FOCUS

Character-based Service Manager

Focus for Passport RW32

Demo Handbook

RTM™

RTM COMPUTER SOLUTIONS, INC.

FOCUS Demo Handbook
Table of Contents

Introduction

Thank you for your interest in RTM's Focus service software for Passport's RW32. This demonstration handbook is designed to assist you with the installation and running of the accompanying software. It is intended to provide you with an understanding of the basic functions of our software and give you a general overview of many of Focus' capabilities.

The demo software is fully functional and is installed with sample data related to the computer industry. You may add your own data to more realistically emulate your specific working conditions. Some examples of other industries to which the software can be applied are: heating and air conditioning, pool and spa, plumbing, appliance repair, alarm and security services, elevators, telecommunications, and marinas.

We believe this demonstration will convince you of Focus' extraordinary versatility, ease of use, reporting power and unquestionable ability to save you time and money! The scripted examples provided in this booklet barely scratch the surface of the software's functionality. Please explore the system by navigating each of the screens and trying the functions in Focus as they may apply to your own business. The demo data can be set back to its original state at any time by using the "svreset" batch file provided.

After reviewing the software, please contact your local RW32 dealer or RTM for further information and pricing.

RTM COMPUTER SOLUTIONS, INC.

Package Contents

The FOCUS demo package contains:

1. This demo handbook
2. Focus demo system CD

Hardware and System Requirements

Memory Requirements :

Refer to your RW32 installation guide for memory requirements.

Hard disk space:

The space required to install the demo is about 8 MB.

Printer Requirements:

The system must have a printer capable of printing 132 column reports. An 80 column printer which can print 132 columns in compressed mode is satisfactory.

System Requirements:

Windows 98, NT, 2000, or XP.

RW32 version 10, with Company 00 demo data installed.

At minimum, the Accounts Receivables, Inventory Control and System Manager modules must be installed to run the demo and perform all steps as they are shown in this guide. A copy of the RW32 demo may be obtained from your local dealer, or from Passport Software. http://www.pass-port.com

Pentium or better processor required.

The line FILES=128 should be included in the CONFIG.SYS file.

Support

This demo handbook should enable you to use the software without additional help. However, if problems or questions arise that you cannot resolve using these materials, additional assistance is available by contacting RTM at (410) 335-8350.

Installation

If you are installing from the demo CD, the autorun menu has a selection to automatically install demo software. If you have downloaded the demo from the web, you must locate the exe file, then double click on the file to begin the installation process. The screen will display introduction messages followed by a prompt for the directory in which to install the FOCUS demo. Follow the instructions as they appear on the screen. **The demo data will install automatically for Company 00, this will overwrite any existing data in this company.**

Be sure that the Accounts Receivables, Inventory Control and System Manager modules are installed for RW32. A copy of the RW32 demo may be obtained from your local dealer, or from Passport Software. http://www.pass-port.com

To reset the demo data back to its original form after a demo has been completed, type ***SVRESET*** ↵ from the top level Great Plains Classic directory.

If you make changes to the supplied demo data and wish to save them, type ***SVSAVE*** ↵ from the top level Great Plains Classic directory. This will update the default information that is used during later *svreset* procedures.

Demo Objectives

Service Call Processing

- Service call overview. Use an existing service call to get an understanding of Focus service call processing.

- Log a simple service call to show how quickly and efficiently calls may be entered into the Focus system.

- Learn some of the more detailed features available in Focus service call entry. Log a call for a customer with a credit problem. Directly access service history and customer notes from service call entry.

- More service call detail. Log a call for a customer with pending calls already in the system. Use searches to find those calls. Add a new piece of equipment "on the fly" from the call entry screen for this customer.

- Extra credit: Log a call for a customer with pending calls. Bypass the search features and use the system alerts to find the calls. Put equipment that has a help desk note on a call and attach the note to the service call. Print a work order for the call.

Scheduling and Dispatching

- An overview of scheduling and dispatching service calls.

Service Call Billing

- Complete a service call. Select, print and post service call invoices.

Customer equipment and service contracts

- View a customer's equipment. Look at warranties and PM schedules.

- Take a look at a service contract.

- Select, print and post contract invoices.

Reporting

- Review management reports.

Legend

The following is an explanation of the symbols used throughout this handbook.

↵	Enter key
←	Left arrow key
↓	Down arrow key
→	Right arrow key
↑	Up arrow key
-	Minus key
+	Plus key

Demonstration

Begin the demonstration

STEP	ACTION
1	Start the RW32 software that has the Focus demo installed RESULT: The *RW32 license* screen is displayed, along with a prompt for User id.
2	Type in user ID to access the software. For the RW32 demo, the user is PSI. Example: **PSI** ↵ ↵
3	Highlight *SVC* from the RW32 menu RESULT: The *SVC* menu is displayed.

Service call overview

Use an existing service call to get a basic understanding of Focus service call navigation.

STEP	ACTION
1	From the *SVC menu*, highlight *Service calls* and press ↵ RESULT: The *Service call screen* will be displayed.
2	At the *Customer* field, press ↑ RESULT: The *Search options window* will be displayed.
3	Highlight *Service call number* then press ↵ RESULT: The *service call number search window* will be displayed.
4	Highlight call number 707, using the arrow keys or by typing **707** ↵ RESULT: Service call number "707" will be highlighted.
5	Press ↵ RESULT: The service call will be displayed. NOTE: The heart of the Focus service call entry system is the*Function menu*. The **Hist** and **Note** indicators notify you that there is on-line history available for this customer, and that this call has a note attached. Both of these items are available directly by using the *Function menu*, which can be "popped up" on the call screen at any time.
6	Press **F11 then Z** RESULT: The *Function menu* will be displayed. NOTE: When the function menu is displayed, any desired selection may be executed by highlighting and pressing ↵**.** When the function menu is *not* displayed, each function is directly available by pressing the F11 key + the letter corresponding to the desired selection.
7	Press **C** to highlight *View customer info* then press ↵ RESULT: The *Customer information window* will be displayed. This feature allows immediate access to a wealth of customer information, useful during service call processing.

STEP	ACTION
8	Press **ESC** RESULT: The *Customer information window* will be cleared.
9	Press **F11 then C** RESULT: The same *Customer information window* will be displayed that was just accessed through the Function menu. This demonstrates the ability to quickly and directly access the functions on the pop-up menu.
10	Press **ESC** RESULT: The *Customer information window* will be cleared (again).
11	Press **F11 then H** RESULT: The *Service call history selection window* will be displayed. NOTE: Each line in this window shows a service call previously performed for this customer. At the bottom of the window, the dispatch note describing the highlighted call will be displayed. As the cursor moves down each call, the note will change.
12	Highlight any history call and press ↵ RESULT: The *Service call history view screen* will be displayed for the selected call. The lower portion of the call screen will show the extended data for the call. NOTE: The history view screen looks and functions exactly like the service call entry screen, with the exception of the title on the top line. Users need only to learn the functionality of one design for both current and history call access.
13	Press **F11 then P** RESULT: The lower portion of the call screen will display the parts used on the call.
14	Press **F11 then L** RESULT: The lower portion of the call screen will display the service technicians that worked on the call.

