



Administration Guide & User Manual

**Miracle Service
Version 11**

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Chapter 1

Welcome

Thank-you for selecting Miracle Service™ as your Service Management Solution. You have purchased a world class business software solution that is designed to meet your needs today and grow with you into the future.

Back in 1994, we released the very first version of Miracle Service™. Today, Miracle Service™ has thousands of users in over 45 countries around the world, and we're very pleased to welcome you to this group.

To make sure you get the most from your Miracle Service™ software, we offer a complete range of services from installation and training, to on-going technical support services, to software customization services from our professionally trained support staff. Web-based support technologies enable us to provide the same responsive support to both local customers, as well as to customers around the globe.

Our goal is to continually innovate our products and services to support our customers as their needs change and grow. From time to time we'll release new modules or updates of Miracle Service™. An update might include a time-saving new feature, minor repairs to keep your software running smoothly or other change relevant to your business. Upgrades will be placed on our support website to download, and are available to all customers with an active technical support contract.

Because Miracle Service™ is a modular solution, you can add modules at any time as your business grows and changes. To order additional modules or client licenses, please contact your sales representative.

At Nexent Innovations our customers are the key to our success, and our commitment to them is that Miracle Service™ provides, and will continue to provide, the best value for their service management software dollar.

Again, thank you for choosing Miracle Service™ and we look forward to working with you today and in the upcoming years.

- The Nexent Innovations Team

Chapter 2

The Importance of Backups

An important daily process for Miracle Service users is to make backup copies of your data and security files. Adhering to this routine will ensure that you have a fairly recent copy of your data in the event of a system crash.

How to Backup your Miracle Service Data Files

To make a daily backup of your Miracle Service files, copy the files in your MiracleDB folder on your server to a backup location. Note that this location should be either a different computer or a recordable CD.

If you are using the Report Designer to modify or develop reports, you should also make sure you back-up your \Reports Directory.

How to Backup your Miracle Service MS-SQL Data

This section will describe the steps involved to create an automatic or manual backup of your SQL Server database using the Miracle Service MS_SQLBackupRestore utility. Note that for best performance it is recommended that the MS_SQLBackupRestore utility reside on the same server as your database.

We recommend that regular backups are made daily in order to reduce the amount of loss if an issue occurs. As the size of a backup file is generally large, it is important that you monitor your available disk space to ensure that the server has enough free disk space. The backup folder needs to be manually maintained to ensure that it contains only the number of backup files that you require.

Steps:

1. Setup configuration file.
2. Create a manual backup your database.
3. Create a Scheduled Task to automatically backup your database.

Setup Configuration File

1. Open the file msbackup.ini using Notepad. The default location of this file is C:\MiracleDB on the server where SQL Server is installed.

2. Modify the following values accordingly:

- BENAME - database name, default is MiracleService
- SERVERNAME - server name and SQL Server instance
- LOCATION – location of backup files, folder requires write permission
- LOG – location of log files, folder requires write permission

Example without using SQL Server instance:

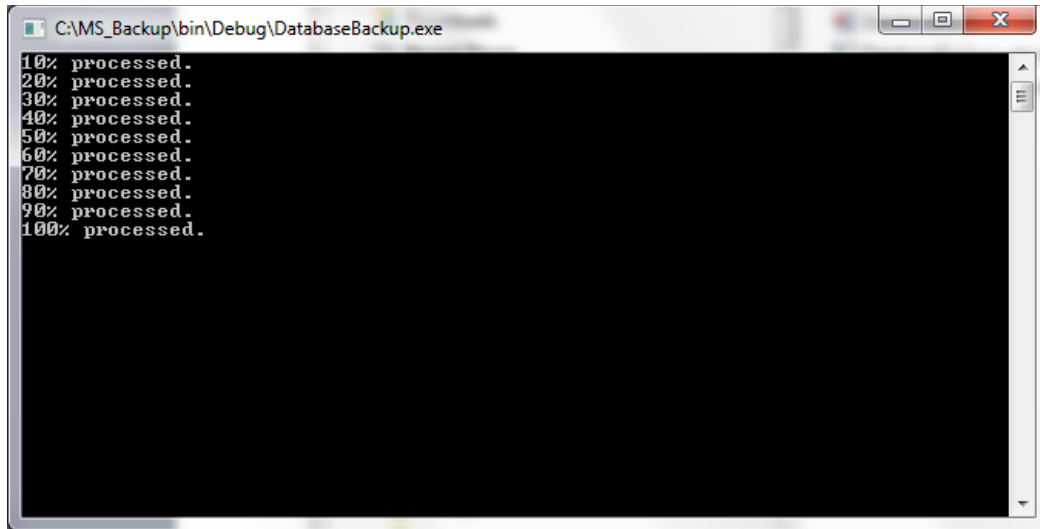
```
[SOURCE]
BENAME=MiracleService
SERVERNAME=.\
[BACKUP]
LOCATION=C:\\MiracleDB\\Backups\\
LOG=C:\\MiracleDB\\Logs\\
```

Example using SQL Server instance:

```
[SOURCE]
BENAME=MiracleService
SERVERNAME=.\SQLEXPRESS
[BACKUP]
LOCATION=C:\\MiracleDB\\Backups\\
LOG=C:\\MiracleDB\\Logs\\
```

Manual Backup

Run the file MS_SQLBackupRestore. The default location of this file is C:\MiracleDB on the server where SQL Server is installed. A program window will appear with the progress of the backup. The backup and log files will be generated in the location specified in the configuration file above.

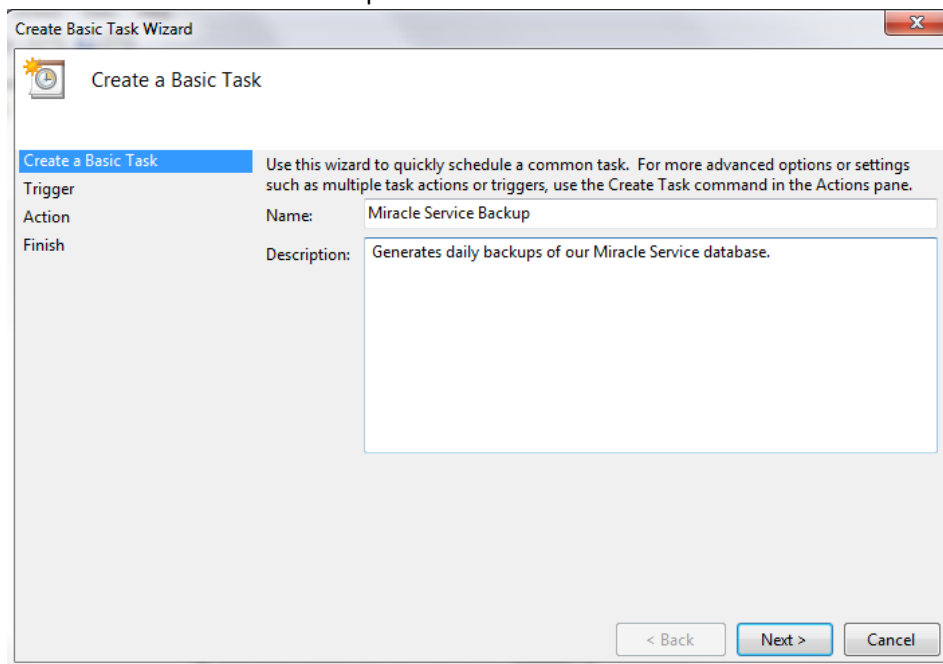


Automatic Backups

A Scheduled Task can be used to automatically generate backups of your Miracle Service database on a regular basis. In order to create a Scheduled Task you must have administrator privileges.

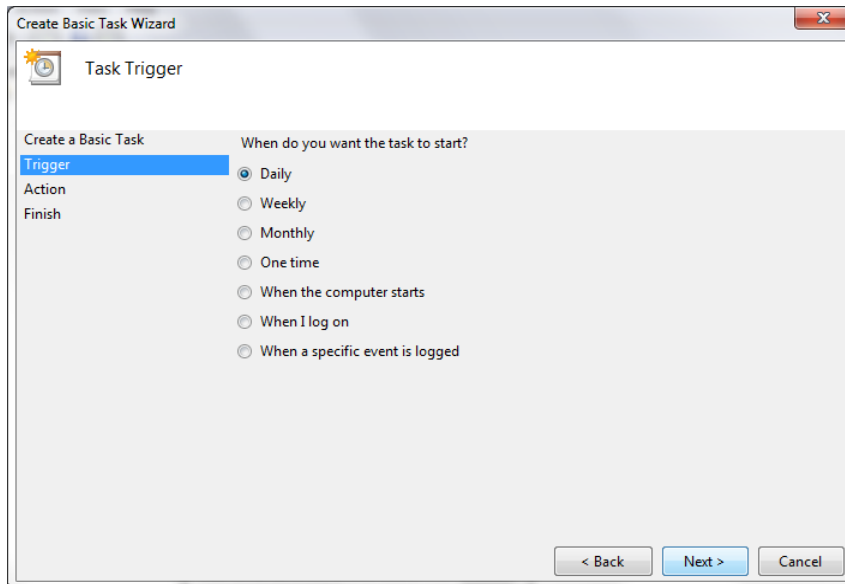
Step 1

1. Select 'Create Basic Task' from the Task Scheduler panel to open the task wizard. Enter a name and description to identify the scheduled task.
2. Select the 'Next' button to proceed.

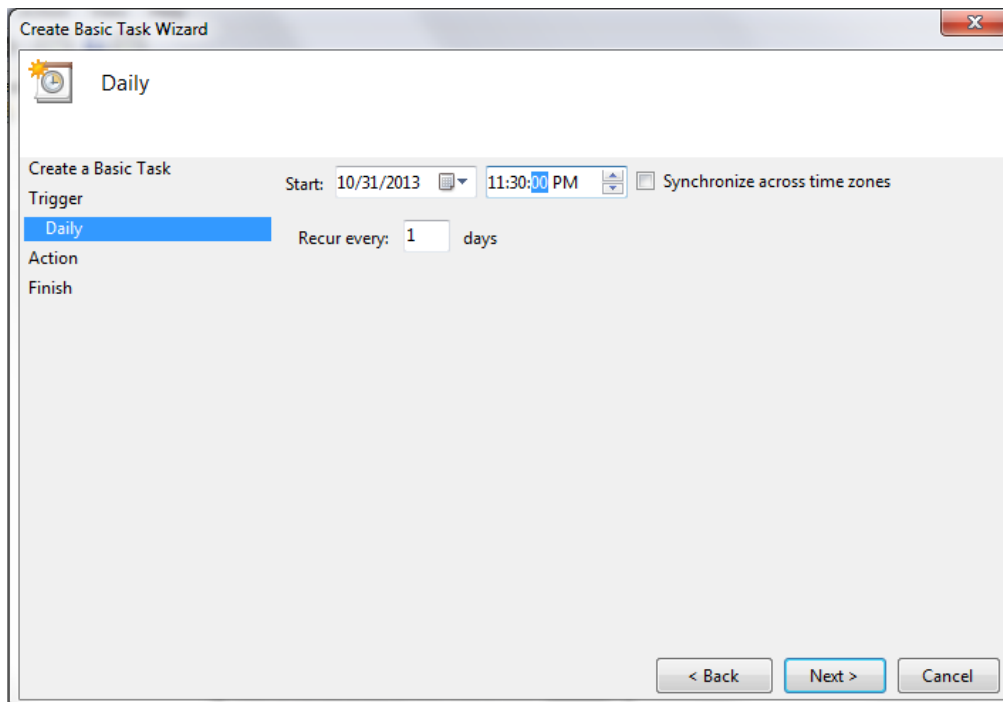


Step 2

Select the frequency to run the schedule task and select the 'Next' button to proceed.

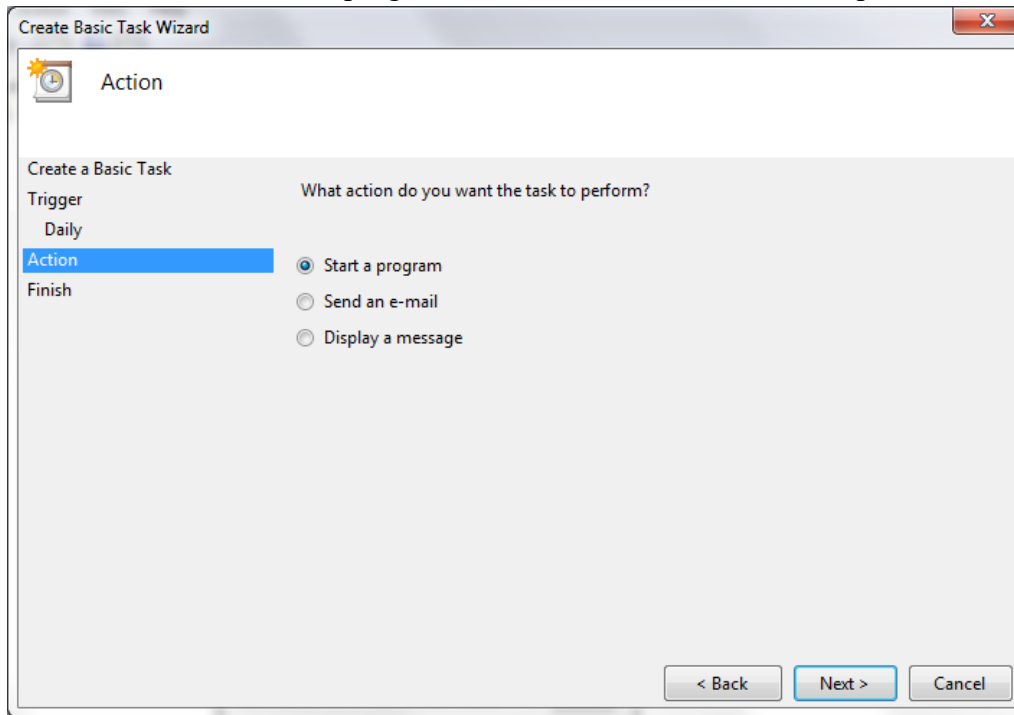


Note: we recommend setting a scheduled start time during off hours when there are no or few users in Miracle Service.



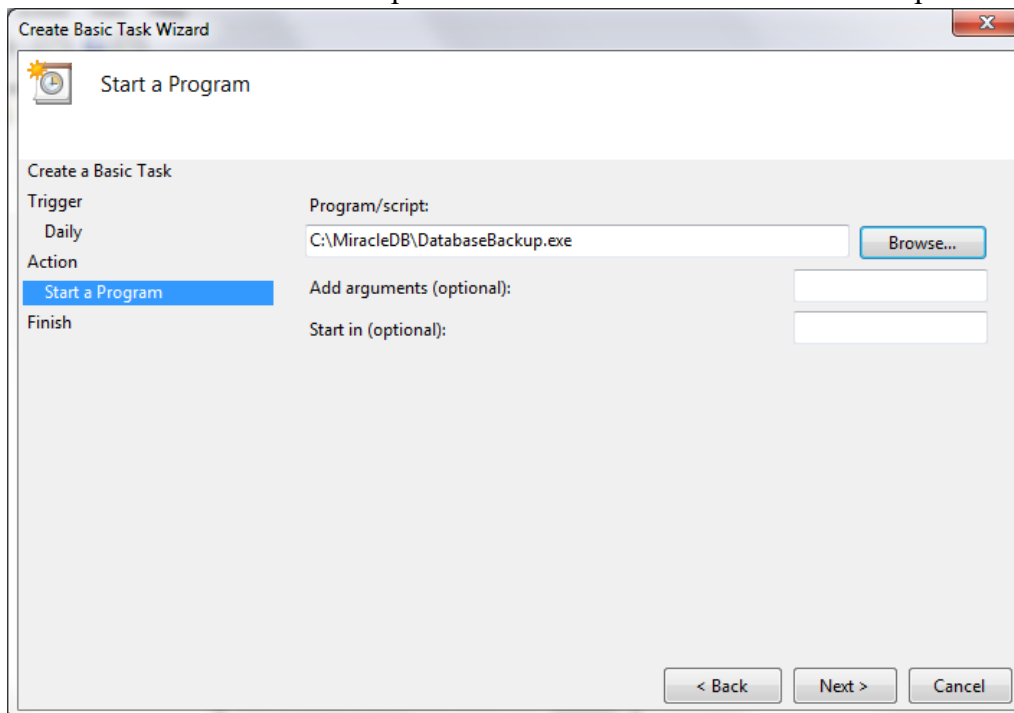
Step 3

Select the action to start a program and select the 'Next' button to proceed.



