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# Purpose

A service call need to be created (No segment structure is required).

# Use of icons

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|  | **Business rule** |  | **Key point / Tips** |  | **Information** |

**What is covered in this guide**

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# Workflow of a service call

**Cancel Service Call**  
NAXT Status: Cancelled

**Credit Service Call**  
NAXT Status: In process

**Invoice Service Call**  
NAXT Status: Finished

**Reopen Service Call**  
NAXT Status: In process

**Add structure**  
NAXT Status: Created

**Add pricing**  
NAXT Status: Created

**Start Service Call**  
NAXT Status: In process

**Technician complete**  
NAXT Status: In process

**Finish Service Call**  
NAXT Status: In process

**Confirm Quote**  
NAXT Status: In process

**Quote Service Call**  
NAXT Status: Quotation

**Create Service Call**  
NAXT Status: Created

**Terminology**

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| **Line Category Group Items** | What the transaction is for, For example,  STANDARD = standard labour  TRAVEL = travel labour |
| **Line Property** | How the transaction is to be charged/sold, For example, hour transactions:  SC-SS = Standard Cost, Standard Sell  SC-OS = Standard Cost, Overtime Sell |
| **Misc Costs** | Misc cost estimate lines are used as a basis for quoting, credit checking, and transactions are generated from these lines when the Segment/Operation is moved to Finished status |
| **Misc. Items** | The fast tab where OWM can be added |
| **Need by date** | This is the date that you require the parts to be available for installation. This is particularly important when a part needs to be backordered |
| **Notifications** | Alerts or messages that will pop up when specific information is entered |
| **Operating Unit** | This is the ‘Cost centre’ where the work is being completed |
| **Opportunity** | Record of possible earning revenue. Opportunities may be active or inactive |
| **OWM** | Outside Working Materials. Used when an outside service is required. For example, air conditioning servicing, auto electrician etc |
| **Parts Return Request** | A document that is generated to go with the part when it is returned. It is essentially the opposite of a pick list document |
| **PM** | Preventative Maintenance |
| **Project** | Service segment/operation number |
| **Reason Code** | Reason for win/loss/cancellation of quote (for reporting) |
| **Registration line** | A line entered in a timesheet |
| **Reopen** | Moves the segment/operation status from *Finished* to *In process* |
| **Return Reason Code** | A code representing the reason for the part being returned to the warehouse |
| **Rework** | This indicates that the job is rework of a previous service |
| **Segment Details Estimate** | Used for creating quick quotes. This is a value entered into a Parts, Labour or Misc charges field |
| **Segment/Operation** | A task within a service call |
| **Service Call** | A job that a technician must complete |
| **Service Call Status: Confirmed** | This means there is a confirmed quotation from the Customer. Investigate as this Service call should be completed along with the current intended work if possible |
| **Service Call Status: Finished** | This call is about to be invoiced. Investigate as the current repair could relate to work completed on this Service call |
| **Service Call Status: In process** | This call has one or more Segments which remain in process. Investigate as the current repair could relate to work completed on this Service call |
| **Service Call Status: Quotation** | This is a call which has been quoted and not confirmed. Investigate as this quotation could be progressed and confirmed and all work completed at one time |
| **Service Call Status: Registered** | This is a call which has not been quoted and is not in process. Investigate as you may be able to use this Service call for the work you need to complete |
| **Service Report** | A record that a technician creates for what happened on the job |
| **SOS** | Source of Supply. This is the business which owns this part |
| **Standard Job** | A template that can be used to create a segment automatically with all the parts, labour and miscellaneous items that are usually required for that piece of work |
| **Transfer** | Posts registered time for the selected worker/s to the relevant segment/operation |
| **Transfers** | This function allows movement transfer of transactions |
| **Vendor Account** | The business supplying the OWM |
| **Warehouse** | The warehouse that will be attributed to the Service sales |
| **Warranty** | A written guarantee, issued to the purchaser of an article by its manufacturer, promising to repair or replace it if necessary within a specified period of time |