STEP	ACTION
15	Press **F11 then A** RESULT: The lower portion of the call screen will display the additional charges for the call.
16	Press **F11 then N** RESULT: Any notes that were attached to the call will be displayed. Notes entered onto a call can print on the work order, invoice, or be entered for internal use only.
17	Press **ESC** RESULT: The note display window will be cleared.
18	Press **F11 then S** RESULT: The *Call summary information window* will be displayed.
19	Press **ESC** RESULT: The *Call summary information window* will be cleared.
20	Press **ESC** RESULT: The *Service call history view* screen will be closed and the *Service call history selection window* will once again be displayed.
21	Press **ESC** RESULT: The *Service call history selection window* will be cleared and you will be returned to the *Call entry screen*. NOTE: All of the various functions that were accessed in the history display are available here. Experiment by accessing the various functions in the call entry screen. Remember, If you don't know a function's "alt" letter, just use F11 Z (or any F11 key combination that is *not* a valid selection) to pop up the function menu.
22	When you are finished, press **ESC** to abort the changes to this call. Answer "**Y**" to the "abort changes" messages. RESULT: The call screen will be cleared and the cursor will appear at the *Customer* field.
23	Press **ESC** to return to the Focus main menu.

Log a call

Enter a simple service call to show how quickly and efficiently calls may be entered into the Focus system.

STEP	ACTION
1	From the *SVC menu*, highlight *Service calls* and press ↵ RESULT: The *Service call screen* will be displayed.
2	At the *Customer* field, press ↑ RESULT: The *Search options window* will be displayed.
3	Press **S** to highlight *Serial number*, then press ↵ RESULT: The *serial number search window* will be displayed.
4	Type **101** ↵ RESULT: The first serial number starting with “101” will be highlighted.
5	Press ↵ RESULT: All available information for the selected piece of equipment will be imported into the call. Customer, service location and most equipment information will be filled in, and the cursor now appears at *Call #*.
6	Press **F1** to have the system assign the next call #
7	At the *Date*, and *Time* fields, press ↵ RESULT: The system defaults for date and time will be filled in. Focus then checks to see if there are any existing calls for this location to help you more efficiently schedule your service and avoid duplicate call entry. The message “*Active calls exist for the selected site*” will be displayed. This feature is covered later in this handbook.

STEP	ACTION
8	Press ↵ three times to get past the *View existing calls?* question, and the *Contact* and *Phone* fields RESULT: After the *Phone* field is complete, the *Service call equipment add window* will be displayed. Information for the serial number we have selected is already loaded into the call. NOTE: The system defaults all these fields, but they can be typed over and changed at any time.
9	At the *Invoicing code* field, press **END** RESULT: Pressing the end key allows you to go immediately to the bottom of the equipment window, quickly completing the screen.
10	At the *Contract #* field, press ↵ RESULT: The *Call* e*quipment add window* will close, and the *Call equipment selection window* will be highlighted.
11	Press ↓ RESULT: The cursor will move to the *Extended data section* for this call.
12	Press ↵ at the *Priority*, *Bill group*, *Time to repair*, *PO#*, *Tax code*, *Map grid* and *Cash rcvd* fields
13	At the *Dispatch note* field, type **Perform preventive maintenance** ↵
14	At the *Call taken by* field, type **DEM** ↵
15	At the *Work order* field, type **6197** ↵ NOTE: *Call taken by, Work order* and *Expected comp'l date* are user defined fields. We have used common choices in the demo. These labels can be set to suit the needs of your company in the *Control Information*.
16	Press **F11 then F** RESULT: A prompt will be displayed to file this service call.
17	Type ↵ RESULT: The *Call status window* will be displayed. NOTE: The window has the recommended status highlighted. Any status shown may be selected.

STEP	ACTION
18	Press ↵ RESULT: The service call will be saved, the *Service call entry screen* will be cleared, and the cursor will appear at the *Customer* field.
19	Press **ESC** to return to the Focus main menu

Learn some of the more detailed features available in Focus service call entry.

Log a call for a customer with a credit problem. Directly access service history and customer notes from service call entry.

STEP	ACTION
1	From the *SVC menu*, highlight *Service calls* and press ↵ RESULT: The *Service call screen* will be displayed.
2	At the *Customer* field, press ↑ RESULT: The *Search window* will be displayed.
3	Highlight *Address* by using the arrow keys or by pressing "**A**", then press ↵ RESULT: The *Address search window* will be displayed
4	Type **9132** ↵ RESULT: The address starting with "9132", Green Thumb Landscaping, will be highlighted.
5	Press ↵ RESULT: The customer and service address information will be imported into the call screen and the *Customer credit window* will be displayed, indicating a possible credit problem. NOTE: The credit problem - over limit and overdue invoices - is shown at the bottom of the *Customer credit window* along with various credit information. Any overdue invoices are listed in the window. (* The Receivables option must be registered in CounterPoint automatically display the credit window*)
6	Press **ESC** RESULT: The *Customer credit window* will be cleared. NOTE: Clearing the credit window can require the entry of a password, defined in the *Control information.* This can restrict entry of calls for credit problem customers without supervisory approval.

STEP	ACTION
7	Press **F11 then Z** RESULT: The *Function menu* will be displayed. NOTE: When the function menu is displayed, any desired selection may be executed by highlighting and pressing ↵. When the function menu is *not* displayed, each function is directly available by pressing the F11 key + the letter corresponding to the desired selection.
8	Type **C ↵** RESULT: The *Customer information window* will be displayed in the center of the screen. NOTE: This window offers a quick and easy way to check customer information, including credit status. There are 3 function keys available to allow access to more customer information. They are shown at the bottom of the screen. The F2 key will provide the same credit report which was automatically displayed above. The F6 key will provide access to customer notes and the F7 key will provide access to service address notes.
9	Press **F6** RESULT: The *Customer notes window* will be displayed. The customer note indicating that payment arrangements have been made will be displayed. NOTE: The note indicates that it is okay to take the call, without having to stop and wait for approval from the credit manager.
10	Press **ESC ESC** RESULT: The *Customer note window* and the *Customer information window* will be cleared. NOTE: Notice the **Hist** notification, displayed just below the *Time* field. This indicates the availability of service history information for this customer. The history is easily accessed during call entry using the *Function menu,* which can be "popped up" on the call screen at any time.