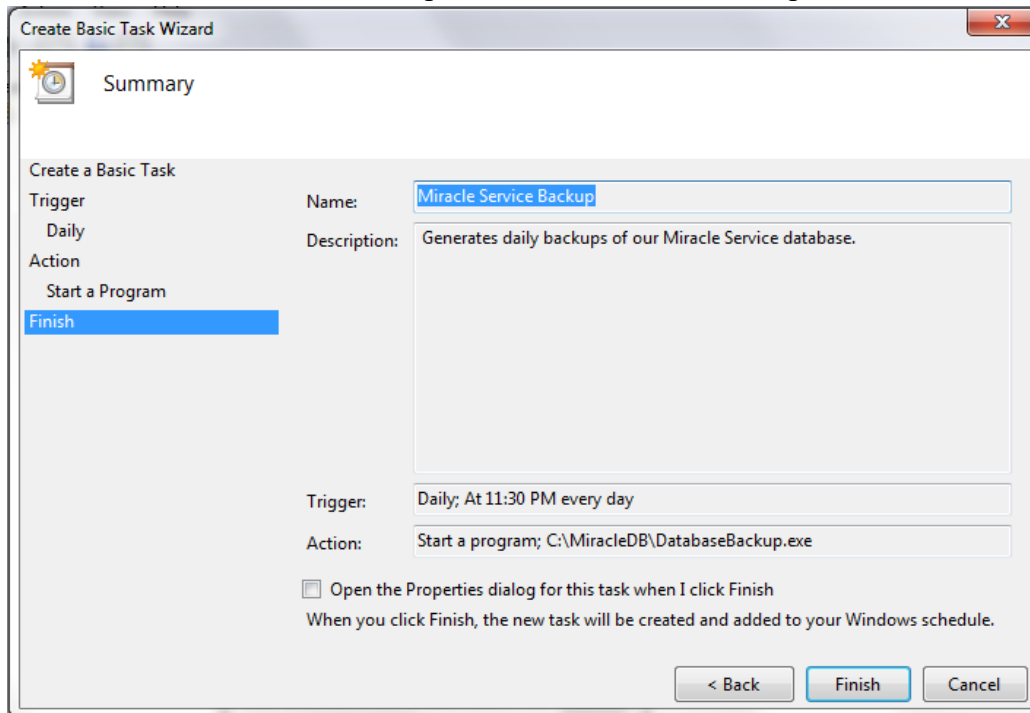
Step 4

Browse to the DatabaseBackup.exe file and select the 'Next' button to proceed.



Step 5

Click the “Finish” button to complete the scheduled task setup.



Visit our technical support web site for more information at
<http://www.miracleservice.com/>

Chapter 3

Application Conventions

The following application conventions or standards are used throughout both the Administration and the Miracle Service applications:

- ▶ Escape [Esc] Key/Cancel Button
- ▶ Date Fields
- ▶ Currency
- ▶ Hot Keys
- ▶ Record Screen Modes (New, Edit, View)
- ▶ Field Colors
- ▶ Cursor Arrows (Keyboard)
- ▶ Drop Down Fields
- ▶ Navigation Arrows
- ▶ Tab Key (on keyboard)
- ▶ Once in the Data Sheet View the options for this view are also displayed along with a Quick Search field (see Quick Search below).
- ▶ Zoom Buttons
- ▶ Online Support Resources
- ▶ Lists and Lookups
- ▶ Special Info Buttons
- ▶ Recalculate/Refresh Buttons
- ▶ Review Screens

► User Screens

Escape [Esc] Key/Cancel Button

The 'ESC' key is a keyboard key that overrides Miracle Service when it will not allow the user to exit from a screen.

On occasion, if a user fails to add the required information on a data entry screen, Miracle Service will lock the screen. The user can press the [Esc] (Escape) key if other efforts are ineffective. Pressing the [Esc] (Escape) key will cancel any changes and release the screen.

Note: This act can delete any unsaved work done on that screen. In an 'Add' or 'Data Entry' screen, you can lose data entered. In an 'Edit' or 'Maintenance' screen, you can lose data entered since the last time you saved the screen.

Date Fields

Numbers or characters may be used for date formatting. Date formatting is defaulted from your Microsoft Windows International Date Field Settings. Enter 'MMM, DD, YY' in any field which requests a date and it will translate it to the proper date format. Three characters are required for the month to be added automatically.

Currency

The currency formatting is displayed on all screens and reports according to the Microsoft Windows International Currency Settings.

Hot Keys



In some cases it may be faster to use a Hot Key rather than the mouse. Hot Keys are used by holding down the [Alt] key then a specific character key. Hot Keys are indicated on buttons and menus by a character, which are underlined. In the above example a user wishing to select Delete may either mouse click on the Delete button or hold down the [Alt] key and hit the D key. The hot keys in the above picture are: [Alt] + N, [Alt] + E, [Alt] + R, [Alt] + P

Hot keys will only work on buttons that have a focus (letter with an underline). Press and hold the [Alt] key on the keyboard and then press the letter in focus. For 'Print' (notice the underscore under the [P]), click on the 'Print' button with the mouse or press and hold the [Alt] key then press the [P] key.

If the Focus is on a button, that is, a broken line surrounds the caption on a button and a heavy line surrounds the button, select it with the mouse or simply press the [Enter] key.

Record Screen Modes (New, Edit, View)

There are three basic screens, New, Edit and View found throughout the application.

New (Add) Mode



The 'New' screen mode is a 'Data Entry' screen where new records are created in the database. The 'Edit' screen mode is a 'Maintenance' screen where existing records can be viewed or edited (modified).

You can access the 'New' button from various menus. They are also accessible through the 'New' buttons found on the 'Maintenance' screens. Various 'Zoom' [+] buttons are provided throughout the application to direct users to 'Data Entry' screens. This allows information to be entered or edited on the fly.

Use 'Add' screens to add new records to files. When opening any 'Data Entry' screen, the screen will contain only the screen name and a text box that requires a unique ID. After the unique identifier is entered, the screen opens and allows users to enter the appropriate data. After the new information is entered, select 'Save', the application will automatically open a fresh 'Data Entry' screen. To edit previously entered information, select the edit mode. This allows unlimited and rapid data entry.

New Mode

Every table in Miracle Service has a 'Data Entry' or 'Add' screen. 'Add' screens often have defaulted information. Fields appear or disappear depending on their relevance. These features allow for rapid data entry on the fly.

Edit Mode

Edit mode screens are used to edit records. Only white fields may be edited.

There are several 'Edit' or 'Maintenance' screens with the 'Edit' buttons on their menus. There are also 'Zoom' [+] buttons located throughout the application, which allow access to 'Edit' or 'Maintenance' screens.

View Mode

View Mode Screen Fields

The View Mode displays the fields of information in gray. There are search options buttons in the top right of the screens. Blue arrows are used to scroll through records at the bottom right of the screens as well.

If the user's security allows for View Mode only, the user will not be permitted into the Add/Edit mode. A message will alert the user of their security View Mode only. Note: the 'Edit' button on the main screen must be selected to edit information on any following screens.

City	Quaketown	State	PA
Zipcode	18951	Country	USA

Edit Mode Screen Fields

When the 'Edit' button is selected from a menu screen, the screen opens in view mode. Notice the editable fields are white and the blue arrows have disappeared.

City	Quaketown	State	PA
Zipcode	18951	Country	USA

Select 'OK' after the information has been entered. The fields will turn back to gray and the 'Search' buttons located in the top right and/or the blue arrows at the bottom which are used to locate the correct record will return. The screen returns to 'View' Mode.

Field Colors

A field is a box on a screen that displays information. They are presented in one of three colors:

Gray Fields

A gray field indicates locked information. To edit information in these fields the 'Edit' button needs to be selected.

White Fields

A white field permits information to be entered or edited.

Blue Fields

A blue field displays information entered, stored, or calculated from another screen. In order to change information displayed in a blue field, the information must be entered or edited from the original source. Under normal circumstances, information in blue fields does not require changes. Sometimes tables appear with green fields. These green fields have the same characteristics as blue fields.

Cursor Arrows (Keyboard)

Most standard keyboards have four-arrow keys, which allow the movement of the screen cursor one increment at a time. In Miracle Service, you can use these arrow keys to help you navigate around the application. There are two methods used in applying the use of these cursor arrow keys.

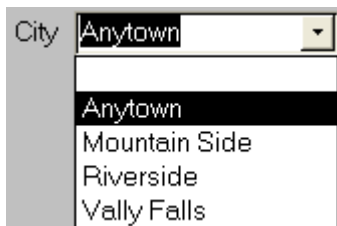
Method 1: The cursor arrows on your keyboard allow scrolling up and down lists. For example in a drop down box, using your keyboard 'down' cursor arrow will allow scrolling down the list.

Method 2: The cursor keys also have limited ability to move your cursor from field to field around any screen. Arrow keys cannot exit drop down boxes or boxes. Use the [Tab] button to exit drop down boxes or comment boxes.

Drop Down Fields



The drop down list feature offers the opportunity to speed up data entry. A white field with an arrow pointing down at one end hides an entire list of options appropriate for that field. Select the 'down' arrow at the end of a field opens the entire list. Select one of the options from the list and the data will automatically be entered, or type the entry into the field.



The auto-expand function will find the closest existing match from the information entered. After the information appears, select enter.

Select [Tab] or [Enter] to exit each field.

Navigation Arrows



Blue Arrows, Tabs or Enter Keys allow the systematically displaying of records in the order that they appear in the files. After an entry is made into the search field, the blue arrows will display the next record, regardless of the specification.

Select the blue arrow pointing to the right and the next records that follow the current record will appear. The order of appearance can be alphabetical, numerical, or chronological depending on the current record. Select the arrow pointing left and the records that precede it will be appear.

Tab Key (on keyboard)

Pressing [Tab] will advance the next field or button. Pressing [Shift]-[Tab] enables the previous field or button.

Exiting Data Fields

Usually by selecting [Enter] the data typed into a field is entered and your cursor will advance to the next field. Occasionally, when using larger fields like 'Comment' boxes, the [Tab] key is required to advance your curser to the next field. In the example of a comment box, the [Enter] key will advance the curser to the next line in that field.

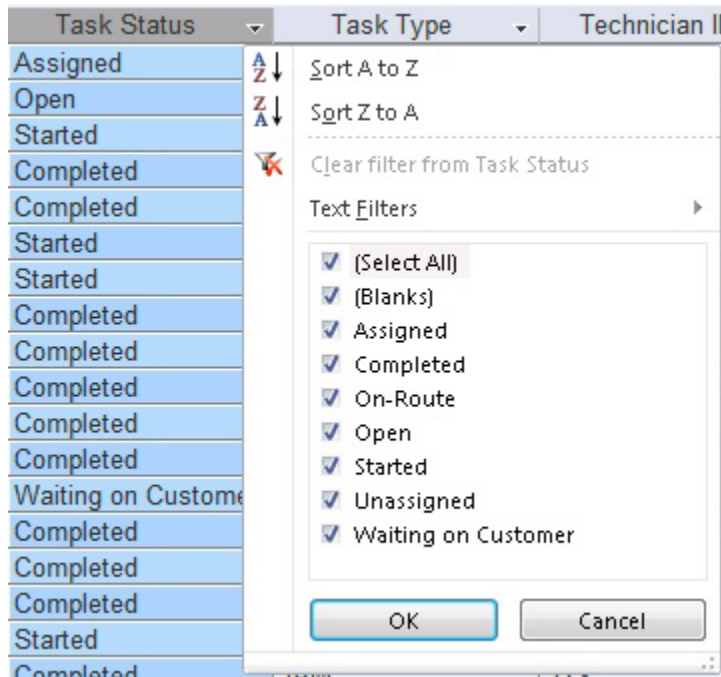
Data Sheet View

The Data Sheet View is the Top Level view of a list of records. The Data Sheet View is available for each major area of the application (Customers, Service, Equipment, Contracts, Inventory, Suppliers, Purchase Orders, Sales Orders, Sales Invoices, Service Invoices, and Period Billing Invoices).

Task Number	Task Status	Task Type	Technician ID	Unit ID	Model Number
2003-1	Assigned	MISC	SUB	100047	M5035 MFP
2093-2	Open	INST			
2129-3	Started	JAM	BS, GDE	102215	7855
2145-1	Completed	PMC	KN		M9050 MFP
2146-1	Completed	PMC	KN		P4515
2159-3	Started	JAM		101472	4250
2169-2	Started	MISC	BP1		M251nw
2173-1	Completed	JAM	KN		9050
2174-1	Completed	JAM	TM	100608	4100
2175-1	Completed	IMAGE	TM		M475dn MFP
2177-1	Completed	PMC	BP1		4100
2179-1	Completed	MISC	TM	P00074	4350
2181-2	Waiting on Customer	MISC		101321	CM4540 MFP
2182-1	Completed	IMAGE	TM	100967	1022n
2183-1	Completed	ERROR	BS	102062	5875
2185-1	Completed	JAM	TM		M3027 MFP
2187-2	Started	JAM			4350
2188-1	Completed	JAM	BS	100751	P3015
2190-1	On-Route	JAM	TM	101001	4050
2191-1	Completed	IMAGE	JE	100873	CP3525
2192-1	Assigned	ERROR	JE		M602
2194-1	Unassigned	ERROR		102806	M401
2195-1	Unassigned	ERROR		102804	7835
2196-1	Unassigned	JAM			M603
2197-1	Unassigned	JAM			9040
2197-2	Unassigned	INST			3600
2198-1	Unassigned	IMAGE	GDE, TM		M725
2199-1	Assigned	MISC	BP1	100040	M2727NF MFP
2202-1	Unassigned	SOFT			
2204-1	Unassigned	SOFT			

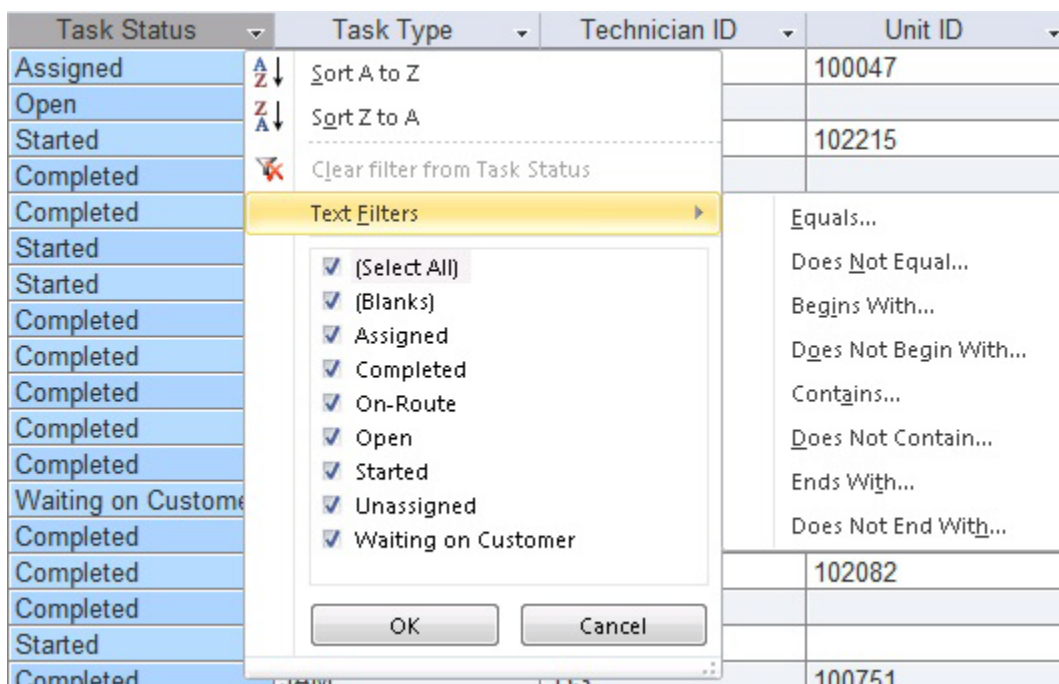
Once in the Data Sheet View the options for this view are also displayed along with a Quick Search field (see Quick Search below).

