

This shows our InventoryControl form. It's used to keep track of every item of stocking inventory. At any moment (and with its assistance) you can tell how much of any particular stocking item you have, where its located (i.e., how much in which trucks, how much in the store room, where the bin locations, etc.), how much you paid for each unit, from whom you purchased it, and for how much. This form further facilitates the processes of restocking trucks (that's what's happening in the illustration), ordering restock, checking in the shipments of restock, and many related processes

Sun, 3:45 pmAardvark Appliance ServiceFeb 25, 2001

File FunctionsCommand SummaryDispatch OperationsWork In ProgressParts ManagementPeriodic Reports

ItemFindTimeClockAcntsRcvblSalesViewDspchMapSchdListJobsCrmtPartOrdersSltsEnterInventoryPrdcRptsDbaseSrch

Call Sheet # 1

DOE, JOHN

123 SOMERSET LN [952E5]

SAN JUAN CAPISTRANO

661-3774

Active Desk

My own

Items needing restocked to Richard, 91 Ford Van, Type Standard (page 1 of 1)

3392519		J27105	WP	DR	THERMAL FUSE (NEW STYLE)	has 0 of 1	need 1	10 onshlf	move 1
	GLC3-71K		AL	MS	HOSE CLAMP (#20), 1-3/4	has 2 of 3	need 1	13 onshlf	move 1
			AL	MW	DIODE (GENERIC W/LEADS)	has 0 of 1	need 1	28 onshlf	move 1
MO805108	GLC420	G31317	AL	MW	FUSE (push-in, 1.00" stdrd)	has 4 of 5	need 1	106 onshlf	
	GLC14104S3		AL	MW	MICRO SWITCH (SNP APRT 3/16)	has 3 of 4	need 1	18 onshlf	
M16D93	GLC16-93		LI	MW	TRIAC ASSEMBLY	has 0 of 1	need 1	2 onshlf	
	IGN3	F16746	AL	OV	GAS IGNITOR (SQRE-MED)	has 0 of 1	need 1	4 onshlf	
	410	B11421	AL	RE	ICEMAKER WATER VALVE	has 0 of 1	need 1	4 onshlf	
3362624		J27573	WP	WA	TIMER KNOB (DRCT DRVE UNITS)	has 0 of 1	need 1	3 onshlf	

Item(s) Type

REFER

Problem to be solved

NOT COLD, LEAKING

Call Sheet # 2

JOHNSTON, FRED AN

212 MONARCH BAY DR

DANA POINT

499-4234

Active Desk

My own

Events to log/perform

Type of Transfer

review Needs and disburse to truck

Disburse w/o prior review

Return items . . .

Change tech assigned to truck

Indicate the quantity:

Hit 'Esc' when ready to record the transfers indicated

Print list

Sort InvtryList

Exit

Item(s) Type

WASHER

Problem to be solved, and/or Description of Customer's Request

WON'T SPIN

Call Sheet # 3

Active Desk

My own

Status

Current

Hibernate

deLeTe

Job/Sale

othrws Dn

Originated:

GR 3:36 pm

Sun 2/25/01

More info?

Empty

Active Desk

My own

Another's

Status

Current

Hibernate

deLeTe

Job/Sale

othrws Dn

Originated:

More info?

Empty

This shows our PartsProcess form. It's used for managing the ordering and receipt of non-stock parts. At any instant, you can view all the parts that need order/inquiries (and compose perfectly-formatted requests, specifying which items you want to go to which supplier, and transmit via your computer's internal fax, etc.). Or you can view and manage items on which you are presently waiting for response back from a supplier. You can check-in parts when received (and document having done so). You can instantly determine what parts were ordered for what job, or what jobs have used a particular kind of part, etc. You can track your costs, frequency of use, etc.