STEP	ACTION
11	Press **F11 then H** RESULT: The *Service call history selection window* will be displayed. NOTE: Each line in this window shows a service call. At the bottom of the window, the dispatch note describing the highlighted call will be displayed. As the cursor moves down each call, the note will change. The call history selection window offers many flexible options for accessing history. Highlighting a call and pressing ↵ will allow detailed inquiry into any call.
12	Press **ESC** RESULT: The *Service call history selection window* will be cleared. The cursor will be at the *Call #* field. NOTE: We will now continue entry of the new call.
13	Press ↑ RESULT: The *Service call search menu* will be displayed. NOTE: This menu gives the ability to search for existing calls at this service address. This is a valuable tool to prevent logging duplicate calls.
14	Press ↵ RESULT: The message will indicate there are no existing calls.
15	Press ↵ RESULT: The message will be cleared.
16	Press **F1** to assign the next call #.
17	At the *Date* field, type **021601** ↵ RESULT: The date will be formatted to 02/16/2001 and the cursor will move to the time field.
18	At the *Time*, *Contact* and *Phone* fields, press ↵ RESULT: After the *Phone* field is complete, the *Service call equipment add window* will be displayed. NOTE: The system defaults these fields, but they can be typed over to reflect different information for this call.

STEP	ACTION
19	Press **F1** RESULT: The *Customer equipment selection window* will be displayed. NOTE: Each line in this window shows a piece of equipment at this service address. At the bottom of the window, the equipment's description and coverage status (indicating the presence of a warranty or service contract) are displayed. The physical location of each piece of equipment is also shown. This will help the dispatcher select the correct piece of equipment. As the cursor moves down the equipment list, the information at the bottom will change.
20	Highlight *LASP02* and press ↵ RESULT: The *Service call equipment add window* will be displayed with information from the equipment completed.
21	At the *Invoicing code* and *Eqp location* fields, press ↵ NOTE: The *invoicing code* controls how charges are applied to a service call. The default code has been provided, in this case, by the equipment's warranty.
22	At the *Problem code* field, press **F9** RESULT: The Problem c*ode lookup window* will be displayed. NOTE: Any field in Focus that can be chosen from a predefined set of values has an *F9 lookup window* available.
23	Press ↵ RESULT: The highlighted problem code from the lookup window is returned into the call.
24	Press **CTRL-END** RESULT: The cursor will move to the last field in the window, providing a convenient way to quickly complete an entry.

STEP	ACTION
25	At the *Contract #* field, press ↵ RESULT: The *Call equipment add window* will close, and the *Call equipment selection window* will be highlighted.
26	Press ↓ RESULT: The cursor will move to the *Extended data section* for this call.
27	At the *Priority* field, type **4** ↵
28	At the *Bill group* field, press ↵
29	At the *Time to repair* field, type **1.75** ↵
30	At the *PO#*, *Tax code*, *Map grid* and *Cash rcvd* fields, press ↵
31	At the *Dispatch note* field, type **All lights on printer blink when trying to print** ↵
32	At the *Call taken by* field, type **DEM** ↵
33	At the *Work order* field, type **9058** ↵ NOTE: *Call taken by, Work order* and *Expected comp'l date* are user defined fields. We have used common choices in the demo. These labels can be set to suit the needs of your company in the *Control Information*.
34	Press **F11 then F** RESULT: This will invoke the *File* function from the function menu. A prompt will be displayed to file this service call.
35	Type ↵ RESULT: The *Call status window* will be displayed. NOTE: The window has the recommended status highlighted. Any status shown may be selected.
36	Press ↵ RESULT: The service call will be saved, the *Service call entry screen* will be cleared, and the cursor will appear at the *Customer* field.
37	Press **ESC** to return to the Focus main menu.

More service call detail

Log a call for a customer with pending calls already in the system. Use searches to find those calls. Add a new piece of equipment “on the fly” from the call entry screen for this customer.

STEP	ACTION
1	From the *SVC menu*, highlight *Service calls* and press ↵ RESULT: The *Service call screen* will be displayed.
2	At the *Customer* field, type **115** ↵ RESULT: Big S Auto Parts, Inc., will be displayed and cursor moves to the *Call #* field.
3	Press ↑ RESULT: The *Call search menu* will be displayed. *Service call number* will be highlighted.
4	Press ↵ RESULT: The existing calls for Big S Auto Parts, Inc., are shown in the *Call Selection window*. NOTE: The highlighted call, #709, is for the Big S Auto Parts, Inc., service address. The dispatch note at the bottom of the screen indicates the reason for the call. The call status is *Waiting for parts*. The reason for the new call will be to install a new piece of equipment at this site. The customer has indicated that the equipment can be installed when the technician returns to correct the problem associated with this previously entered call.
5	Press ↵ RESULT: The *Service call entry screen* will be displayed with information completed for service call # 709. The cursor will be in the *Extended data section*. NOTE: The equipment to be added does not exist in the customer's equipment database and will be added “on the fly” during call entry.
6	Press ↑ RESULT: The *Call equipment selection window* will be highlighted.

STEP	ACTION
7	Press **F1** RESULT: The *Service call equipment add window* will be displayed.
8	Press **F1** again RESULT: The *Customer equipment selection window* will be displayed. NOTE: The list shows all the equipment on file for this customer. The new equipment is not shown and should be added to the customer's equipment file.
9	Press **F1** again to add the new equipment RESULT: The *Customer equipment entry screen* will be displayed with the customer and service address information already filled in.
10	Press **F9** at the equipment *Type code* field. RESULT: The *Equipment type lookup window* will be displayed. NOTE: Any field in Focus that can be chosen from a predefined set of values has an *F9 lookup window* available .
11	Highlight code *LASP02* and press ↵ RESULT: The information for equipment type code LASP02 will be imported into the customer equipment add screen. The default values for this equipment type can be used to speed up equipment entry.
12	At the *Model* and *Description* fields, press ↵
13	At the *Serial #* field type **LS9210** ↵
14	At the *Quantity*, *Category/Sub*, *Manufacturer*, *Warranty*, *PM schedule* and *Dflt work cat* fields, press ↵ NOTE: The values for these fields are filled in based on information setup in the *Equipment type* code. It provides a template for customer equipment to speed entry and provide consistency.
15	At the *Location* field, type a description of the physical location of the equipment, for example: **Attached to file server** ↵
16	At the *Last repair*, *Wty start* and *Last PM* fields, press ↵
17	At the *Next PM* field, type **63001** ↵

STEP	ACTION
18	At the *Field number to change* prompt, press ↵ RESULT: The new piece of equipment will be saved in the customer equipment database and the *Service call equipment add window* will be displayed with information from this new piece of equipment.
19	At the *Invoicing code* and *Eqp location* fields, press ↵ to accept the default values.
20	At the *Problem code* field, press **F9** to pop up the *Problem code lookup window*, highlight INSTAL and press ↵ RESULT: The problem code of INSTAL is brought into the call.
21	Press the **CTRL-END** key. RESULT: The cursor will move to the last field in the window, providing a convenient way to quickly complete an entry.
22	At the *Contract #* field, press ↵ RESULT: The *Call equipment add window* will close, and the *Call equipment selection window* will be highlighted.
23	Press ↓↓ RESULT: The cursor will move to the *Extended data section*. The cursor will be at the *Priority* field
24	At the *Priority*, *Bill group, Time to repair*, *P.O. #*, *Tax code*, *Map grid* and *Cash rcvd* fields, press ↵
25	At the *Dispatch note* field, press the → to the end of the line and type **/install LASP02** ↵
26	Press **F11 then F** RESULT: A prompt will be displayed to file this service call.