User can refine the information displayed in the Data Sheet view by clicking the filter icon on each column header row. This will display a filter list where users can further filter the view or choose the sort order for the field (Sort A to Z or Sort Z to A). This lets the user display the data in Ascending or Descending order.



The user also can further restrict the information displayed in the Data Sheet View by Selecting which of the criteria should be in the screen.

A more refined filters is also possible. Depending on the type of field (string, numeric or date).



Searching for Information

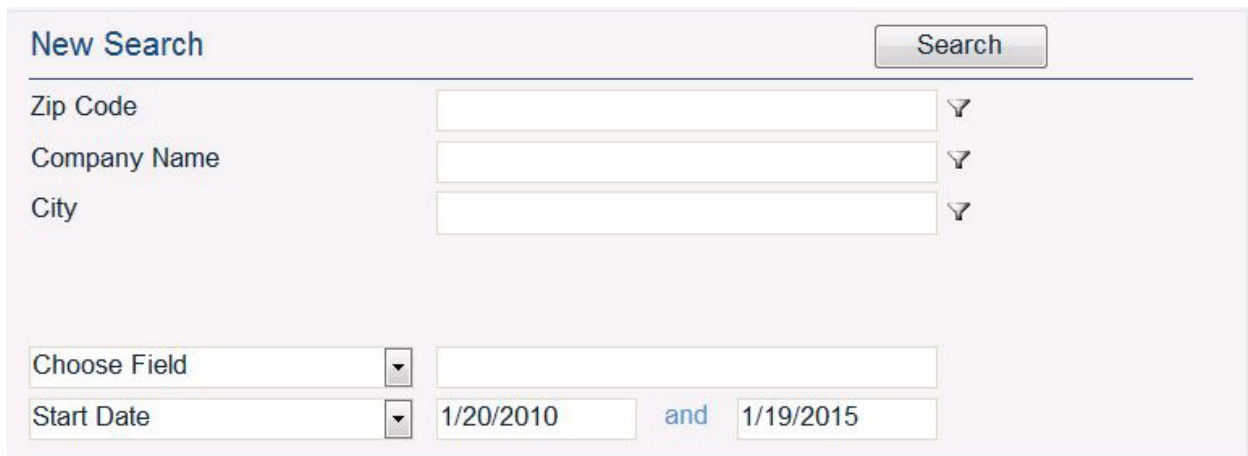
Version8 has introduced a much more advanced search method to help users find their information faster. Using 'My Preferences' each user is able to configure Miracle Service to work as they prefer.

In 'My Preferences' the user can define the initial screen for each major area of the application or they can set it to use the Field Search method.

Field Search

Using the Field Search method is a very powerful method for locating a group of records that match a defined group of records. When using the Field Search method a user can define up to 5 fields to include in their standard search. The user has also two additional fields where they can choose any other field and a date field to select a group of records.

 The funnel icon beside each field lets the user choose how the information will be searched. Users can define if the searched field Contains, Equals or Starts With the information entered in to the search field. Note: if a search field is left blank, it will assume all records match that criteria and it will not filter the search based on the blank field. The 'Contains' method is selected by default. Clicking on the funnel will display the search methods for selection. Each field can have a different search method applied.



Quick Search



Miracle Service uses the Quick Search field to help find a specific record quickly and easily.

The Quick Search field is located at the top of each data sheet view of the main screens. Next to this field is a Clear All and Views selection. The 'Clear All' allows the user to reset (clear) the search to the original filter. Users can select the Views to either reset back to the user's original view or to open the My Preferences screen so they can modify their view options.

Search Tips

More information entered in search fields, narrows the field of search and reduces unrelated records.

Wild Cards are not needed as the information entered in the Quick Search field will be searched in any field even if it is just matches partial information.

Zoom Buttons



Zoom [+] buttons are typically to the right (only a few are to the left) of several fields located throughout the application and appear as shown above.

Zoom buttons marked with a yellow plus sign [+] drill down to specifically related information.

On many screens throughout the application, codes or IDs such as Customer IDs, Equipment IDs or Service Contract IDs are displayed. Periodically, there may be a need to review the details. Selecting the 'Zoom' [+] button will display the specific details of that code or ID. To return to the previous screen, select 'Exit' on the details screen.

In a few maintenance screens, the 'Zoom' [+] button allows the user to drill down to details screens. The details screen also allows the amendment or addition of records. This screen also allows movement to other records for amendment. On those occasions, the most recently viewed, amended, or added record will be displayed and associated to the original screen zoomed from.

Online Support Resources

Miracle Service has a library of technical notes offering additional support resources.

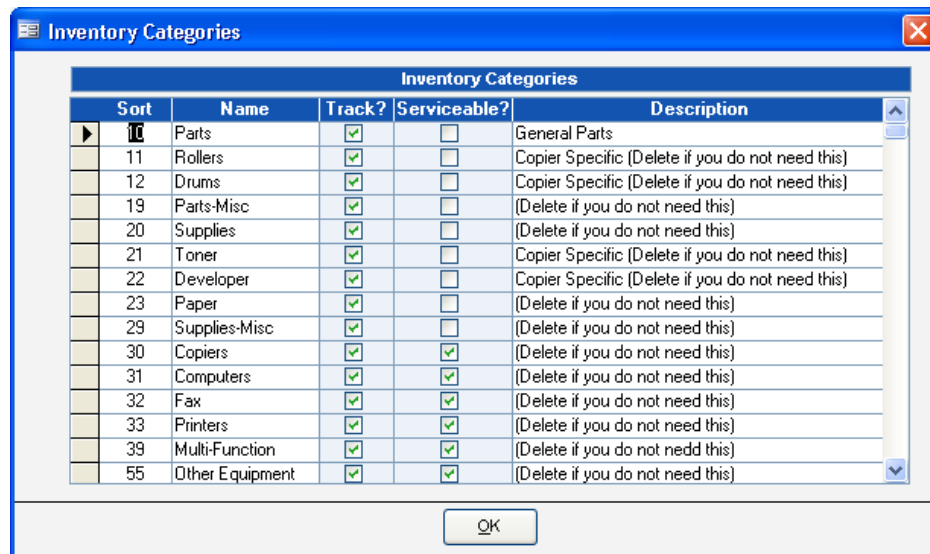
The Miracle Service technical notes, updates to the software and the latest version of this manual can be found in the Customer Center on our web site at:

<http://www.miracleservice.com/>

Lists and Lookups

Lookups contain the data that will appear in drop-down boxes throughout the application. Several of these drop-down boxes throughout the application can be customized to display information differently.

Lists are very much like lookups, however they may contain more information relating back to a single field, for example Categories and Tax Codes. These lists may also be displayed in drop-down boxes.



Lists and lookups are located in several screens within the application. They're primarily located in the Administration program.

Adding Lookup Information

To add information to a lookup or list, enter the information on the field that has an asterisk [*] in a small gray box next to it. When entering new information, the asterisk [*] will move down to a new empty line.

Deleting Data from Lookups and Lists

Periodically it will be necessary to delete information from a list rather than editing the entry. To delete information from a lookup or list, select the gray button to the left of the line. Notice the button turns darker, and a black triangle appears in the square. This indicates that the entire row is in focus. Press the [Delete] key on the keyboard to remove the data. A confirmation message will appear indicating that the data has been deleted.

Note: The application will not permit information to be deleted if linked to other records. All dependent information must be deleted first. For example, to delete a city, which has existing customers, attached, either a new city name must be entered or the customer must be deleted. If the city was spelled incorrectly, simply correct the spelling. All customers belonging to that city will display the corrected name.

Special Info Buttons



Additional information about a screen is accessible through the multiple 'Special Info' buttons.

They're located on many screens, usually across the bottom.

To access special information, select the 'Special Info' buttons. Each chapter of this manual contains specific information about its own 'Special Info' buttons. To edit information contained within the screen(s) below these buttons, select the 'Edit' Mode prior to selecting the button.

Recalculate/Refresh Buttons



The Recalculate Button is a dark red exclamation mark '!' found on some screens. They prompt the application to re-calculate the accuracy of the field next to it. For example, this function is required in the event another user is simultaneously accessing the data from another machine altering the same information.

The 'Recalculate' or the 'Refresh' button is located to the right of the 'Total' box on many screens that perform calculations, particularly those with complex formulas or large numbers to manipulate.

By clicking one of these buttons, the application will re-calculate/refresh and display the new information if applicable.

Review Screens

These screens produce a summary of transactions that can be viewed or processed as a group. These review screens are used throughout the application to simplify the processing of major billings, approvals, and transactions. For example, review screens are used for Invoices, Purchase Orders, Automatic Service Contract Billings (called Period Billings), Automatic PM Creation, Contract Renewals and more.

Enter a 'Review' screen by selecting the 'Review' button located on several menus.



A table appears containing the essential information representing each transaction that has occurred in this field.

Working with Review Screens

Located across the top of the screen are flags that consist of an essential part of the review. They display the number of entries, the status of those entries, and what can be done with those entries as a group or individually.

Sales Order Review							
				# SOs	17	# Marked to be Converted	
Show Group Type				All		☒ Show Only Non-Converted SOs ☐ Show Only Back Orders ☐ Show All SOs	
Sales Order Number		Date	Bill-To ID		Ship-To ID	Shipped Via	Total
120404-0002	+	04/04/2012	CAV001	+	CAV001		\$17.11
120404-0001	+	04/04/2012	BAIL002	+	BAIL002		\$31.20
120130-0003	+	30/01/2012	AIR001	+	AIR001		\$20.57
120130-0001	+	30/01/2012	AIR001	+	AIR001		\$7.47
120125-0002	+	25/01/2012	AIR001	+	AIR001		\$11.23
120125-0001	+	25/01/2012	AIR001	+	AIR001		\$25.33
111219-0002	+	19/12/2011	AIR001	+	AIR001		\$660.47
111121-0001-BC01	+	21/11/2011	AIR001	+	AIR001		\$26.22

There are a number of 'Zoom' [+] buttons to obtain more specific details of the information shown.

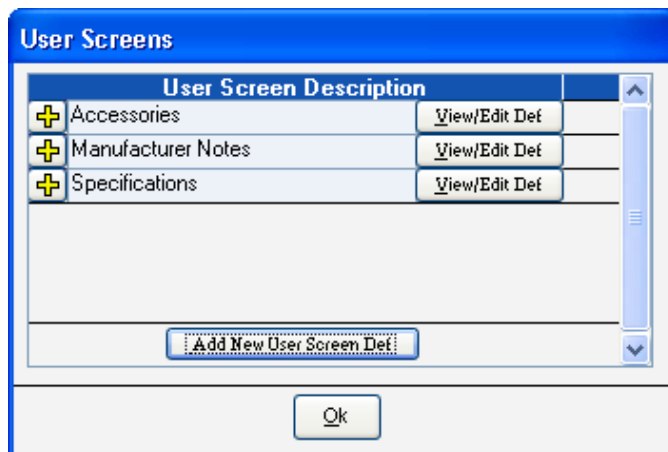
For example, from the 'Sales Orders and Invoices' menu, select 'Sales Order Review'. The screen displays a table that contains a list of every sales order completed. To view orders and invoices by a specific date range, enter the date range in the 'Show For A Date Range' box.

Use the buttons at the bottom labeled 'Print' or 'Print All Unprinted' to mark as a group to be printed and/or converted to an invoice. Alternatively, select the boxes on each line of the table to mark them individually.

This manual discusses in detail each unique characteristic of individual 'Review' screens in their related chapters.

User Screens

User Screens allows end-users to enter and store information particular to their company's needs or to your client's needs. This feature offers the ability to customize the application and track unique information in addition to the standard application. This customized data is not stored in the existing tables in the database but as in a new table created when the information is entered. For this reason, user screens and the data they contain are not supported.



Accessing User Screens

Many 'Maintenance' screens, for example 'Customer Maintenance' and 'Inventory Maintenance', have a button among the 'Special Info' group marked 'User Screen'. Select this button to go to the 'User Screens'

This screen allows the creation of an unlimited number of user screens. To add or edit information, select the 'Add or Edit' button the 'User Screens'.

Creating User Screens

Select 'Add' or 'Edit' mode. Enter Screen Description and Number of Fields. Each field can be given a name, text length, width and height.

To create additional user screens select the 'Add New User Screen Def.' button located just above the 'OK' on the screen.

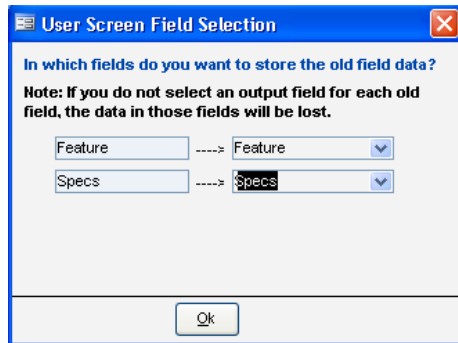
	Field #1	Field #2	Field #3	Field #4	Field #5
Name	Feature	Specs	Field3	Field4	Field5
Text length	20	20	20	20	20
Width (inches)	1	1	1	1	1
Height (inches)	0.35	0.35	0.35	0.35	0.35

Choose the number of fields contained in the User Screen to a maximum of five. The default setting for 'User' screens is five fields. Each field is twenty characters or one inch wide, and 0.35 inches high. These values can be changed to meet specific needs. If three is entered, three fields will appear; if five fields are

entered, five fields will appear, etc. Next, name the fields by replacing the text 'Field 1', etc. Each field is limited to 255 characters per user screen. For example, if the first field name consists of 55 characters, 200 characters would remain to distribute among the remaining fields for that line.

Editing an Existing User Screen Field

Enter the user screen while the screen is in 'Edit' mode and the screen will appear as below. Select the 'View/Edit' button



To change characteristics, or edit a field definition in any way, (name, length, width etc.), the application must know where to move the data from the old-field structure into the new one. Assigning the old-field name to the new-field name easily moves this information across and changes the information to the new field format characteristics automatically.

Note: If the field is left blank in this selection process, the old information will be deleted from the tables. Make sure all the fields are selected if the data is to remain in the edited user screen.

Chapter 4

Getting Started with Miracle Service

To locate Miracle Service after it has been properly installed, go to the 'Start' menu, 'All Programs' then select Miracle Service.

When you launch Miracle Service, you will have the option to select which Application to launch: Miracle Service Client or Miracle Service Administration.



Miracle Service Administration

The Administration application assists the administrator with configuring each area of the application to suit their specific needs. To assist with this a First Time Administration Setup Checklist is available and we highly recommend using this to properly plan and complete the setup. This guide is available on our web site.

Prior to running Miracle Service Client, the Administration application must be completely configured to avoid potential database errors.

There are a number of Standard or Default ('DEF') configurations that must not be deleted to ensure the proper operation of Miracle Service.

Miracle Service Client

This is where the day-to-day sales and service processes are executed and the inventory and service contracts are managed. When Miracle Service is opened, it operates in the manner that was configured in the Administration application.

