

Service and Repair Options and Security Bits

This document contains valuable information to set up your Eagle System Service and Repair Orders function. Make sure that all of your settings are configured before using these features. Contact your System Administrator if any of your security bits are not enabled after purchase.

Options

Release 27 and higher:

Option 1759 Service Orders - using multiple Repair Types?

You can now define multiple repair types for the clerk to select from when creating a Service Order in POS. For example small engine repairs require a different set of equipment and additional information than those needed to repair window screens. You can add up to 46 multiple Repair Types.

Note: If you are a current Service Order user, create a Repair Type for the type of repair you do today using the existing values from options 9301-9307, 9308, and 9324. Once option 1759 "Service Orders - using multiple Repair Types?" is changed to Yes, these options are no longer used.

Enter Multiple Repair Types?

Multiple Repair Types?

| | |
|---|-----|
| Y | Yes |
| N | No |

Only applies when option 1093 "Service and Repair on System" is Yes.

Set this option to No if your business has only one type of repair or service. Define the prompts needed for this type of repair or service in options 9301 thru 9308, and 9324.

Set this option to Yes if your business does multiple types of repairs each with its own set of prompts for gathering information about the item and the type of repair or service needed. In POS when creating a new Service Order the clerk will be able to select from a list of Repair Types. The repair type selected governs the pieces of information the clerk is prompted to collect from the customer.

When set to Yes, use "Maintain Service Order Repair Types" on the Go To Menu of Options Configuration to define the type of repairs your business does (access requires security bit 911). Then use Option 1755 "Service Order - Repair Types which can be created at this POS station" to define the list of Repair Types which can be created in a particular store, or terminal, or user.

Note: When this option 1759 is set to Yes, options 9301 thru 9308 and 9324 do not apply.

Kept By System

Option 1755 Service Order - Repair Types which can be created at this POS station

Update this option with the Service Order Types you will be using at Point of Sale. Add them in the order you wish them to appear in the drop down list. This setting is updated after Options ID 1759 has been changed to yes and the Service Order Repair Types have been configured from the GoTo menu.

Enter Service Order Types

Service Order Types

OK

Cancel

This option only applies if one or more Repair Types have been defined in "Maintain Service Order Repair Types" and option 1759 "Service Orders - using Multiple Repair Types?" is set to Yes.

Enter the types you want to appear and in the order you want them to appear in the Repair Type dropdown when a new Service Order is being created. The first type entered in this option will be the default choice.

Leave this option blank if you want POS to show all repair types in the Repair Type dropdown when a new Service Order is being created.

Repair Types are setup in "Maintain Service Order Repair Types" on the Go To Menu of Options Configuration.

Kept By System (can be changed)

Option 1674 Send text message notifications to customers for these events.

You can also text your customers that their service order is complete if you are using the Text Messaging feature. Contact your customer account manager if you would like to add this function.

Enter Send text message

Send text message

| | | |
|-------------------------------------|---|--------------------------|
| <input checked="" type="checkbox"/> | R | Rain Check received |
| <input checked="" type="checkbox"/> | S | Special Order received |
| <input checked="" type="checkbox"/> | M | Service/Repair completed |

OK

Cancel

Applies when option 1673 "Text Messaging (SMS) available on System" is Yes. Check each event in this list that you want customers to be asked if they would like to receive a text message notification.

If you use advanced rain checks (option 5413 is Y) select R if you would like to offer the customer the ability to receive a text message notification once that item is back in-stock.

If you use advanced special orders (option 1028 is A) select S if you would like to offer the customer the ability to receive a text message notification once the special order item has been received.

If you create Service Orders (option 1093 is Y) select M if you would like to offer the customer the ability to receive a text message notification once the service order's status has changed to one of those selected in option 9327 "Service Order status changes which prompt to email or text customer". Use instead of or in addition to the email notifications defined in options 9325 thru 9328.