STEP	ACTION
27	Press ↵ RESULT: The *Call status window* will be displayed. NOTE: The window has the recommended status highlighted. Any status shown may be selected.
28	Press ↵ RESULT: The service call will be saved, the *Service call entry screen* will be cleared, and the cursor will appear at the *Customer* field.
29	Press **ESC** to return to the Focus main menu.

Extra credit

Log a call for a customer with pending calls. Bypass the search features and use the system alerts to find the calls. Put equipment on the call, which has a help desk note, and attach the note to the service call. Print a work order for the call.

STEP	ACTION
1	From the *SVC menu*, highlight *Service calls* and press ↵ RESULT: The *Service call screen* will be displayed.
2	At the *Customer* field, press ↑ RESULT: The *Search options window* will be displayed, with *Name* highlighted.
3	Press ↵ RESULT: The *Service address name search window* will be displayed.
4	Highlight *American Insurance Co.* (customer 113’s “Main” address), and press ↵ RESULT: The customer and service address information for *American Insurance Co.* will be imported into the call.
5	Press **F1** to assign the next call #.
6	At the *Date* and *Time* fields, press ↵ RESULT: After the *Time* is entered, a message will be shown at the bottom of the screen notifying the operator of existing service calls for the selected site. The prompt to view the service calls will be displayed. NOTE: This valuable feature allows the system to alert you of any other existing calls for a customer. This can prevent the duplicate entry of service calls, as well as allow for more efficient scheduling of concurrent service work.

STEP	ACTION
7	Type **Y**↵ RESULT: The existing call for American Insurance Co., is shown in the *Call selection window*. NOTE: The note at the bottom of the screen indicates the reason for the existing service call. We can view any call shown in detail by highlighting the call and pressing ↵
8	Press ↵ RESULT: The highlighted call will be displayed in detail on the *Service call view screen*. All information for this service call can be easily accessed using the service call function keys. NOTE: We know that the customer wants immediate service for the call that we are in the process of entering and it is not a duplicate of an existing call, so we will continue logging the new call.
9	Press **ESC** RESULT: The *Service call view screen* will be closed and the *Call selection window* will be redisplayed.
10	Press **ESC** RESULT: The *Call selection window* will be closed and the *Service call entry screen* will be redisplayed.
11	At the *Contact* and *Phone* fields, press ↵ RESULT: The *Service call equipment add window* will be displayed.
12	Press **F1** RESULT: The *Customer equipment selection window* will be displayed. NOTE: The list shows all the equipment on file for this customer.

STEP	ACTION
13	Highlight Eqp ID *CMP030,* Model *5001Server* and press ↵ RESULT: The *Service call equipment add window* will be displayed with information from the equipment completed. The cursor is on the *Invoicing code* field, with "T/M" as the recommended invoicing code. NOTE: Notice the additional equipment information displayed. On the top line of the *Service call equipment add window*, the "*PM overdue*" warning, last PM date and next scheduled PM are displayed. At the bottom of this window, the warranty and contract information is shown. The invoicing code is recommended based on the presence of an active warranty and/or contract. If there is not a valid contract or warranty, the default set in the *Control information* is displayed, as seen in this example.
14	At the *Invoicing code* and *Eqp location* fields, press ↵
15	At the *Problem code* field, type **PM** ↵ RESULT: The PM problem code will be selected and a message will display indicating that there is help desk text available.
16	Press ↵ RESULT: The PM note for this equipment will be displayed. NOTE: Since the note shows the steps the technician should perform, we will attach this text to the service call as a work order note.
17	Press **F1** RESULT: The *Attach to call as a work order note?* prompt will be displayed.
18	At the prompt, type **Y** ↵ RESULT: The message indicating that the note has been attached will be displayed.
19	Press ↵ to clear the message

STEP	ACTION
20	Press **ESC** RESULT: The note display will be cleared and the Note indicator will appear in red below the Call number.
21	At the *Work category* field, Press **F9** RESULT: The *Work category lookup window* will be displayed. NOTE: During entry of Focus fields that require verification or selection from a predefined list, several methods of lookup can be used. The F9 lookup windows can be invoked, the F1 key can be used to advance through the allowable values, or the value, if known, can be keyed into the field directly.
22	Highlight the *Preventive maintenance* work category and press ↵ RESULT: The code and description for the PM work category will be brought into the call and displayed. NOTE: The Work category is most commonly used to indicate the type of work performed to correct the customer's problem. It is usually filled in after the service call has been completed.
23	Press the **END** key RESULT: The cursor will move to the last field in the window, providing a convenient way to quickly complete an entry.
24	At the *Contract #* field, press ↵ RESULT: The *Call equipment add window* will close, and the *Call equipment selection window* will be highlighted.
25	Press ↓ RESULT: The cursor will move to the *Extended data section* for this call.
26	At the *Priority* field, type **1** ↵
27	At the *Bill group* field, press ↵
28	At the *Time to repair* field, type **3** ↵
29	At the *P.O. #*, *Tax code*, *Map grid* and *Cash rcvd* fields, press ↵
30	At the *Dispatch note* field, type **Perform PM** ↵
31	At the *Call taken by* field, type **DEM** ↵
32	At the *Work order* field type **2354** ↵

STEP	ACTION
33	Press **F11 then W** RESULT: The service call work order print function will be invoked and the *Print service call work orders screen* is displayed.
34	At the *Field number to change* prompt, press ↵
35	At the *Printer menu*, highlight the desired printer and press ↵ NOTE: If Dskfil is chosen, the printout will be saved to a file called DSKFIL.PRT in the demo directory. It is a standard ASCII file and can be viewed with any text editor. If this printer is used later, the DSKFIL.PRT file will be overwritten with the new printout.
36	At the *Print alignment* prompt, press ↵ RESULT: The work order will be printed and you will be returned to the service call entry screen. A prompt is automatically displayed, asking to file this service call.
37	Type ↵ RESULT: The *Call status window* will be displayed. NOTE: The window has the recommended status highlighted. Any status shown may be selected.
38	Press ↵ RESULT: The service call will be saved, the *Service call entry screen* will be cleared, and the cursor will appear at the *Customer* field.
39	Press **ESC** to return to the Focus main menu.

