ICE Business System

Service Call Manager

(Version 1.1)

Learning Unit Guide

Table of Contents

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

To understand and appropriately utilise the Service Call Manager module within the ICE Business System.

III : Target Audience

Service works controller and or Administration staff responsible for recording jobs within the Service Call Manager module.

IV : Prerequisites

- Service Call Manager Processing Activities

V : Scenarios

V.1 : Service Call Manager - Standard

Workflow :	Service Call Manager - Standard
Scenario 1:	An administration staff member needs to record a new service job within the Service Call Manager module.

Inputs	Activities / Stages	Outcomes
	1.1 Access Service Call Manager	• The Reporting screen is now active and users can run reports.
	1.2 Create a new Job	• The Job is ready to be entered.
	1.3 Enter Job Details on Call In tab	• The details of the Job have been recorded.
	1.4 Print Job Card	• The details of the Job have been printed.

Scenario 1: Service Call Manager - Standard

An administration staff member needs to record a new service job within the Service Call Manager module.

1.1: Access Service Call Manager

Objectives:
• *Access the Service Call Manager module.*
SLC Reference:
• *ICE Business Systems > Service Call Management > Processing Activities*

Work Instructions

Screen: ICE Main
1. Access **Service Call Manager**. Select menu path: **Operations > Service > Service Call Manager** or The [**Service Call Manager**] icon

Outcomes:
• *The Service Call Manager is now open ready for a new job to be entered.*
Notes:
• *N/A*

1.2: Create a new Job

Objectives:
• *Create a new job within the Service Call Manager module.*
SLC Reference:
• *ICE Business Systems > Service Call Management > Processing Activities*

Work Instructions

Screen: Service Call Manager
1. Create a new **Job**. Select the **New Job** speed button to insert a new Job.
Screen: New Service Job

2. Select the required **Working Module**.

3. Select whether this is a **Casual Job** or a job for **Existing Equipment**.

4. Select the **Job Type** of either **Install** or **Maintenance**.

5. Enter known details such as **Equipment Number** (System Number from Equipment Master File), **Serial Number** or the client's **Phone Number** (no area code required). This will assist with searching for an existing piece of Equipment.

6. Select the **OK** button to create the new Job.

   Note:
   If known details entered, they must match an open record within the Equipment Master File to continue.

Screen: Account Status

   Note:
   Account Notes will be displayed when a Customer has been matched and the Invoice System Default "Display Customer Current Account – when entering Service Calls" for the Branch has been selected.

7. View the **Customer Account** details and any **Customer** or **Equipment Alerts** that have been entered.

8. Select **OK** to continue.

Outcomes:

- *The Job is ready to be entered.*

Notes:

- *N/A*

1.3: Enter Job Details on Call In tab

Objectives:

- *Record the details of the Job.*

SLC Reference:

- *ICE Business Systems > Service Call Management > Processing Activities*

Work Instructions

Screen: Job Details tab

1. A **Job Number** will be automatically assigned.

2. Confirm the correct Equipment and Customer has been found, if details entered. If the job is a casual job and no Customer is appearing, select the **Customer Code search arrow**.

Screen: Customer Search

3. Search for the **Customer** the Job is for, in any of the searchable fields.

4. Press **F12** to retrieve the search results.
5. Select the **Customer** required.
6. Press **OK** to select the **Customer** and close the Customer search.

Screen: Job Details tab

7. Confirm the correct Equipment has been found, if details entered. If no Equipment appearing, select the **Equipment ID search arrow**.

Screen: Equipment Search

8. Search for the **Equipment** the Job is for in any of the searchable fields.
9. Press **F12** to retrieve the search results.
10. Select the **Equipment** required.
11. Press **OK** to select the **Equipment** and close the Equipment search.

Screen: Job Details tab

12. The details of the Equipment from the Equipment Master File will be entered against the Job.

Screen: Call In tab

13. Select the correct **Call Type** from the drop down. If a default call type has been selected in the setup area for call types – change this to the correct call type that you require.
14. If required, modify the **Received Date & Time**.
15. Select the correct **Call Priority** from the drop down.
16. If applicable enter the **Customer Order Number**.
17. Enter the person who logged the job in the **Call reported by** field.
18. If known, record the Allocated Technician for the job by selecting the **Allocated Technician search arrow**.

    Note:
    The Allocated Technician can be entered at a later date.

Screen: Staff Search Dialog

19. Search for the **Technician**, the Job is to be allocated to in any of the searchable fields.
20. Press **F12** to retrieve the search results.
21. Select the **Technician** required.
22. Press **OK** to select the **Technician** and close the Staff search.

Screen: Call In tab

23. Select the correct **Error Code, Fault & Solution** from the drop down.
24. If applicable, enter the **Current Meter Read** of the Equipment.
25. If applicable, select a **Task** description from the drop down.
26. Add any additional **Fault Details** as required.
27. To save the job, select **Apply or F10**.
28. If the job contains multiple Call components, press **F9** to insert another call whilst your cursor is on the call in tab and repeat steps 13 – 27.

    Note:
    To view multiple calls select the Call Browse tab of the Job.

