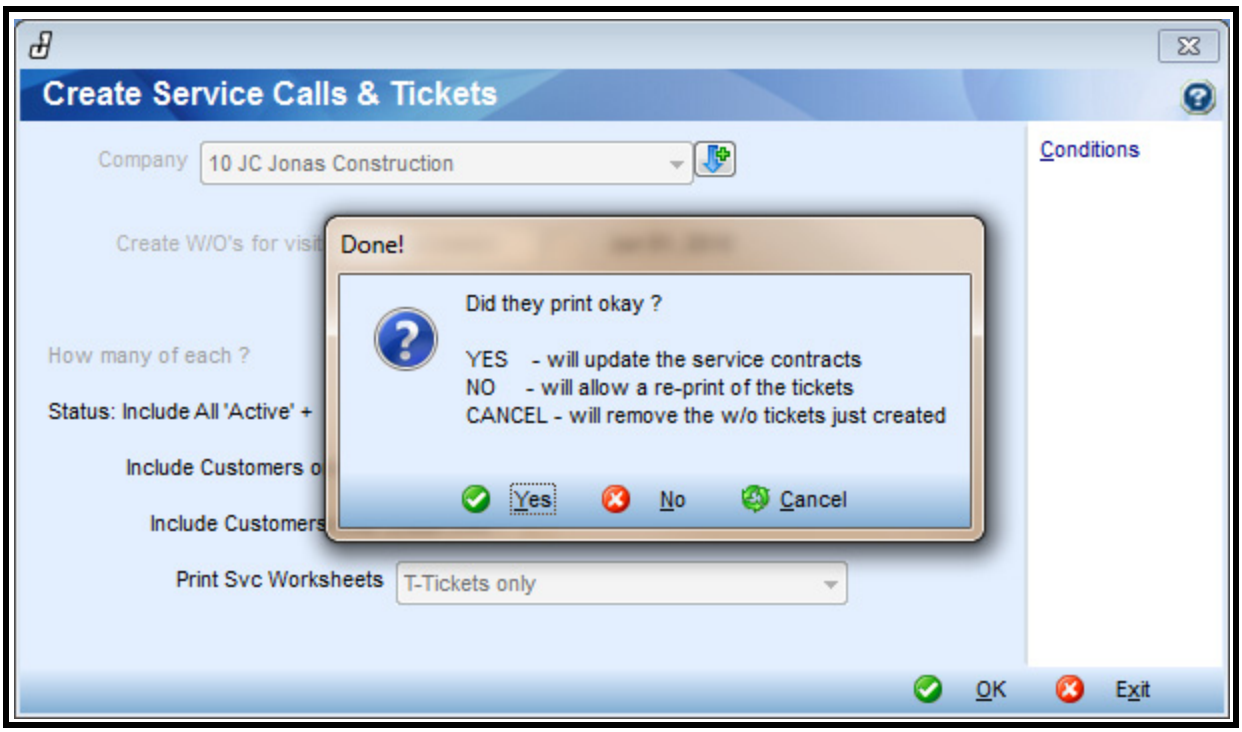

Once printing is finished the system will ask if they printed **OK**.

- **YES** - Means write the W/O number created back to the contract that shows the W/O which was issued for that call and prevent the system from issuing another ticket for that call.
- **NO** - Means they didn't print correctly but you want to continue with the issuing of maintenance W/O's so write the W/O number back to the contract but let me print the copy again as they didn't print correctly.
- **CANCEL** - Means you're unhappy with what just happened and you want to do start over again.

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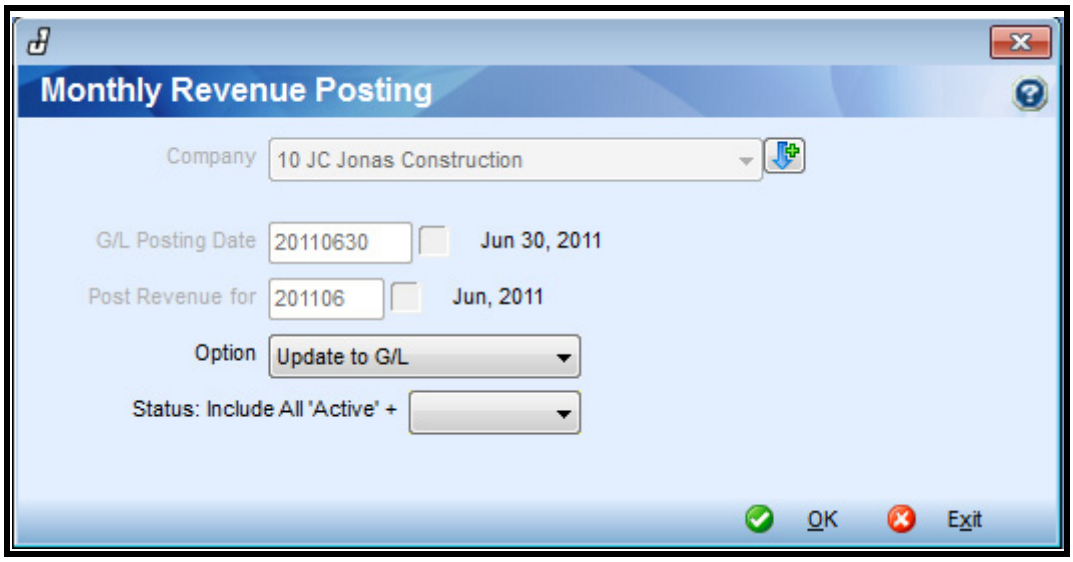
Service Billing -> Service Contract -> Monthly Revenue Posting

Monthly Revenue Posting

Most contractors have revenue schedules associated with their contracts. Revenue is posted monthly. It will immediately increase Sales and decrease your liability account, Deferred Revenue.

The Revenue Forecast and the Analysis of Deferred Revenue Reports show you the revenue you will be recognizing. This should coincide with the quantity of work you are going to do over the next 3 months. Remember the accountants matching principle; you want your Sale to be in the same period that you did the work. These reports also provide a reconciliation of the G/L Deferred Revenue account.

The ***Monthly Revenue Posting*** moves the money from deferred to sales. We suggest you run in the preliminary mode first. Scrutinize the preliminary report before running the report to update.



G/L Posting Date

Enter the date to be used for posting. Press <**ENTER**> for the current date.

Press <**F2**> to select the date from the Calendar.

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Post Revenue for

Enter the Period/month to be used. Press <**ENTER**> for the current month or press <**F2**> to select the month from the Calendar.

Option

From the list, select whether to:

- update the General Ledger, or
- print a preliminary report (i.e. no G/L update)

Status: Include All 'Active' +

If you wish to include all '***Active***' status contracts AND ones that are '***Hold***', '***Inactive***', or '***Quote***' statuses, then choose Hold, Inactive, Quote, or All from the drop box list.

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Service Billing -> Service Contract -> Monthly Warranty Posting

Monthly Warranty Posting

This program allows you to post your monthly recognized Warranty Revenues.

Note:
The amount of the entry posted will be the warranty amount divided by the number of month of the warranty.

G/L Posting Date
Enter the date to be used for posting. Press <**ENTER**> for the current date. Press <**F2**> to select the date from the Calendar.

Post Revenue for
Enter the Period/month to be used. Press <**ENTER**> for the current month or press <**F2**> to select the month from the Calendar.

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Option

From the list, select whether to:

- update the General Ledger, or
- print a preliminary report (i.e. no G/L update)

Status: Include All 'Active' +

If you wish to include all '***Active***' status contracts AND ones that are '***Hold***', '***Inactive***', or '***Quote***' statuses, then choose Hold, Inactive, Quote, or All from the drop box list.