An overview of scheduling and dispatching service calls

STEP	ACTION
1	From the *SVC menu*, highlight *Scheduling/Dispatching* and press ↵ RESULT: The *Schedule board* will be displayed for the current date. The schedule for the first four service technicians is displayed. The selected technician is ANDERS. NOTE: The schedule board date is shown at the top of the screen. Possible actions are shown in the message lines below the schedule board.
2	Press → RESULT: The selected technician is now DOVER. NOTE: The left and right arrow keys are used to select technicians, by moving one technician to the left or right. The “<“ and “>“ keys can be used to move across four technicians at a time.
3	Press **F1** to find an available service call for assignment to the currently selected technician. RESULT: The *Service call selection window* will be displayed. NOTE: Each line of the *Service call selection window* shows an available service call. At the bottom of the window, the dispatch note describing the highlighted call will be displayed. As the cursor moves down each call, the note will change. The time to repair (TTR) is also shown for each call.
4	Highlight call # 710, for American Insurance Co. NOTE: Notice that the currently selected technician is still visible behind the *Service call selection window*. This serves as a reminder of the technician being used for call assignment.

STEP	ACTION
5	Press ↵ RESULT: The *Labor entry window* will be displayed. NOTE: The *Call #*, *Svc address*, *Map grid*, *Call Date*, *Time* and *Priority* are shown at the bottom of the *Schedule board*. The call will be scheduled here, by entering the *Schedule Date/Time* fields into the *Labor entry window*. If the call is scheduled and dispatched simultaneously, the *Schedule Date/Time* fields can be bypassed, with only the *Dispatch Date/Time* fields completed. The *Dispatch Date/Time* will then override the *Schedule Date/Time* when determining placement on the *Schedule board*.
6	At the *Work description* field, press ↵ ↵ RESULT: The cursor will move to the *Schedule date* field.
7	At the *Schedule Date* field, press **F1** RESULT: The current schedule board date will automatically be assigned.
8	At the *Schedule Time* field, type **1500** ↵
9	Press the **CTRL-END** key RESULT: The cursor will move to the last field in the window, providing a convenient way to quickly complete an entry.
10	At the *Taxable* field, press ↵ RESULT: The *Labor entry window* will be closed and the newly scheduled call is shown under Robert Dover. NOTE: The first line of the entry shows *Call #* and *Zip code*. The second line of the entry shows *Schedule Time*, *Time to repair* and *Priority*.
11	Press → RESULT: The selected technician is now SUMGAI.

STEP	ACTION
12	Press **F1** RESULT: The *Service call selection window* will be displayed. Call # 705 will be highlighted. NOTE: The F2 key will allow access to options for sorting and filtering call information on this screen. These settings can be saved by user id so that each person may configure the screen the way they wish.
13	Press ↵ RESULT: The service call for Mid Atlantic Security will be selected and the *Labor entry window* will be displayed.
14	At the *Work description* field, press ↵ ↵
15	At the *Schedule Date* field, press **F1**
16	At the *Schedule Time* field, type **1600** ↵
17	Press the **CTRL-END** key.
18	At the *Taxable* field, press ↵ RESULT: The *Labor entry window* will be closed. The call will be shown on the schedule board under SUMGAI. NOTE: Notice that this call is yellow, indicating it is a high priority call. Rescheduling one of these calls for a different technician is a very simple task.
19	Press ↵ RESULT: Call # 705 is now the active call. The message below the *Schedule board* indicates the three choices that are available. Pressing ↵ a second time will display the *Labor entry window* again, allowing additions or changes to the labor record. Pressing ← or → will allow the selected call to be moved between technicians. Pressing **ESC** will clear the active call status.
20	Press → RESULT: The *Schedule board* active technician is now WILSON. The message below the *Schedule board* changes to show that pressing ↵ here will re-assign the highlighted call to the currently selected technician.

STEP	ACTION
21	Press ↵ RESULT: Call # 705 is now assigned to Wilson. NOTE: The bottom line of messages below the schedule board indicates the following choices: *F2 = Options, -/+ = scroll date and ESC = exit.*
22	Press **F2** RESULT: The *Options menu* will be displayed.
23	At *Jump to Date*, press ↵ RESULT: The *Jump to date* prompt will be displayed. NOTE: This feature allows the dispatcher to quickly look at another day's schedule, without having to scroll through one day at a time.
24	Type **021601** ↵ RESULT: The *Schedule board* for 02/16/01 will be shown.
25	Press **+** RESULT: The *Schedule board* for 02/17/01 will be shown.
26	Press **F2** RESULT: The *Options menu* will be displayed.
27	Highlight *Adjust refresh rate* and press ↵ RESULT: The *Refresh rate menu* will be displayed. NOTE: This selection controls how often call information is updated on your workstation's Schedule board. This feature ensures that changes made by other users are reflected properly at this workstation (very useful to a company with multiple dispatchers).
28	Press ↵

STEP	ACTION
29	Press **F2** RESULT: The *Options menu* will be displayed.
30	Highlight *Schedule summary* and press ↵ RESULT: The *Schedule summary board* will be displayed. NOTE: This screen gives a convenient, graphical overview of the calls scheduled for the date. Up to 16 service technicians are shown at a time and paging keys are available. The "*" symbol represents a half-hour of time committed for a technician from the *Time to repair* field on the call. If two or more calls overlap for a given technician, a "?" symbol will be displayed where the overlap occurs.
31	Press **-** RESULT: The *Schedule summary board* now changes to the schedule for 02/16/01.
32	Press **ESC** RESULT: The *Schedule board* will be redisplayed. NOTE: The date on the *Schedule board* was carried from the *Schedule summary board*. The schedule date always remains constant between the various scheduling screens.
33	Press **ESC** to return to the Focus main menu.

Complete service calls. Select, print and post service call invoices

STEP	ACTION
1	From the *SVC menu*, highlight *Service calls* and press ↵ RESULT: The *Service call screen* will be displayed.
2	Press ↑ RESULT: The *Search window* will be displayed.
3	Highlight *Service call number* and press ↵ RESULT: The *Service call window* will be displayed.
4	Highlight call # 710, and press ↵ RESULT: The *Service call entry screen* will be displayed for service call # 710. The cursor is positioned in the *Extended data section*, at the *Priority* field.
5	Press **F11 then L** RESULT: The *Labor* section will be displayed with the labor record highlighted.
6	Press ↵ RESULT: The *Labor entry window* will be opened.
7	At the *Dispatch Date* field, press ↵
8	At the *Start Date* field, press **F1** to accept the default date.
9	At the *Start Time* field, type **1500** ↵
10	At the *Stop Date* field, press **F1** to accept the default date
11	At the *Stop Time* field, type **1700** ↵
12	Press the **CTRL-END** key RESULT: The cursor will move to the last field in the window, providing a convenient way to quickly complete an entry.

STEP	ACTION
13	At the *Taxable* field, press ↵ RESULT: The *Labor entry window* will be closed. NOTE: The status on the labor record has changed to Completed. Any other billing information should be entered at this time. The *Function menu* will provide for easy access to this information.
14	Press **F11 then Z** RESULT: The *Function menu* will be displayed. The *Parts function* will be highlighted.
15	Press ↵ RESULT: The *Parts section* of the call will be displayed. NOTE: Remember, the parts section could have been accessed directly by pressing ALT-P, bypassing the service call function menu.
16	Press **F1** RESULT: The *Parts entry window* will be displayed, ready for us to add an item to the call.
17	At the *Item #* field, press **F9** RESULT: The *Item lookup window* will be displayed.
18	Highlight item # 511 and press ↵ RESULT: The screen will display the item # and description in the *Parts entry window*. The cursor will be positioned at the *Warehouse* field. NOTE: You can assign a default warehouse to each service technician. This warehouse will default in parts entry if you have entered a labor record for this call already.
19	Press **CTRL-END** RESULT: The cursor will move to the last field in the window, providing a convenient way to quickly complete an entry. The default quantity of one is used, and the selling price is determined using the equipment invoicing code.

