



ICE Business System

End of Month - Service Management

(Version – 1.1)

Learning Unit Guide

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I : Introduction

This Learning Unit Guide is reference-based, in that most of the information for the tasks can be found in the **Signature Learning Centre**.

This guide is designed as a workbook to be used during facilitator led learning.

It includes instructional materials, descriptions of business processes and details of demonstrations to be undertaken by the facilitator.

There are references to **menu paths** for accessing the functions within **ICE** application and **SLC References** for locating additional information in the **Signature Learning Centre**.

II : Objectives

Outline the items to be reviewed regularly to maintain accuracy of the Service Module in the ICE Business System.

III : Target Audience

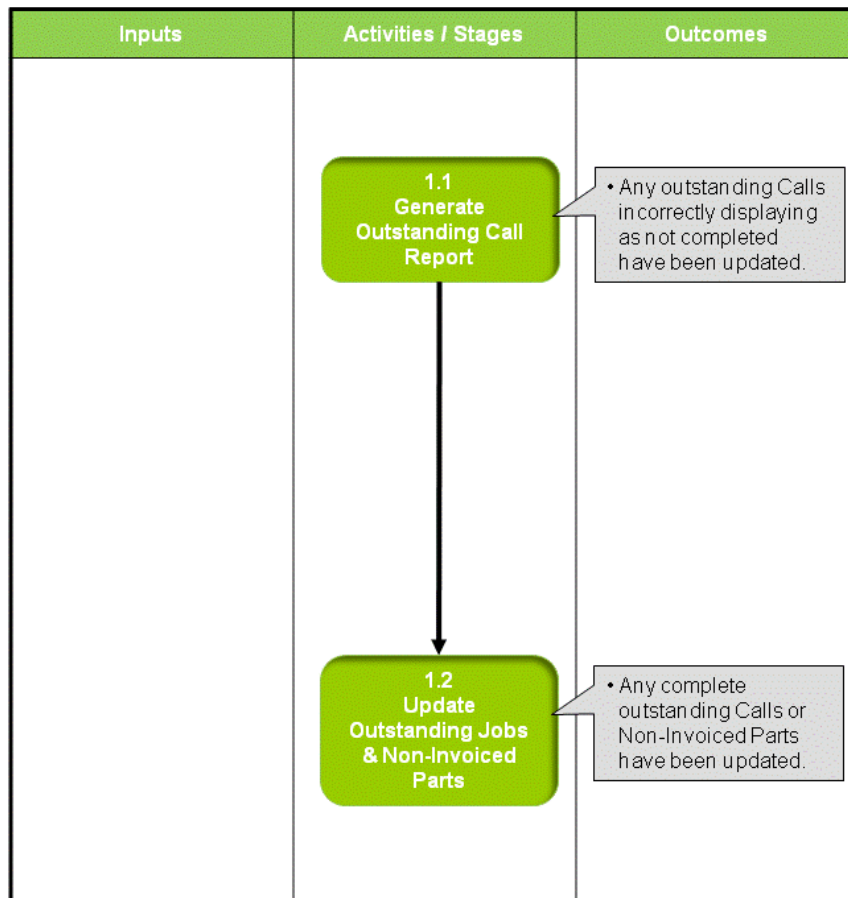
Repair and administration staff responsible for Service Management within the ICE Business System.

IV : Prerequisites

- Service Call Setup Activities
- Service Call Processing Activities
- Service Call Reporting Activities

V : Scenarios**V.1 : Jobs & Non-Invoiced Parts Updated****Workflow**

Workflow :	Jobs & Non-Invoiced Parts Updated
Scenario 1:	Regular maintenance to ensure all completed Jobs & Non-Invoiced Parts have been updated and posted to the general ledger provides greater accuracy within any reporting completed at the end of month.



Scenario 1: Jobs & Non-Invoiced Parts Updated

Regular maintenance to ensure all completed Jobs & Non-Invoiced Parts have been updated and posted to the general ledger provides greater accuracy within any reporting completed at the end of month.

**1.1: Generate Outstanding Call Report****Objectives:**

- Determine any Jobs incorrectly displaying on the Outstanding Call report that should have been completed and updated.

SLC Reference:

- ICE Business Systems > Service Call Management > Reporting Activities

Work Instructions**Screen: ICE Main**

1. Access **Outstanding Call Report**.

Select menu path:

Reports > Service Reports > Outstanding Call.

Screen: Outstanding Calls Report Parameters

2. Select the **Report Type** of **Detail**.
3. Select **Both Job**.
4. Select **All Job Types**.
5. Select all of the **Call Status**'.
6. Select a **Date Range** with a **From Date** that considers when no Calls would still be expected open and a **To Date** until recently or select **All**.
7. Select a **Group By** to determine the format of the report.
8. Select a **Sort Order** for the report.
9. Select **Preview**.

Screen: Print Preview

10. Review each Call and identify any not completed that should have been.

Screen: ICE Main

11. Where changes are required, update the **Call** to be completed and ready to be updated.

Outcomes:

- Any outstanding Calls incorrectly displaying as not completed have been updated.

Notes:

- N/A



1.2: Update Outstanding Jobs & Non-Invoiced Parts

Objectives:

- Update any outstanding Calls or Non-Invoiced Parts that have not been updated.

SLC Reference:

- ICE Business Systems > Service Call Management > Processing Activities

Work Instructions

Screen: ICE Main

1. Access **Audit Trails**.

Select menu path:

Admin > End of Day > Audit Trails.

Screen: Audit Update Procedures

2. Select each of the **Service** transactions of **Invoices**, **Job Parts** and **Non Invoiced**.
3. Select the **From** and **To** range for transactions to be updated.
4. Select **OK**.

Screen: Print Preview

5. **Review** the Checklist.
6. If required select the **Print** icon.

Note:

Either the Checklist or Audit Trail are required to be printed, as they contain the same information. It is recommended that the Audit Trail be printed as this is printed on confirmation of Updating the transaction. It is suggested that a Checklist only be printed if the transactions entered need to be reviewed further than can be done on the screen.

7. Select the **Close** button to proceed with the update.

Screen: Confirm

8. After reviewing the Checklist, if no further changes are required, select the **Yes** button to continue with the update.

If changes are required, select the **No** button to not continue with the update.

Screen: Print

9. If a copy of the Audit Trail is required, select the **Print** button.

Note:

If a copy of the Audit Trail is not required, select the Cancel button.



Selecting to cancel the print does not cancel the update. Audit Trails can be reprinted at any time.

Screen: Audit Update Procedures

10. Select the **Cancel** button to close the Window.

Outcomes:

- Any complete outstanding Calls or Non-Invoiced Parts have been updated.

Notes:

- N/A