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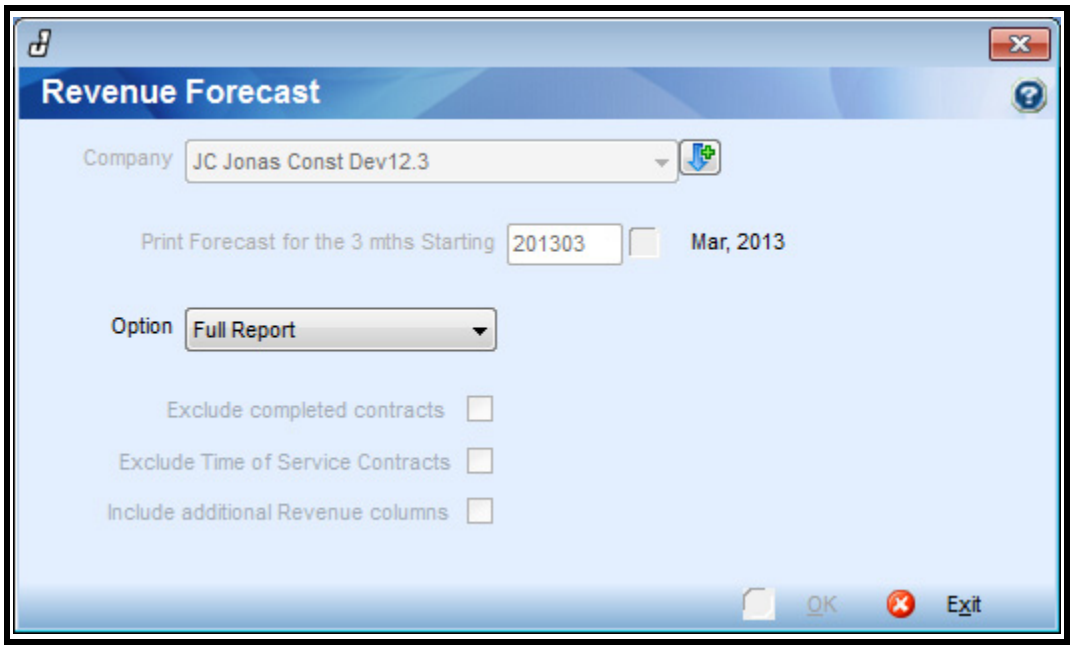
Service Billing -> Service Contract -> Revenue Forecast

Revenue Forecast

This program allows you to print a list showing (by month and in total) the Revenue expected for a six-month period starting from the date requested. Each Service Contract relating to the Revenue will be listed.



Print Forecast for the 3 mths Starting

Enter the starting Period/month to be used. Press <**ENTER**> for the current month. Press <**F2**> to select the month from the Calendar.

Option

From the list, select the type of report you want:

. full report, or

. quick summary.

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Service Billing -> Service Contract -> Analysis of Revenue

Analysis of Revenue

This program allows you to print a report showing the deferred (or unearned) income as of the date specified.

Only contracts with a balance in deferred revenue will print. Contracts that have $0 of outstanding revenue will not print.

Balance As Of

Enter the Period/month to be used. Press <**ENTER**> for the current month or press <**F2**> to select the month from the Calendar.

Option

From the list, select the type of report you want:

. full report, or

. quick summary.

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Use Service Contract Dates for Analysis

If checked, this flag will use the Service Contract's last billing date and last revenue allocation date for analysis.

If left unchecked, it will use the current date for analysis.

Starting Period

In Service Contracts, the Analysis of Revenue report now includes an option to enter a 'Starting Period" when running the report to allow you to display revenue analysis within a specific period range.

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Service Billing -> Service Contract -> Analysis of Warranty

Analysis of Warranty

This program allows you to print a report showing the deferred (or unearned) warranty as of the date specified.

Balance As Of

Enter the Period/month to be used. Press <**ENTER**> for the current month or press <**F2**> to select the month from the Calendar.

Option

Only the Full Report option is available at this time.

Use Service Contract Dates for Analysis

If checked, this flag will use the Service Contract's last billing date and last revenue allocation date for analysis.

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If left unchecked, it will use the current date for analysis.

Starting Period

Entering a Starting Period will allow you to display warranty analysis within a specific period range.

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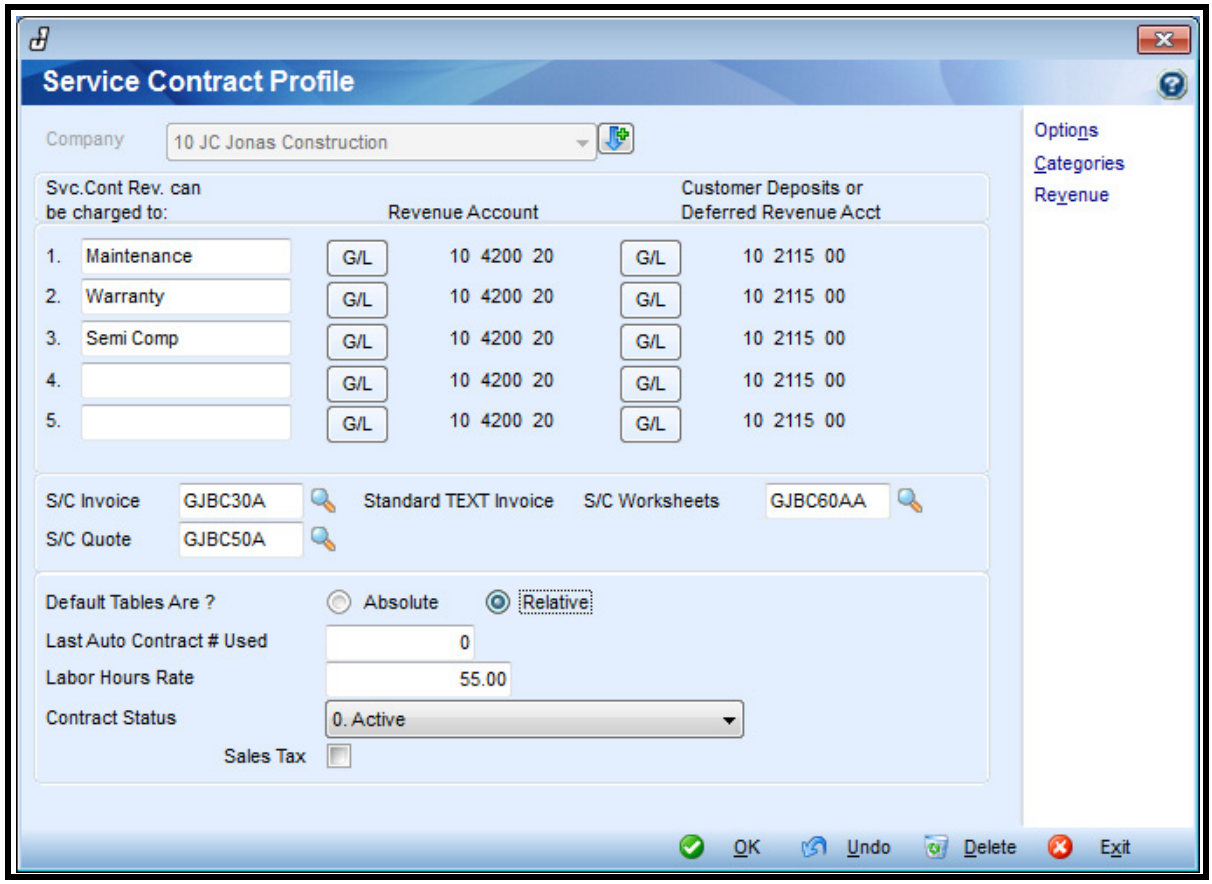
Service Billing -> Service Contract -> Service Contract Profile

Service Contract Profile

This screen must be setup for the service contract module to operate properly. It will establish the rules with which the module will control how revenue is recognized and contracts are setup.



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Categories and GL Integration

You may establish up to five different revenue categories. These categories will allow you to split your revenue by source of income and allocate the revenue to different G/L revenue accounts for each category; most of our clients only use one or two. You'll notice that there are two columns. One is for income and the other is for deferred revenue. One of the principals of accounting is "matching"; meaning you will always try and put the revenue and the associated costs in the same accounting period.

When a Service Contract is invoiced to the customer, the invoice value is not shown as revenue in the books. It is put into a deferred revenue account. The revenue is then matched to the costs. Accountants regard the sale as having been made when the work is done. Revenue and visit schedules will use the same accounting periods. We want to recognize the sale when the technician goes and does the work.

All five lines must be filled even if they are blank categories. Enter the appropriate G/L account. We recommend using a deferred revenue account solely for Service Contract deferred revenue, making it very easy to reconcile the account.

If you are contractor where your service contract invoices and visits are **always** in the same accounting period, you do not have to setup revenue schedules. This is a decision best discussed with your accountant. If you don't want or need to defer revenue, put your Contract Sales G/L account in the left and the right hand column.

Service Contract Profile - Screen Fields

- The ***Service Contract Revenue*** fields allow you to specify up to five different categories for the General Ledger Revenues (e.g. PM - Preventive Maintenance or WA - Warranty Contract). Up to 10 additional revenue fields are available by pressing the ***Revenue*** button on the right side of the screen.

- Most Companies ***defer revenue*** at the time of Billing, then recognize the Revenue when the Visit takes place. To achieve this, enter your ***G/L Account number*** for Deposits or Deferrals for all 5 of the Revenue items. If you want the Revenue split on recognition, enter the Revenue accounts and complete a Revenue Schedule for each Contract.