STEP	ACTION
20	At the *Taxable* field, press ↵ RESULT: The *Parts entry window* will be closed, and the new part will be displayed in the service call *Parts section*.
21	Press **F11 then F** RESULT: A prompt will be displayed to file this service call.
22	Press ↵ RESULT: The *Call status window* will be displayed. NOTE: The window has the recommended status highlighted. In this case, the recommendation is based on the information just entered in the *Labor entry section*. Any status shown may be selected.
23	Press ↓ RESULT: The *'Ready to invoice'* status will be highlighted.
24	Press ↵ RESULT: The service call will be saved, the *Service call entry screen* will be cleared, and the cursor will appear at the *Customer* field.
25	Press **ESC** to return to the Focus main menu RESULT: The *SVC menu* will be displayed.
26	From the *SVC menu*, highlight *Invoicing, calls…* and press ↵ RESULT: The *Service call invoicing menu* will be displayed. *Select for billing* is highlighted.
27	Press ↵ RESULT: The *Call billing selection window* will be displayed. NOTE: Only calls filed as 'Ready to invoice' appear in this window. The message lines below the *Call billing selection window* indicates the options available.

STEP	ACTION
28	Press ↵ RESULT: The *"Invoice?"* status will be changed to "Yes" for the highlighted call.
29	Press **F2** RESULT: The *Options menu* will be displayed.
30	Highlight *Select all* and press ↵ RESULT: The *Select all displayed service calls* prompt will be displayed.
31	Type **Y**↵ RESULT: The *"Invoice?"* status will be changed to "Yes" for both calls.
32	Press **ESC** RESULT: The *Svc menu* will be displayed.
33	From the *SVC menu*, highlight *Invoicing, calls…* and press ↵ RESULT: The *Service call invoicing menu* will be displayed.
34	Highlight *Print invoices* and press ↵ RESULT: The *Print service call invoices screen* will be displayed.
35	At the *Invoice format number* and *Default invoice date* fields, press ↵
36	At the *Service call #*, *Starting customer #*, *Ending customer #* and *Bill group* fields, press **F1**
37	At the *Sorted by* field, press ↵
38	At the *Default comments* field, press **F2**
39	At the *Reprint invoices already printed* and *Suppress zero balance invoices* fields, press ↵
40	At the *Field number to change* prompt, press ↵
41	At the *Printer menu*, highlight the desired printer and press ↵ NOTE: If Dskfil is chosen, the printout will be saved to a file called DSKFIL.PRT in the demo directory. It is a standard ASCII file and can be viewed with any text editor. If this printer is used later, the DSKFIL.PRT file will be overwritten with the new printout.

STEP	ACTION
42	At the *Print alignment* prompt, press ↵
43	At the *Starting invoice #* prompt, press ↵
44	At the *Any change* prompt, press ↵ RESULT: The invoices will be printed.
45	At the *Are invoices just printed OK* prompt, type **Y** ↵ RESULT: The *Print service call invoices screen* will be displayed.
46	Press **ESC** RESULT: You will exit the invoice printing function and the *SVC menu* will be displayed.
47	From the *SVC menu*, highlight *Invoicing, calls…* and press ↵ RESULT: The *Service call invoicing menu* will be displayed.
48	Highlight *Post* and press ↵ RESULT: The *Post service call invoices screen* will be displayed.
49	At all three prompts, press **F1**
50	At the *Any change* prompt, type **N**↵
51	At the *Printer* menu, highlight the desired printer and press ↵ RESULT: The posting process will occur, the different stages of posting will be displayed on screen and the posting journals for sales, inventory transactions and cash receipts will print (if necessary).
52	At the *Posting complete* message, press **ESC** to return to the Focus main menu.

View a customer's equipment. Look at warranties and PM schedules.

STEP	ACTION
1	From the *SVC menu*, highlight *Customer equipment* and press ↵ RESULT: The *Customer equipment screen* will be displayed.
2	At the *Customer #* field, press **F9** RESULT: The *Customer lookup window* will be displayed.
3	Highlight customer # 115 and press ↵ RESULT: Big S Auto Parts, Inc., will be highlighted and selected. The *Customer equipment screen* will show the customer # and name.
4	At the *Service address* field, press **F1 F1** RESULT: All information for a piece of customer equipment will be displayed. NOTE: The *Warranty*, *PM schedule*, *Dflt work cat* and *Location* fields are used during service call entry. The *Next PM date* (field #17) is derived from the last PM date using the schedule setup in field # 11. The *Warranty*, *PM schedule* and *Work category* are defined in the FOCUS Setup functions.
5	Press **F2** RESULT: The information for the previous piece of equipment will be displayed. Notice that this piece of equipment is covered under a service contract, as indicated in the upper, right corner of the screen. NOTE: All Focus screens that allow lookup using the F1 key can sequence through the records both forward (using F1) and backward (using F2).
6	At the *Field number to change* prompt, press ↵ RESULT: The equipment screen will be cleared and the cursor placed at *Service address*.

STEP	ACTION
7	At the *Service address* field, press **ESC**
8	At the *Customer #* field, press **ESC** RESULT: You will exit the *Customer equipment maintenance* function, and the main Focus menu will be displayed.
9	From the *SVC menu*, highlight *Setup* and press ↵ RESULT: The *Setup menu* will be displayed.
10	Highlight *PM schedules* and press ↵ RESULT: The *PM Schedule setup screen* will be displayed.
11	At the *Schedule ID* field, press **F1** RESULT: The PM information for the *6 Month date schedule* will be displayed. NOTE: The values in the *Dates of scheduled PM* field are calendar dates. An early/late window is available to define the time frame in which the PM should occur. With this type of schedule, even if a scheduled date is missed, the next PM will be scheduled for the next calendar date shown. Up to 30 dates may be defined.
12	At the *Field number to change* prompt, press **F1** RESULT: The PM information for the *Monthly PM schedule* will be displayed. NOTE: The *Normal interval between PM's* is specified using a number, followed by a frequency. The frequency can be Days, Months or Years. An early/late window is available to define the time frame in which the PM should occur. With this type of schedule, the next PM date is based upon the equipment last PM date and the PM schedule interval.
13	At the *Field number to change* prompt, press ↵ RESULT: The *PM schedule screen* will be cleared.
14	At the *Schedule ID* field, press **ESC** RESULT: You will exit the *PM schedule setup* function and the *SVC menu* will be displayed.