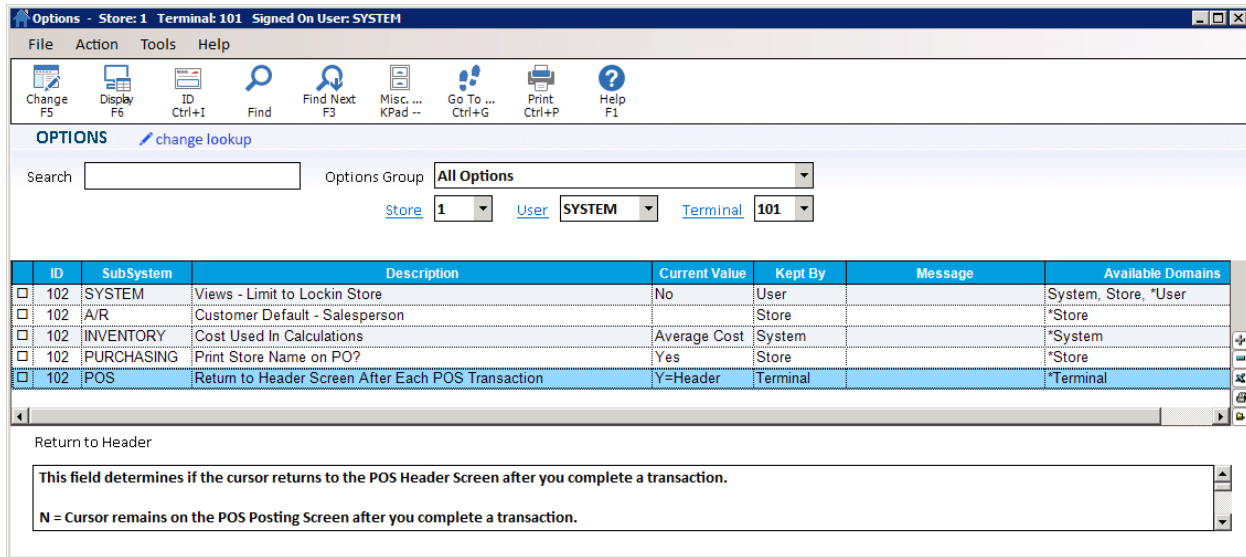
Refer to related option 1675 "Default phone number for text message notifications to customers".

Kept By System (can be changed)

Release 26.1 and higher:

Option 102 Return to Header Screen After Each POS Transaction

This option has the choice S (Header/Service Order) to use with terminals that create Service Orders. When set to 'S', POS is ready to create another Service Order at the end of every transaction. This is held 'by Terminal' so only use the S option at POS stations that will be creating all or mostly Service and Repair orders.



Option 160 Print Prices on Estimates? (Y/N/E)

This option determines whether prices are displayed on printed Service Order estimates ("Quote" status). If you would like your customers to see the quantity and price for the service item, set this option to Y.

Option 1093 POS Service and Repair on System

This option must be set to Yes if you have purchased the "Service and Repair" package. Service and Repair allows tracking of service and repair activity using the POS document type of Service Order. Contact your Customer Account Manager if you would like to purchase this software.

Option 7743 E4WDI Enhanced Form for Service Order Document

Select the Enhanced Form you want to use for Service Orders. Contact your trainer, Customer Account Manager or the advice line for more information on Enhanced Forms.

Option 7745-E4WDI Enhanced Form sort order for Service Order Documents

Select the sort order that you prefer for Service Order documents. The options include:

D = Department\class\fineline\sequence number

L = Location

N = Line Number

S = SKU

U = Use a user created

Option 7746 Enhanced Form location/suggested column for Service Order Documents

Determine which column should print on Service Order documents; Location or Suggested Price.

Option 7747 Enhanced Form Barcode Prints for Service Order Documents

Each standard Enhanced Form has the ability to print a barcode which can be interpreted by the Document Scanning OCR feature (a purchase option). If you have the Document Scanning ORC feature, best practice is to select YES.

If this Enhanced Form will be scanned later by the Document Scanning application AND you have purchased the OCR option, you should enable the form to print a barcode. Doing this allows the form to automatically load the document attributes during the scanning process.

The barcode format is: IICCCCCCJJDDDDDDTSPPP

- Where II is a 2-character identifier
- CCCCCC is the customer number and JJJ is the job number
- DDDDDD is the document number,
- T is the Document Type S is the Store and PPP is the page number of the document

Option 8829 Compass Analytics on System

This option must be enabled, and Compass must be installed, in order for you to access the Service History Viewer. Contact your Customer Account Manager if you are not currently using Compass.