- If you want to ***recognize the Revenue immediately***, enter the same Revenue Account number for both the Revenue and Deferral columns. If you need to split it out, you will have to enter the Revenue recognition schedule. Although you won't run the Monthly Revenue Recognition, it will use those values to split the Billing to the appropriate G/L Accounts.

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- Enter the name of the ***Invoice Form*** to be used. You can also press <**F2**> to select from a list of names.

> ***Note:***
> Service Contract Invoice print programs are told **NOT** to print $0 invoices. The only exception is GJBC30G (custom form). "***Standard with National Code***" means the address from the national code will print *instead* of the address from the AR file.

- Enter the name of the ***Quotation Form*** to be used, or press <**F2**> to select from a list of names.

- Enter the name of the Worksheet Form to be used, or press <**F2**> to select from a list of names. The standard GUI is ***GJBC60AA***.

- Select what you would like the ***Default Tables*** to be. Later you will be setting up standard contracts: this question refers to the visit schedule. If you wish the W/O Tickets for the visits to be for the same months shown on the standard schedule, press the **Absolute** button. The visits would always occur in the same months regardless of when the contract was signed (seasonal visits are an example of this). For example, if the visit schedule shows 05 there will be a visit in May.Or, press the **Relative** button and the date will be adjusted to the date the contract was signed. *It is relative to the start date*. For example 05 as determined by the Standard Contract Type visit schedule will be the fifth month from the start of the contract. If the contract start date is Feb. then the first visit will be June.In other words, 5 months from the start date.

> ***Note:***
> You can override this option when setting up the contract itself. The majority of customers have their table set as "Relative". This means you require fewer standard contracts.

- Enter the ***Last Auto Contract # Used*** prior to system start-up. After system start-up, this number will be updated automatically by the computer each time it is assigned to a new Contract.

- The ***Labor Hours Rate*** is applied to projected hours in the Visit Schedule, resulting in future costs when performing Service Contract Inquiries to estimate the costs remaining on a contract. ***Estimated rates*** are used for Service Contracts that are in progress; this rate is multiplied by ***hours remaining*** to get an estimated cost to complete the contract. This estimate, when combined with the actual costs to date yields a ***Projected Gross Margin***.

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- When you set up new Service Contracts, how to do want to set the default ***Contract Status***? Select from:

  0. Active all new or renewal contracts will be set to active.

  1. New as Quote, Renewal as inactive, all new contracts as Quote status, any renewals as inactive.

  2. Automated contracts - Inactive (All Service contracts automatically created by the Charge Parts to Jobs program will be set to Inactive). The User will activate the Service Contract when the home owner purchases. Any manual contracts setup will also be marked as ***Inactive*** if this is set to 2.

- If you usually charge ***Sales Tax*** on Service Contracts, check the box.

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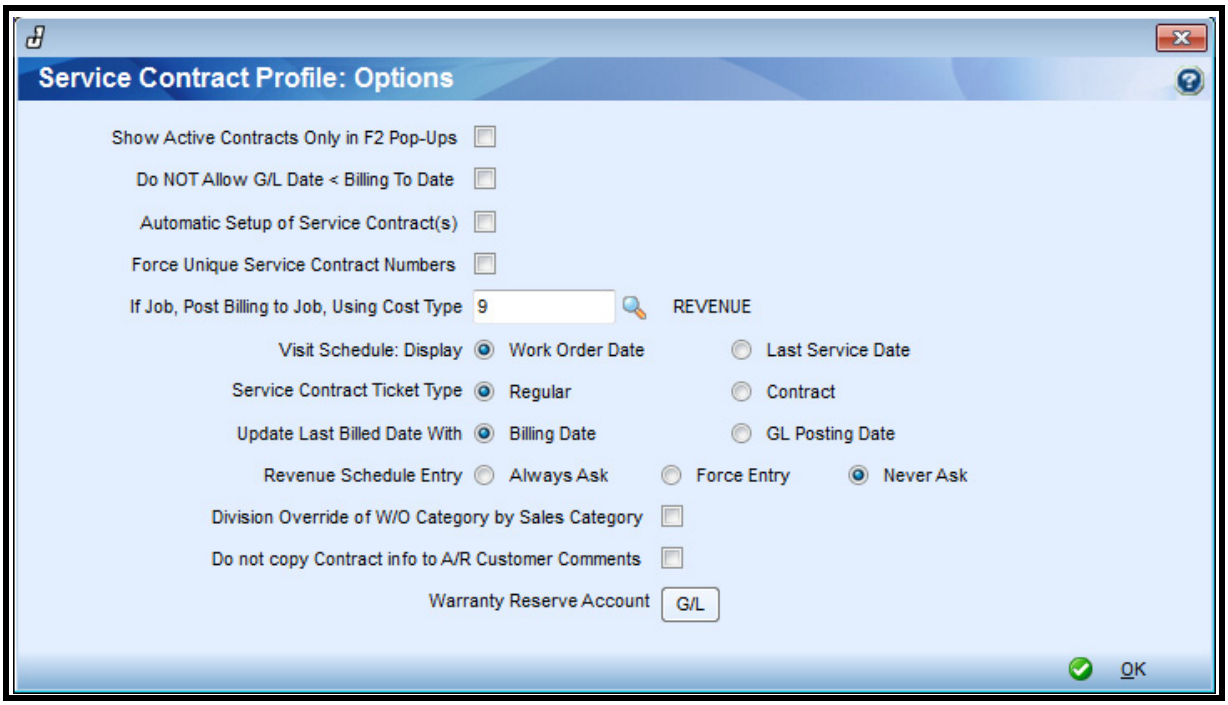
Service Billing -> Service Contract -> Service Contract Profile ~ Options

Options

The ***Options*** screen contains additional fields available to complete and customize the setup of your ***Service Contract Profile***.



Show Active Contracts Only in F2 Pop-Ups

If check marked, this flag will limit the <**F2**> window in the ***Setup W/O*** screen to see active contracts only. This prevents W/O's being tied to expired contracts in error.

Do NOT allow G/L Date < Billing to Date

When billing your Service Contract invoices, if you wish to not allow the Date of Record (the date the G/L is posted) to be less than the Billing date, then check this box.

This can prevent a situation where the March billing is done in the last weeks of February. The invoice date is March 1st, but if this flag is not checked, the person processing the billing may hit ENTER and get a Date of Record of Feb 20th - thus posting the revenue into February by mistake instead of March.

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Automatic Setup of Service Contracts

When this flag is checked, the posting of serialized parts to either *Jobs* or *W/O's* In ***Inventory -> Processing -> Charge Parts to Jobs and W/O***, will prompt you to set up a Service Contract to accompany the posted parts.Only this method of entering parts to jobs and W/O will prompt you to set up a contract and it will only do so for serialized parts that have a model template attached (with warranty information) to the inventory parts master file.

Force Unique Service Contract Numbers

In the Service Contract system, do you want the Contract numbers to be unique?

YES (check the box) to force unique Contract numbers

or

NO (do not check the box) if there may be duplicate Contract numbers.

If Job, Post billing to Job, Using Cost Type

If this is a Job, enter the ***Cost Type*** code to be used when posting the ***Billing to the Job*** or press <**F2**> to select from a list of codes.

If this Service Contract is really part of the Job, then two things will happen:

- The tickets produced will be Job W/O's
- The billings will post to the Job as revenue for that Job. This being the case, the system needs to know what cost type to use for Revenue when it posts to the Job.

Very few customers use this feature.

Visit Schedule: Display

In the ***Visit Schedule Display***, select which date you want the computer to show:

- **Work Order** (check the box) to show the Work Order date when the Ticket was created
- **Last Service** (check the box) to show the completion date entered from the "*Prepare Service Billing*" program.

Service Contract Ticket Type

Which Service Contract Ticket type do you want to use?

REGULAR (check the box) to allow Ticket numbers to be created in sequence.

CONTRACT (check the box) to generate the Ticket number as follows: the first 5 digits of the Contract number + 2 digits of the Renewal number (e.g. R1) + the 2-digit Visit number (e.g. 02 = 2nd Visit).

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> ***Note:***
> Your Work Order number of digits must be at least 9 - we suggest you use 10 if you are going to use this feature. This is not compatible with Mobile Jonas, which requires a W/O # length that is 7 characters or less.

> ***Note:***
> If you are using this feature, do not create contract numbers with "-R" in them. When the system sees a "-R", it assumes it is the renewal portion of the contract #.

> ***Note:***
> CAUTION, If choosing the *Contract* option, you will also want to turn the flag on to "Force Unique Service Contract Numbers", also on this screen.