Outcomes:
• *The details of the Job have been recorded.*
Notes:
• *N/A*

1.4: Print Job Card

Objectives:
• *Print the details of the Job on a Job Card.*
SLC Reference:
• *ICE Business Systems > Service Call Management > Processing Activities*

Work Instructions

Screen: Job Details tab
1. If required, right-click on the Blue Title Bar and select the **Job Card** format required.

Outcomes:
• *The details of the Job have been printed.*
Notes:
• *N/A*

V.2 : Modify Job

Workflow :	Modify Job
Scenario 2:	An administration staff member needs to update the details of an existing service job within the Service Call Manager module.

Inputs	Activities / Stages	Outcomes
	2.1 Select Job	• The Job is ready to be modified.
	1.3: Enter Job Details on Call In tab ▼ **1.4: Print Job Card**	• The details of the Job have been modified.

Scenario 2: Modify Job

An administration staff member needs to update the details of an existing service job within the Service Call Manager module.

2.1: Select Job

Objectives:
• *Update the details of a Job within the Service Call Manager module.*
SLC Reference:
• *ICE Business Systems > Service Call Management > Processing Activities*

Work Instructions

Screen: Service Call Manager
Note: *Filter options selected at the top of the screen determines which Jobs are displayed. Modify as required.*
1. Ensure **Working Module** is set to either All Modules or the required Module for this Job.
2. Select either the **Un/Allocated Calls** tab to view the calls separated into two lists based on whether Unallocated or Allocated, or the **Combined Calls** tab to view all calls displayed together regardless of whether Unallocated or Allocated. A Job is considered Allocated when a Technician has been assigned.
Note: *The status of Calls are displayed using a colour legend. Select the Colour Legend button at the bottom of the screen to view further details.*
3. Select the **Job** required to be modified and select the **View/Edit** button.
Note: *Alternatively double click on the Job to view the Job details.*

Outcomes:
• *The Job is ready to be modified.*
Notes:
• *N/A*

Signature **Software**

1.3: Enter Job Details & Call In Job
        to
1.4: Print Job Card

Objectives:
• *Modify the details of the Job.*
SLC Reference:
• *ICE Business Systems > Service Call Management > Processing Activities*

Work Instructions

Screen: Job Details tab
1. Complete Scenario "**Service Call Manager- Standard**" from Stage 1.3 to end.

Outcomes:
• *The details of the Job have been modified.*
Notes:
• *N/A*

V.3 : Book Date

Workflow :	Book Date
Scenario 3:	The Service Call Manager allows you to book or schedule a time for service jobs to be completed by a technician.

Inputs	Activities / Stages	Outcomes
	2.1 Select Job	• The Job is for booking is selected.
	3.1 Book Job	• The Service Call has been booked.
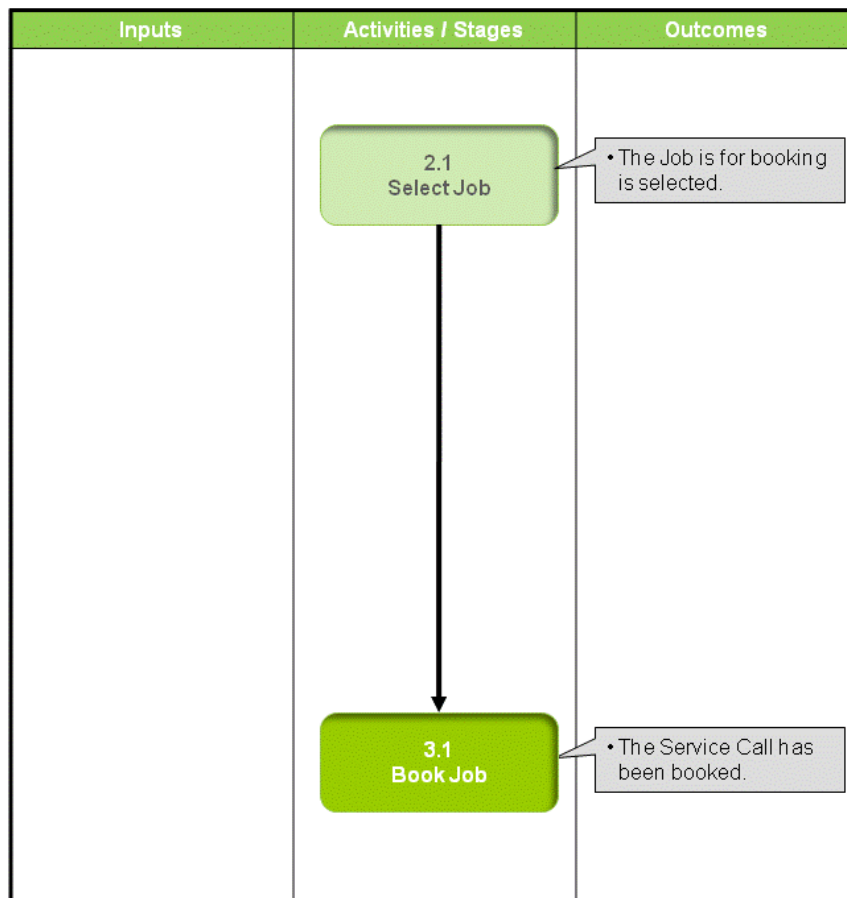
Scenario 3: Book Date

The Service Call Manager allows you to book or schedule a time for service jobs to be completed by a technician.

