Service and Repair Orders Overview

Running your business isn't always about selling goods. It can also involve providing services to your customers. By creating and managing a Service Department you will be better able to meet all of your customer's needs. In this course we will explore the process to create Service Orders, recall them in Point of Sale and modify them.

Creating Service Orders can help keep your business organized and efficient.

The process begins in Point of Sale. If you do not have a terminal dedicated to service orders, click Start Transaction from the ribbon menu and select Service Order. Choose Start New Order. Enter the Serial number, VIN or Tag Number.

Select the customer's name from the drop down menu or click Add Customer to use the Quick Add feature. Enter a Job number if applicable. On Eagle Software Release 27 and higher you can create from multiple repair types. For this example, we will select Type M, Mower Repair. Then press OK.

Confirm that the customer's personal information is correct. Best Practice is to require their phone number and email address. You can set Option ID 9280 or use the Flexible Consumer Information feature to determine which fields are required.

On the right, fill in the Equipment Description fields to provide more detail about the task to be performed. Now select the correct Service package and any additional notes related to the work. You can then enter the Date Requested, Location, Technician, and Status of the order. Choose More Fields to enter a PO number or Reference notes. You can also alter the Tax Code, Terms Code or Salesperson. Press OK.

The system posts your selections. Enter the quantity of the Service SKU that is required for the repair and press Enter. Press Total, and select the appropriate option from the Finish Service Order dialog. A document number is assigned.

Once you have created a Service Order, you can later recall it and make any needed modifications. Just like creating a Service Order, select Start Transaction and then Service Order. Now choose Recall Existing Order. If your terminal is set up as a service order station, simply select Recall Existing Order.

There are three ways to look up a Service Order. If you know the serial number of the item, type it in the box and press OK. If you have the document number of the order, enter a period followed by the document number. If you do not know the serial number or the document number you can look up the transaction in the Service Order Viewer. Locate the correct order and press Select. The transaction is displayed in the Maintain Service Orders Window.

Once you have recalled a Service Order, you may need to view or modify it. To modify a line item, double click it and change the information, just as you would with any saved order. To modify more detailed information on your order, press F11. The modify Service Order Window Displays.

You can edit customer information, change the order status, and update any available data fields. If a customer has decided not to follow through with a quote, you can select Delete Service Order to cancel it. You can also change the Service Order Status from the totals screen. Select Service Order Status.

Here you can change the order to Work in-Process and leave a note with further details. You can also assign a Technician and name a Location for this particular lawn mower.

Using Eagle service orders keeps your service department running smoothly. Be sure to download and read the documentation found in the Course Materials section of this class. This will help you get your system ready to go. After that, you should ready to create a service order as needed, recall a saved one and modify them when needed.

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