Update Last Billed Date With

Which date should be used to update the "Last Billed Date" field?

BILLING DATE (check the box) to use the Billing date - or -

G/L POSTING DATE (check the box) to use the G/L posting date

Revenue Schedule Entry

Not all companies use the Revenue Recognition Schedule in Service Contract.

When setting up contracts, would you prefer that the system:

Always Ask - If you haven't set up a schedule ASK if you would like to set one up but don't force it to be set up.

Force Entry - You always set up this schedule and want the system to force you to set it up before leaving the Service Contract Screen.

Never Ask - You don't set up the schedules so don't want to be prompted to set it up.

Division Override of W/O Category by Sales Category

If checked, this flag will use the Revenue G/L Override attached to the W/O Sales Category (**Service System Profile -> Sales Categories**) when the Service Contract is billed.

Do not copy Contract info to A/R Customer Comments

Normally, new Service Contracts will place a line in the Customer Master File -> Comments screen with simple details of the Contract (Number, period From-To, source). If you wish to suppress this info from appearing in the Customer Comments, check this flag.

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Warranty Reserve Account

Press this button to display a screen for GL account entry. If a GL account is entered here, the function to post warranty cost estimates to a job and post monthly amortization will be enabled. The credit of the initial set up of the reserve, as well as the debit side of the warranty reserve amortization will post to this account.

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Service Billing -> Service Contract -> Service Contract Profile ~ Categories

Categories

When you click on this button, a second screen appears asking which “W/O Categories to verify for Contracts.” This will force you to enter the Contract Number every time you create a W/O in a category that you check mark here. It forces the user to tie maintenance calls to maintenance contracts, ensuring accurate profitability reporting.

Note:

This same function may be set in the **Service System Profile-> W/O Categories** screen and both screens perform the same function.

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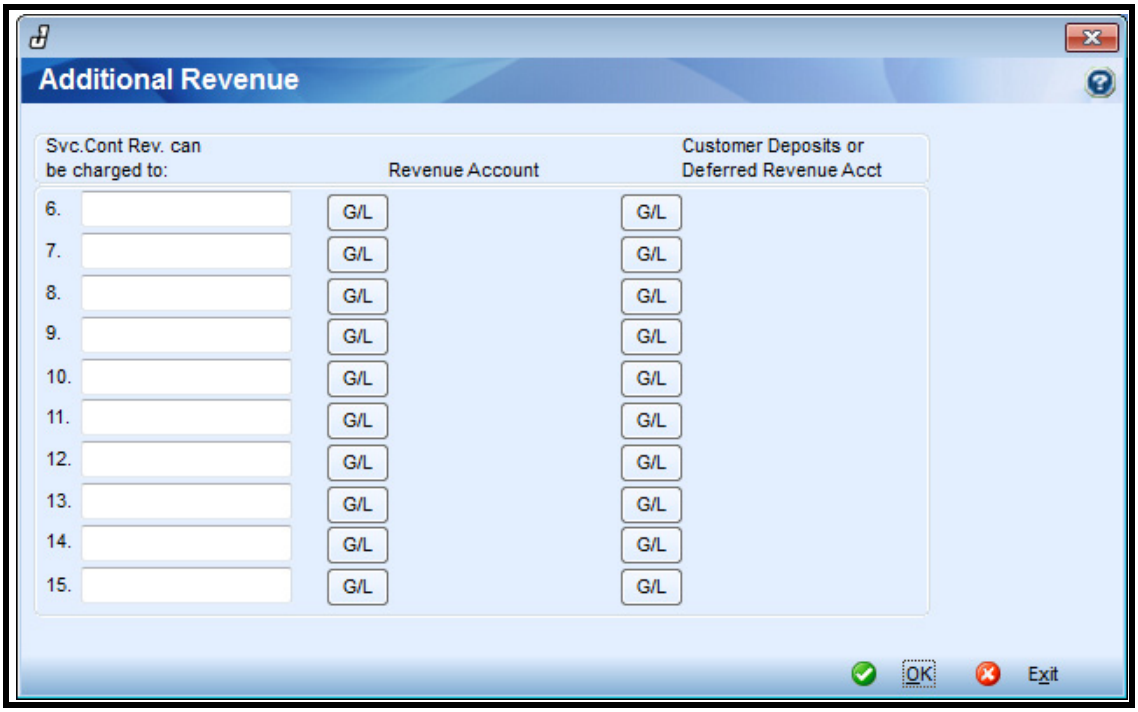
Service Billing -> Service Contract -> Service Contract Profile ~ Revenue

Revenue

The **Revenue** button has 10 extra fields for entry of extra categories to charge Service Contract Revenue to. Entry of fields on this screen works in the same way as those on the main entry screen, giving you a total of 15 fields for category entry.



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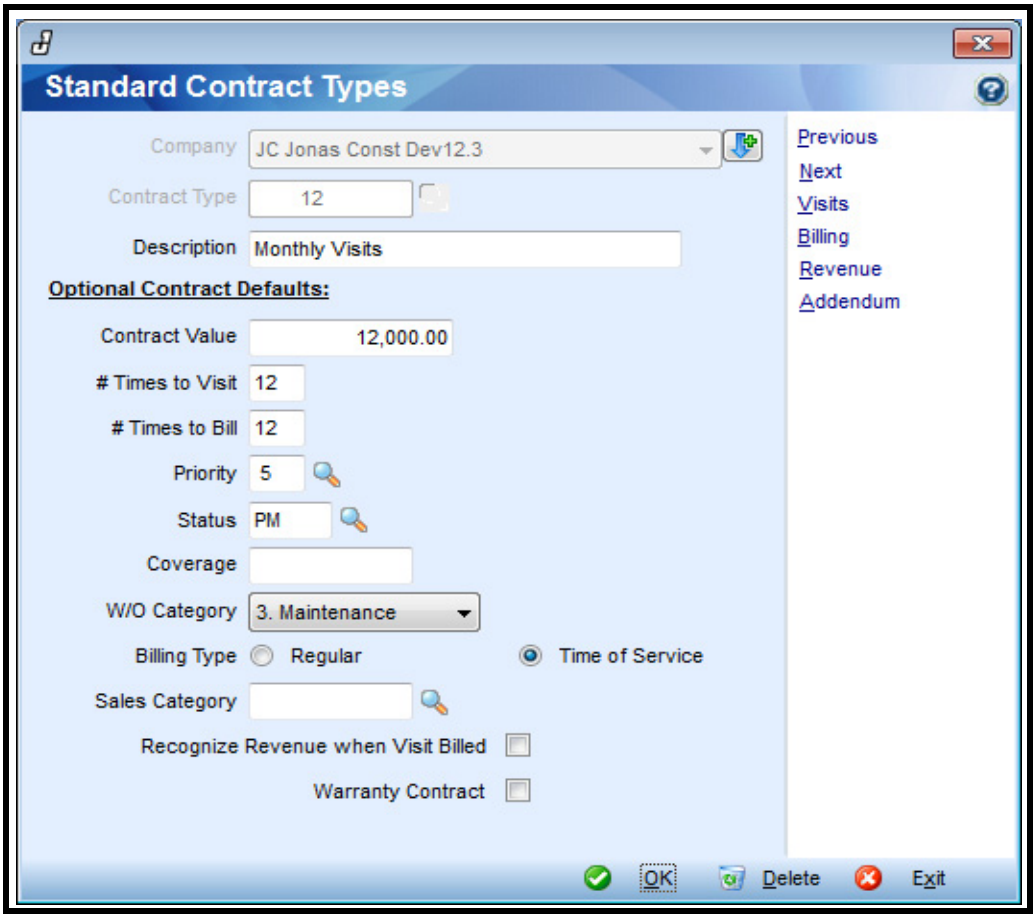
Service Billing -> Service Contract -> Standard Contract Types

Standard Contract Types

This is where you are able to setup a template for the common types of Service Contracts you have. There can be many different types of contracts setup using different codes. Most clients use the frequency of visits to differentiate their contracts (ie. *SPG*-Spring, FAL-Fall, MON- Monthly). The items to be setup is the number of visits, the billing amount and revenue schedule (if required). Also, if you are using the Dispatch board you can set-up default priority and status codes that will determine how the tickets will appear on the board. Once setup, these items make setting up new contracts much more efficient. However, if the billing amounts vary, just setup the visits as standard and wait to set the billing amounts until you are setting up the actual contract. The Fast Setup button will help you setup the Billing/Revenue quickly.