This is done by using the Book Date button in the Service Call Manager when the Schedule button on the Call in tab of the service job was not completed.

Use booking dates for calls where you must comply with specific times & dates provided by the customer to ensure accurate response time on Service reporting, as response times do not start being recorded until the booked time elapses.

Note:
Note that response times do not start recording until the scheduled / booked time for the job has elapsed.

2.1: Select Job

Objectives:
• *Select a Job within the Service Call Manager module.*
SLC Reference:
• *ICE Business Systems > Service Call Management > Processing Activities*

Work Instructions

Screen: Service Call Manager
1. Complete Scenario "**Service Call Manager- Modify Job**" Stage 2.1 selecting the **Book Date** button.

Outcomes:
• *The Job is for booking is selected.*
Notes:
• *N/A*

3.1: Book Job

Objectives:
• *To book the Service Call.*
SLC Reference:
• *ICE Business Systems > Service Call Management > Processing Activities*

Work Instructions

Screen: Service Work Control Booking Calendar
1. Select the **Display Period** required. 2. Confirm the required **Booking Date** and **Booking Time**. 3. Select the **Book Call** button.

Outcomes:
• *The Service Call has been booked.*
Notes:
• *N/A*

V.4 : Close / Call Off Job

Workflow :	Close / Call Off Job
Scenario 4:	An administration staff member needs to record the details of a job that has now been completed within the Service Call Manager module and ensure it is no longer outstanding.

Inputs	Activities / Stages	Outcomes
	2.1 Select Job	• The Job is ready to be called off.
	4.1 Call Off Job	• The Service Call Off information has been recorded against the call
	4.2 Complete Job	• The Service Call has been closed.
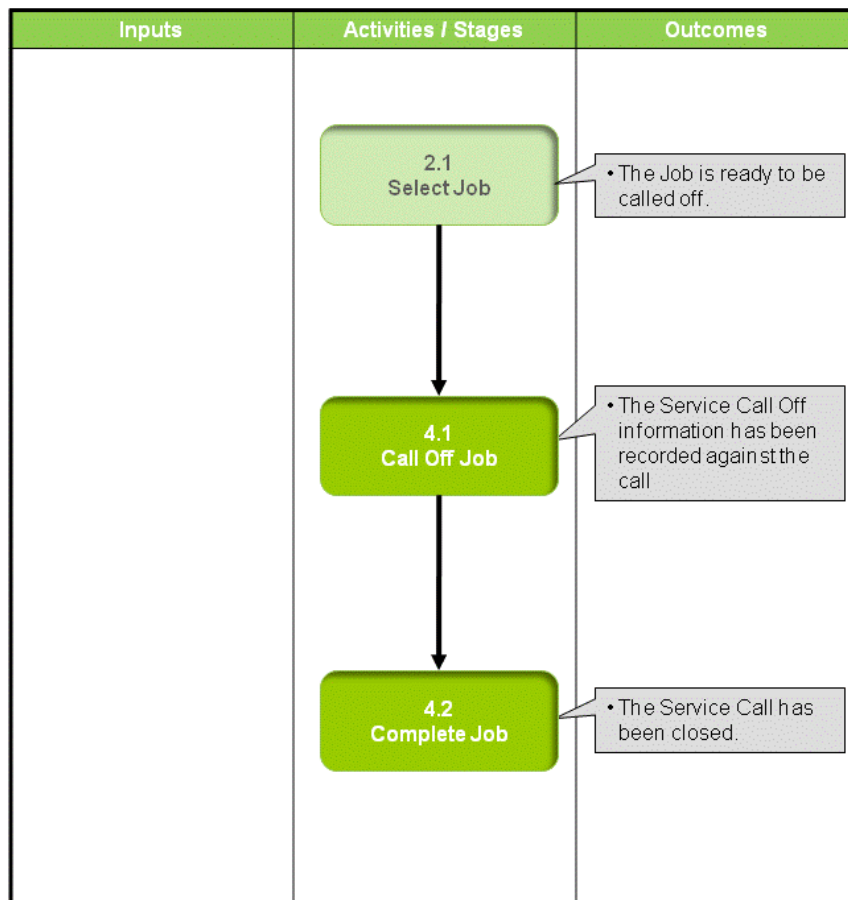
Scenario 4: Close / Call Off Job

An administration staff member needs to record the details of a job that has now been completed within the Service Call Manager module and ensure it is no longer outstanding.

2.1: Select Job

Objectives:
• *Select a Job within the Service Call Manager module.*
SLC Reference:
• *ICE Business Systems > Service Call Management > Processing Activities*

Work Instructions

Screen: Service Call Manager
1. Complete Scenario "**Service Call Manager- Modify Job**" Stage 2.1 selecting the **Complete** button to ensure the **Call Off tab** is displayed.