STEP	ACTION
15	From the *SVC menu*, highlight *Setup* and press ↵ RESULT: The *Setup menu* will be displayed.
16	Highlight *Warranties* and press ↵ RESULT: The *Warranty setup screen* will be displayed.
17	At the *Warranty ID* field, press **F1** RESULT: The information for the *Extended system warranty* will be displayed. NOTE: A warranty can specify several different, successive periods of coverage. An invoicing code is entered, which is then used as the default when equipment service falls within the specified time period. The time periods are defined using a number, followed by a frequency. The frequency can be Days, Months or Years.
18	At the *Field number to change* prompt, press ↵ RESULT: The warranty screen will be cleared.
19	At the *Warranty ID* field, press **ESC** RESULT: You will exit the warranty setup function and the *Setup* menu will be displayed.
20	Press **ESC** to return to the Focus main menu.

Take a look at a service contract.

STEP	ACTION
1	From the *SVC menu*, highlight *Contracts* and press ↵ RESULT: The *Contract maintenance screen* will be displayed.
2	At the *Contract #* field, press **F9** RESULT: The *Contract lookup window* will be displayed.
3	Highlight contract # 115 and press ↵ RESULT: Contract number 115, for Big S Auto Parts, Inc., will be selected. The *Contract maintenance screen* will display the contract information. NOTE: The upper section of the contract screen shows general contract information, including billing and term of coverage information. The bottom of the screen displays a list of the equipment covered under this contract.
4	At the *Field number to change?* prompt, press **F5** RESULT: The contract equipment selection window will become active, with the first piece of equipment highlighted. NOTE: As indicated at the bottom of the screen, the up and down keys can be used to navigate the list of equipment.

STEP	ACTION
5	Press ↵ RESULT: The *Contract equipment maintenance screen* will be displayed. The information for the selected piece of equipment is shown. NOTE: You may notice the similarity between the customer equipment maintenance screen and the contract equipment maintenance screen. Customer equipment records may be added and maintained from either function. The contract equipment screen has additional fields related to contract processing: *Contract billing amount* and *Service call invoicing code*. The billing amount specifies the amount to be included on the contract invoice for this equipment, and the call invoicing code provides billing defaults when providing service for this equipment during the contract coverage period.
6	At the *Field number to change* prompt, press ↵ RESULT: The contract equipment screen will be closed and you will be returned to the equipment selection window in contract maintenance. NOTE: Customer equipment can be easily attached to a contract using the *Add new equipment* function.
7	Press **F1** RESULT: The *Contract equipment maintenance screen* will be displayed, ready for the addition of a new piece of equipment.
8	Press **F5** RESULT: A window is displayed, listing all of the equipment on file for the customer that is *not* currently attached to a service contract.

STEP	ACTION
9	Select any piece of equipment from the list, and press ↵ RESULT: The information for the selected equipment will be brought into the contract equipment screen.
10	At the *Field number to change?* prompt, type **13** ↵ RESULT: The cursor will be placed in the *Contract billing amount* field.
11	Type **50** ↵
12	At the *Taxable?* field, press ↵
13	At the *Field number to change?* type **14** ↵ RESULT: The cursor will be in the *Service call invoicing code* field.
14	Press **F9** RESULT: The *lookup invoice code* window will pop up.
15	Highlight PARTS and press ↵ RESULT: The PARTS invoice code will fill in and the cursor will move to the *Field number to change?* Prompt.
16	At the *Field number to change?* prompt, press ↵ RESULT: The *Contract equipment screen* will be cleared.
17	At the *Service address* field, press **ESC** RESULT: You will exit the equipment maintenance function and you will be returned to the equipment selection window in contract maintenance. NOTE: The piece of equipment just added will be included in the selection window, and the *Eqp total* billing amount display will be updated to reflect the new total.
18	Press **ESC** RESULT: You will exit the contract equipment selection window and the cursor will be placed at *Field number to change?* on the contract screen.
19	Press ↵ RESULT: The contract maintenance screen will be cleared.
20	At the *Contract #* field, press **ESC** to return to the Focus main menu.

Select, print and post contract invoices

STEP	ACTION
1	From the *SVC menu*, highlight *Invoicing, Contract…* and press ↵ RESULT: The *Contract invoicing menu* will be displayed. *Select for billing* will be highlighted.
2	Press ↵ RESULT: The *Contract billing selection window* will be displayed. NOTE: The message lines below the *Contract billing selection window* indicate the available options.
3	Press **F2** RESULT: The *Options menu* will be displayed. *Activate filters* is highlighted.
4	Press ↵ RESULT: The *Filter entry window* will be displayed.
5	At the *Cutoff date* field, type **033101** ↵
6	At the *Customer*, *Contract #* and *Status* fields, press **F1**
7	At the *Any change* prompt, press ↵ NOTE: The "*Filter on*" notification will be shown in the lower part of the screen. This indicates that only contracts meeting the filter selection criteria are displayed.
8	Press ↵ RESULT: The *"Invoice?"* status will be changed to "Yes" for the highlighted contract.
9	Press **F2** RESULT: The *Options menu* will be displayed.
10	Highlight *Select all* and press ↵ RESULT: The *Select all displayed contracts?* prompt will be displayed.

STEP	ACTION
11	Type **Y** ↵ RESULT: The *"Invoice?"* status will be changed to "Yes" for all of the displayed contracts.
12	Press **ESC** RESULT: You will exit the contract billing selection function and the *SVC menu* will be displayed.
13	From the *SVC menu*, highlight *Invoicing, Contract…* and press ↵ RESULT: The *Contract invoicing menu* will be displayed.
14	Highlight *Print invoices* and press ↵ RESULT: The *Print service contract invoices screen* will be displayed.
15	At the *Invoice format number* and *Default invoice date* fields, press ↵
16	At the *Contract #*, *Starting customer #* and *Ending customer #* fields, press **F1**
17	At the *Sorted by* field, press ↵
18	At the *Default comments* field, press **F2**
19	At the *Reprint invoices already printed* and *Suppress zero balance invoices* fields, press ↵
20	At the *Field number to change* prompt, press ↵
21	At the *Printer menu*, highlight the desired printer and press ↵ NOTE: If Dskfil is chosen, the printout will be saved to a file called DSKFIL.PRT in the demo directory. It is a standard ASCII file and can be viewed with any text editor. If this printer is used later, the DSKFIL.PRT file will be overwritten with the new printout.
22	At the *Print alignment* prompt, press ↵
23	At the *Starting invoice #* prompt, press ↵
24	At the *Any change?* prompt, press ↵ RESULT: The invoices will be printed.
25	At the *Are invoices just printed OK?* prompt, type **Y** ↵ RESULT: The *Print service call invoices screen* will be displayed.