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Alternatively you may have many different standard contracts each describing a number of visits and a billing amount. Use a consistent coding structure so they get sorted in manner that is easy to use. For example:

0B2V (0 Bills 2 Visits)- $0.00 (used for Fast Setups)
1B1V (1 Bill 1 Visit)- $69.95
1B2V (1 Bill 2 Visits)- 119.95

By using a consistent coding structure, standard types will be grouped together in the ***F2*** window AND you'll know what the contract entails simply by looking at the Code.

Once you have established these templates, you will be asked, when entering the service contract details, what type of contract has been purchased? Remember; these are designed to save you time when entering new contracts, especially for the visits: please use them.

One of the biggest time savers for the residential contract is selling a standard winter or summer tune up contract. These are identical contracts for the visits and the billing so the use of a standard contract setup would speed up the entry of the information.

When determining how many Standard Types you have, decide whether the types are "*Relative*" or "*Absolute*" in terms of the dates. Absolute users will have far more templates.

- Enter the ***Contract Type*** code or press ***F2*** to select from a list of codes. This field is used to set up a "template" for your Contracts. For example, you may set up a 1-year, 2-visit Preventive Maintenance Contract, or a 5-year Parts and Labor Warranty Contract. Once a template has been established, you will be asked when entering the Service Contract detail what type of Contract the Client has purchased.
- Enter the total ***Contract Value***, or Enter 0 (zero) if the template you set up is for Warranty only.
- Specify the ***W/O Category*** to be used as a default when setting up new Service Contracts (if desired). The default is blank.
- Select the ***Billing Type*** you wish to use. Jonas normally bills by creating a table of scheduled dates and amounts. This is then billed at the scheduled times. This is defined as "***Regular***" (default). In other systems (like S2000), users can bill on a "***Time of Service***" basis. This allows them to create a contract, give it a contract value, then instead of billing the contract on a scheduled basis, the contract value is passed to the Service System as a Fixed Price W/O, which will generate the invoice upon completion of the work.

  If the contract is set as "*Tax = N*" AND it is *Time of Service,* then the system will set the tax rules on the W/O to '*Exempt*'. It ignores the tax rules set in the WO Catego

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ry. If the contract is set to "*Taxes =Y*" then the system will look at the WO category to get the correct tax rules for that WO.

- Review the other optional fields available on this screen:

Contract Value

Enter the TOTAL value of the standard Contract or enter 0 (zero) if the template you set up is for Warranty only.

 # Times to Visit

Enter the number of Visits (0-60) allowed for this Contract Type.

 # Times to Bill

Enter the number of Billings (0-60) for this Contract Type.

Priority

This field will override the *Priority* that has been selected in the Dispatch System Profile. Use this only if you need to assign a special Priority for contracts of this type. This field is usually blank. Choose a default priority to identify Work Orders related to this contract type on the Dispatch Board by its color.

Status

This field will override the Status that has been selected in the ***Dispatch System Profile***. Use this only if you need to assign a special Status for contracts of this type. This field is usually blank. Choose a default Status to identify work orders related to this contract type on the Dispatch Board.

Coverage

This is a memo field used to indicate what is included in your agreement. For example, some customers have a Gold, Silver or Bronze plan. Each plan can included different levels of service and different billing arrangements.

W/O Category

Specify the W/O Category to be used as a default when setting up new Service Contracts (if desired). The default for this field is blank.

Billing Type

Jonas normally bills by creating a table of scheduled dates and amounts. This is then billed at the scheduled times. This is defined as "***Regular***". (default)

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In other systems (like S2000), users can bill on a "***Time of Service***" basis. This allows them to create a contract, give it a contract value, then instead of billing the contract on a scheduled basis, the contract value is passed to the Service System as a Fixed Price W/O, which will generate the invoice upon completion of the work.

If the contract is set as Tax = N AND it is Time of Service, then the system will set the tax rules on the W/O to Exempt. It ignores the tax rules set in the WO Category. If the contract is set to Taxes =Y then the system will look at the WO category to get the correct tax rules for that WO.

Sales Category

Enter the Sales Category associated with this Contract Type, or press F2 to select one that is on file.

Recognize Revenue when Visit Billed

This flag allows you to distribute the contract revenue based on the billing of the W/O, thus, matching the costs of the maintenance visit to the revenue.

> ***Note:***
> You must be using a deferred revenue account for this option to work.

Warranty Contract

Select this flag to set this contract type as a “Warranty”.

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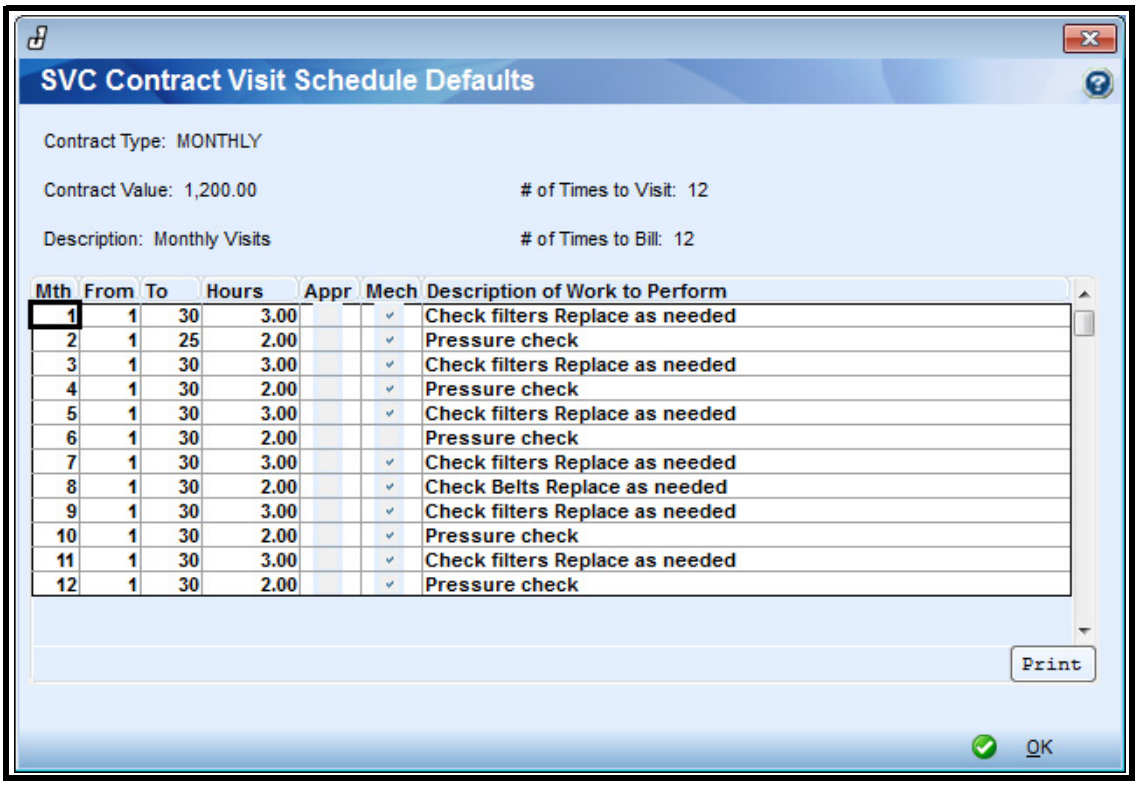
Service Billing -> Service Contract -> Standard Contract Types ~ Visits

Visit Schedule Defaults

The ***Visit Schedule Defaults*** screen is where a brief description of each visit for a contract type can be added.



Mth

Enter the default month in which the Visit is scheduled, or press ENTER for the current month.

From

Enter the default starting (FROM) Date of this Visit.

To

Enter the default ending (TO) Date of this Visit.

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Hours
Enter the default number of Hours for this Visit.

Appr
Does this Visit require an Apprentice? (What is the default?)
YES (check the box) or **NO** (do not check the box)

Mech
Does this Visit require a Mechanic? (What is the default?)
YES (check the box) or **NO** (do not check the box)

Description of Work to Perform
Enter a default name/description for the work that needs to be done.