ON ORDER, AWAITING ARRIVAL (Page 1 of 2)														
Description of items needed					Inquiry/Order			Info Provided			Order Status			
Ref #	ItemTp	ItemMk	Model #	Other #	Rqst	Vendor	Whom	Mthd	Date/Tm	Confirmed	Expected	Received	\$ Cost	\$ Sold
Cstmr Nm	Part Description			Instr	Part #		Avlbty		\$ whlsl	\$ retail	- - Notes - -			
68247-1-1	Microwave	Whirlpool	RM288PXP-Q	M51504356	Ship if I/S	Wpool	resear	Fax	12/8/00 1:32 pm	12/11/00	12/26/00		31.19	
AHS/Vaness	Interlock Sw (center Outside W/ Arm)			Definite	832952		n/s		16.41 31.19					
68994-1-1	Dishwasher	Viking	VUD141	PSEUDO23	Ship if I/S	API	resear	Fax	2/19/01 9:28 am	2/21/01	2/22/01		81.60	
FNW/Moran	Drain Pump			Approved	PD140017		i/s		52.50 77.00					
69065-1-1	Icemaker	U-line	ULN-CLR60WH-00	002409-05-0131	Ship if I/S	U-Line	Kriste	Voice	2/20/01 1:06 pm	2/20/01	2/24/01		1.00	
Wilson	Recirculating Pump.			Definite	31613		i/s		1.00 1.00	Warranty				
69072-2-1	M/w	Sharp	R1821	211893	P&A Only	Andrews	Mark	Voice	2/21/01 9:04 am	2/21/01	2/26/01		8.94	
Maxic/Taylor	Stirr Cover			Tentative	PCOVPA180WRF0		i/s		2.16					
69062-1-1	Washer	Kenmore	110.82694140	C834018873	P&A Only	Marcone	resear	Fax	2/21/01 1:16 pm				242.40	
AHS/Dstrow	Control Board			Approved	3407104		n/s		192.40 267.43					
					Ship or b/o	Wpool	Marv	Voice	2/22/01 9:26 am	2/22/01	3/1/01		242.40	
					3407104		n/s							
68274-1-1	Oven	Thermador	ct227nprs	96060195	Ship if I/S	API	Eric	Voice	1/30/01 10:11 am	12/20/00	3/3/01		10.49	
Moore	Oven Knob			Definite	14-39-270		b/o							
68965-1-1	Heat Pump	GE	az32h12d3cm1	dt62899a	Ship if I/S	GE		Voice	2/16/01 11:58 am	2/21/01	2/26/01		105.50	
Best Western	Temp Control			Definite	WP26X10006		i/s		40.00					
68965-2-1	Heat Pump	GE	az31h12dacv1	ft883277	Ship if I/S	GE		Voice	2/16/01 11:58 am	2/21/01	2/26/01		138.80	
Best Western	Operations Control			Definite	WP26X0037		i/s		40.00					
69109-1-1	Washer	Maytag	LA710	646350	Ship if I/S	Marcone	resear	Fax	2/22/01 10:20 am	2/22/01	2/23/01		17.95	
Feucht	Drain Hose From Tub To Pump			Definite	213045		i/s		5.91 15.95					
69050-1-1	OVEN	GE	JTP45W0W/w/w	AS648741R	Ship if I/S	Marcone		Fax	2/22/01 9:29 am				157.80	
YOUNG	Touch Pad (wb36t10202 wrong pt)			Definite	WB36T10028		n/s		66.89 109.00					
					API		Tim	Voice	2/22/01 9:30 am				157.80	
					WB36T10028		n/s		69.50 119.00					
					Ship if I/S	GE		Voice	2/22/01 9:31 am	2/22/01	2/26/01		157.80	
					WB36T10028		i/s		62.40					
69130-1-1	Microwave	Sharp	R-4A53	278215	Ship if I/S	Andrew's		Voice	2/22/01 9:53 am	2/22/01	2/26/01		10.16	
Patterson	Door Pushbutton			Approved	JBTN-A760WRF0		i/s		2.16 4.00					
69107-3-1	Oven	Tappan	30-3457-57	04230-28353039	Ship if I/S	marcone	resear	Fax	2/22/01 10:23 am	2/22/01	2/23/01		15.59	
Hunn	Temp Knob/Dial			Approved	5303207048		i/s		9.84 15.59					
69142-1-1	Oven	Jennaire	W230-03	344894VP	Ship if I/S	Maytag	Clair	Voice	2/22/01 10:54 am	2/22/01	2/26/01		44.95	
Gasparro	Latch Assy			Definite	12001106		i/s							
69098-1-1	Washer	Frig	FWT449GF51	XC91989986	P&A Only	marcone	resear	Fax	2/23/01 9:44 am				52.69	
Gangolea	Drain Pump			Approved	131889800		n/s		29.68 41.59					
					Ship if I/S	API		Voice	2/23/01 1:54 pm	2/23/01	2/26/01		52.69	
					131889800		i/s		29.68					

This is our Funds form. It's makes use of the FundsJournal, a record that includes an entry documenting every item of money (whether a *sum* of cash, check or bankcard transaction) that comes into the business. By this means, we attain perfect security to make sure that all such items of money reach a proper destination – or we know about it! This tracking of funds also is coordinated with SalesRecording functions, to make sure there's proper correspondence between what we've actually collected (as recorded here) and what we are charging against ourselves in terms of our sales (and accounts receivable) records. As part of the process, this form is also used to prepare deposits, check-in money received in payment on past jobs, etc.