Option 9199 Display email address in POS Customer Details Window

At the time you create a service order, the system obtains the email address (if one exists) from the customer's account in Customer Maintenance based on how you set this option. Best Practice is to use Option I and default to the contact that received all emailed POS documents.

Enter Email address in POS

Email address in POS

| | |
|---|---|
| C | Display e-mail address of the first Contact in MCR that has one |
| I | Display e-mail address that receives emailed POS documents |
| N | No |
| S | Display e-mail address that receives emailed A/R statements |

OK

Cancel

This option determines if an email address will display in the POS customer details window and if so what the source of that email address should be. It also controls which email address populates the Email Address field in the Required Consumer Information dialog (if you are using Flexible Consumer Information collection).

Set to N, if you do not want the customer's email address to appear in this window.

Set to C, if the system should use the email address of the first Contact flagged as Primary which has an email address entered. If there is no Primary contact with an email address, display the email address of the first Contact which has an email address entered. Note: Customer contacts are entered in WinMCR on the Contacts tab.

Set to S, if the system should use the email address entered in WinMCR Contacts tab (email addresses for Statements). If there is not a statement email address for the customer, then the system will use the email address in Contacts tab (email address for POS invoices/orders).

Set to I, if the system should use the e-mail address entered in WinMCR Contacts tab (email address for POS invoices/orders). If there is not a POS invoices/orders email address for the customer, then the system will use the email address in Contacts tab (email addresses for Statements).

Kept By System (can be changed)

Option 9241 POS New Service Order Default Status

Enter the default status to use when starting a new Service Order transaction. The option you choose will depend on your business practice. The options are:

- C = Checked-in. This setting begins the transaction as a Service Order, and the parts are committed.
- Q = Quote. This setting begins the service transaction as a Service Quote. Use this setting if you typically quote orders before receiving approval to do the repair. The parts for the service/repairs are not initially committed.

Option 9242 POS Custom Field Label for Service Order Identifier

This option allows the user to select the label used for the equipment identifier. Set the option in the manner that makes most sense for your business.

- S = serial number (default)
- V = VIN number
- T = tag number (Note: You may want to consider using serial or VIN numbers rather than tag numbers because with serial and VIN numbers, the system automatically checks for previous repairs or sales for that serial /VIN and then auto-populates the new service order's customer information and equipment description upon the clerks approval. Additionally, serial and VIN numbers allow for more unique identification in the history files, unlike Tag numbers.)

Option 9245 Show which users in Service Order Technician drop-down

Select A to have all users display in the Technician dropdown. If you only want users designated as technicians to appear in the Technician dropdown, select T.

Enter Show which users

Show which users

| | |
|---|------------------|
| A | All users |
| T | Technicians only |

OK

Cancel

Set to A if you want all users to display in the Technician dropdown.
Set to T if you only want those users identified as technicians to appear in the Technician dropdown.

To identify a user as a Technician, in Options Misc Menu 'Add/Delete/Change User' enter a value in the "Technician" field. You can enter a Y, or perhaps use multiple values such as 1, 2, 3 or A, B, C to identify the expertise level of that technician. Any user with a non-blank Technician field in their user record will display in the Technician dropdown when this option is set to T.

Kept By System (can be changed)