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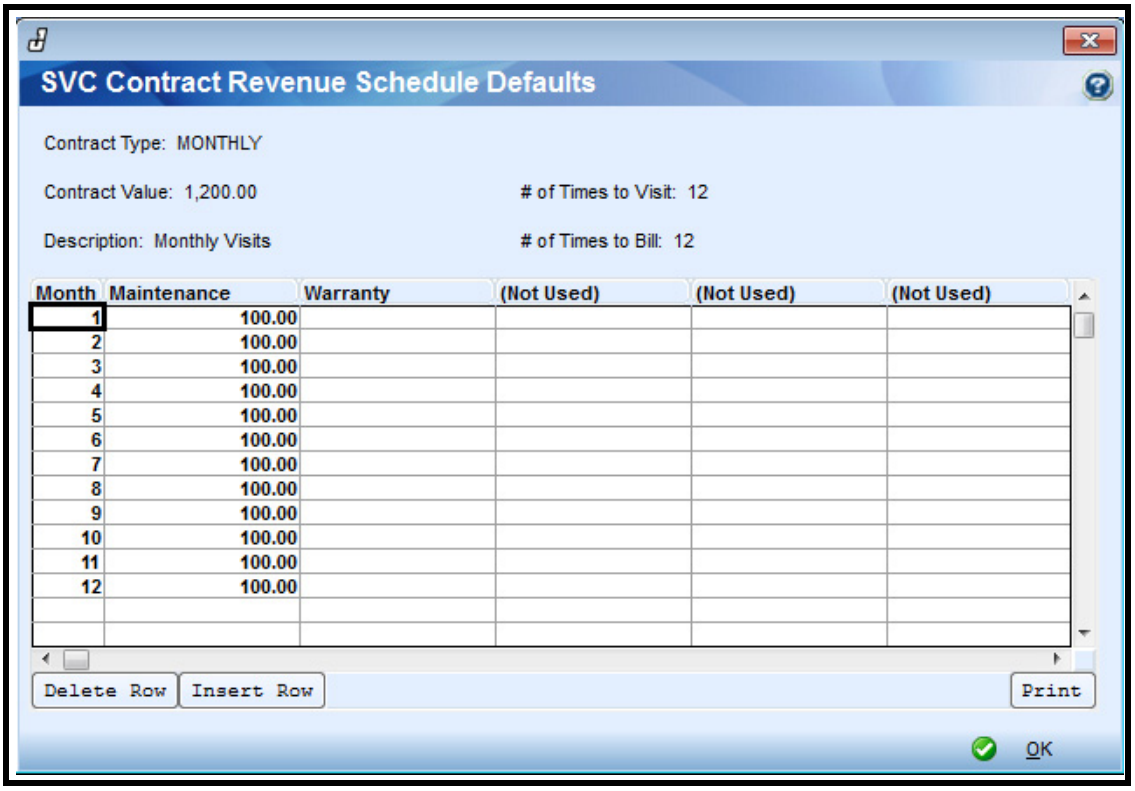
Service Billing -> Service Contract -> Standard Contract Types ~ Revenue

Revenue

The Revenue screen is used to track when revenue is expected for each revenue category. Each revenue category will display as an entry column.



Month	Maintenance	Warranty	(Not Used)	(Not Used)	(Not Used)
1	100.00				
2	100.00				
3	100.00				
4	100.00				
5	100.00				
6	100.00				
7	100.00				
8	100.00				
9	100.00				
10	100.00				
11	100.00				
12	100.00				

Month

Enter the default month in which the Revenue is expected. Press ENTER for the current month or click on INSERT ROW to insert a Revenue item before this Line. You can also click on DELETE ROW to delete this Revenue Line.

Revenues

For each Revenue Category, enter the default expected Revenue for the month.

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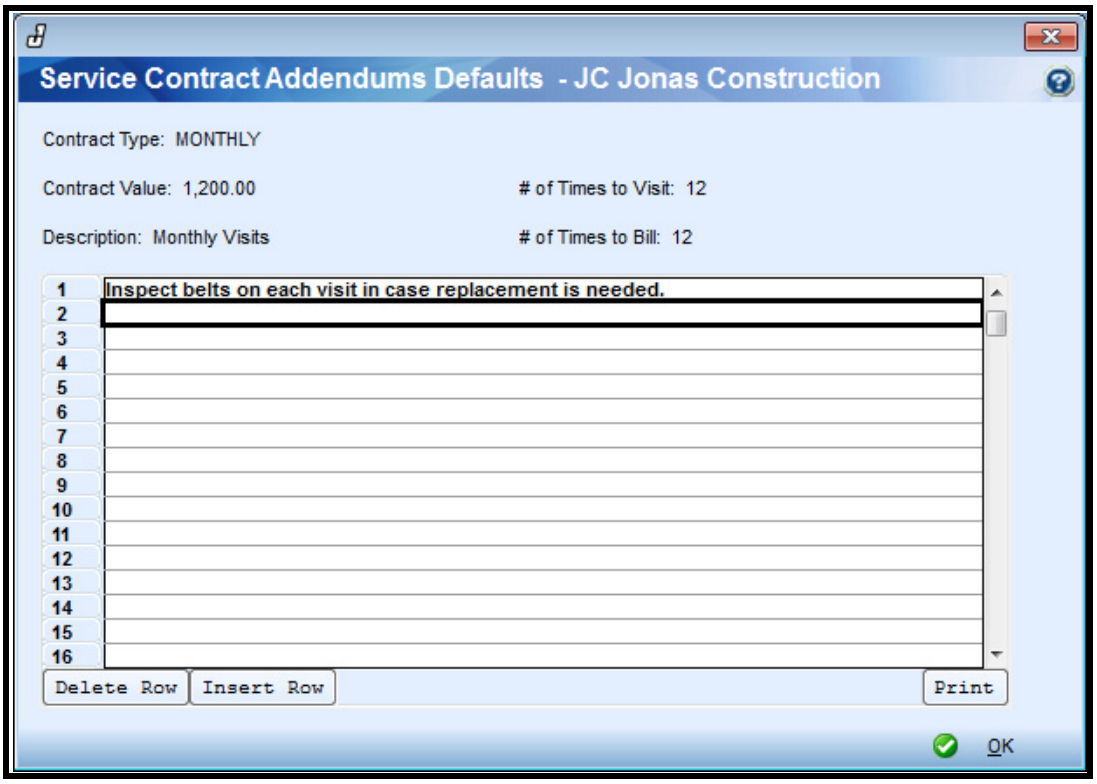
Service Billing -> Service Contract -> Standard Contract Types ~ Addendum

Addendum

The Addendum screen is where you will enter notes relating to this Service Contract. Select INSERT ROW to insert a new Addendum line before an existing line. Select DELETE ROW to delete this Addendum line.



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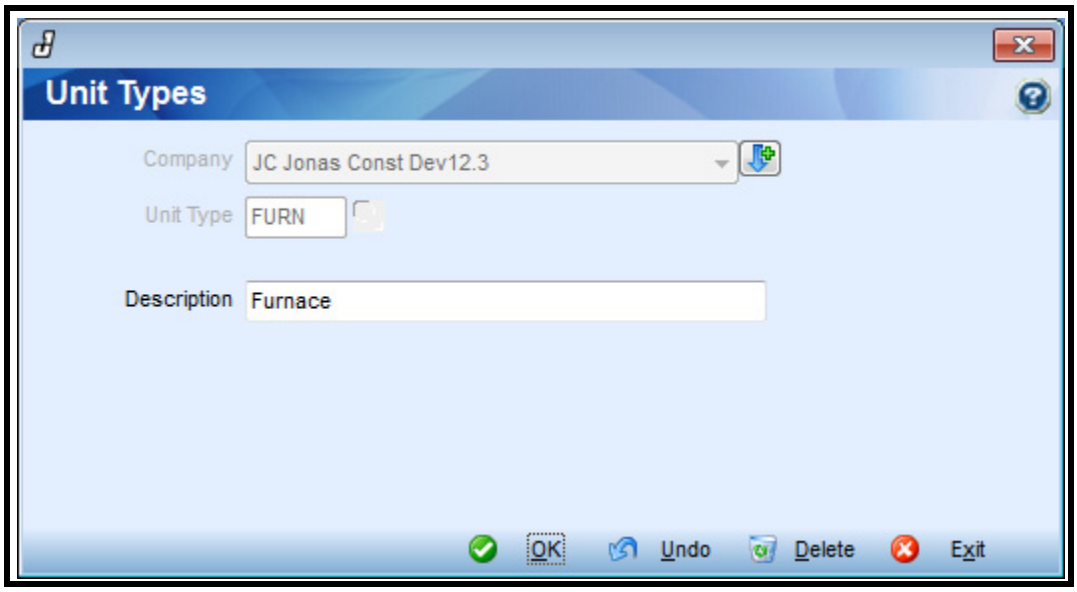
Service Billing -> Service Contract -> Service Item Unit Types

Service Item Unit Types

This allows you to setup standard unit types for Service Items. This will be used in the service item area of the customer master file. These standard unit types can then be selected from a lookup box for each service item.