Outcomes:
• *The Job is ready to be called off.*
Notes:
• *N/A*

4.1: Call Off Job

Objectives:
• *To call off the Service Call.*
SLC Reference:
• *ICE Business Systems > Service Call Management > Processing Activities*

Work Instructions

Screen: Call Off tab
Note: *The Completed Date & Time defaults to the current system date and time.*
1. Select the **Labour** button to enter associated Labour that has been completed on the call.
Screen: Service Call Labour
2. If correct Technician not displayed, select the **Technician search**

arrow.

3. Search for the **Technician** the Job is to be allocated to in any of the searchable fields.
4. Press **F12** to retrieve the search results.
5. Select the **Technician** required.
6. Press **OK** to select the **Technician** and close the Staff search.

7. Select whether this was the **Main Technician** for the Job.
8. **Arrived Date** and **Arrival Time** defaults to current system date and time. Modify to actual arrival time supplied by Technician.
9. Select whether **Call Out Fee** is chargeable and confirm the number of **Units** and **Charge Rate** is correct. Ensure correct **Product Code** defaults as this is where Invoice Charges will be posted to.
10. Select whether **Travel** is chargeable and enter the **Hours** and **Minutes** applicable, confirm correct number of **Units** determined. Ensure correct **Product Code** defaults as this is where Invoice Charges will be posted to.
11. Select whether **Labour Time** is chargeable and enter the **Hours** and **Minutes** applicable, confirm correct number of **Units** determined. Ensure correct **Product Code** defaults as this is where Invoice Charges will be posted to.
12. If more than one Technician provided Labour, select the **green "+" button** to insert another Technician and repeat steps 2 – 11 until all Technicians recorded selecting the **green "✓" button** to save the last Technicians details.

    Note:
    To view other Technician details select the black toggle arrows.
13. *By entering the travel and labour time the ICE system will automatically calculate the completed time for that call by adding the travel and labour hours and minutes to the arrival time of the call that you have entered.*
14. Select **OK** to save and close the screen.

15. If Stock Items have been used within the Job select the **Parts** button.

16. Confirm the **Technician** for the Parts.
17. Select the **Product search arrow**.

    Note:
    Alternatively the Part's barcode can be scanned to enter the Item. Select the Barcode Entry box to place the cursor there and scan the Part's barcode.

18. Search for the **Product** by typing into any of the searchable fields.
19. Press **F12** to retrieve the search results.
20. Select the **Product** required.

21. Press **OK** to select the **Product** and close the Product search.

Screen: Service Call Parts Used
22. Select whether the Part is to be charged to the Customer by selecting the **Chargeable** tick box.
23. Confirm the **Supplied** quantity for the Part. If any Part not available confirm the **Quantity Back Ordered**.
24. Confirm the **Value** to be charged.
25. Confirm the correct **Tax** value.
26. The **Total** is automatically determined.
27. If Part used was provided under warranty, select **Warranty** tick box. By flagging the part as supplied under warranty the machine history will record the use of this part at zero cost against the equipment. A warranty claim is then required to be processed internally to claim the credit for this item back from the manufacturer/supplier.
28. Confirm the **GL Set Code** for the Part.
29. Save the Part by pressing **F10**.
30. If multiple Parts required, press **F9** and repeat steps15 – 27 until all parts entered.
31. Close the window by selecting the **OK** button.

Screen: Call Off tab
32. Enter any **Call off Notes** provided by the Technician.
33. Enter any **Invoice Notes** that are required to appear on the Customer's Invoice.
34. Save the Call Off details by selecting the **Yellow "✓"** button, pressing **F10** or the **Apply** button.
35. If known, enter the current meter **Reading** supplied by the Technician.
36. If applicable, enter the number of **Test Copies** supplied by the Technician. **Note:** *The recording of Test Copies is an internal process. It has no impact on the Auto billing or any customer charge facility.*

Outcomes:
• *The Service Call Off information has been recorded against the call*
Notes:
• *N/A*

4.2: Complete Job

Objectives:
• *To complete and close the Service Call Job.*

SLC Reference:
• *ICE Business Systems > Service Call Management > Processing Activities*

Work Instructions

Screen: Call Off tab
1. Once all information has been correctly entered select the **Complete Call** button.

Screen: Charge Customer
2. If Job is chargeable, confirm the Customer an Invoice is to be raised for.

Screen: Confirm
3. If Job is chargeable, confirm Invoice details.
4. If Invoice required in XML select the **Export to XML** tick box and the template required from the drop down list. Once exported the XML Invoice can be provided to the Customer.
5. Select whether Invoice is to be Printed or Previewed.