Sun, 4:04 pm-----Aardvark Appliance Service-----Feb 25, 2001

File Functions

Command Summary

Dispatch Operations

Work In Progress

Parts Management

Periodic Reports

ItemFind

TimeClock

AcntsRcvbl

SalesView

DspchMap

SchdList

JobsCrmt

PartOrders

SlsEnter

Inventory

PrdcRpts

DbaseSrch

Num Lock ON

Caps Lock ON

Ins ON

Call Sheet # 1

DOE, JOHN

123 SOMERSET LN [952E5]

SAN JUAN CAPISTRANO

661-3774

Active Desk

My own

Another's

Journal of Receipts (Page 1 of 1, total value is \$479.20)

01/25/01	68805	AHS/FREEDMAN DCBankcard		\$35.00
02/12/01	69029	AHS/DALEQ MISSI	Check # 6382	\$35.00
02/16/01	68952	ROSE	Cash	\$10.91
02/16/01	68972	YATES	Cash	\$16.13
02/19/01	68924	AYRES	Cash	\$53.64
02/20/01	69090	NOVAK	Cash	\$20.00
02/21/01	69130	PATTERSON	Cash	\$25.00
02/22/01	69110	STOBBE	Cash	\$88.59
02/22/01	69126	CANTRELLE	Cash	\$65.00
02/23/01	69136	WALLER	Cash	\$103.27
02/23/01	68983	CLARK	Check # 8191	\$26.66

General function

Assemble deposit/transmittal report

rcv Payment on firmly billed job(s)

View/edit items in file

Search

Confirm deposit/transmittals

Print prtn of itm's applictn to other

document Refund made to cstmr

Kind of fund

checks

Bankcard

Cash

All

Other

Show . . .

Receipts

Deposits

All

Select items that are . . .

Undeposited/Unverified

Checked-off as so processed

All

Add items

Exit

Item(s) Type

REFER

WES

Problem to be solved, and/or Description of Customer's Request

NOT COLD, LEAKING WA

Call Sheet # 2

JOHNSTON, FRED AND S

212 MONARCH BAY DR [

DANA POINT

499-4234

Active Desk

My own

Another's

Journal of Receipts (Page 1 of 1, total value is \$479.20)

01/25/01	68805	AHS/FREEDMAN DCBankcard		\$35.00
02/12/01	69029	AHS/DALEQ MISSI	Check # 6382	\$35.00
02/16/01	68952	ROSE	Cash	\$10.91
02/16/01	68972	YATES	Cash	\$16.13
02/19/01	68924	AYRES	Cash	\$53.64
02/20/01	69090	NOVAK	Cash	\$20.00
02/21/01	69130	PATTERSON	Cash	\$25.00
02/22/01	69110	STOBBE	Cash	\$88.59
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General function

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Print prtn of itm's applictn to other

document Refund made to cstmr

Kind of fund

checks

Bankcard

Cash

All

Other

Show . . .

Receipts

Deposits

All

Select items that are . . .

Undeposited/Unverified

Checked-off as so processed

All

Add items

Exit

Item(s) Type

WASHER

MAYTAG

28 WED 3-6

Sun 2/25/01

Problem to be solved, and/or Description of Customer's Request

WON'T SPIN

Call Sheet # 3

Customer Name, Address and Phone numbers

My own

Another's

General function

Assemble deposit/transmittal report

rcv Payment on firmly billed job(s)

View/edit items in file

Search

Confirm deposit/transmittals

Print prtn of itm's applictn to other

document Refund made to cstmr

Kind of fund

checks

Bankcard

Cash

All

Other

Show . . .

Receipts

Deposits

All

Select items that are . . .

Undeposited/Unverified

Checked-off as so processed

All

Add items

Exit

Item(s) Type

Problem to be solved, and/or Description of Customer's Request

More info?

Empty



In the foreground (and in purple) you see our little Accounts Receivable form. For every invoice that's unpaid at the time it's recorded as a completed sale, the system creates an Accounts Receivable *record*, that is displayed (and may be managed) from within this form.

