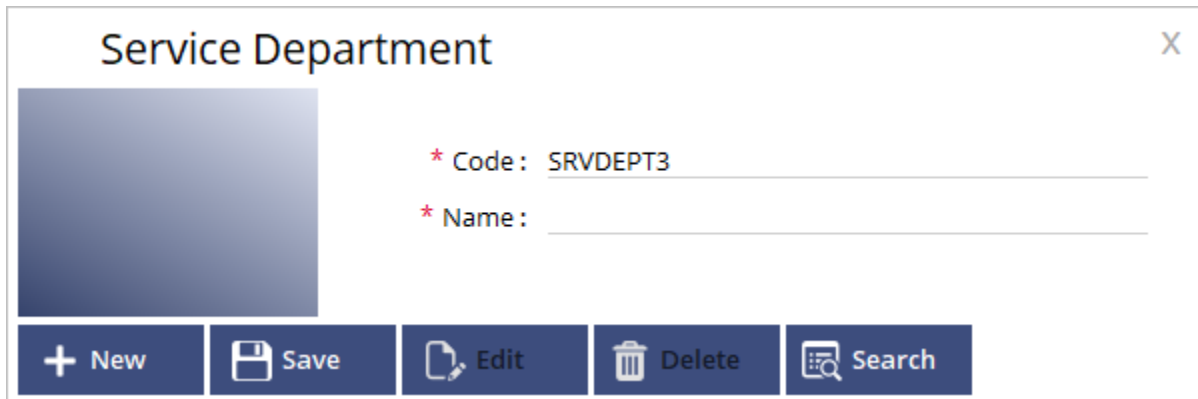# Service System

Introduction

The **Service system** is a module available in **atACC ERP 19** which addresses the generic issues faced after the order is finalized and the product is installed at the customer's end. The vendor may initiate for some of the voluntary steps for providing their customers enough satisfaction. Services offered by vendors ensure efficient client relationship, more and more repeated orders thus a long term business bonding. Resolving complaints on time will be possible now. Each and every activity regarding the services is recorded inside the software. The most prominently faced problem is that of the proper scheduling of the service engineers to coordinate their activities well. Also it is important to make a proper planning to make the optimum utilization of your organization resources. **atACC** software caters to all the needs of an organization for giving their customer complete satisfaction and ultimately a long term business relationship. It also maintains the activity of the service engineers. You can also manage your customer by tracking whether the customer is under any warranty etc.

Service Department

➤ Select **Service System > Master > Service Department**

You may create as many departments as you want you to, based on your requirement. The Dept. code by default will be system generated and if you to change it then you may change it as well. Enter the name and click save to create a new Service Department.

Service Insurance

 ➢ Select **Service System > Master > Service Insurance**

You can make use of this form to add the name of the insurance scheme providing for the services and their respective company. You may also add additional description for the same as well which is not a mandatory field to be filled at the same time.

Service Entry

 ➢ Select **Service System > Transactions > Service Entry**

This form is used to enter the details of the customer and will also include the details of the product which needs to be serviced.

Job Card No.: The Job card no. is by default system. If the user wants to then they can change the series according to their requirement and the same will be incremented for each new entry after saving.

Entry Date: Select the date on which the entry is done. By default, current date will be displayed.

Cash/Party: Select Cash Account if it's a cash based transaction. If the service entry is on credit, select the party account.

Customer: Even if it's a cash based transaction and you still want to maintain the Customers name as reference then you may enter the same in the Customer column and the same can be used to filter while generating reports.

Address: Enter the client address.

City: Enter City.

State: Enter State.

Pin code: Enter pin code.

Phone no.: Enter Phone number.

Mobile no.: Enter Mobile number. (It's a mandatory field)

Entered by: Specify the name of the employee who entered all the required data of the client. (You may create employee from Administration > Master > Employee, you must specify the employee type as service man)

Product Name: Select the product which need to be serviced from the list. You may create a new product from (Accounting & Inventory > Masters > Product)

Product Voucher No.: You may enter the product voucher number of the selected product for reference.

Serial No.: Enter the serial number of the product (Eg. IMEI, vehicle number etc.)

Repair condition: You may create the required repair conditions as master values. (Administration > Masters > Master Value, Enter the Master value name and specify the Master Type as PreRepairCondition in order to create a new Repair condition).

Damage Type: Mention the type of damage as Physical or Non-Physical damage.

Complaint: Mention the complaint which the product has.

Comments: You may specify further details in the comments to provide a detailed information for service section.

Attachments: You may also attach up to 4 additional documents required and also the customers signature document as well.

Payments: You may also settle the payment or give advance amount for the service which you're offering from the service entry form itself.