Compact Database

The data file is vulnerable to human error, mechanical failure, and other environmental factors. Periodically selecting this icon and Miracle Service will 'repair and compact' the database to keep it running smoothly. This feature should also be run in the event of other anomalies such as power failures or any other minor issues that workstations experience from time to time. The software license agreement explains this in greater detail.

Chapter 5

Administration Setup Program

To fully take advantage of Sales, Service, Inventory and Service Contract automation and the sharing of departmental information, take the necessary time it takes to properly implement the application.

A successful rollout requires that the person or people involved in the setup of the administration application strictly follow the next steps outlined in the Administration Setup Program Chapter 5. Do not deviate or skip steps. It is imperative that the questions be answered in the order that they appear in the manual and the 'First Time Administration Setup Checklist'. Miracle Service uses referential integrity rules to ensure database integrity. Spend the time now to properly rollout the application and eliminate valuable time and resources later to amend the database.

The biggest misunderstanding administrators make is using the defaults provided within Miracle Service Administration application without customizing the defaults for their own business. Businesses operate differently therefore the application offers several choices. Careful planning when making these choices is critical during the configuration.

Defaults are supplied to educate the administrator as to the type of information that may be used. Discussions with people in the sales, service, parts, service contract, administration and bookkeeping will greatly increase the chances of setting the application up properly the first time.

The Miracle Service Quick Start Training program will provide you with the resources that you need to implement your Miracle Service software. Please reference your Suggested Implementation Schedule that is sent to you with your software for the quickest and easiest method of rolling out Miracle Service.

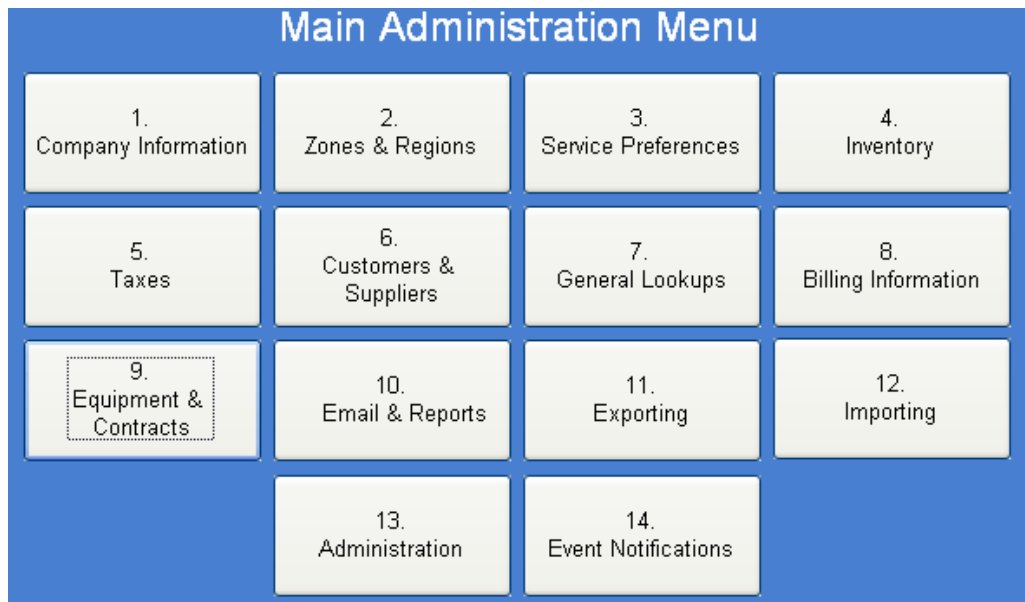
Administration Set-up Overview

The Miracle Service Administration application is where the customer, suppliers, inventory, equipment, purchasing, sales, service, service contracts, taxes and a host of other information and processes are set-up to support the way your company already does business.

There are 14 numbered buttons. Follow them in the numeric order that they appear. Within the screens, answer the questions from left-to-right and from top-to-bottom. Do not enter information or processes out-of-sequence. Miracle Service is a relational database. This means that latter questions refer to answers in former questions.

Although items may be edited later, the process may take substantially longer than setting it up properly the first time.

The following manual offers great detail, however to reduce the set-up time, we recommend that the First Time Administration Setup Checklist be used. The vast majority of questions in the Administration application are basic. The guide references each section of this manual.



Accessing the Miracle Service Administration

After the Miracle Service application has been completely installed, find the 'Miracle Service Administration' program from the Windows 'Start' button. Select 'Programs' then 'Miracle Service', the icon for Miracle Service will appear.

When the program launches, in the 'Application' field, select 'Miracle Service Administration' from the drop down menu.

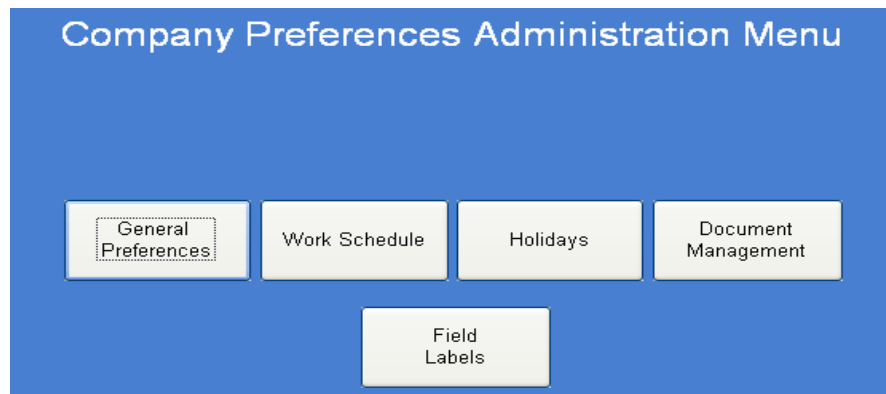


Complete 'logon' routine and follow the fourteen-buttons on the 'Main Administration Menu'. The remainder of this chapter details the fields within each screen. We have included illustrations and documentation of various customer set-ups when multiple scenarios are offered.

Company Information

The Company area addresses general company preferences, service department work schedules and general holidays.

Select the Company button from the Main Administration Menu.



General Preferences (Company)

The first box contains the business name as listed with Nexent Innovations. Call Nexent Technical Support to trigger the additional client licenses and optional modules. The company name cannot be altered without trigger codes from Nexent's technical support team.

Address on Invoices

This information field, which is created by clicking the Re-Calculate/Update button [!], will be printed on all invoices and purchase orders. Modify the contents of this box and changes will be saved. If the recalculate (!) button is clicked again, the default information will once again appear. This allows customized information to appear on invoices and purchase orders. Up to 6-lines of information, including the Tax ID number may be displayed.

Note: The service department related invoices might have a different service phone number and a different service department related slogan, if they are entered later in Service Preferences.

Invoice Message

The Invoice Message area is used to enter a static invoice message on every invoice. This information is limited to 3 lines of text and 300 characters. The text is printed on all invoices centered at the bottom just above the Comment box. Typically this is used to print your Payment or Banking information where your customers can remit their payments. Some users use it to print a current special or communicate other upcoming company or industry events.

Default Telephone Mask

In many countries, telephone numbers consist of a ten-digit number - a three-digit area code followed by a three-digit exchange followed by a four-digit number. Some countries use different telephone number formats (telephone masks). Miracle Service is used in nearly 40 countries. The drop down box allows the administrator to choose or create a suitable format for the telephone numbers entered throughout the application. There are several phone masks available to select as a default telephone format.

International Alignment Factor

The defaulted International Alignment Factor for currency is defaulted to 2 decimal places. Change this factor if the currency uses more or less decimal places. Select 'OK' to return to the 'Company Preferences Menu'.

Server Settings - Internal Server Link

This is typically the server's hostname and will auto-populate the first time the software is installed.

Example: `http://hostname`

In most cases, this will only need to be modified in the case of a server change.

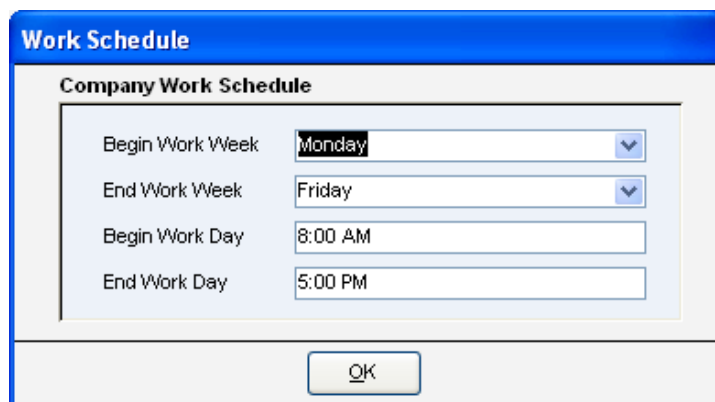


Server Settings

Internal Server Link ? i.e. http://hostname

Work Schedule (Company)

Enter the standard days and hours-of-operation information to properly schedule technicians and service calls. These fields apply to the service department only.



Work Schedule

Company Work Schedule

Begin Work Week ▼

End Work Week ▼

Begin Work Day

End Work Day

OK

Enter the details of your company's work schedule including the beginning work day of the week, the end work day of the week, the start time of the day and the end time of the day. Several screens, features, and reports are calculated using these standard days and hours-of-operation.

For Example:

If the hours-of-operation are 9:00 AM to 5:00 PM and a service request is entered at 4:00 PM, and you've agreed with the customer that your service department will respond within 2-hours, the application will calculate the expected arrival time as 10:00 AM the next business day.

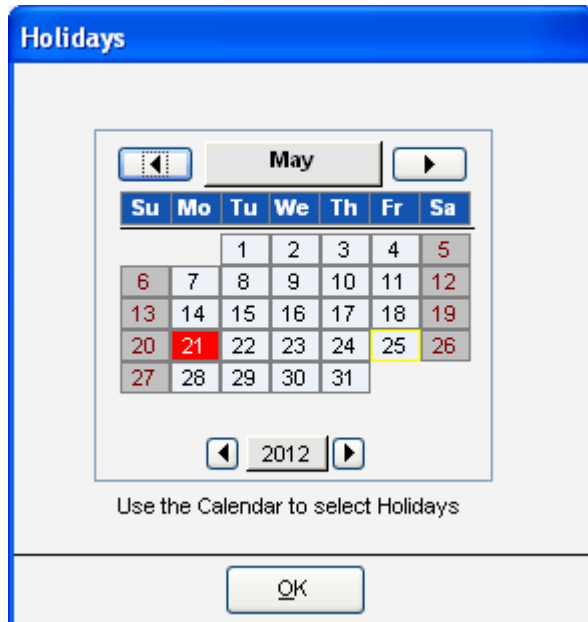
Response Time calculations are determined from the time a service call is entered, taking into consideration the response time agreement, call priority and the standard hours-of-operations.

Essentially, this allows your call-takers to offer your customer an approximate arrival time, and it informs the technicians as to the time your customer expects them to arrive according to their priority.

Select 'OK' to return to the 'Company Preferences Menu'.

Holidays (Company)

The application will not allow the scheduling of service calls on holidays. Select the 'Holidays' button. Enter as many holidays for as many months or years as possible.



Note the days designated as working days are in blue and the other [non-working] days are gray. The arrows to the left and right of the month and year allows scrolling through the calendar to enter those days that your company wishes to observe as holidays.

Double click the holiday date and a red mask appears on the date. This is a toggle feature that may be double clicked to cancel the holiday.

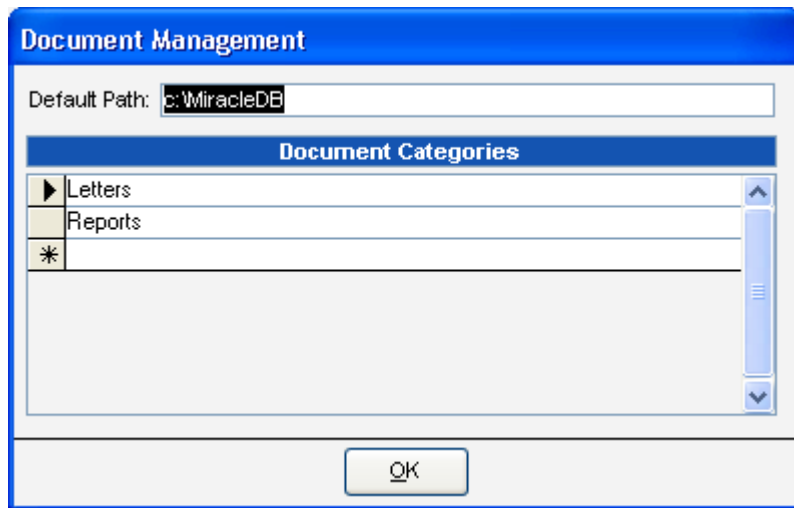
Set up all the holidays for at least the next 2 years now so that service calls and service call response time reports are accurate. These reports will consider the fact the service department was closed on these dates.

Select 'OK' to return to the 'Company Preferences Menu'.

Document Management

Configure the default Document location where documents will be stored on your server. It is best to set this to a UNC (Universal Naming Convention) path so all computers on the network can easily locate this location.

Define the different Document Categories to help segment your documents. This is most helpful when searching for specific documents.

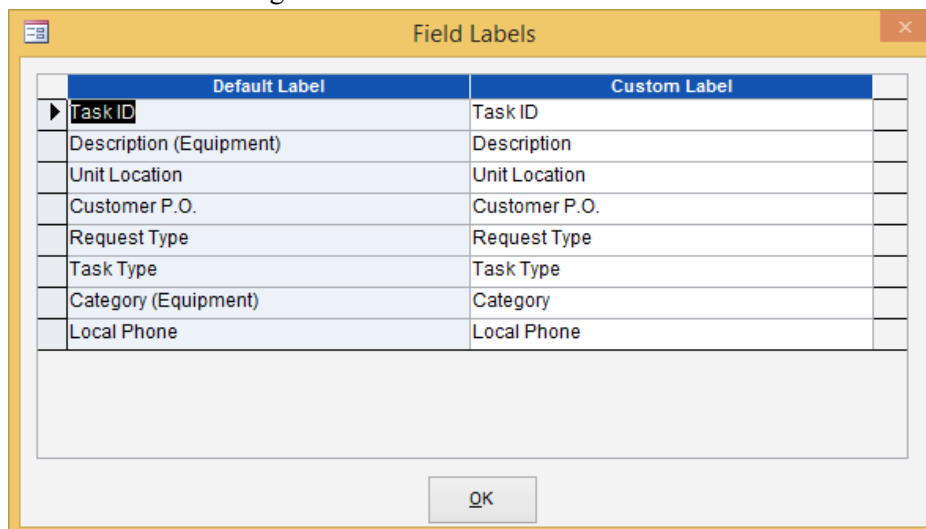


Select 'OK' to return to the 'Company Preferences Menu'.

Select 'Back' to return to the 'Main Administration Menu'.

Field Labels (Optional Feature)

Miracle Service offers an ability to modify a very limited number of field names in the Client Application. This is a special feature that needs to be unlocked by our Technical Support. These fields are currently limited to the following list.



To create a Custom Label enter the desired text in the Custom Label field in the table. When Miracle Service is started it will use the labels in this table to replace the standard one used in Miracle Service.

Select 'OK' to return to the 'Company Preferences Menu'.

Select 'Back' to return to the 'Main Administration Menu'.

Zones & Regions

These are physical and/or theoretical subdivisions of your work area. Zones and Regions work hand in hand and are set up together. Customers belong to regions and regions belong to zones. A zone can have many regions and a region can have many customers. Zones usually represent geographic areas, but they could represent the workload of a certain technician or they could represent a 'Customer Type'.

There are two types of zones: the billing zone and the technician zone. The Billing Zone dictates any charges or surcharges to be added to contracts or service done in the zone. The Technician Zone separates the zones according to technician areas. These may be geographical areas or areas of expertise, for example.