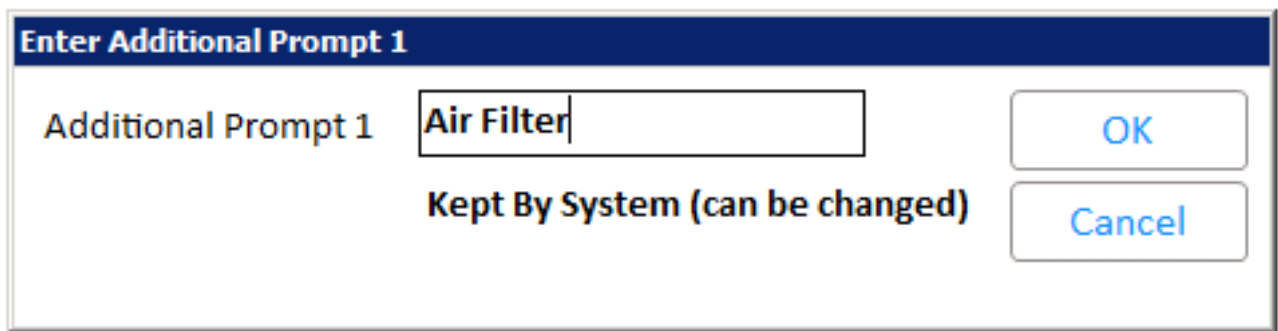
Option 9301-9303 Custom Field Label for Service Order Equipment Prompts 1-3

Use these three options to create up to three custom fields for Service Order equipment. These field labels can be up to 12 characters long. If you set up any or all three of these fields, they will display in POS and must be filled in by the clerk when creating a Service Order. Some labels you may use are Fuel or Machine Cond. (Condition). This would allow clerks to note the state of these items.

Option 9304-9307 POS Custom Field Label for Service Order Additional Prompts 1-4

Use these four options to enter field labels for up to four additional prompts for service orders. For example, you may want to prompt the clerk to enter more information about the item to be serviced such as fuel condition or the state of an air filter. These field labels can be up to 12 characters long.

Note: Option 9324 determines if these additional comments are considered internal [non printing] or external [print on the service order].



Enter Additional Prompt 1

Additional Prompt 1

Kept By System (can be changed)

OK

Cancel

Option 9308 POS Service Order - Standard Services Department

In this option, enter the Department that contains the SKUs you set up for standard services. Best Practice is to create and use department SD.

Option 9309 POS Service Order - Default Technician to clerk creating the order

Set this option to Yes if you want the Technician field to default to the clerk creating the order. Set to No if you have someone managing your technicians and you want them to assign one to the order.

Option 9310 POS Custom Label for Service Order Status "Quote"

If you want to customize the label the system uses for service orders that are in the Quote status, enter the label name in this option. You can use up to 20 characters. Otherwise, leave the default of "Quote."

Option 9311 POS Custom Label for Service Order Status "Checked-in"

If you want to customize the label the system uses for service orders that are in the Checked In status, enter the label name in this option. You can use up to 20 characters. Otherwise, leave the default of Checked-in.

Option 9312 POS Custom Label for Service Order Status "Work In-Process"

If you want to customize the label the system uses for service orders that are in the Work in-Process status, enter the label name in this option. You can use up to 20 characters. Otherwise, leave the default of Work in-Process.

Option 9313 POS Custom Label for Service Order Status "Waiting on Parts"

If you want to customize the label the system uses for service orders that are in the Waiting on Parts status, enter the label name in this option. You can use up to 20 characters. Otherwise, leave the default of Waiting on Parts.

Option 9314 POS Custom Label for Service Order Status "Complete"

If you want to customize the label the system uses for service orders that are in the Complete status, enter the label name in this option. You can use up to 20 characters. Otherwise, leave the default of Complete.

Option 9317 POS Prompt clerk to change status on Service Orders for backorders

Set this option to Yes if you want the clerk to be prompted to change the service order's status to "Waiting on Parts" if the order has items on backorder. Once the items are available and no longer on backorder, the clerk will be prompted to change the status back to 'Work In-Process.'" Otherwise set this option to No.

Note: Customer Order Management (COM) customers: If you use the COM feature that automatically back-orders any insufficient quantity when you change a quote into an order, that same logic applies to this option (9317) in that the system automatically back-orders and put items on the Buyer's List.

Option 9318-9320 POS Custom Field Label for Service Order Code (1-3)

These three options allow you to set up codes that let a technician know information about the repair. These codes display in POS. After the transaction has been processed, they also display in the Service Order viewer so that you can sort by them. Optionally, you can use options 9321-9123 to establish up to three specific settings for each code you establish.