STEP	ACTION
26	Press **ESC** RESULT: You will exit the contract invoice printing function and the *SVC menu* will be displayed.
27	From the *SVC menu*, highlight *Invoicing, Contract…* and press ↵ RESULT: The *Contract invoicing menu* will be displayed.
28	Highlight *Post* and press ↵
29	At both "*cut-off*" prompts, press **F1**
30	At the *Any change* prompt, type **N** ↵
31	At the *Printer menu*, highlight the desired printer and press ↵ RESULT: The posting process will occur, the different stages of posting will be displayed on screen and the posting journals for sales will print .
32	At the *Posting complete message*, press **ESC** RESULT: The *Contract invoicing* menu will be displayed.
33	At the *Posting complete message*, press **ESC** to return to the Focus main menu.

Print and review some management reports.

STEP	ACTION
1	From the *SVC menu*, highlight *Reports…* and press ↵ RESULT: The *Management reports* menu will be displayed.
2	Highlight *Svc call profit analysis* and press ↵ RESULT: The *Service call profit analysis report screen* will be displayed. The *Sort/selection criteria window* is displayed. NOTE: This report is a powerful tool that can help you analyze the profitability of your service work in a number of different ways.
3	Highlight *Problem* and press ↵
4	At the *Starting problem*, *Ending problem*, *Starting date* and *Ending date* fields, press **F1**
5	At the *Report format* field, press ↵
6	At the *Field number to change?* prompt, press ↵
7	At the *Printer menu*, highlight *Display on screen* and press ↵
8	After reviewing the report, press **ESC** RESULT: The *Service call profit analysis screen* will again be displayed.
9	Highlight *Invoicing code* and press ↵
10	At the *Starting code*, *Ending code*, *Starting date* and *Ending date* fields, press **F1**
11	At the *Report format* field, press ↵
12	At the *Field number to change* prompt, press ↵
13	At the *Printer menu*, highlight *Display on screen* and press ↵
14	After reviewing this version of the report, press **ESC** RESULT: The *Service call profit analysis screen* will be displayed.

STEP	ACTION
15	Press **ESC** RESULT: The *SVC menu* will be displayed.
16	From the *SVC menu*, highlight *Reports…* and press ↵ RESULT: The *Management reports* menu will be displayed.
17	Highlight *Referral analysis* and press ↵ RESULT: The *Referral source analysis screen* will be displayed. NOTE: This report helps to determine the effectiveness of your advertising by determining the new and long term sales resulting from various sources.
18	At the *Starting referral source*, *Ending referral source*, *Starting date*, *Ending date*, *Starting cust #*, *Ending cust #* and *Customer type fields*, press **F1**
19	At the *New customers only?* and *Report format* fields, press ↵
20	At the *Field number to change* field, press ↵
21	At the *Printer menu*, highlight *Display on screen* and press ↵
22	After reviewing the report, press **ESC** RESULT: The *Referral source analysis screen* will be displayed.
23	Press **ESC** RESULT: The *SVC menu* will be displayed.
24	Highlight *Contract profit analysis* and press ↵ RESULT: The *Service contract profit analysis screen* will be displayed. NOTE: This report will help you determine the effectiveness of your contract pricing by analyzing the costs of service on the customer's equipment.
25	At the *Starting cust #*, *Ending cust #*, *Starting contract*, *Ending contract*, *Starting date* and *Ending date* fields, press **F1**
26	At the *Field number to change?* prompt, press ↵
27	At the *printer menu*, highlight *Display on screen* and press ↵

STEP	ACTION
28	After reviewing the report, press **ESC** RESULT: The *Service contract profit analysis screen* will be displayed.
29	Press **ESC** RESULT: The *SVC menu* will be displayed.
30	From the *SVC menu*, highlight *Reports…* and press ↵ RESULT: The *Management reports* menu will be displayed.
31	Highlight *Service invoice history* and press ↵ RESULT: The *Print service invoice history screen* will be displayed. NOTE: This report can give you detailed or summary reporting of your completed service work, based on a number of different selection options.
32	At the *Select/order by* field, type **I** ↵, to select Invoice order
33	At the *Starting invoice #* and *Ending invoice #* fields, type **2688** ↵
34	At the fields from *Starting invoice date* through *Expected Comp'l date*, press **F1**
35	At the *Report format* and *Print notes?* fields, press ↵
36	At the *Field number to change* prompt, press ↵
37	At the *Printer menu*, highlight *Display on screen* and press ↵
38	After reviewing the report, press **ESC** RESULT: The *Print service invoice history screen* will be displayed.
39	Press **ESC** RESULT: The *SVC menu* will be displayed.
40	From the *SVC menu*, highlight *Reports…* and press ↵ RESULT: The *Management reports* menu will be displayed.
41	Highlight *Reprint call invoices* and press ↵ RESULT: The *Service call invoice reprint window* will be displayed. NOTE: At the bottom of the window, the dispatch note describing the highlighted call is displayed. As the cursor moves down each call, the note will change. This powerful function will allow you to easily locate service history and reprint the invoice.

STEP	ACTION
42	Press **F2** RESULT: The *Options window* will pop up, allowing you to look up the history in a number of different ways.
43	Press “**I**” to highlight *Invoice # order* and press ↵ RESULT: The history lookup window will be re-ordered by invoice number, and the lookup prompt will change to *Invoice #*.
44	Type in **2688** and press ↵ RESULT: The service call matching invoice number 2688, call number 423, will be highlighted.
45	Press ↵ to select the highlighted call RESULT: The *Service call invoice reprint* screen will be displayed.
46	At the *Format number* field, press ↵
47	At the *Comments* field, press **F2**
48	At the *Field number to change* prompt, press ↵
49	At the *Printer menu*, highlight the desired printer and press ↵ NOTE: If DSKFIL is chosen, the printout will be saved to a file called DSKFIL.PRT in the demo directory. It is a standard ASCII file and can be viewed with any text editor. If this printer is used later, the DSKFIL.PRT file will be overwritten with the new printout.
50	At the *Print alignment* prompt, press ↵ RESULT: The invoice will be printed and the *Service call invoice reprint selection window* will be redisplayed.
51	Press **ESC** RESULT: The *SVC menu* will be displayed.

STEP	ACTION
52	From the *SVC menu*, highlight *Reports…* and press ↵ RESULT: The *Management reports* menu will be displayed.
53	Highlight *Technician schedules* and press ↵ RESULT: The *Print technician schedules screen* will be displayed. NOTE: The technician schedule report provides an easy way to analyze a technician's workload. It can also be used to see at a glance how a technician's time has been utilized for a given time frame.
54	At the *Starting svc tech ID* and *Ending svc tech ID fields* type **ANDERS** and press ↵
55	At the *Starting date* and *Ending date* fields press **F1**
56	At the *Tech date to use, Call status, Technician status, Report format, Include current calls?* and *Include history calls?* fields press ↵
57	At the *Field number to change* prompt, press ↵
58	At the *Printer menu*, highlight *Display on screen* and press ↵
59	After reviewing the report, press **ESC** RESULT: The *Print technician schedules screen* will be displayed.
60	Press **ESC ESC** to return to the Focus main menu. NOTE: Please take some time to look at samples of other reports that Focus offers. They offer powerful features certain to be useful in your business.