Imagine a commercial enterprise located next door to an elementary school in your downtown area. The commercial enterprise could be in your 'Commercial Zone' of your 'Downtown Region' and the school in your 'Public Service Zone' of your 'City Wide Region'. The choice is yours.

Zones can also have surcharges on them, but regions cannot. The defined Regions assume the charges defined and attached from the Billing Zones. Surcharges are extra charges you bill for when work is done in that zone.

Zones and Regions

Billing Zones				
Zone ID	Description	Charge	Surcharge	
▶ LOCAL	0-25 Miles	\$0.00	\$0.00	
ZONE1	25-50 Miles	\$0.00	\$30.00	
ZONE2	50-100 Miles	\$0.00	\$60.00	
ZONE3	100-125 Miles	\$25.00	\$75.00	
ZONE4	125+ Miles	\$25.00	\$100.00	

Technician Zones		
Zone ID	Description	
▶ DEF	Default Zone	
EST	East Territory	
LOC	Local	
NTH	North Territory	
STH	South Territory	

Regions			
ID	Name	Billing Zone	Technician Zone
▶ BEDFO	Bedford County	LOCAL	East Territory
MAURY	Maury County	LOCAL	Local
FRANK	Franklin County	ZONE1	East Territory
DVD	Davidson	ZONE2	North Territory
HICKM	Hickman County	ZONE2	West Territory

Region Groups	
Region Group Name	Regions
East	+
▶ West	+
*	+

☐ Use Multiple Zone Charges For Master Service Contracts

OK

Creating Zones and Regions

From the Administration menu, select Zones and Regions to enter the Zones and Regions screen. These screens offer the opportunity to add multiple zone charges. There are three tables available, two for 'Zones' and one for 'Regions'.

Use Multiple Zone Charges for Master Service Contracts Option

When contracts are created, zone charges may be defaulted or added. The zone charge amounts are entered in the billing zone.

If the contract contains multiple pieces of equipment, the zone charge is only applied once to the contract if this is not checked. If the 'Use Multiple Zone Charge for Master Service Contracts' is selected, the zone charge will be added once for each piece of equipment on the contract.

Billing Zones and Technician Zones and their related information must be set-up prior to Regions. Regions are created using the Billing Zones and Technician Zones.

Zones

Enter a unique identifier to differentiate the various zones. Enter a brief description of the zone. This does not necessarily need to be a geographic identifier (See 'What' in this section above). For example, Zone ID 0001 named 'Commercial', or ID 'HAZ' for hazardous, or ID 'AGI' for All Government Installations.

Add an optional 'Charge' to the value of a contract.

Within the billing zones, the 'Charge' is the amount that will be added to the value of a contract. The 'Surcharge' is an amount added to a service call billing (each time the equipment is serviced).

The cost to maintain a piece of equipment is a set amount, but if it is in a given zone the cost is the set amount plus a charge. Miracle Service reassesses the charge with each cycle of the contract.

For example a \$1200.00 service contract with a customer located 50 miles away may have a zone fee tacked onto the value of the contract. In this case, if the extra charge is \$200.00, the contract would be billed at:

$$\$1200.00 + \$200.00 = \$1400.00.$$

The \$200.00 charge can also be added as an optional line on the service contract, 'Zone Charge', or hidden in the total contract value as \$1400.00. See 'Contracts' for more information.

Additionally, Miracle Service levies the 'Surcharge' every time a technician visits the site of a piece of service equipment. The contract discussed above is an amount plus a zone charge. Each time a technician visits this piece of equipment there are additional charges. These could be for an out-of-town reason as well. Whether or not the equipment is covered by a contract, an added \$15.00 fee (for example) could be charged for any service call. Entering a zone surcharge here gives this option for calls made into zones. The zone surcharge may be overridden on each call as well.

Regions

Enter a unique identifier to differentiate the various regions. Enter a brief description of the region. The Downtown region could be DT Downtown, or Eastside could be ES East Side. They could also be regions 00001 and 00002. In the zone column, a drop down box offers choices of zones. Several regions may be added to the same zone.

Important: Do not revise or delete the DEF Default Billing Zone or the DEF Default Tech Zone. These entries are the standard defaults used for basic service contracts. Select 'OK' to return to the 'Main Administration Menu'.

Region Groups

Region Groups define a collection of the Regions configured above. Region Groups are assigned to users so users will only have access to the customers belonging to a Region Group. A user can only be assigned to one Region Group; however, many Region Groups can be configured with any of the Regions selected to define the Region Group needed for any user or users.

When a user is assigned to a Region Group it will limit their view of information for Customers, Equipment, Contracts, Sales Orders, Invoices and Service Calls to only the ones that affect the Customers in that Region Group. The filtering is based on the Ship To region of the customer so customers with multiple locations will only show the sites located in the Regions for that Region Group assigned to the user.

Region Groups	
Region Group Name	Regions
▶ East	☐
West	☐
*	☐

Enter a Region Group Name and then Click the [+].

Region Group Detail		
Region ID	Name	Included
BEDFO	Bedford County	☒
DVD	Davidson	☒
FRANK	Franklin County	☒
GILES	Giles County	☒
HICKM	Hickman County	☐
LAWRE	Lawrence County	☐
LEWIS	Lewis County	☐
MAURY	Maury County	☐

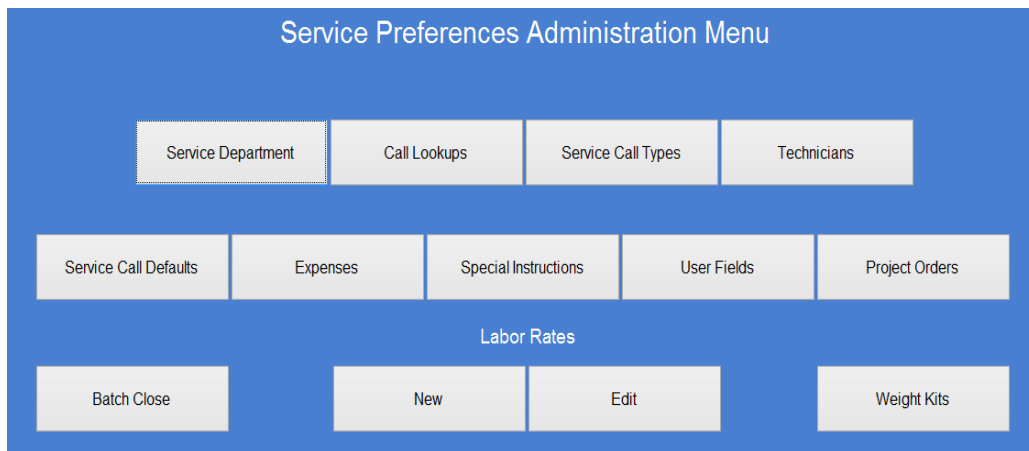
Ok Cancel

Click the 'No' field to select which Regions belong to this Group Region. If there are regions that overlap, you can choose the same Region in another Group Region so it will also be included in that Region. For Example, the Davidson Region may be covered by both the East and West Group Region. In this case select to include the Davidson Region in both the East and West Group Regions. This will allow users in both regions to see the customers and information in the Davidson region.

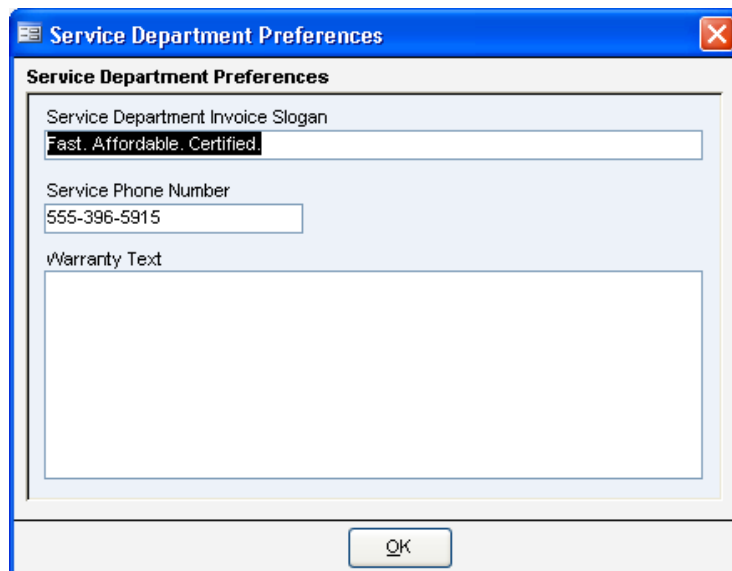
Service Preferences

These are service department related preferences and defaults. They include overall service department preferences and defaults, service technician information and defaults, and various service labor rates.

Select '3. Service Preferences' to go to the 'Services Preferences Administration Menu'. The buttons displayed are:



Service Department Button



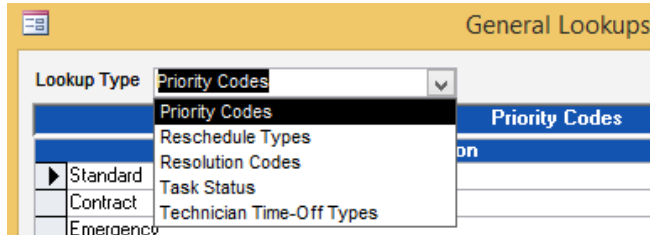
Miracle Service prints this [text] slogan and phone number on Service Department invoices only. (Some companies use a different phone number and message for their service department). Another slogan with the main phone number, set up under Company Preferences, will print on all other non-service related invoices.

Warranty Text can be added to printed Service Task Tickets to define your standard Warranty Terms and Conditions.

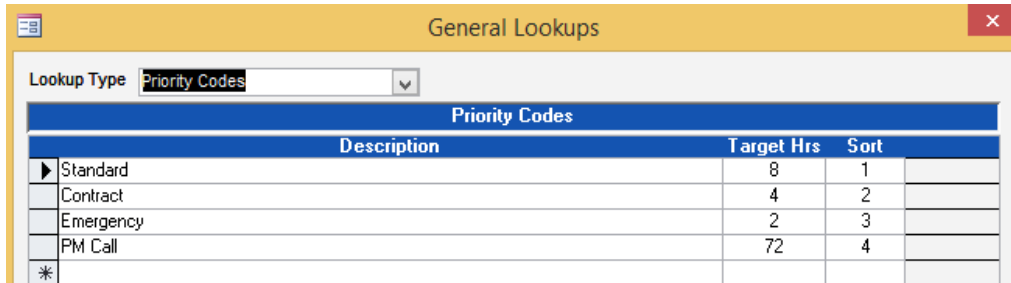
Select 'OK' to return to the 'Service Preference Administration Menu'.

Call Lookups

The 'Call Lookups' area addresses the service call Priority Codes, Resolution Codes, Reschedule Types, Task Status and Technician Time-Off reasons.



Priority Codes



Service call priority codes address the various levels of service call response times. For example: contract customers with break/fix situations may be set as urgent, time and material break/fix situations can be set as high, equipment installations may be set as medium, preventative maintenance calls may be set as low.

Description: Enter a description of the priority such as urgent, high, medium or low. These descriptors will appear during the service call taking process.

Target Hours: Enter a corresponding target time in hours for each priority code. The target time is the number of hours the technician is expected to arrive at the customer's location. Based on the actual time the service call was logged and the actual technician's arrival time will determine the actual response time. Several reports, report on the variances of target time and response time.

For Example: A call comes in and is given a high priority. Your 'Target Hours' for this priority level is 3 hours. If the call came in at 1:00 pm, the system will display a Task Target Date & Time of "Today-4:00 pm". If the call was a medium priority with a Target Time of 4 hours and your hours are 8:00 to 5:00, the Target Date/Time will be displayed as "Tomorrow-9:00 am". Miracle Service will spot excessive delays in response time based on this information. Your service call response time reports will show you on average how long it took to arrive at calls.

Customers covered by a service contract can also be assigned a priority code and target time. The application will automatically select the defaulted priority code when a piece of equipment covered under a contract is selected. The above feature informs the call taker and the dispatcher of the customer's expected response target time. Priority codes can always be overridden on a service call.

Sort Order: The drop down box displays the priority codes list in ascending sort order. Ideally, the most common call should be at the top rather than the most urgent, which might be encountered less frequently.

Reschedule Type

The screenshot shows a window titled 'General Lookups' with a dropdown menu set to 'Reschedule Types'. Below the menu is a table with the following data:

Reschedule Types		
Reschedule Type	Sort	
Ordered/Needed Part	1	
Emergency	2	
Tech Delayed	3	
Cust. Call Back	4	
Research	5	
*		

When service calls are rescheduled, the application requires a reason why the rescheduling was selected. For example: Parts may be required, Assistance may be required, Customer Training may be required etc. Rescheduling Types are used for reporting purposes.

Sort Order: The drop down box displays the Reschedule Types codes list in ascending sort order. Ideally, the most common Reschedule reason should be at the top.

Resolution Code

The screenshot shows a window titled 'General Lookups' with a dropdown menu set to 'Resolution Codes'. Below the menu is a table with the following data:

Resolution Codes		
Code	Description	Sort
FIXED	Call Complete	1
OPEN	Call Incomplete	2
RESET	Reset Machine	3
PM	PM Call	4
NR	Not Repairable	5
CJM	Cleared Jam	6
*		

Resolution Codes may be used in place of entering hand-written descriptions as to the work performed. This feature is optional. When closing a service call, the service coordinator can simply select the Resolution Code from a drop-down box. These codes not only allow quick service call closure they also provide excellent reports. The sort order determines the order they will appear.

Sort Order: The drop down box displays the Resolution Codes list in ascending sort order. Ideally, the most common resolution should be at the top.

Task Status

The screenshot shows the 'General Lookups' window with 'Task Status' selected in the 'Lookup Type' dropdown. The table below lists various task statuses and their sort order.

Task Status	
Status	Sort
Open	1
Completed	30
On-Route	3
On-Site	6
Assigned	9
In Progress	11
Part Needed	14
Confirmed	16
Parts Available	18
Call On Hold	20
Pending	22
Waiting on Customer	24
*	

Task Status is used to define the current status of a task. Users can define the different status' they would like to use. The 'Completed' status cannot be modified or deleted. When a task is assigned the 'Completed' status the technician status will also be automatically set to 'Completed'.

Sort Order: The drop down box displays the Task Status codes list in ascending sort order. Ideally, the most common Task Status should be at the top.

Technician Time-Off Types

The screenshot shows the 'General Lookups' window with 'Technician Time-Off Types' selected in the 'Lookup Type' dropdown. The table below lists various technician time-off types.

Technician Time-Off Types	
Office Administration	
Sick	
Training	
Vacation	
Vehicle Maintenance	
*	

Technician Time-Off Tracking is a optional feature used for recording other technician time. This time can be reported in a custom time sheet report that is available as an optional service.

Sort Order: The drop down box displays the Technician Time-Off Tracking codes list in ascending sort order. Ideally, the most common Time-Off reason should be at the top.

Select 'OK' to return to the 'Service Preference Administration Menu'.

Service Call Types Button (For Tasks and Requests)

To assist in creating and completing work orders, enter a list of service call types prevalent in your industry or business. We've included basic Task Types and Request Types for examples. Keep this information relatively basic. Do not be too specific with this information, as the service coordinators are required to select these types from down lists. Attention here will result in efficient service operations and useful reports. Enter the 'Call Type' as follows:

Task Types			
Code	Task Type	ETTR (Hrs)	Sort
ERROR	Error code	1	1
FAULT	Mechanical	1.5	2
JAM	Jamming	1	3
SOFT	Software	2	4
TRAI	Training	1	5
PJT	Project	4	6

Request Types			
Code	Request Type	Corresponding Quick Call Default Task Type	Sort
ELEC	Electrical	ERROR	5
MECH	Mechanical	FAULT	10
JAM	Jamming	JAM	15
SOFT	Software	SOFT	20
PJT	Project	PJT	22

OK

Task Types

Code: Task Type Codes are alphanumeric identifiers used in identifying the type of service call task, for example, ELEC for Electrical, MECH for Mechanical, etc.