For example, you could set up a code in option 9318 called "authorized," to let the technician know whether or not they can go over the amount of the quote without calling the customer for authorization first. Then, you could set up corresponding option 9321 with three settings, such as "Quote Amount or Less," "Can Exceed Quote up to \$50", and "No Restriction."

| Maintain Table | | | | | | | |
|-------------------|---|---|----------------------|---|-----------------------------|---|-----------------|
| Description | Service Order Code 1 | | | | | | |
| Number of Entries | 3 | | | | | | |
| Codes | <table border="1"><tbody><tr><td>1</td><td>Quote Amount or Less</td></tr><tr><td>2</td><td>Can Exceed Quote Up to \$50</td></tr><tr><td>3</td><td>No Restrictions</td></tr></tbody></table> | 1 | Quote Amount or Less | 2 | Can Exceed Quote Up to \$50 | 3 | No Restrictions |
| 1 | Quote Amount or Less | | | | | | |
| 2 | Can Exceed Quote Up to \$50 | | | | | | |
| 3 | No Restrictions | | | | | | |

Buttons: Add, Change, Delete, Save, Cancel

Option 9321-9323 POS Add/change Service Order Code (1-3)

Use these options to establish up to three specific settings for each code you establish in options 9318-9320. For example, you could set up a code in option 9318 called "Authorized," to let the technician know whether or not they can go over the amount of the quote without calling the customer for authorization first. Then, you could set up corresponding option 9321 with three settings, such as "Quote Amount or Less," "Can Exceed Quote up to \$50", and "No Restriction."

Option 9324 POS Service Order Additional Prompts/Answers Print Options

This option determines whether to post the service order additional prompts and answers (as defined in options 9304, 9305, 9306, and 9307) to the body of the service order as "External" (printed) comments which are customer-facing, or as "Internal" (non-printing) comments which are for internal viewing only. The options are:

- P = External. Print these prompts and their answers
- I = Internal. Do not print these prompts and their answers.
 - Note: Internal (non-printing / on screen only) comments have INT in the Codes column so that you can confirm that a comment is 'Internal' by seeing this code.

Option 9325 Prompt to email customer when status changes on Service Order

Set this option to yes if you want to email service order customers when their order's status is changed to one of the statuses in option 9327 "service order status changes which generate prompt to email customer." If the service order customer has an email address, you receive a prompt asking if you want to send the email to the customer. The prompt defaults to Yes or No based on option 9328 "Default answer for prompt to email customer when service order status changes".

Option 9327 Service Order status change which generate customer email prompt

Select the statuses that should cause POS to prompt to send an email notification to the customer. See option 9325 “Prompt to email customer when status changes on Service Order?” for details on how to send this type of email.

| Enter Email Statuses | |
|-------------------------------------|-------------------------|
| <input type="checkbox"/> | 1 Checked-in |
| <input type="checkbox"/> | 2 Work-in-Process |
| <input type="checkbox"/> | 3 Waiting on Parts |
| <input checked="" type="checkbox"/> | 4 Complete |
| <input type="checkbox"/> | 5 Additional Status (1) |
| <input type="checkbox"/> | 6 Additional Status (2) |

Select the statuses that should cause POS to prompt to send an email or text notification to the customer.

See option 9325 "Prompt to email customer when status changes on Service Order?" for details on how to send this type of email.

See option 1674 "Send text message notifications to customers for these events" for details on how to send a text.

Choices 5 thru 9 represent the additional statuses which can be defined in options 9985 thru 9989.

Pre-requisite to use this feature to email the customer is iNet E-Invoices (option 5784 "iNet email POS invoices on system" must be Yes).

Pre-requisite to use this feature to text the customer is option 1673 "Text Messaging (SMS) available on System.

Kept By System

OK

Cancel

Option 9328 Default Prompt to send when change in Service Order Status

Select yes if you want the email prompt to default to Yes, or select No if you want the email prompt to default to No.

See option 9325 "Prompt to email customer when status changes on Service Order?" for details on how to send this type of email.

Option 9330 Service and Repair Store Licenses

In Options Configuration, verify that option 1093 is set to Yes, and that option 9330 is set to the appropriate number of licenses. In the Options Configuration window, click ID, enter the option ID number, and press Enter. If the options aren't set properly, contact Epicor Direct at 800-538-8597

Option 9332-9335

If you have created any User defined notes (and codes) for Terms/conditions, best practice is to enter the code for each note.