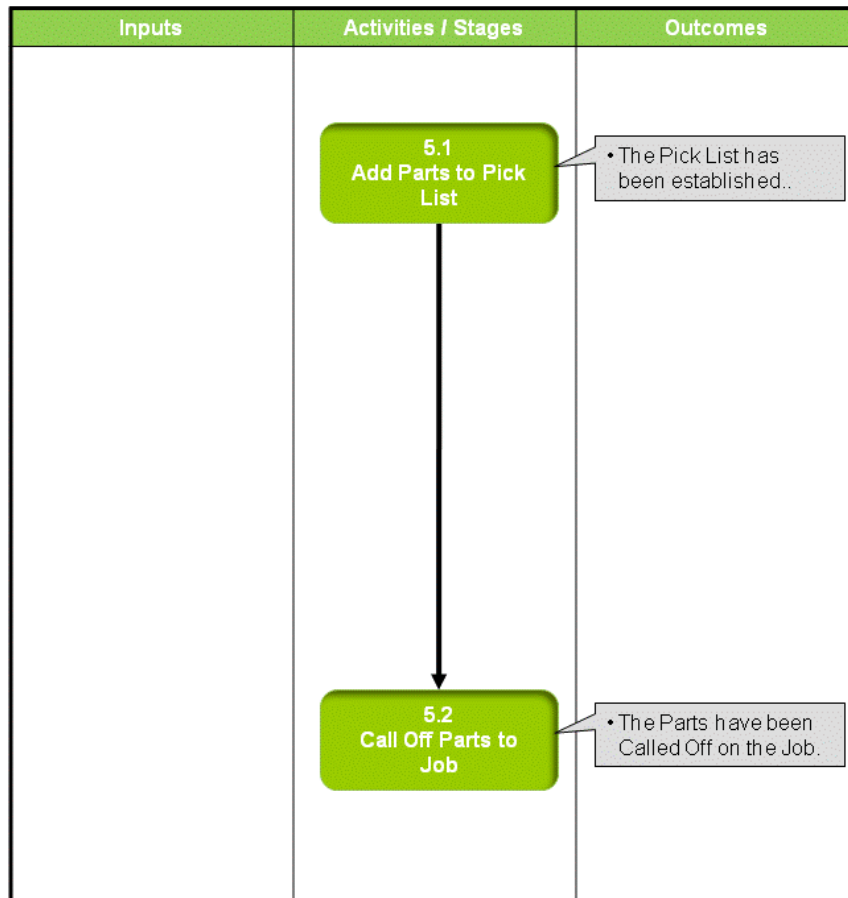| Outcomes: |
|---|
| • *The Service Call has been closed.* |

Notes:
• *Where there are multiple calls against a job – the complete call button will complete the associated call, whilst leaving the job outstanding if it still has open calls against it. Charges for the completed call will be saved (they can be viewed on Job Summary) and added to a final total invoice for the entire job when all calls are completed.*

V.5 : Pick List

Workflow :	Pick List
Scenario 5:	A Technician needs to order stock Parts to be used on a Job and hold some parts that are currently on hand for that job. Once supplied and fitted they are then to be transferred as a Part within the Call Off tab of a Job.

Inputs	Activities / Stages	Outcomes
	5.1 Add Parts to Pick List	• The Pick List has been established..
	5.2 Call Off Parts to Job	• The Parts have been Called Off on the Job.

Scenario 5: Pick List

A Technician needs to order stock Parts to be used on a Job and hold some parts that are currently on hand for that job. Once supplied and fitted they are then to be transferred as a Part within the Call Off tab of a Job.

Note:
The Pick List can be used to record parts that need to be ordered for the service call, they do not need to be in Stock. Once they have been supplied and fitted they can then be transferred to the Parts Call Off area.

5.1: Add Parts to Pick List

Objectives:
• *Select Parts to be added to a Job's Pick List.*
SLC Reference:
• *ICE Business Systems > Service Call Management > Processing Activities*

Work Instructions

Screen: Pick List tab
1. Select the **Pick List tab**.
2. Select the **Green "+"** button to insert a new Part.
3. Select the **Stock Code search arrow**.
Note: *Alternatively the Part's barcode can be scanned to enter the Item. Tick the Barcode active tick box, select the Barcode Entry box to place the cursor there and scan the Part's barcode.*

Screen: Product Search
4. Search for the **Product** by typing into any of the searchable fields.
5. Press **F12** to retrieve the search results.
6. Select the **Product** required.
7. Press **OK** to select the **Product** and close the Product search.

Screen: Pick List tab
6. Confirm the **Quantity** required.
7. If applicable, enter a **Technician** responsible for the Part.
8. If a serialized item, confirm the **Serial Number**.
9. Select the Green **"✓"** button to save the Part.
10. If multiple Parts required, press **F9** and repeat steps 2 – 14 until all Parts entered.

Outcomes:
• *The Pick List has been established.*
Notes:
A pick list can be established for parts that are to be ordered and or to

hold parts that are currently on hand whilst awaiting other parts to arrive. Only those parts entered to stock will be able to be transferred to the job for call off.

If you are using a system that allows negative stock – which is not a recommended course of action, you will be able to transfer parts from the pick list to the call off regardless of quantity on hand, resulting in negative quantity on hand in your inventory file.

5.2: Call Off Parts to Job

Objectives:
• *Select Parts from the Pick List to be Called Off to the Job or by adding parts used as listed on the completed job sheet.*
SLC Reference:
• *ICE Business Systems > Service Call Management > Processing Activities*

Work Instructions

Screen: Parts button on Call off tab / or Pick List tab
When using the pick list:
1. Select the **Part** required.
2. Select the **Add to Parts** button.
When just adding parts on the call off tab:
3. Enter the **PARTS** button
4. Select the **parts** required
5. Save them against the technician and the call
6. Ensure that the number of parts required equals the number assigned in order to complete the call

Outcomes:
• *The Parts have been Called Off on the Job.*
Notes:
• *N/A*

Signature Software

V.6 : Return/Loan

Workflow :	Return/Loan
Scenario 6:	An operator needs to record a piece of Equipment that has been returned for repair and another piece of Equipment that has been given on Loan during this period.