Task Type: Task Types are brief descriptions for the type of service required, for example, Electrical, Mechanical, etc.

ETTR (Hrs): When a task is selected the Estimated Time to Repair (ETTR) time will be automatically populated with the value specified in the ETTR (Hrs) column. This aids in setting standard call durations for specific task types.

Sort: Allows the administrator to sort and display the Task Types in a particular order in the drop box, for example more commonly used service tasks should appear closer to the top of the list.

Request Types

Code: Request Type Codes are alphanumeric identifiers used in identifying the type of service call requested, for example: CALLIN for Customer Called, INSTAL for Installations, etc.

Request Type: Request Types are brief descriptions for the source or reason of service call request, for example, Customer Called In, Installation, etc.

Corresponding Quick Call Default Task Type: There are two methods of creating service calls; they are service 'Requests' and 'Quick Calls'. A Service 'Request' allows multiple Tasks per request, for example: Deliver & Install Equipment and Train. This type of service request may require multiple visits by multiple field personnel. Quick Calls are used to create simple one-task type of service calls, for example, a break/fix type situation.

The 'Corresponding Quick Call Default Task Type' field allows the administrator to associate 'Request' type services to 'Quick Call' type services, for example, installations.

Sort: Allows the administrator to sort and display the Request Types in a particular order in the drop box, for example more commonly used service request should appear closer to the top of the list.

Select 'OK' to return to the 'Service Preference Administration Menu'.

Technicians Button

The Technicians area of the application addresses basic technician information such as: name, whether they are on vacation, their service zone, cell phone email address, and the short message service length.

Enter one technician per row in the table.

Technician Maintenance										
Technicians										
	ID	Name	Active	Zone	Region Group	Home Warehouse	Email Address	Max. Length	Mileage Cost	Position
	BW	Ben Wilson	☒	DEF	All	MAIN	technician@nexent.com	2000	\$0.58	
	DEF	Default Tech	☐	DEF	All	MAIN			\$0.00	
	JG	Josh Gordon	☒	NTH	All	MAIN	jgordon@demo.com	240	\$0.58	
	KN	Kevin Norton	☒	LOC	All	MAIN	knorton@demo.com	240	\$0.58	
	SD	Scott Davis	☒	DEF	All	MAIN	sdavis@demo.com	240	\$0.58	
	TR	Tyler Roberts	☒	WST	All	MAIN	troberts@demo.com	240	\$0.58	
	*		☒	DEF	All	MAIN				

ID

Enter a unique technician alphanumeric identifier, for example, employee number, initials, etc.

Name

Enter the given and family name of the technician.

Active

The 'Active' checkbox allows service coordinators to deactivate technicians if they have left the company. Technicians can only be deactivated if they have no outstanding Service Calls assigned to them. When assigning technicians to service calls, only activated technicians will appear.

Zone

Assign the technician to a zone, if 'Technician Zones' were created earlier during the set-up. This feature displays or defaults technicians to customers belonging to the same zone. This feature is used only if technicians are assigned to specific geographic areas.

Region Group

Region Group setting for the Technicians is used in the Mobile Field Technician Console to filter the tasks a Technician can see. When this is set, the technician will only see calls based on the Region Group set for the technician. This setting will not affect how the technician information is viewed within the main Miracle Service Client.

Home Warehouse

As an option to tracking inventory to the truck level, it is also possible to track parts usage based on the technicians 'home warehouse'. This is useful for companies that have regional warehouses where technicians can also draw parts from. This deepens the inventory management process to include the related warehouse locations for the technicians in the regional locations.

Email Address

Enter the technician's cell phone email address. If you are using the Text/SMS feature it is imperative that the cell phone email address is entered for the application to send the work order information to the their cell phone text messaging. This is not needed if you have the Mobile Field Technician Console.

Examples of some common gateways are:

AT&T Wireless (US)	number@mobile.att.net
Bell Mobility (Can)	number@txt.bellmobility.ca
Nextel Wireless	number@messaging.nextel.com
Rogers Wireless (Can)	number@pcs.rogers.com
Sprint PCS (US)	number@messaging.sprintpcs.com
Telus Mobility (Can)	number@msg.telus.com
T-Mobile	number@tmomail.net
Verizon Wireless	number@vtext.com

Maximum Length

Enter the technician's cell phone text messaging length. If you are using the Text/SMS feature it is imperative that the length of message is entered. This field specifies the maximum-length of text messages that the technician's wireless carrier permits. Most wireless services allow 120-160 alphanumeric characters per text message.

Select 'OK' to return to the 'Service Preference Administration Menu'.

Cost per Mile (or KM)

Enter the cost per mile that is used to calculate the cost for each mile (KM) the technician drives. This cost is multiplied by the number of miles listed on a service call and used to establish a total cost per mile for the service task ticket.

Position

Identifies the current position of job level of the technician. This is an information field and can be included in the custom reports to show technicians by Position.

Service Call Defaults Button

Service Call Defaults

Preventative Maintenance Defaults

Priority: | - For automatic PM generation

Request Type: |

Task Type: |

☒ Only Display PM Warning Light for Machines on a Contract that has PMs Included.

☒ Enable equipment service charge on PMs.

General Task Defaults

Task Priority:

Technician:

Task Status:

Integrate Statuses: ☐ Link the completed task status to the technician status.

Task Mileage: ☒ Calculate the total mileage of all technicians as a single 'Mileage' expense.
Mileage Rate:
☐ Calculate charges based on defined customer mileage and expense rates.
☐ Do not automatically calculate mileage expenses.

Parts Used Warehouse Filter:

Labor & Travel Rates: ☐ By Task/Job (Default)
☒ By Technician

Multiple Task Types: ☐

Multiple Service Equipment: ☒

Equipment Charge: ☒ Enable equipment service charge on tasks.

Service Numbering: ☒ Sequential (0000001)
☐ Prefix + Sequential (WO00001)

Reschedule Text: ☒ Problem Description ☒ Parts Needed ☐ Reschedule Reason
☐ Work Performed ☐ Last Task Comments

Quick Call Defaults

Task Type: ☒ Display the Task Type so that the default value can be modified.

Group Type: ☐ Display the Group Type

Multiple Technicians: ☐ Assign multiple technicians

Parts Used Defaults

Serialized Parts: ☐ Enable serial numbers to be modified as parts are used on a service task.

Callback Defaults

Callback: Calls Within Days

Problem Alert: Calls Within Days

OK

To further quicken call taking, the 'Service Call Defaults' screen addresses Preventative Maintenance Defaults, General Task Defaults and Callback Defaults.

Preventative Maintenance Defaults

Miracle Service offers the Preventative Maintenance Module optional module. The PM Module auto-generates PM calls, based on service contract settings, into the dispatchers screen. When these PM Calls are created, they are defaulted with Call Priorities (normally set to LOW), Request Type (normally set to PM Call), and/or Task Type, (normally set to PM Call). Initially, we recommend not changing these defaults.

Only Display PM Warning Lights for Machines on a Contract with PM's Included: Miracle Service intelligently determines which machines require PM calls. A warning light on the Service Task screen will appear if the equipment is due for Preventative Maintenance. Select 'Only Display PM Warning Light for Machines on a Contract that has PM's Included' if you do not wish to be made aware of PM's due on equipment where the maintenance is not covered by a contract.

Enable equipment service charge on PMs.: will active the flat Rate PM Charge field to be available when a PM Call is created. If this feature is not checked, the Flat PM Charge cannot be set on equipment listed on a PM Task. If it is checked, this feature will only work on a task that has a Task Type of PM Call unless item 4 is also checked.

General Task Defaults

When general service requests are created, the Task Priority, Technician and Task Status are defaulted automatically based on these setting. These defaults can be edited to reflect a different priority, technician or status. Typically, the Technician Default is used with smaller organizations or organizations with technical specialists.

Integrate Statuses. To link the Technician Completed Status to update based on the Completed Task Status check the Integrate Statuses box. When this is left unchecked, the technician status will show Completed when the Labor End time is entered. In situations where Tasks are assigned to single technicians only we recommend leaving this unchecked. When Tasks typically involve multiple technicians we recommend this to be checked / selected.

Task Mileage. The Task Mileage group is used to configure how mileage charges will be calculated on a completed service task. There are three (3) options. Option 1 is to have the system accumulate all mileage for all technicians on the task and calculate a total mileage charge based on the total mileage multiplied by a defined rate per mile. Option 2 is to calculate the mileage charge based on a defined mileage set on the customer record. It will use the defined customer mileage and allow the user to set the mileage rate on the task based on the type of vehicle (truck) used on the task. Option 3 is to not automatically calculate any mileage which is for customers that do not charge by mileage.

Mileage Rate. To establish a default to use the mileage information to calculate the cost per mile and revenue per mile, the item marked “Calculate the total mileage charge of all technicians as a single ‘Mileage’ expense. This defines the default capability to calculate mileage costs and charges when generating service tickets. When an actual Service Task Ticket is being updated or closed, this flag can be removed on a case-by-case basis on the task so mileage charges are not calculated for an individual service task.

Parts Used Warehouse Filter. To establish the default location for parts used on a service task, you can select the default in the drop down list for the ‘Parts Used Warehouse Filter’. The selection in this drop down will filter the available list when selecting the parts used on a service task. Users can override this setting locally and select to use a part from any location, this selection just defines the default setting.

Labor & Travel Rates. Labor and Travel Rates can be set by Task/Job or By Technician. Depending on your business needs you can define how the rates will be applied to the Labor and Travel time on your Tasks/Jobs. When the selection is by Technician, a separate rate can be set by technician. If the default By Job/Task is set, it will use the same rate for all technicians on the task. Note: If the Rates by Technician is selected, the Charges and Surcharges in the Service Billing Review are no longer editable since this value cannot be properly linked back to each different technician. The Charges and Surcharges in Service Billing Review are only editable if the rates by Task or Job is selected.

Multiple Task Types. When this is checked, users can define multiple task types for a task. Note: the existing reports in Miracle Service assume a single task type so activating this feature will cause not report correctly in the existing reports.

Multiple Service Equipment. When this is checked, users can attach multiple equipment to the same task ticket. Note: only the primary equipment will link to the task activity for service history and profitability information.

. Equipment Charge: will enable the equipment service charge to be used on all task types except PM Tasks. PM Tasks can also be included if the field is checked as stated above with “Enable equipment service charge on PMs.”

. Service Numbering. Service Numbering is normally set to System Generated. This is the standard default method. The Sequential option is only used with a special “Off-Line” implementation of the Miracle Service Database. This mode of operation is optional and used for circumstances where an off-line version of the Miracle Service DB is required.

. Reschedule Text. Select the field to copy to the Task Description field for the new rescheduled task. This will control the information provided to the technician that receives the rescheduled task. This can be modified at any time and be effective on any new rescheduled task.

Task Type on Quick Call. when this is checked, the Task Type and Request Type are displayed on the Quick Call screen and they can both be modified if needed.

Group Type on Quick Call. To enable the Group Type field to be used on a Quick Call.

Assign Multiple Techs on Quick Call. When this is checked the single selection to assign technicians is hidden and a new ‘Schedule’ button is displayed. This button allows users to assign multiple technicians when taking a Quick Call.

. Parts Used Defaults

This feature allows users the ability to modify Serialized Parts when the parts are used on Service Tasks. This is a unique feature that allows companies to set-up fictitious serialized parts and then when the items are actually used on a job, the actual installed serial number can be entered at that time. This is used with organizations that have contracts for large scale installations where 50 serial numbered items are shipped to an installer and the actual site receiving the items is not known until the installation is complete. In these cases the company will set-up 50 fictitious serial numbers and then enter the actual number when the item is used and the ticket is being closed.

Call Back Defaults

A Call Back is defined as a second call on the same piece of equipment with the same Task Type within a user-defined period of time. A Problem Alert is a user-defined amount of calls on the same piece of equipment with the same Task Type within a user-defined period of time. The number of days for the Problem Alert must be greater than the number of days for the Call Back.

When taking a service call from a customer, the Call Back or Problem Alert warning lights will illuminate if a piece of equipment with the same task type from a previous service call is created.

Call Back and Problem Alert information is also used in various service department reports.

Select 'OK' to return to the 'Service Preference Administration Menu'.

Expense

Using the Expense area, you can define the various types of expenses that you would like to track and invoice when completing service calls. This area enables you to define the various expense types that can be used when completing service calls so you can track the costs and / or revenues.

The expense function is very flexible. You can collect only costs or only revenues or both. This information is added to the total service cost and is used in the profitability calculations.

Expense Types					
Sort	Name	Description	Mileage Rate	Web Portal	
				Technician Enabled	Read-Only
1	Shipping	Shipping Expense	\$0.00	☒	☐
2	Parking&Tolls	Parking and Toll Expenses	\$0.00	☒	☐
3	Accommodations	Lodging Expense	\$0.00	☒	☐
4	Mileage	Travel Mileage Expense	\$1.55	☒	☐
10	Equipment Charge	Equipment Charge	\$1.20	☒	☐
12	Truck1	Truck1 Charge	\$1.65	☒	☐
14	Truck2	Truck2 Charge	\$2.75	☒	☐
*				☐	☐

Mileage Rate. For Expense Types that will be used to calculate Mileage Charges, a Mileage Rate can be set on the expense item. This will be used to calculate the total mileage charge when this expense type is selected for the Mileage expense on a task.

Web Portal. The Web Portal settings are used to define how the expense items will be used in the Mobile Field Technician Console. If it is 'Technician Enabled' it means the technician can use this to capture expenses on a task. If it is 'Read Only', then the technician can just view if the expense was added to the task in the Miracle Service Client application.

Special Instructions

The Special Instruction area enable you to record a list of standard special instructions used when servicing equipment. These instructions can be edited once added to a Service Task and can be copied and pasted into the Problem Description if required.

You are able to create an unlimited number of these special instructions which can be selected when creating new tasks.

Special Instructions		
Reference	Description	Sort
Estimate	Requires Approval	1
Access Card	Bring Access Card and 2 additional pieces of identification (with picture).	2
Call Ahead	Call before leaving for site.	3
Check List	1. First Item on Checklist 2. Second Item on Checklist 3. Third Item on Checklist 4. Fourth Item on Checklist	5
*		

Reference

Enter a reference name that is a quick description of the special instruction. This is the name that is presented in the drop down menu on the Service Task Ticket screen.

Description

The description is the actual special instruction information. This is a standard memo field in the database and can be up to 4,000 characters in length.

Sort

The sort number represented the order these items are listed in the drop down menu. The lower the number, the higher the item is on the drop down list. These numbers do not need to be consecutive.

User Fields

You can create an unlimited number of additional user fields to collect other data when creating a service task ticket. These fields can be stored with the Service Task Ticket in the system only, or can be printed on the service task ticket.

Field Label	Print on Task Ticket?		Show In Portal
	When Specified	Always	
▶ Checklist Item A	☒	☐	☐
Checklist Item B	☒	☐	☐
PM Checklist	☐	☒	☐
Checklist Item C	☒	☐	☐
*	☐	☐	☐

Field Label

The Field Label is simply the name that the field is given and what is displayed in the task ticket. This tells the user that type of data this field is used to collect. All of these fields are standard free form fields.

Print on Task Ticket

You can specify if you want to print these fields on the Service Task Ticket or not. As well, you can choose to print the field on the service task ticket only if there is data present “When Specified” or always “Always”.

Show in Portal

Specifies if the field is available in the Technician and Wireless web portals.

Project Order Preferences

The Project Order Preferences area contains the set-up parameters used when a project order is entered into the application. These preferences define how a project order will be handled within the application.