1. Create a service call

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| See **SOP SER\_1.2\_Create a Service Call** for details on how to perform this task. |

1. Create a segment/operation

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| See **SOP SER\_1.3\_Service Call Structure** for details on how to perform this task. |
| No posting can be made against a Segment in ‘**Created’** status  When segments are imported via a standard job the status of the segments will be ‘**Created’.** |
| After segments have been added to the call, pricing details need to be added see **SOP SER\_1.4\_Service Call Pricing** for details on how to perform this task. |

1. Quote a service segment

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| See **SOP SER\_1.5\_Create and manage a service quote** for details on how to perform this task. |
| Quotes can be created for individual segments, when a quote is created the relevant segments status changes to ‘**Quotation’**. |

1. Start a segment/operation

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| See **SOP SER\_1.5\_Create and manage a service quote** for details on how to perform this task. |
| 1. Highlight the required segment and select **Start segment**   The **Status change** window will display  C:\Users\johi\AppData\Local\Temp\SNAGHTML1f2ecb8.PNG |
| 1. Select **OK** |

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| A notification will display either advising that the customer’s credit check has failed or that the customer’s purchase order number is missing  **Credit check message**  Select **OK.**  A credit check will be run on the customer and if the customer **passes** the segment status will be updated to ‘**In-process’** you can now order parts, post labour and complete OWM purchases  The credit check **fail** message is a stop warning. Accounts Receivable will receive an alert and check the customer’s overall credit standing and approve to proceed or reject. Accounts receivable will send a message. Refresh by pressing F5 in a few minutes. **Do not proceed with the work until the credit has been approved**.  **Purchase order missing message**  The Purchase order number missing message is a warning message only. It displays when a segment or operation is Started. The customer needs to supply a requires a Purchase order number that can be applied to the invoice  Select **Close** |
| 1. To view the Credit Check history, highlight the segment and select **Credit check log**   The **Credit status log** window will display with all credit checks that have been completed on that segment listed  C:\Users\johi\AppData\Local\Temp\SNAGHTML5dc3bd.PNG |

1. Cancel a service segment/operation

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| See **SOP SER\_1.5\_Create and manage a service quote** for details on how to perform this task. |
| A segment cannot be cancelled once there are transactions  Quotes are usually cancelled for the following reasons:   * 1. Quote was not confirmed (i.e. was Lost or Cancelled)   2. Segment will not be used |
| 1. Highlight the required segment   Select **Cancel**  C:\Users\johi\AppData\Local\Temp\SNAGHTML1fc504b.PNGThe **Status change** window will display |
| 1. Select **Ok**   A notification will display advising the **Status** of the segment has been updated to ‘**Cancelled’** |
| Postings can’t be made for segments with the status of ‘**Cancelled’**. |
| 1. Select **Close**   The **Service segments** window will display  C:\Users\johi\AppData\Local\Temp\SNAGHTML54c3fb.PNG |
| If only 1 segment on the call the **Status** will update to ‘Closed’ |

1. Update segment status: technician complete

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| After the Technician completes work, they provide a copy of the service report to be entered in NAXT.  See SOP **SER\_5.2 Enter Service Report Data** for details on how to perform this task.  Part of this task involves updating the segment status to **Technician complete** |

1. Invoice a service call/segment

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| When all segments have a status of **Technician complete** the service call status is automatically updated to **Review**  See SOP **SER\_5.1\_Complete a service call** for details on how to perform this task. |
| Segments can be re-opened if you need to complete further work. The system will request a reason. Using the Reopen function button moves the Segment to ‘In-process’ status.  If an invoice proposal is already created this will need to be deleted before a segment can be reopened, see SOP **SER\_5.1\_Complete a Service Call**for details on how to perform this task. |

# What next?

* Invoice a service call / segment see SOP **SER\_5.1 Complete a service call**
* Create a credit invoice see SOP **SER\_5.5\_Backout a service invoice**