Inputs	Activities / Stages	Outcomes
	6.1 Add Return/Repair Details	• The Return/Loan item has been recorded.

Scenario 6: Return/Loan

An operator needs to record a piece of Equipment that has been returned for repair and another piece of Equipment that has been given on Loan during this period.

6.1: Add Return/Repair Details

Objectives:
• *Record a piece of Equipment for Repair and another for Loan.*
SLC Reference:
• *ICE Business Systems > Service Call Management > Processing Activities*

Work Instructions

Screen: Pick List tab
1. Select whether the returned item is to be an **Inhouse Repair** or **Return to Supplier**. 2. If known, enter the **Return Authority Number**. 3. Enter the Equipment's **Date Returned**. 4. Enter an estimated or known return date for the Item in the **Due/Review Date** field. 5. If returned to a Supplier, select the **Returned to Supplier search arrow**.
Screen: Supplier Search
6. Search for the **Supplier** by typing into any of the searchable fields. 7. Press **F12** to retrieve the search results. 8. Select the **Supplier** required. 9. Press **OK** to select the **Supplier** and close the Supplier search.
Screen: Pick List tab
10. If applicable, select the **Freight Company** used. 11. Enter any comments within the **Repair/Return Details** field. 12. Select whether **Loan Equipment Issued**. 13. If loan Equipment issued, select the **System No search arrow**.
Screen: Machine Search
14. Search for the **Equipment** by typing into any of the searchable fields. 15. Press **F12** to retrieve the search results. 16. Select the **Equipment** required. 17. Press **OK** to select the **Equipment** and close the Machine search.
Screen: Pick List tab
18. Save the details entered by selecting the Green "✔" button, pressing **F10** or the **Apply** button.

Outcomes:
• _The Return/Loan item has been recorded._
Notes:
• _N/A_

V.7 :   Service Escalation

Workflow :	Service Escalation
Scenario 7:	A Service escalation is used to ensure that a service job is receiving the correct priority in the job queue.

Inputs	Activities / Stages	Outcomes
	7.1 Set up User as Works Controller	• The Users are now flagged to receive escalation warnings.
	7.2 Create Service Priorities	• The Service Priorities have been entered.

Scenario 7: Service Escalation

A Service escalation is used to ensure that a service job is receiving the correct priority in the job queue.

The service call is escalated due to the priority elapsed time having past, with a Service Priority Alert window appearing on entry to the Service Call Manager enabling the main works controller to action the escalated calls accordingly.

Based on the received call time of the job, once the elapsed time has passed the job will appear in the Service Call Manager in a highlighted block of colour (as opposed to coloured text). This colour reversal is used to identify calls that have been escalated.

The Service Priority Alert Window allows the works controller to manage the escalated calls via multiple options: To snooze the job for a set time, ignore all escalation warnings and or view the call details.

Note:
The use of service call escalation requires the user to be set up in the User Utility as a works controller and that elapsed times are set up against service priority codes in the ICE Business System.

7.1: Set up User as Works Controller

Objectives:
• *Record a User as a Work Controller to activate Service Escalation.*
SLC Reference:
• *ICE Business Systems > Database & User Administration > Processing Activities*

Work Instructions

Screen: ICE Utility Main
1. Access **Users & Groups** Select menu path: **Security > Users and Groups**
Screen: Users & Groups > Users tab > Browse tab
2. Select the **User** required to be set as a Works Controller on the Browse tab. **Note:** *It is recommended that Service Call escalation be assigned to your main service works controller and setup for that user only be applied. Escalation messages can cause frustration for users if this setup is not controlled and not customised to suit your business.* 3. Select the **Details** tab.
Screen: Users & Groups > Users tab > Details tab
4. Within the Service Controller section select the **Request Service Priority Warnings** dialog tick box. 5. Select the **Warnings for Job Types** required. 6. Save the changes by selecting **F10** or pressing the **Yellow "✓"** button.

7. If multiple Users require escalation warnings, repeat steps 2 – 6.

Outcomes:
• *The Users are now flagged to receive escalation warnings.*
Notes:
• *N/A*

7.2: Create Service Priorities

Objectives:
• *Enter the Service Priorities to be utilised within the Service Call Manager escalation process.*
SLC Reference:
• *ICE Business Systems > Service Call Management > Setup Activities*