The screenshot shows the 'Project Order Preferences' dialog box. It is divided into three main sections:

- Service Defaults:** Contains 'Priority' set to 'Medium' and 'Request Type' set to 'Project'.
- Service Billing Defaults:** Contains 'Labor Rate' set to 'STANDARD' and 'Travel Rate' set to 'STANDARD'. Below these are two identical groups of options for 'Any Additional Charges for Labor?' and 'Any Additional Charges for Travel?'. Each group has three radio buttons: 'Flat Charge', 'Flat Charge by Zone', and 'No Surcharge'. The 'No Surcharge' option is selected in both groups. Below each group is a 'Flat Charge if Applicable' field set to '\$0.00'.
- Automatic Email Notification:** This section is highlighted with an orange border. It contains a checked checkbox with the text 'Send email notification when parts are not available when generating a new Service Request from a Project Order.' and an 'Email:' field with the value 'parts@company.com'.

At the bottom left is a 'Categories Included' button, and at the bottom center is an 'OK' button.

Service Defaults

When a project order is converted to a request, you must define the Request Type and Priority used to create the new request automatically. The Priority and Request Type are the same as those defined in the Service Call Types Button discussed previously.

Service Billing Defaults

The Service Billing Defaults defines the standard rates that will be used when completing a Project Service Task.

Automated E-mail Notification

The Automated E-Mail Notification can be configured to send an e-mail to notify your parts department or dispatcher that a new order has been created.

“Send e-mail notification when parts are not available when generating a new Service Request from a Project Order.” will cause an e-mail to be sent to your parts department (warehouse manager) to alert them of the new project order and also to list the parts that are required that are not currently in stock. This is intended to give the parts manager early notification so they can initiate the parts ordering process.

Categories Included

It is important to define which inventory categories are included on the work orders when a Project Service Request is processed. Since a Project Order presumes that the payment is occurring on a Sales Order / Invoice, we generally assume that it is best to include all categories. However, the flexibility exists in the application to define if any categories are not included. Note, the Categories Included are only referenced if

the Payment Type is Percent Completed or Date Completed since those are expected to be invoiced through the Sales Order. Categories Included are not considered if the Project Order is Time & Material since it is expected all items are invoiced through the job for Time and Material type payments.

Batch Close Button

The Batch Close feature can be activated for users wanting to have the ability to close multiple jobs / tasks at the same time. Activate this feature by selecting the 'Batch Close' check box.

Service Call Batch Close Defaults

Batch Close Defaults

Batch Close ☒ Allow users to close a group of Service Tasks at once with a set of common predefined properties. Note that the settings are defaults only and will not replace existing data.

Resolution Code: FIXED

Work Performed: Batch Closed Task

Technician: Ben Wilson

Task Completed Date: Current Date and Time

Request Status ☐ Close the Service Request immediately after closing the Service Task.

Print ☐ Print individual task tickets.

Unused Parts Used ☐ Check this option to remove any parts linked to the Service Task with quantity set to 0 (unused). If this option is not checked the Service Task will not be closed.

Purchase Orders not received ☐ Check this option to remove the link to any Purchase Order not yet received. If this option is not checked the Service Task will not be closed.

Serviceable Parts Used ☐ Check this option to automatically create Service Equipment for serviceable parts used. If this option is not checked the Service Task will close however no Service Equipment will be added.

OK

Once this is active users need to set the default behavior that is desired when jobs area closed in a batch.

Resolution Code: This will set all batch closed jobs to this same resolution code if no code is already selected.

Work Performed: This is the default Work Performed that will be added to the Work Performed for a batch closed task.

Technician: This will be the technician added to the batch closed task if no technician is currently selected.

Task Completed Date: This is the date that will be set as the task completed date. Users have the option of the Current Date and Time, or to use the Scheduled Date and Time.

Request Status: Users can choose to close the Service Request immediately after closing the Service task or leaving the request open. If the requests are left open, there is no batch close for the Service Requests so users will need to manually close each Service Request if this is not checked.

Print: This will automatically print a completed Task Ticket if this box is checked. This will only print if the Batch Close if run directly from the Open Task screen.

Unused Parts Used: Checking this option will remove any parts on a task that have a quantity set to zero (0). If this is not checked the service task will not be closed if it has unused parts listed on a task.

Purchase Orders not received: Check this option to remove the link to any purchase order not yet received. Note: the unlinked purchased order will still be waiting to be received. Also, if this option is not checked and a Purchase Order is not received, the task will not be closed automatically.

Serviceable Parts Used: Check this option to automatically create Service Equipment for any serviceable parts used on a task. If this option is not checked, the Service Tasks will be closed; however, no Service Equipment will be added.

Labor Rates Button

The 'STANDARD' labor rate record may be edited, however, this record is the default record for the service department's standard field service rate, and should not be deleted.

Note: the currency symbol is defaulted from your operating system.

Unlimited rate schedules may be created. For example, if the service department bills their customers at different rates for labor and travel, two separate rate schedules need to be created for each. If the service department charges different labor rates for time and material service calls, service contracts, bench service, manufactures warranties and etc., a labor rate needs to be created for each.

First, modify the existing 'Standard Labor Rate' to reflect the service departments most commonly used billable labor rate.

To create a new labor rate, select the 'New Labor Rate' button to enter 'Labor Rate Data Entry' screen.

Enter a short 'Rate Code' descriptor, for example, Travel, T&M, Contract, In Shop, or Man War.

Remember; keep the Rate Code descriptor short. These Rate Codes appear in drop down boxes during the service contract and billing processes.

Enter a brief description of the Labor Rate for example, T&M Travel Rate, Contract Travel Rate, Service Contract Labor Rate, In Shop/Bench Labor Rate, or Manufacturers Warranty Labor Rate.

After these two fields are completed a series of time related fields appear.

There are many methods of charging for labor. In some cases there are minimum charges, incremental charges or escalating charges. The application offers a flexible method for creating these labor rate scenarios.

Rate Code STANDARD																													
Description Standard Default Labor Rate																													
If the service call is less than 60 minutes, the following rates will be billed, in these time frames. <table border="1"> <tr> <td>1-5 Min</td> <td> \$50.00 </td> <td>6-10 Min</td> <td> \$50.00 </td> <td>11-15 Min</td> <td> \$50.00 </td> </tr> <tr> <td>16-30 Min</td> <td> \$50.00 </td> <td>31-45 Min</td> <td> \$60.00 </td> <td>46-60 Min</td> <td> \$80.00 </td> </tr> </table>						1-5 Min	\$50.00	6-10 Min	\$50.00	11-15 Min	\$50.00	16-30 Min	\$50.00	31-45 Min	\$60.00	46-60 Min	\$80.00												
1-5 Min	\$50.00	6-10 Min	\$50.00	11-15 Min	\$50.00																								
16-30 Min	\$50.00	31-45 Min	\$60.00	46-60 Min	\$80.00																								
After the first full hour, the labor rate is based in 5 minute increments for flexibility. The 46-60 Minute Rate will be added as the first hour charge. <table border="1"> <tr> <td>Next 5</td> <td> \$80.00 </td> <td>Next 20</td> <td> \$80.00 </td> <td>Next 35</td> <td> \$80.00 </td> <td>Next 50</td> <td> \$80.00 </td> </tr> <tr> <td>Next 10</td> <td> \$80.00 </td> <td>Next 25</td> <td> \$80.00 </td> <td>Next 40</td> <td> \$80.00 </td> <td>Next 55</td> <td> \$80.00 </td> </tr> <tr> <td>Next 15</td> <td> \$80.00 </td> <td>Next 30</td> <td> \$80.00 </td> <td>Next 45</td> <td> \$80.00 </td> <td>Next 60</td> <td> \$80.00 </td> </tr> </table>						Next 5	\$80.00	Next 20	\$80.00	Next 35	\$80.00	Next 50	\$80.00	Next 10	\$80.00	Next 25	\$80.00	Next 40	\$80.00	Next 55	\$80.00	Next 15	\$80.00	Next 30	\$80.00	Next 45	\$80.00	Next 60	\$80.00
Next 5	\$80.00	Next 20	\$80.00	Next 35	\$80.00	Next 50	\$80.00																						
Next 10	\$80.00	Next 25	\$80.00	Next 40	\$80.00	Next 55	\$80.00																						
Next 15	\$80.00	Next 30	\$80.00	Next 45	\$80.00	Next 60	\$80.00																						
Comments By breaking the first 15-minutes into 5-minute intervals and the remaining 45-minutes into 15-minute intervals, the service department can: Charge a minimum fee for on-site service, i.e. \$50.00 for a minimum charge or charge an hourly rate with a minimum amount of time, i.e. \$80.00/hr with a minimum half hour charge.																													

Most, but not all companies charge a minimum rate to diagnose a customer's problem, for example a minimum charge of \$25.00. For this example, if the hourly rate is \$100.00/hr, enter \$25.00 in the first three fields, and enter \$50.00 in the 16-30 minute field, and enter \$75.00 in the 31-45 minute field, and \$100.00 in the 46-60 minute field.

Note: the second hour is broken down into 12 5-minute increments. The values entered into these fields are added to the 46-60 minute value, for example, a service call that required one and a half hours would be billed by adding the 46-60 minute field and the Next 30 minute field.

Depending on the geographic size or traveling difficulties of some areas, companies sometimes charge for travel time as well. If the Travel Time Labor Rate is different than the Labor Rate another rate schedule must be created.

Create additional rate schedules to reflect every labor rate offered by your service department. For example, if service contracts or manufacturer warranties are billed at different labor rates, create a schedule for each.

Labor Rates will be defaulted based on Service Requests, Task Types and amount of time a technician spend performing the service. Labors Rates and/or chargeable amounts may be modified during service billing process.

Weight Kits (Only Available in Weights and Measures Edition)

Users with the Weights and Measures Edition can set-up their weights and weight kits so they can be linked to tasks as needed.

Each record in this Weight Kit screen represents either a single weight or a weight kit. User can chose to set-up this to meet their specific needs and how these will be listed on the task ticket and on a Certificate of Calibration generated with the eForms optional module.

If the record is for a kit, it is recommended that the Description field contain a list of the individual Serial Numbers of the weights in the kit or sufficient description to clearly define the contents of the kit as needed.

If the Active field is not checked, the record will not be available to be selected on a task. Additionally, if the Calibration Due date is passed, the kit will also not be listed as available on a task even if it is still set to Active.

Weight Kit Maintenance

☒ Hide Inactive

Weight Kit Number	NIST Number	Calibration Date	Calibration Due	Weight Class	Unit of Measure	Weight Amount	Test Weight Tolerance	Heaviest Weight	Active
1212	A55443234	02/15/2016	02/15/2017	F	lb	50	0.23	50	☒
Description 50 lb Kit									
1213	A55603301	02/15/2016	02/15/2017	F	lb	100	0.1	100	☒
Description 100 lb Kit									
1214	A54298190	03/01/2016	03/01/2107	F	lb	50	0.2	50	☒
Description 50 lb Kit									
1215	A83992012	05/31/2016	05/31/2018	F	lb	25	0.1	25	☒
Description 25 Lb Kit									
1216	A37338290	05/01/2016	05/01/2018	F	lb	10	0.02	10	☒
Description 10 lb Kit									
3366	KJ8918	09/15/2016	09/15/2017	F	lb	0	0	0	☒
Description 25 lb Wieght Kit									
3367	KJ8918	09/15/2016	09/15/2017	F	lb	0	0	0	☒
Description 50 lb Weight Kit									

OK

Select 'Back' to return to the 'Main Administration Menu'.

Inventory

Note: Miracle Service defines serialized items as equipment and non-serialized items as inventory.

This is one of the most demanding portions of the set up process. Take time to understand the significance of 'Categories' and 'Model Classes' in particular.

Inventory Administration Menu

Categories

Edit

Model Class

Add
Edit

Sales Orders / Invoices

Inventory
Pricing Options
Terms & Conditions

Defaults

Settings
Reserved Parts

Price Groups

Add
Edit

Warehouses

New
Edit

Categories

Categories are best described as groups of 'like inventory items'. These items may be from different suppliers or manufactures. For example, if the sales department sells a line of equipment from various manufactures, group that line of equipment together (copiers from two manufactures). If the sales department sells another completely different line of equipment from those same manufactures, group that line of equipment together (fax machines from the same manufactures).

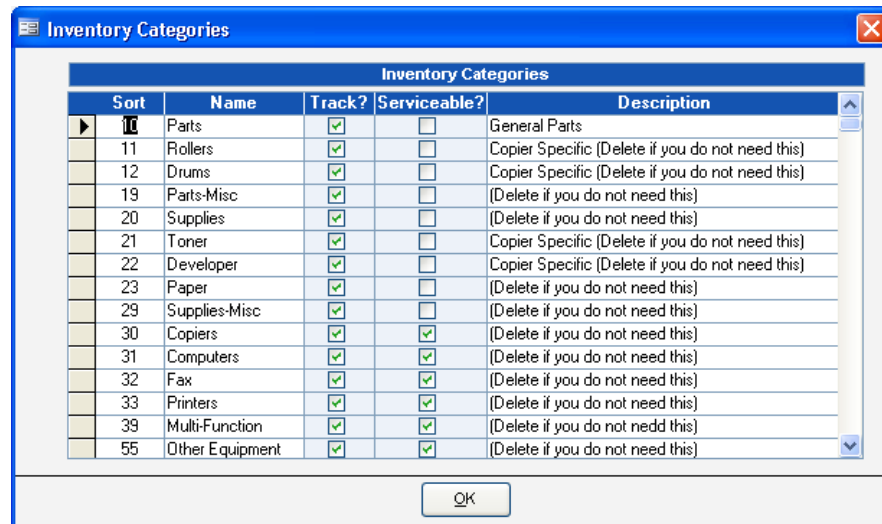
If the sales department sells 5 completely different lines of equipment, there should be 5-separate categories created. For example, copiers, printers, fax machines, postage machines etc.

Create categories for serialized equipment, non-serialized accessories, non-serialized consumables and non-serialized break/fix type parts. Reminder: group like inventory items together, for example cartridges.

The average number of categories for most companies is somewhere between 10-12.

Inventory Categories are used in the parts management tracking, items included in service contracts and exporting to accounting applications.

Select the 'Edit Categories' button to see the 'Inventory Categories' screen.



Sort	Name	Track?	Serviceable?	Description
10	Parts	☒	☐	General Parts
11	Rollers	☒	☐	Copier Specific (Delete if you do not need this)
12	Drums	☒	☐	Copier Specific (Delete if you do not need this)
19	Parts-Misc	☒	☐	(Delete if you do not need this)
20	Supplies	☒	☐	(Delete if you do not need this)
21	Toner	☒	☐	Copier Specific (Delete if you do not need this)
22	Developer	☒	☐	Copier Specific (Delete if you do not need this)
23	Paper	☒	☐	(Delete if you do not need this)
29	Supplies-Misc	☒	☐	(Delete if you do not need this)
30	Copiers	☒	☒	(Delete if you do not need this)
31	Computers	☒	☒	(Delete if you do not need this)
32	Fax	☒	☒	(Delete if you do not need this)
33	Printers	☒	☒	(Delete if you do not need this)
39	Multi-Function	☒	☒	(Delete if you do not need this)
55	Other Equipment	☒	☒	(Delete if you do not need this)

What are Categories?

Every item whether it is equipment or inventory must belong to a Category. There is 3 significant reasons items need to belong to a specific category: 1. Categories of items are required for cost-per-copy reporting and parts usage reports. 2. Categories of items may be excluded or included in service contracts, (set through defaults). 3. Categories of items may have their own General Ledger account when exporting through the optional Accounting Exporter Module.

The 'Inventory Categories' screen has a table with one row for each 'Inventory Category.'

Sort

Allows the administrator to sort and display the Categories in a particular order in the drop box, for example more commonly used categories may appear closer to the top of the list.