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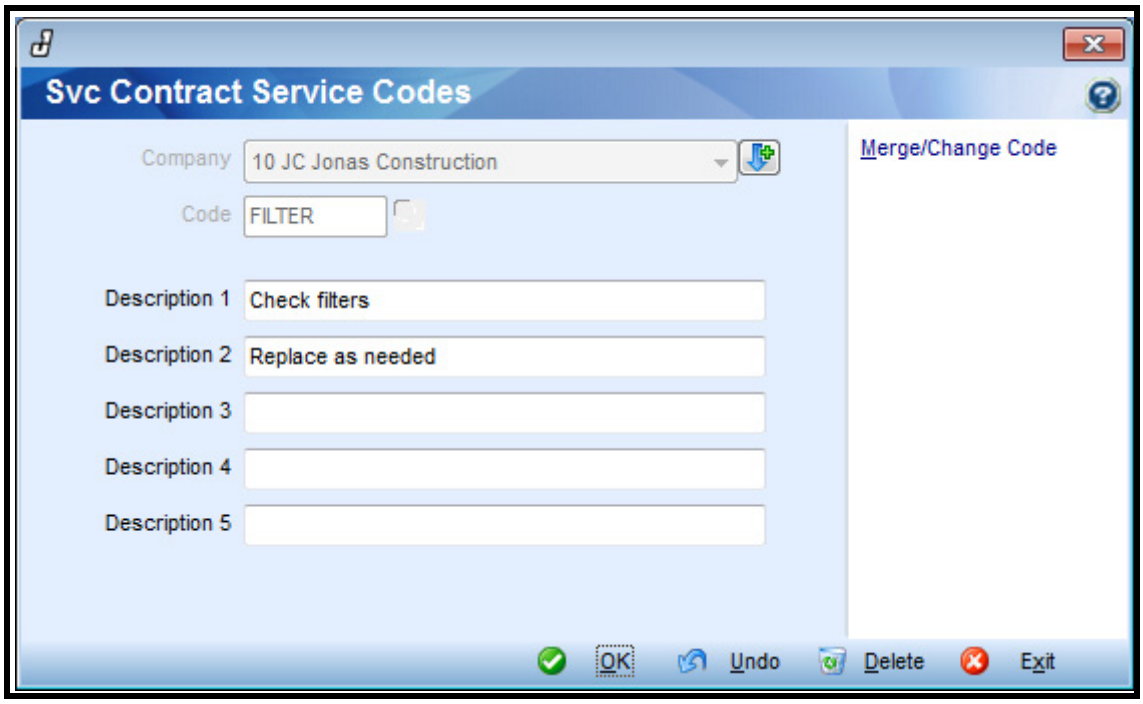
Service Billing -> Service Contract -> Svc Contract Service Codes

Service Contract Service Codes

Another time saving feature of the Jonas System is the use of Codes for common phrases. Once setup, whenever the code is selected (by using the F2 lookup) under the description of work in the visit schedule, the phrase will be automatically inserted.

There are 180 characters available in each visit to describe what the technician is going to do. Additionally, there is the parts list and memo lines in the Belts & Filters record tied to each piece of equipment.



Code

Enter the Service code or press F2 to select from a list of codes or to create a new Service code. Press F9 to print a listing of the Codes setup.

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Description

Enter a name/description for this Service code in the five lines on this screen.

Merge/Change Code Button

This button allows you to enter an existing code to merge another code to.

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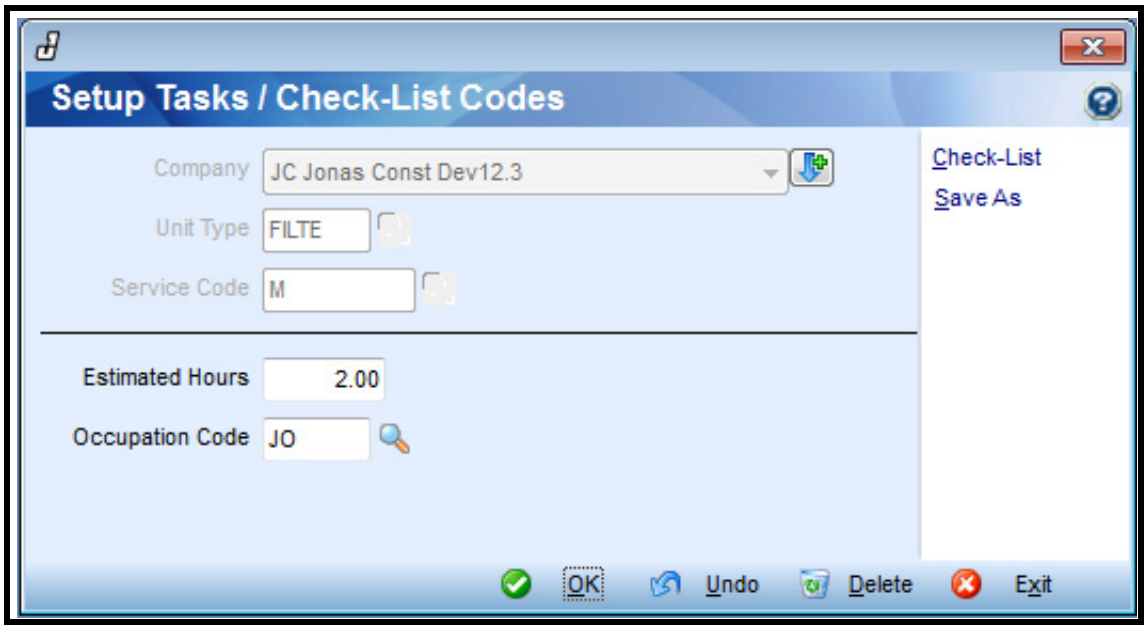
Service Billing -> Service Contract -> Tasks Check List Codes

Tasks Check List Codes

Checklists can be created to help the technician service different types of equipment for specific services.

An example of checklist for a type of equipment for a specific service would be Chillers, Spring Visit, Chillers, or Annual Inspection.

The equipment type comes from Service Item Unit Types and is attached to each service item (Unit Type Field) so the system knows what type of unit it is. The specific service comes from the "Svc Contract Service Codes"



Unit Type

You are creating checklists for a technician to perform. Select the Type of Unit the checklist is for. Unit types are created in Service Contract Item Unit Types.

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Service Code

Select the type of Service they are to perform. These codes are created in **Service Contract > Service Contract > Service Codes**.

Estimated Hours

Optional - enter the estimated time for this inspection.

Occupation Code

Optional - Enter the occupation code for this inspection.

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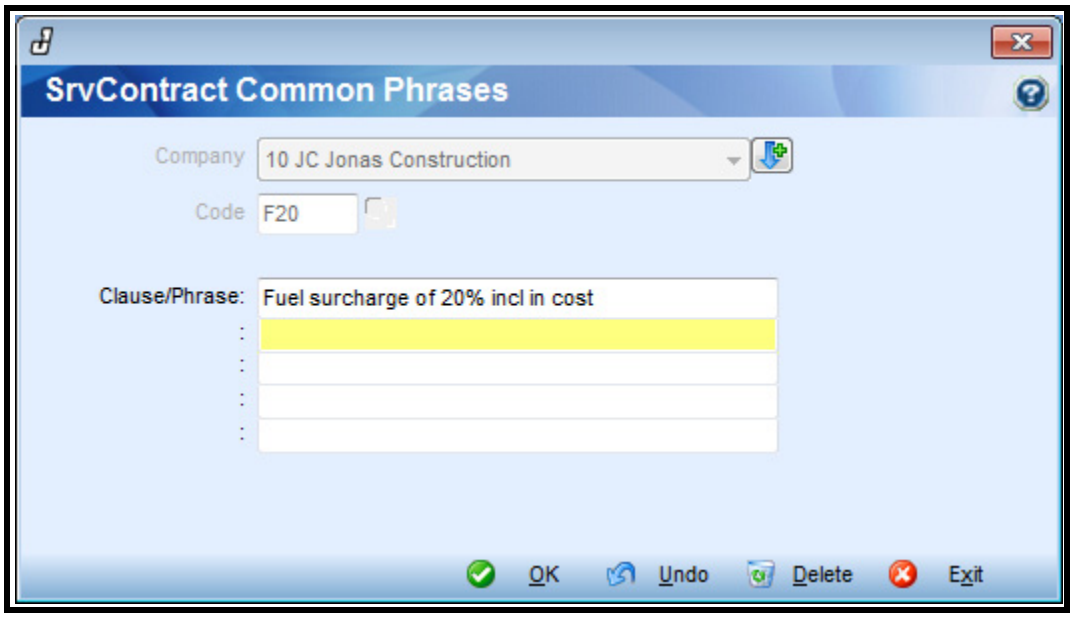
Service Billing -> Service Contract -> Svc Contract Common Phrases

Service Contract Common Phrases

On this screen, you can enter the Common Standard Clauses or Phrase Codes that can be used in the invoice description section to save typing time. You can press ***F2*** to select for a list of codes or create a new code, or press ***F9*** to print a listing.