Work Instructions

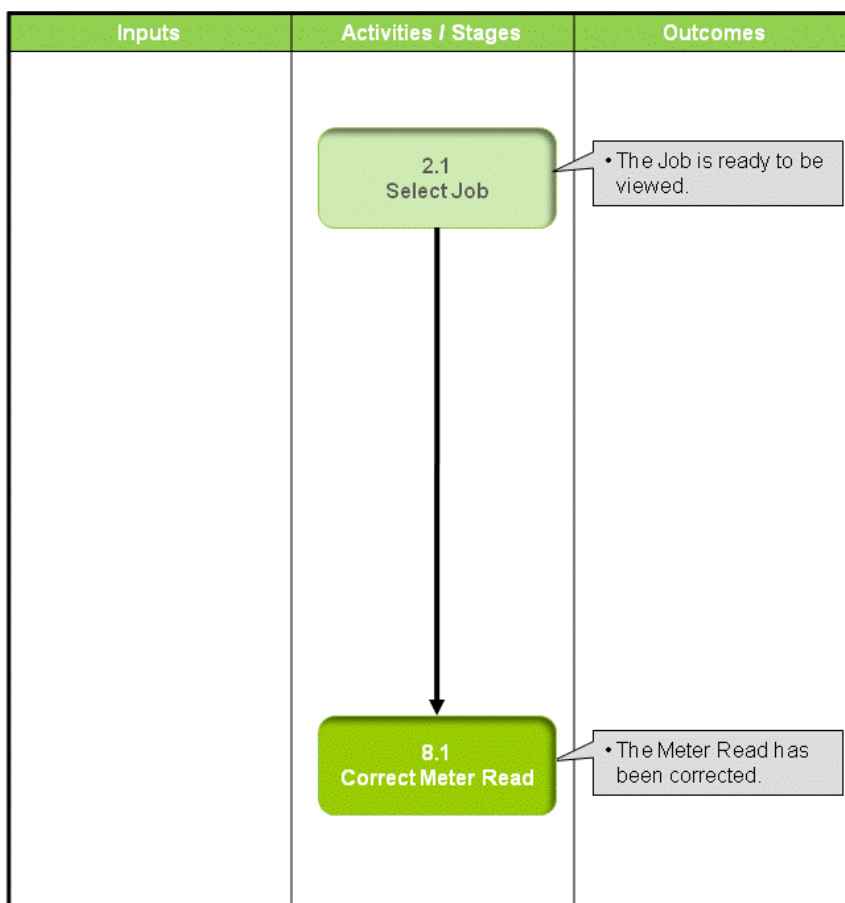| Screen: ICE Main |
| --- |
| 1. Access **Priorities**

 Select menu path:
 Admin > Setup > Service > Priority Types |
| **Screen: Priorities > Details tab** |
| 2. Insert a new **Priority** by selecting the **Green "+"** or pressing **F9**.

 Note:
 Service Call Priority Types are intrinsically linked to the Call Escalation Process. Without Priority Types, the Escalation process will not work. Care should be exercised when assigning a call Priority Type, as the incorrect type could adversely affect the performance of the service department. |
| 3. Enter a priority **Code**. |
| 4. Enter a **Priority Description**. |
| 5. Enter the **Elapse time before warning** in **hours** and **minutes**.

 Note:
 When determining the time to activate the Call Escalation process, be sure to consider the size of your Outstanding Call list. A large number of calls with small elapse time will result in the works controller being inundated with escalation messages. Be very realistic when setting elapse times. |
| 6. Select whether to **Ignore service calendar**. |
| 7. Save the details entered by selecting the **Green "✓"** button, pressing **F10** or the **Apply** button. |
| 8. If multiple priorities required, repeat steps 2 – 7. |

Outcomes:
• The Service Priorities have been entered.
Notes:
• N/A

V.8 : Correct Meter Read

Workflow :	Correct Meter Read
Scenario 8:	A meter reading that was entered incorrectly on a previous completed service needs to be edited.

Inputs	Activities / Stages	Outcomes
	2.1 Select Job	• The Job is ready to be viewed.
	8.1 Correct Meter Read	• The Meter Read has been corrected.

Scenario 8: Correct Meter Read

A meter reading that was entered incorrectly on a previous completed service needs to be edited.

Maintaining accurate meter records is important for accurate system reporting, so attending to incorrect meter entry as soon as the error is noticed is advisable.

Note:

Where multiple meter entries are required to be corrected, it is recommended that a search be performed on all jobs within the Service Call Manager on all jobs for that particular Equipment ID. Once completed the Job summary tab can be used to filter all jobs, sorting by date and allowing each meter read to be edited in sequence. For large number of readings requiring correction, Signature Support can be contacted by your System Administrator for directions on a shorter method that can be applied through Direct Access.

2.1: Select Job

Objectives:
• *Select a Job within the Service Call Manager module.*
SLC Reference:
• *ICE Business Systems > Service Call Management > Processing Activities*

Work Instructions

Screen: Service Call Manager
1. Complete Scenario "**Service Call Manager- Modify Job**" Stage 2.1.

Outcomes:
• *The Job is ready to be viewed.*
Notes:
• *N/A*

8.1: Correct Meter Read

Objectives:
• *Correct meter reads that have been entered incorrectly.*
SLC Reference:
• *ICE Business Systems > Service Call Management > Processing Activities*

Signature Software

Work Instructions

Screen: Call Off tab
1. Select the **Call Off tab** to display the incorrect meter read.
2. Enter the correct **Reading**.
3. Save the change by selecting the **Yellow "✓"** button, pressing **F10** or the **Apply** button.
4. Check the job for multiple calls by selecting the Call Browse tab and complete steps 1 – 3 for any other meter reads required to be edited.