Option 9336 Default for Short ID on Service Orders

This option determines the Short ID on Service Orders created for cash customers. When a Service Order is created for the default cash customer (as defined in option 330 "Default Cash Customer"), this option determines the value that will be placed in the Short ID field of the Service Order.

| Default for Short ID | |
|----------------------|---|
| 1 | Phone Number |
| 2 | E-mail Address |
| 3 | Name |
| 4 | Last Name |
| 5 | 3 characters of Last Name and 2 of First Name |

Determines what the Short ID on a Service Order type of transaction will be set to on Service Orders created for cash customers.
When a Service Order is created for the default cash customer as defined in Option 330 "Default Customer Number", this option determines the value that will be placed in the Short ID field of the Service Order.

When 1 is selected, the Phone number entered in the Service Order's header will be placed in the Short ID.
When 2 is selected, the first 10 characters of Email Address entered in the Service Order's header will be placed in the Short ID.
When 3 is selected, the first 10 characters of the Name entered in the Service Order's header will be placed in the Short ID.
When 4 is selected, the 2nd word of the Name entered in the Service Order's header will be placed in the Short ID.
When 5 is selected, the first 3 characters of the 2nd word and the first 2 characters of the 1st word of the Name entered in the Service Order's header will be placed in the Short ID.

Kept By System

Option 9985 through 9989 Additional Status Options

These additional status options give you a total of up to 10 different statuses that can be used to represent the different stages through which a service order must go. These options are in addition to options 9310 through 9314 in Options Configuration. The additional statuses are also relevant to option 9327 “Service Order status changes which generate prompt to e-mail customer.” You may want to add a status of “Waiting for Auth.”, “Complete-Review” or “Complete-Pickup”

Security Bits

Bit 911 Allow Service Orders in POS

This bit controls the ability to create or recall a Service Order. When this bit is set to No, the selection for Service Order on the Start Transaction (F2) menu is grayed out.

Bit 833 Allow Access to Compass

If you have Compass (option 8829 "Compass Analytics on System" is set to Yes), you must have security bit 833 set to Yes.

The contents of this document are for informational purposes only and are subject to change without notice. Epicor Software Corporation makes no guarantee, representations or warranties with regard to the enclosed information and specifically disclaims, to the full extent of the law, any applicable implied warranties, such as fitness for a particular purpose, merchantability, satisfactory quality or reasonable skill and care. This document and its contents, including the viewpoints, dates and functional content expressed herein are believed to be accurate as of its date of publication. The usage of any Epicor software shall be pursuant to the applicable end user license agreement and the performance of any consulting services by Epicor personnel shall be pursuant to applicable standard services terms and conditions. Usage of the solution(s) described in this document with other Epicor software or third party products may require the purchase of licenses for such other products. Epicor, the Epicor logo, and are trademarks of Epicor Software Corporation, registered in the United States and other countries. All other marks are owned by their respective owners. Copyright © 2016 Epicor Software Corporation. All rights reserved.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, [connect with Epicor](#) or visit www.epicor.com.



Corporate Office

804 Las Cimas Parkway
Austin, TX 78746

USA

Toll Free: +1.888.448.2636

Direct: +1.512.328.2300

Fax: +1.512.278.5590

Latin America and Caribbean

Blvd. Antonio L. Rodriguez #1882 Int. 104

Plaza Central, Col. Santa Maria

Monterrey, Nuevo Leon, CP 64650

Mexico

Phone: +52.81.1551.7100

Fax: +52.81.1551.7117

Europe, Middle East and Africa

No. 1 The Arena

Downshire Way

Bracknell, Berkshire RG12 1PU

United Kingdom

Phone: +44.1344.468468

Fax: +44.1344.468010

Asia

238A Thomson Road #23-06

Novena Square Tower A

Singapore 307684

Singapore

Phone: +65.6333.8121

Fax: +65.6333.8131

Australia and New Zealand

Suite 2 Level 8,

100 Pacific Highway

North Sydney, NSW 2060

Australia

Phone: +61.2.9927.6200

Fax: +61.2.9927.6298