Service Entry Approval

> ➢ Select **Service System > Transactions > Service Entry Approval**

Job card No.: Specify the job card number which you've entered in the service entry form to call the voucher details from the same.

Customer and Serial No. details will automatically fill once the job card no. is specified.

Approved by: Mention the name of Employee whom has approved the Service Entry.

Approved Date: Specify the Service Entry Approved date.

Due Date: Specify the expected Delivery date.

Service Departments

> ➤ Select **Service System > Transactions > Service Department**

Voucher no.: The Voucher no. is by default system. If the user wants to then they can change the series according to their requirement and the same will be incremented for each new entry after saving.

Job Card no.: Specify the job card number which you've entered in the service entry form to call the voucher details from the same.

Customer name, Complaint Item, Complaint etc. will be automatically filled as you specify the job card no.

Delivery Date: Specify the Delivery date

Remarks: Add additional remarks if required.

Department: Choose from the list box that which department is assigned.

Serviceman: Specify the name of serviceman.

Remarks: Add additional remarks.

User Field 1 - 4: You can add additional details in the user fields about the service. There are 4 user fields available.

Status: There are 4 Status available by default like Committed, Dispatched, Transfer, Waiting for Spare. You need to change the status for each service from here with respect to each department.

New Sales Invoice: You may add new Sales invoice against this particular service. The same will be listed down in the grid down below.

New Service Invoice: You may add new Service invoice against this particular service. The same will be listed down in the grid down below.

Service Dispatch

➢ Select **Service System > Transactions > Service Dispatch**

Voucher No.: The Voucher no. is by default system. If the user wants to then they can change the series according to their requirement and the same will be incremented for each new entry after saving.

Voucher Date: Select the date on which the Dispatch is done. By default, current date will be displayed.

Job Card No.: Specify the job card number which you've entered in the service entry form to call the voucher details from the same.

In the top left Grid, the Department, Service man and Status of that particular service will be shown. You can only complete the Dispatch once all the service status has changed to Dispatched. You can view all the Sales and Service invoice made against this particular Job card from all the departments in the dispatch window. In the bottom grid

you may add any additional product that you may want to and add insurance and all against the same.

Dispatched by: Mention the name of employee who issued the Dispatch.

Next Service Date: Specify the next service date for the product.

Warranty Date: Specify the warranty end date.

Payments: You may also settle the payment for the service which you're offering in multiple payment methods from the Dispatch form itself.

Checklist Service Department

Select **Service System > Checklist > Masters > Service Department**

You may view the report of all the departments which you've added using the service checklist department report. The report can be filtered using dept. code and Name as criteria's.

Checklist Service Insurance

Select **Service System > Checklist > Masters > Service Insurance**

You may view the report of all the Insurance which you've added using the checklist Service insurance report. The report can be filtered using insurance code and Name as criteria's.

Checklist Service Entry

Select **Service System > Checklist > Transactions > Service Entry**

You may view the report of the Service Entries made which you've added using the checklist Service Entry report. The report can be filtered using job card no., Customer name or Serial no. as criteria's.

Checklist Service Department

Select **Service System > Checklist > Transactions > Service Department**

You may view the report of the Service Department transactions made which you've added using the checklist Service Department view report. The report can be filtered using job card no., Customer name and Product name as criteria's.

Checklist Service Dispatch

Select **Service System > Checklist > Transactions > Service Dispatch**

You may view the report of the Service Dispatch transactions made which you've added using the checklist Service Dispatch view report. The report can be filtered using job card no., and Voucher no. as criteria's.

Service Entry Report

Select **Service System > Reports > Service Entry Report**

In this report you basically will have two types of format to preview the report in the first place Summarized format and Detailed format as the name specifies the report preview will be in a Summarized form in Summary format and in Detailed form for Detailed format. You can filter from Approved and Disapproved or view all the transactions made using All option. You may also use all these criteria's as well like Job card no., Cash or party, Customer, Mobile no., Entered by., Approved by, branch, Product, Repair condition, Damage type and Complaint to filter the report.

Service Department Report

Select **Service System > Reports > Service Department Report**

In this report also you will have two types of format to preview the report in the first place Summarized format and Detailed format as the name specifies the report preview will be in a Summarized form in Summary format and in Detailed form for Detailed format. You may also use all these criteria's as well like Job card no., Cash or party, Customer, Mobile no., Department, Serviceman, Status, Branch, Product, Repair condition, Damage type and Complaint to filter the report.

Service Dispatch Report

Select **Service System > Reports > Service Dispatch Report**

In this report also you will have two types of format to preview the report in the first place. You may also use all these criteria's as well like Job card no., Cash or party, Customer, Mobile no., Dispatched by., Branch, Product, Repair condition, Damage type and Complaint to filter the report.