

Using the Service and Repair Order Viewer

Using the Service and Repair Order Viewer

When you offer your customers Service and Repair options, you need to have an easy way to track the status of each project.

Using the available viewer and its ability to add, modify or even delete data can be a big help.

Let's look at the Service and Repair grid. It's a useful tool to display, sort and change Point of Sale details.

Display Service Orders

Display the POS window.

With your cursor In the Customer box, click the Menu button.

Under the Viewers heading, click Documents.

Eagle opens the All Types Viewer.

Click the Service Orders hyperlink.

Eagle launches the Open Services Orders viewer with full grid functionality.

You can limit the data based on the Service Order status, or identify a customer, job account, or specific Serial Number.

Display information by Store, based on a Part number or a specific Technician.

Use the Change Lookup link to search by Phone Number.

You can also access the viewer when you Start a Transaction from the ribbon menu and choose Service order.

Click Recall Existing Order and press the Viewer button.

Modify or Delete Service Orders

To change the Status, enter a Status Note, change the Technician, or alter the Location, highlight the Service Order and press Change.

Make your adjustments and entries.

Note that New Status Notes only apply when the Status is changed.

Press OK when you're done.

To delete a Service Order, you must have security bit number 69 enabled for your Role.

Right-click on a column heading, select checkboxes, and place a checkmark next to the Service Orders you want to delete.

Press the Delete button and confirm the action.

To add items or invoice the Service Order, press the Select button with the document highlighted.

Modify or complete the sale as you normally would.

The Service and Repair function has been greatly expanded with recent Eagle software releases.

The ability to monitor activity in your service department helps keep track of inventory movement, repair status, and technician efficiency.

Use the viewer to display and modify this important data.

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