Sun. 4:22 pm Aardvark Appliance Service Feb 25, 2001

File Functions Command Summary Dispatch Operations Work In Progress Parts Management Periodic Reports

ItemFind TimeClock AcntsRcvbl SalesView DspothMap SchdList JobsCrnt PartOrders SlcEnter Inventory PrdcRpirts DbaseSrch Num Lock ON Caps Lock ON Ins ON

---

**Call Sheet # 1**

DOE, JOHN  
123 SOMERSET LN T952F51 Customer  
SAN JUAN CAP  
661-3774

Journal of Applications from Payment to Invoice (Page 175 of 175)

Date	Payer's Name	ChkNmbr	ChkAmnt	InvNmbr	BalDue	AppldFrnChk	ActlCrdtd	To/From-EDA
02/19/01	SKIN THE	7654	\$12.04	68663	\$12.04	\$12.04	\$12.04	\$0.00
02/19/01	MCBAIN	3792	\$191.53	67091	\$191.53	\$191.53	\$191.53	\$0.00
02/19/01	DEETER	1531	\$158.72	68976	\$158.72	\$158.72	\$158.72	\$0.00
02/21/01	FNW	76127	\$466.09	68764	\$93.00	\$93.00	\$93.00	\$0.00
02/21/01	FNW	76127	\$466.09	68699	\$20.63	\$20.63	\$20.63	\$0.00
02/21/01	FNW	76127	\$466.09	68762	\$40.00	\$40.00	\$40.00	\$0.00
02/21/01	FNW	76127	\$466.09	68030	\$312.46	\$312.46	\$312.46	\$0.00
02/21/01	FAM	431806	\$136.49	67767	\$0.00	(\$45.00)	\$0.00	(\$45.00)
02/21/01	FAM	431806	\$136.49	68758	\$96.49	\$96.49	\$96.49	\$0.00
02/21/01	FAM	431806	\$136.49	68683	\$45.00	\$45.00	\$45.00	\$0.00
02/21/01	FAM	431806	\$136.49	68623	\$40.00	\$40.00	\$40.00	\$0.00
02/21/01	SHOWCASE	4229	\$65.00	67080	\$65.00	\$65.00	\$65.00	\$0.00
02/21/01	CHW	33716	\$251.39	68349	\$251.39	\$251.39	\$251.39	\$0.00
02/23/01	AON	169560	\$80.00	68625	\$45.00	\$45.00	\$45.00	\$0.00
02/23/01	AON	169560	\$80.00	68591	\$35.00	\$35.00	\$35.00	\$0.00
02/23/01	DIVERSIF	1324	\$45.00	68888	\$45.00	\$45.00	\$45.00	\$0.00
02/23/01	AHS	1561387	\$1,379.93	68268	\$56.05	\$56.05	\$56.05	\$0.00
02/23/01	AHS	1561387	\$1,379.93	68392	\$75.00	\$75.00	\$75.00	\$0.00
02/23/01	AHS	1561387	\$1,379.93	68433	\$71.93	\$71.93	\$71.93	\$0.00
02/23/01	AHS	1561387	\$1,379.93	68440	\$194.88	\$194.88	\$194.88	\$0.00
02/23/01	AHS	1561387	\$1,379.93	68460	\$162.22	\$162.22	\$162.22	\$0.00
02/23/01	AHS	1561387	\$1,379.93	68507	\$10.00	\$10.00	\$10.00	\$0.00
02/23/01	AHS	1561387	\$1,379.93	68510	\$154.30	\$154.30	\$154.30	\$0.00
02/23/01	AHS	1561387	\$1,379.93	68510	\$154.30	\$154.30	\$154.30	\$0.00
02/23/01	AHS	1561387	\$1,379.93	68510	\$154.30	\$154.30	\$154.30	\$0.00
02/23/01	AHS	1561387	\$1,379.93	68510	\$154.30	\$154.30	\$154.30	\$0.00
02/23/01	AHS	1561387	\$1,379.93	68510	\$154.30	\$154.30	\$154.30	\$0.00
02/23/01	AHS	1561387	\$1,379.93	68510	\$154.30	\$154.30	\$154.30	\$0.00
02/23/01	AHS	1561387	\$1,379.93	68510	\$154.30	\$154.30	\$154.30	\$0.00
02/23/01	AHS	1561387	\$1,379.93	68510	\$154.30	\$154.30	\$154.30	\$0.00
02/23/01	CLARK	8191						

**Call Sheet # 3**

Active Desk  
☒ My own  
☐ Another's

Status:  
☒ Current  
☐ Hibernate  
☐ deLet  
☐ Job/Sale  
☐ othrws Dn

Originated:  
GR 3:36 pm  
Sun 2/25/01

More info?  
Empty

Active Desk:  
☒ My own  
☐ Another's

Status:  
☒ Current  
☐ Hibernate  
☐ deLet  
☐ Job/Sale  
☐ othrws Dn

Originated:

More info?  
Empty

**Call Sheet # 2**

JOHNSTON, FR...  
212 MONARCH I...  
DANA POINT  
499-4234

Problem to be solved, and/or Description of Custom...  
WON'T SPIN

**Accounts Receivable**

AHS-Ostrow [35725122]  
P.o. Box 866  
Carroll, Iowa 51401

Accounting ☒ Y Attn to: Qty Ltrs sent 0

Tech	InvNmbr	InvDate	Rcrd #
DS	68460	01/09/01	92

Write-off as bad debt

MrchSlid  
 PartsSlid  
 SrvcCall  
 Labor

Total  
 PdToDt

This is the Settings form. It's where you specify most of the elements that are involved in setting up ServiceDesk for your specific situation and preference (aside from the matters that involve the creation of custom operating files, which we do for you as part of creating your package). By examining, you can see some of the kinds information ServiceDesk uses in catering to your specific needs.

Sun, 4:27 pmAardvark Appliance ServiceFeb 25, 2001

File FunctionsCommand SummaryDispatch OperationsWork In ProgressParts ManagementPeriodic Reports

ItemFindTimeClockAcntsRcvblSalesViewDspchMapSchdListJobsCrntPartOrdersSlisEnterInventoryPrdcRptsDbaseSrchNUM LOCK ONCOBS LOCK OFFINS ON

Call Sheet # 1Call Sheet # 3

DOE, JOHN  
123 SOMERSET  
SAN JUAN CAP  
661-3774

Item(s) Type  
REFER

Problem to be  
NOT COLD, LE

Call Sheet # 2  
JOHNSTON, FR  
212 MONARCH  
DANA POINT  
499-4234

Item(s) Type  
WASHER

Problem to be  
WON'T SPIN

ServiceDesk Settings

These values are local (i.e., for this particular station only), and so are stored on the local drive

☒ Enable auto-CstmrDbase Search when entering Callsheet info

☒ Enable drop-down lists in Callsheet Type and Make Boxes

☒ Include full mailing address with all street name insertions

☒ Include full month reference with each appointment insertion

☒ Sound periodic chimes to alert of past-due Callsheets

☒ Show mini-map insert in dispatch map

☒ Show 5 mile range lines in dispatch map

☒ Show individual mileage estimates in dispatch map

☐ Switch this station into TechMode immediately upon startup

☒ Send WipAlerts (dislht notes re stale WipRecords) to this station

☒ WipAlert-Supervisor (informs if items more than 2 days past alert)

☒ Do nightly Archive/Cleanup of files

Drive Designation for ServiceDesk Network  
FileServer (as seen from perspective of this station)

k: [WPC-CLUB...]

Name of person using this station  
(the same name must be included in the List of Station names, top-left box in purple section below)

Glade Ross

Comm port used by Modem:  
☐ 1☒ 2☐ 3☐ 4

Save Local Values

Do not enable any of these from more than one station

These values apply system-wide (i.e., to your entire ServiceDesk network), and so are stored on the designated fileserver drive. You can set and record them from any station, but bear in mind, the result will be felt network-wide, not just at your own station

List of Names (first and last, no commas) for the primary person at each station in this ServiceDesk Network

Glade Ross  
Brenda Nord  
Katy Viljak  
Server Station

List of Technicians (again first and last, no commas, and note that you must enter after typing to insert in list)

Glade Ross  
Jim Dillon  
Richard Weimer  
Dave Sommer  
Curt Butschke  
Toyota Pickup

☐ Departmentalize Sales (forces departmental-assignment of each job)

☐ Enable SourceOfBusiness Survey (invokes questions when scheduling)

☐ Mandatory 10-digit dialing (must use area code even within own area)

☐ Allow for divergent sales tax rates depending on locality, type, etc.

Company Street Address

31878 Camino Capistrano, Suite 278

City, State and Zip

San Juan Capistrano, California 92675

Telephone number (voice)

949-493-5169

Telephone number (fax)

949-493-6069

Parts tax rate

0.075

Labor tax rate

0

Bank Account Number (used for printing deposit reports)

0451157630

Next Invoice Number

69155

Save Net-wide Values

Area codes for which '1' prefix should not be inserted when auto-dialing

Learning Steps . . .

Exit

Empty

Active Desk

☒ My own

☐ Another's

Status

☒ Current

☐ Hibernate

☐ deLete

☐ Job/Sale

☐ othrs Dn

Originated:

GR 3:36 pm

Sun 2/25/01

More info?

Empty

Active Desk

☒ My own

☐ Another's

Status

☒ Current

☐ Hibernate

☐ deLete

☐ Job/Sale

☐ othrs Dn

Originated:

More info?

Empty