Outcomes:
• *The Meter Read has been corrected.*

Notes:
• *N/A*

V.9 : Troubleshooting

Workflow :	Troubleshooting
Scenario 9:	Common questions relating to the use of the Service Call Manager are addressed.

Inputs	Activities / Stages	Outcomes
	9.1 Troubleshooting	• The common questions relating to the use of the Service Call Manager have been addressed

Scenario 9: Troubleshooting

Common questions relating to the use of the Service Call Manager are addressed.

9.1: Troubleshooting

Objectives:
• *Outline the common questions and answers relating to the use of the Service Call Manager.*
SLC Reference:
• *ICE Business Systems > Service Call Management > Processing Activities*

Work Instructions

Screen: ICE Main

1. Should I create a **new job or add a call to an existing job**?

   The Service Call Management module is typically used on a daily basis for entering new service jobs, equipment installations and their associated call details. New Jobs are created for the initial work to be completed and commonly entered when the customer makes a request for a technician to attend a site or when the works controller loads a job for known work to be completed. Each Service Job can then have multiple calls against it. New calls are entered against a job for return work. For example return jobs to fit parts, to provide follow up training on installation etc.

   A service invoice is not raised for a job until all calls have been completed and all exceptions addressed. As individual calls are completed against a job, details of what has already been charged/signed off against the job can be viewed on the job summary tab of the Service Job.

   Additional calls can be added to a job on the "Call in" screen of the job. Press F9 and complete step 13 onwards of **"1.3 Enter Job Details and Call in Job".** To view multiple calls select the Call Browse tab of the Job.

2. How do I change the number of **Service History Records** displayed on a Job card?

   Service job cards can display the history of previously completed jobs for that particular piece of Equipment. System Administrators can modify the number of records displayed within Direct Access. Signature support should be contacted in order to assist with making this adjustment.

3. When & how do I use the **Pending status?**

   A Job is automatically assigned the st**a**tus of Pending when a different "Required" and "Assigned" quantity is entered for a Part and/or Labour Unit on the Call Off tab of a Service Call and the

Complete Call button has been selected. The Pending status is designed to be used when calls have been completed in the field by the technician and may just require the paperwork to be returned to the office before the works controller completes the Parts/Labour allocation against the call.

To complete Pending calls, finalise all Part and/or Labour exceptions and again press the Complete Call button. The call status will be updated to "C" for complete. Refer to scenario "**Close / Call Off Job**" for instructions on completing this process.

4. Why when I go to log a Service Call there is a message advising that **there is a call open** but there isn't?

   A Job has been created and saved in the Service Call Manager with no Service Calls attached to the Job. This may happen for a number of reasons, but often relates to ICE sessions not being closed correctly.

   A simple review as part of your regular system management plan will prevent this from occurring. These Jobs with no calls can be deleted. However it should be noted that when a job is deleted, the job number will be re-used by the system. If you do not wish for these job numbers to be re-used you will need to contact ICE Support to have these removed completely.

   To find and resolve such Job's, view/edit any Service Call. Place the cursor in the Job Number field and select Ctrl-F5. Select F6 to move between each Job from beginning to end, deleting any Jobs with no call details displayed.

5. How do I charge for **machine run up costs**?

   The method you use to charge for run up costs will depend on your business accounting structure, who you are charging and how you want to see these costs reflected in both your Equipment and Financial reporting. Whichever method you choose you must ensure that it complies with taxation "profit transfer rules" and it is recommended that you have your internal policies for cost transfer invoicing reviewed/approved by your accountants.

   The simplest method that can be used to charge for machine run up costs in ICE is to allow the costs of the run up (labour and parts) to be signed off against a Service job as no charge. This method will record the internal labour costs against the equipment and any parts used as cost of goods in your financials. This in effect allows your business to account for the costs involved in running up either new equipment or refurbishing old equipment.

   The alternative methods for charging for machine run up costs involve internal invoicing between company departments that can be done either as part of service call off or direct through AR Invoicing. This may require an internal transaction between a service and sale department. Completed by raising an AR Invoice to a non-stock code set up for service run up income and then raising a manual credit note against this invoice to the relative expense G/L account that would most commonly be setup in your Sales division.

   Machine run up costs can relate to new machines and also to the refurbishment of an old machine. The methods explained here can be applied to both situations; however it is recommended that when charging for refurbishment of a machine that the old machine be

assigned the internal costs.

6. Why after I have completed an update, some records are still **not updated**?

If when you have completed your Job Parts update via End of Day Audit Trails, some records still remain in the drop down list as not updated, you must address the cause of this issue.
This situation occurs when job parts are assigned to a job with zero supplied quantities and have not been removed from the job prior to completing the Service Call. These Job Parts need to be removed by revisiting the job they relate to, deleting them from the job in the Call Off tab and re-completing this service call. As no parts were used they should not remain attached to the job.

Note: Be careful to discuss the removal of parts that have been assigned to a job with zero quantity against them – with the person responsible for closing the jobs – they may have attached the product code in an attempt to record a stock discrepancy. Perhaps the job card had this part as used but the ICE inventory system had none on hand. Issues such as this could indicate that you have stock discrepancies in your system that should be investigated

Outcomes:

- *The common questions relating to the use of the Service Call Manager have been addressed*

Notes:

- *N/A*