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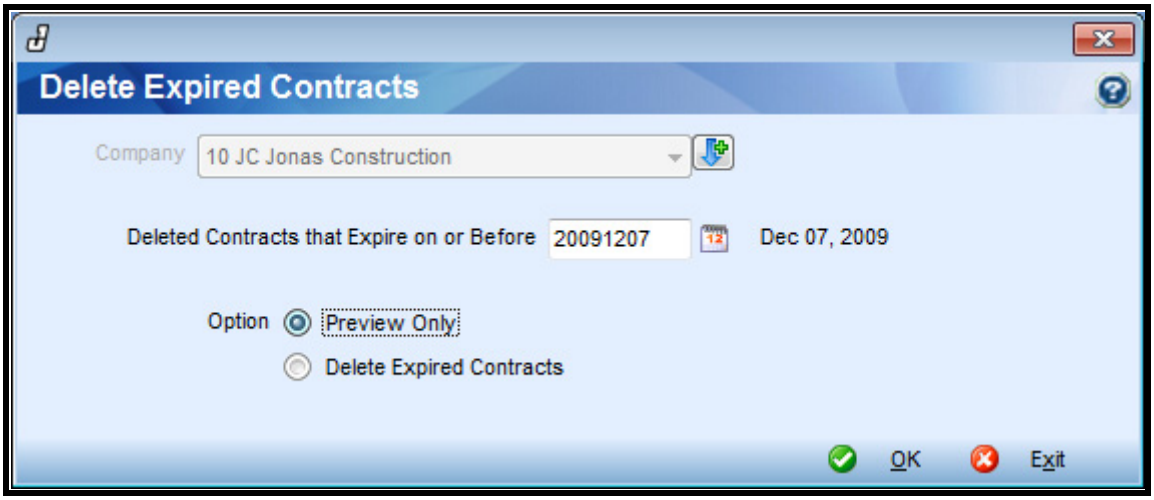
Service Billing -> Service Contract -> Deleting Expired Contracts

Deleting Expired Contracts

There will come a time when you want to delete the old and expired contracts from your system. This menu option should be restricted to just a few individuals.

Note:
Old contracts are inactive and won't interfere with everyday processing.



Deleting the contract means you will lose the costing information on that contract. If this is important, don't delete the contracts. However, before doing a deletion, first run a pre-view of the deletion(s) and check the list to make sure you want to delete these contracts. Once deleted, these contracts are gone.

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```
                    10 - JC Jonas Construction          Pg 1
        Deletion of Service Contracts that expired before Dec07/09

                                              Expires              Sales
Customer / Name                     Contract  on Date       Amount Cat

BESTBUYR   Best Buy Rockford        0000000031 Apr21/09      600.00 NORTH
LAMAUL     Lamanna Audio Ltd        0000000033 Apr06/09      600.00 NORTH
LAMAUL     Lamanna Audio Ltd        0000000036 Apr06/09      120.00 NORTH
MORCO*     Morgan Company Inc       0000000029 Apr12/09      600.00 NORTH
MORCO*     Morgan Company Inc       0000000040 Oct31/09    1,200.00 NORTH
TERFOO     Tersigni Foods           0000000027 Apr07/09      600.00 NORTH
                                                           ----------
 6 Contracts deleted                                        3,720.00

                    ===== End of Report =====
```


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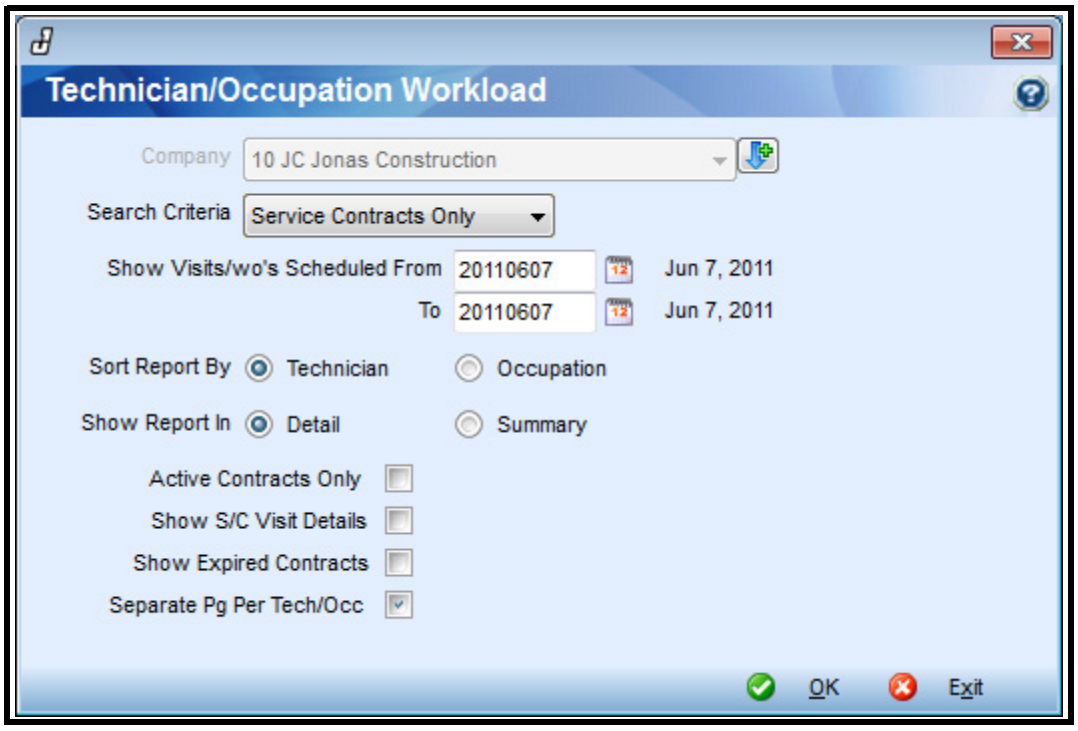
Service Billing -> Reports -> Technician/Occup. Workload

Technician/Occupation Workload

This report provides a detailed list of the work to be performed by Date Range. The report can be sorted by occupation coded. However, it is usually sorted by technician allowing you to see the hours required for each technician. If you have specified an occupation code in the multi-tech section of the visit schedule, then you can get a list of the hours required for that occupation. This is another planning tool to ensure you have sufficient manpower for the upcoming period.



Company

Press <**ENTER**> to accept the default Company whose information you wish to print. Use the Small Down Arrow to select from a list of Companies.

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Search Criteria

Do you want the computer to search only Service Contracts?

If you select this option, your report will exclude routine service tickets that were not created by the service contract module and are linked to a Service Contract.

YES (check the box) to check only Service Contracts

NO (do not check the box) to check all Contracts.

If you select this option, then your report will include all scheduled visits and tickets - including routine calls that were not created from the service contract module and have been attached to a service contract.

Show Visits/wo's Scheduled From

Enter the starting (***FROM***) date to be used. Only transactions from the ***FROM*** date up to and including the ***TO*** date will be included.

Press <**ENTER**> to accept the displayed date. Press <**F2**> to select the date from the Calendar.

Show Visits/wo's Scheduled To

Enter the ending (***TO***) date to be used. Only transactions from the ***FROM*** date up to and including the ***TO*** date will be included.

Press <**ENTER**> to accept the displayed date. Press <**F2**> to select the date from the Calendar.

Sort Report By

In which sequence do you want the report printed?

TECHNICIAN (check the box) to sort by Technician code

- or -

OCCUPATION (check the box) to sort by Occupation code.

Show Report In

Select if you would like to show the report in Detail or Summary format.

Active Contracts Only

Do you want the computer to print only active Contracts?

YES (check the box) to print only active Contracts

NO (do not check the box) to print all Contracts, active or inactive.

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Show S/C Visit Details

Do you want to display Service Contract Details?

YES (check the box) to print expired Contracts

NO (do not check the box) to print only active/unexpired Contracts

Show Expired Contracts

Do you want the computer to print expired Contracts?

YES (check the box) to print expired Contracts

NO (do not check the box) to print only active/unexpired Contracts

Separate Pg Per Tech/Occ

Select the check box if you wish to print a separate page for each Technician or Occupation.

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