

# SERVICE WORK ORDER

Manage your Service and Repair departments as well as track technicians, repair history, warranty information and much more.

## Seamless access to parts and labour for repair and service delivery

Latitude's Service Work Order module is tightly integrated with Accounts Receivable, Inventory Management, and Sales Order modules to provide total solutions for service departments. From a single desktop, users can determine warranty status, order parts, determine labor requirements, place the work order, and generate reports. Through integration with other Latitude modules, the user can also pull customer, product or serial number information from the Sales Order module; draw parts from single or shared inventories; and alter inventory records. Finally, all necessary billing information is automatically sent to Accounts Receivable.

- Determine warranty status, order parts, determine labor requirements, place the work order, and generate reports from a single screen
- Pull customer, product, or serial number information from the Sales Order module
- Draw parts from single or shared inventories and alter inventory records
- Link inventory requirements directly into the Work Order system
- Associate payments and deposits
- Progress bill with automatic updating of unbilled lines
- Preset minimum billing for activities
- Set up technician competence tables which define which activities are restricted to only competent technicians
- Associate activities, products, and technician types with the specific repair codes
- Initiate status messaging which tracks the state of specific work orders for customer review or displayed on your Web page



## Tight integration maximizes productivity

By integrating the Service Work Order module with the other Latitude modules, you've got the ability to link inventory requirements directly into the Work Order system. Parts entered into the Work Order system are immediately reduced from the "available for sale" quantity and reflected as a work order usage on the standard replenishment reports. With system integration, you can also associate payments and deposits, progress bill with automatic updating of unbilled lines processed through Accounts Receivable, and have all activity associated with a specific customer accumulated to a specific credit control officer. It's a seamless system for creating, executing, and tracking every element of the Service Work order process.

## Tailor Work Order assignment any way you want

Work Orders can be assigned for a customer, a product, or a serial number. All types of products can be supported through this module including serialized, lotted, and Bill of Material items. Through integration, all information derived from products invoiced through the Sales Order module, such as sale and warranty information, can be automatically updated into the Service Work Order system. A work order can be created with any degree of detail as long as full details are provided before final billing.

**Quite frankly,  
it's one of the  
most robust  
and flexible  
suites of  
inventory  
management  
applications  
available.**

### **Puts you in control of cost management and billing**

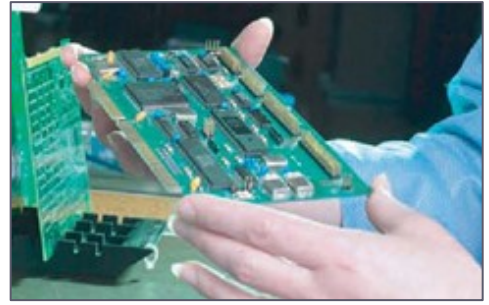
User defined activity tables give you the ability to preset minimum billing for activities. You can also use these tables to define certain activities as restricted to competent technicians only. In concert with this, technician competence tables and user defined technician tables can be created to assist in the dispatch, time entry, and rate setting process for one or more technicians attached to each work order. Rate codes can be matched between activities and technicians with quantity breaks associated with work hours, and with rate changes set to occur at predetermined hour triggers to automatically generate overtime charges. You can also record labor based on start/stop time or as hours worked. Time entry works from user defined activity ID's that describe the tasks performed on the work order documents. More detail can be added by attaching Latitude Notepads. Time can be entered manually on a work order or imported through Excel loads from Payroll or Time Clock systems.

### **Expense tracking keeps you on top of billing**

Mileage and expense charges can be applied to the work order and standard Latitude reports. These expenses can be sorted by both work order and individual technician to aid in billing and in calculating individual expense claims. You can define the expense types to ensure that only applicable charges are charged to the work order and that the billing of related expenses are taken care of in a timely fashion. Should commissions be required, Latitude's Work Order system can automatically calculate them.

### **Integrated desktop decreases data entry time and increases efficiency**

With the Latitude Work Order system, you can define and implement your own repair codes for frequently performed tasks.



Any number of activities or technician types can be associated with the specific repair codes. In addition, pre-defined blocks of text can be associated with each repair code. Default products can also be added to repair codes. This function is used to attach specific quantities of specific products to a repair code. Whenever a repair code is entered, the activities and products linked to the code will automatically be added to the service work order as "activities" and "parts".

### **Custom and standard reporting features keep you abreast of all the details**

Work orders can be classified into types to allow flexible reporting and analysis. This feature allows you to study individual reports or compare data, for instance, comparing the amount of regular service versus warranty activity. You can cross over from previously utilized systems by using Latitude's facility for the entry of serialized or lot type products into the product tracking files.

### **Online Status message provides customer piece of mind**

The Latitude Work Order system provides on-line status messaging which tracks the state of specific work orders. Use this facility to summarize information for customer review or to schedule follow-ups. Status information can also be ported to your web page for direct customer access.