Initially, do not enter the sort numbers incrementally. Enter sort numbers by 5, 10, 15, 20 etc. in this area. This method allows for easy editing and future growth.

If the optional accounting exporter is purchased and the accounting system imports different revenue, cost of goods sold or asset accounts, additional categories may be entered later.

Lastly, the cost-per-click reports will report-on each category, and the cost of the categories associated by the number of clicks.

Name

Enter a brief name for the category, for example, Copier, Fax, Supplies, or Parts.

Track?

All items, serialized or non-serialized are tracked! By selecting this feature the application will further report on equipment and inventory usage and cost-per-copy. We recommend that initially all items are selected to be tracked for reporting. After using the application for some time, it will become apparent through various reports as to which items do not need to be tracked.

Serviceable?

Select only those items that are serviceable, for example copiers, fax machines and postage machine. Typically, only pieces of serialized equipment are serviceable.

When serviceable items are sold, the application automatically defaults the items as equipment on the sales invoice. Additionally, the equipment record will be automatically added to the customers equipment list. When the customer calls for service in the future, the equipment information can be easily entered on the service request. Items not identified as serviceable will need to be manually entered into the customer's equipment records.

Do not, under any circumstances, identify consumables, supplies or break/fix items as serviceable. This will render the application useless, as all items sold would appear in the customer's equipment records.

Description

Enter a slightly more detailed description of the item.

Select 'OK' to return to the 'Inventory Administration Menu'.

Model Class/Model Number

A Model Class is a group of equipment similar in characteristics, for example, small, medium and large copiers, personal and business phones, or desktop PC's and Servers. These would each represent a separate Model Class.

A Model number is the manufacturer assigned number within a class. Manufactures offer several pieces of equipment, with slightly different features in the same Model Class; they differentiate those pieces of equipment with Model Numbers, for example at 500M and 500C.

Creating Class/Models

There are several reasons to set the Model Classes and Model Numbers up properly. If your dealership sells or services equipment from various manufactures, or the manufacturer offers multiple pieces of equipment in the same Model Class, it is easier to find equipment first by searching on a Model Class and then scrolling through the various Model Numbers. Essentially, the equipment records will be organized first by Model Class then by Model within that class.

Models of equipment may also have 'Preventative Maintenance' or 'Meters' associated and defaulted as well. These features will be explained in detail later.

Model Class	Segment 2	
Model Number	A205896423	
Manufacturer	ABC Manufacturing	
Class Description	Desk Top-Black/Color	
Contract Value		\$300.00
Category		
Sales Person		

Click if Meter Readings are Required ☒

PM Info
 When Are PM Calls Required.

Not Required ☐
 By # Days ☐

Number of Days

By Period ☐
 By # Clicks ☐

Number of Clicks

By # Days or # Clicks ☒

Use Fixed PM Schedule ☐

Use last PM Date for calculating scheduled date ☐

Default PM Request Type

Default PM Task Type

Sales or General Information on Model Number
 Please Note: The Segment 2 Class of Equipment is a meter type of device. This option to the left was triggered hence a meter reading will be required to properly close service calls on this type of equipment.
 Meter Devices - tracks the number of times a piece of equipment was used.
 If the Class of Equipment does not have a meter device, this option should be turned off (unchecked).
 Preventative or Planned Maintenance Schedules (PM Info) can be set-up by time or clicks. 'Clicks' are the number of times the equipment was used. If both are selected then the PM is generated

In addition to easier searching and associated actions to Models, several reports, such as equipment performance and technician performance use Model Classes and Model Numbers to generate the information.

In the 'Inventory Administration Menu' select the 'Add Model Class' button and go to the 'Model Class/Model Number Data Entry' screen. Enter a 'Model Class' identifier. Use letters, numbers or a name. When [Enter] is selected, a series of fields open requiring information about the Model Class.

Model Class

Enter a Model Class description to identify this class of equipment. Some companies use industry specific terms, (for example Segment 1, Segment 2, Segment 3), and some companies use manufacturer specific terms, (small, medium, large) and yet other companies use dealership-specific terms.

Note: Reports on equipment performance and downtime are reported in the order of Model Class and then Model number. It would be wise to use the grouping capability of the application so that equipment failure trends can be viewed more easily.

Model Number

Enter the Manufacture's supplied Model Number, for example 95, 98, ME or XP. Note service bulletins are associated to specific Model Numbers.

Manufacturer

Enter the Manufacturer's name, only if equipment belonging to this Model Class, is sold and serviced by a single manufacturer. If there are multiple manufacturers - leave this field blank.

Class Description

If industry specific or manufacturer specific descriptors are used in the previous fields, this optional field allows for an additional dealership-specific descriptor.

Contract Value

Model Class	Segment 2	Advanced Replacement	☐
Model Number	A521489	Sales or General Information on Model Number Please Note: The Segment 2 Class of Equipment is a meter type of device. This option to the left was triggered hence a meter reading will be required to properly close service calls on this type of equipment. Meter Devices - tracks the number of times a piece of equipment was used. If the Class of Equipment does not have a meter device, this option should be turned off (unchecked). Preventative or Planned Maintenance Schedules (PM Info) can be set-up by time or clicks. 'Clicks' are the number of times the equipment was used. If both are selected then the PM is generated whenever either the time or clicks lapse.	
Manufacturer	ABC Manufacturing		
Class Description	Desk Top-Black\Color		
Contract Value	\$300.00		
Category			
Sales Person			
Click if Meter Readings are Required ☒			
PM Info			
When Are PM Calls Required.			
Not Required ☐		By # Days ☐	
		Number of Days 365	
By Period ☐		By # Clicks ☐	
		Number of Clicks 25000	
		By # Days or # Clicks ☒	
Update PM Schedule		Use Fixed PM Schedule ☐	
Default PM Request Type		PM Call	
Default PM Task Type		PM Call	
		Meter Info Bulletins	

Enter a service contract value. The equipment value will be added when a piece of equipment is attached to a service contract. This is a default value that can be edited when a service contract is sold.

Category. will link an item category to the Service Equipment. The inventory item's category is used when creating a new Service Equipment.

Sales Person. will link a Sales Person to the equipment record. This is used with the event manager to send an event to the Product Manager / Sales Person linked to a specific Model Class / Model Number.

Meter Readings

If the Meter Enhancement Module was purchased and this particular Model Class and Model Number of equipment is serviced or billed based on a meter, select 'Click if Meter Readings are required'.

Identify every model class that has a meter. Failure to identify the need to read meters will prevent the application from adding meter readings later. Copiers that are under contract may have some form of per-click charge. Mark this box to track these clicks.

PM Info

For equipment that requires periodic lubrication, checks on belt tensions or any other periodic maintenance enter the details here. If equipment does not require a PM, or if the customer is not under a service contract, select 'Not Required' here. This is the default PM frequency.

PM Info

When Are PM Calls
Required.

Not Required ☒

If 'Not Required' is selected, PM schedules cannot be added to the equipment.

If 'By Period' is selected, a drop down box offers the opportunity to state the appropriate period.

If the Preventative Maintenance Module and the Meter Enhancement Modules are purchased: PM Calls can be auto-generated by a number of periods, for example daily, quarterly, annually etc. The application also offers similar options for 'by # days' and 'by # clicks' or 'by # days or # clicks' which ever comes first.

Update PM Schedule

When you click the Update PM schedule button the system will update the PM schedule definition for all equipment in the Model Class that is selected. This is designed to help modify PM schedules for aging equipment. As equipment ages it may be necessary to conduct the Preventative Maintenance more frequently. This button enable uses to update all equipment in the Model Class quickly.

Use Fixed PM Schedule

When the Use Fixed PM Schedule is checked, the system will establish a schedule based on the settings. If the actual PM is delayed, then the next PM is not shifted and will still be required based on the fixed schedule. For example: if the schedule is monthly and the date is the first of the month. If the PM was not completed until the 15th of the month, the next PM will still be required on the first of the month.

Use Fixed PM Schedule ☐

Conversely, when the Use Fixed PM Schedule is not checked, the next PM is always scheduled based on when the last PM was completed. For example: if the schedule is monthly and the date is the first of the month. If the PM was not completed until the 15th of the month, the next PM will be now scheduled for the 15th of the following month.

Use last PM Date for calculating schedule date

When the 'Use last PM Date for calculating schedule date' is checked, the system will establish a schedule date based on the Last PM Date plus the Period or Number of Days.

Use last PM Date for calculating scheduled date ☐

If this setting is unchecked, the called will be scheduled for the day the call was generated.

Default PM Service Call Type (Requests and Tasks)

Request Type	PM Call
Task Type	PM Call

When the application automatically creates a PM call from the PM review screen, or a PM is manually created, the Request Type and Task Type can be defaulted to PM Call.

Meter Info Button (For Metered Equipment Only)

An unlimited number of meters may be added on this equipment model class, for example 'Black' or 'Main'. When an actual piece of equipment with this Model Class/Model Number combination is entered, the application will automatically default the meter settings.

Model Meter Information			
	Meter Name	Meter Location On Equipment	Linked Items
▶	Black	Control Panel	
	Color	Control Panel	
Ok			

Enter the Meter Name, for example Main, Black, Cyan, Magenta, Yellow etc. Next, enter the physical location of the meter display. This will assist the meter-takers in the event the customer does not know where to look for the readings.

Linked Items. Links the associated inventory items that are the supplies / consumable items that can be used for that meter. These links used with the optional Yield Tracker module. See the Yield Tracker feature for more details.

Service Bulletin

Periodically, manufacturers will circulate service bulletins on specific equipment models. These service bulletins will appear when service calls are created. Unlimited service bulletins may be created for a model class/model number.

Bulletin ID	Effective Date	Description
3918-01	1/12/2004	Replace 98329 board - see web site for details
3954-01	3/15/2004	If equipment experiences intermittent no power, replace wiring harness 6548. See notes and special order parts package.
3967-02	6/27/2004	Replace Caster Lock Part# 09238 with Part# 95652
3971-02	12/3/2004	Do not repair lens on equipment under manufacturer warranty - replace the KD54541 Lens if damaged.

OK

Enter the Manufacturers Service Bulletin Identifier. Enter the Effective Date of the service bulletin. Enter the service bulletin description.

Special Equipment Fields for Weights and Measures Edition

To support the Weights and Measures edition of Miracle Service, the model class record has a series of specific fields required to assist Weights and Measures users.

Model Class/Num. Maintenance

ModelClass

Model Class: **Indicator**

Model Number: **920i**

Manufacturer: **Rice Lake**

Class Description:

Contract Value: **\$0.00**

Category:

Sales Person:

Click if Meter Readings are Required ☐

PM Info

When Are PM Calls Required: **Not Required** ☒ **By # Days** ☐

By Period ☐ **By # Clicks** ☐

By # Days or # Clicks ☐

Update PM Schedule

Use Fixed PM Schedule ☐

Use last PM Date for calculating scheduled date ☐

Default PM Request Type: **PM Call**

Default PM Task Type: **PM Call**

Sales or General Information on Model Number

Capacity: **0**

Increment: **0**

Uncertainty: **0** **Reset All**

Class:

UOM:

Meter Info **Bulletins**

When you are using the Weights and Measures Edition, there are 5 equipment fields that can be used to record more specific information for the equipment created using the specific Model Class record. The fields are:

Capacity: This field is linked to a keyword field used on the eForms so the capacity of the Primary Equipment record can be displayed and used on an eForm document.

Increment: This field is linked to a keyword field and can be displayed/used on an eForm document.

Uncertainty: This field is linked to a keyword field and can be displayed/ used on an eForm document.

Class: This field is linked to a keyword field and can be displayed and used on an eForm document. Standard entries are expected to be I, II, III, IIII, and III L to support Handbook 44 tolerance calculations if designed in to the forms. User can enter any other value as needed; however, if it is expected to be used in a calculation in an eForm, a standardized and consistent use of values is critical.

UOM - (Unit of measure for the device): This field is linked to a keyword field and can be displayed/ used on an eForm document.

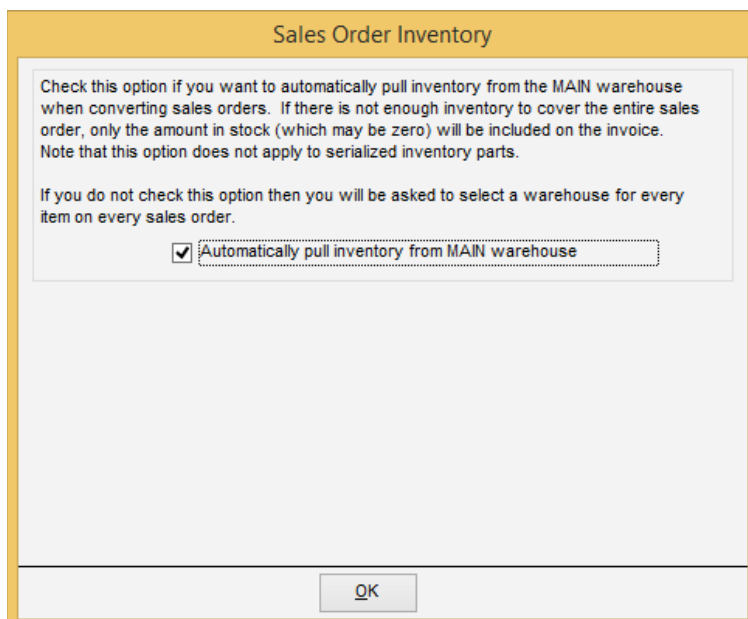
These fields are used to initially populated the related fields on a new equipment record when it is created. Initially the values are set based on the values on the Model Class/Num. record. Once the equipment record is created, it can have it's own values set specifically for the equipment record.

Select 'Exit' to return to the 'Inventory Administration Menu'.

Sales Orders / Invoices

Sales Orders Convert to Invoice Option

When converting a sales order to an invoice, if the inventory items are to be drawn automatically from the main warehouse rather than having to manually select it from various warehouses, check this default. Any choice has its benefits and its drawbacks. This option is available with the Multiple Warehouse Module.



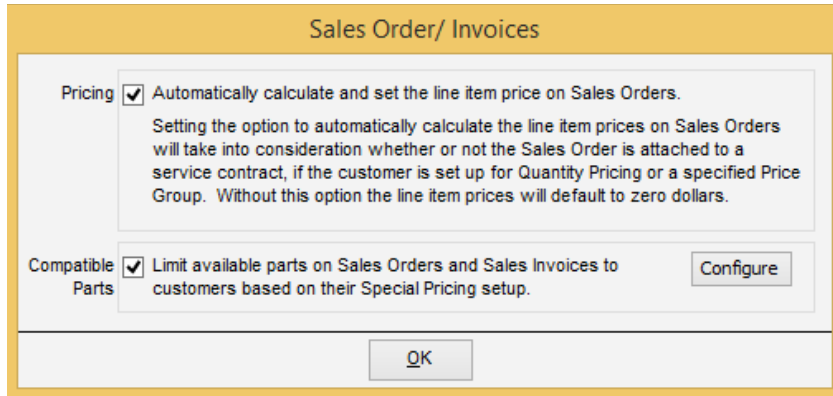
Clicking this option means that only non-serialized items that are converted from sales orders to invoices will automatically come from the MAIN warehouse location, speeding up the sales orders to invoice conversion process. If there are insufficient quantities in the Main Warehouse to cover the entire sales order, only the amount in stock will be invoiced.

If this box is not selected, the salesperson will be required to select a warehouse for every item on the sales order as it is converted. For serialized items, the actual item sold must still be selected or picked from the warehouse by serial number.

Select 'OK' to return to the 'Inventory Administration Menu'.

Pricing Options

Pricing: This feature allows the user to establish the price calculation option for the Sales Order. If the option is not checked, then the line item prices will always be defaulted to Zero Dollars in the Sales Order. If the option is checked, then the system will automatically calculate the line item prices on the Sales Orders.



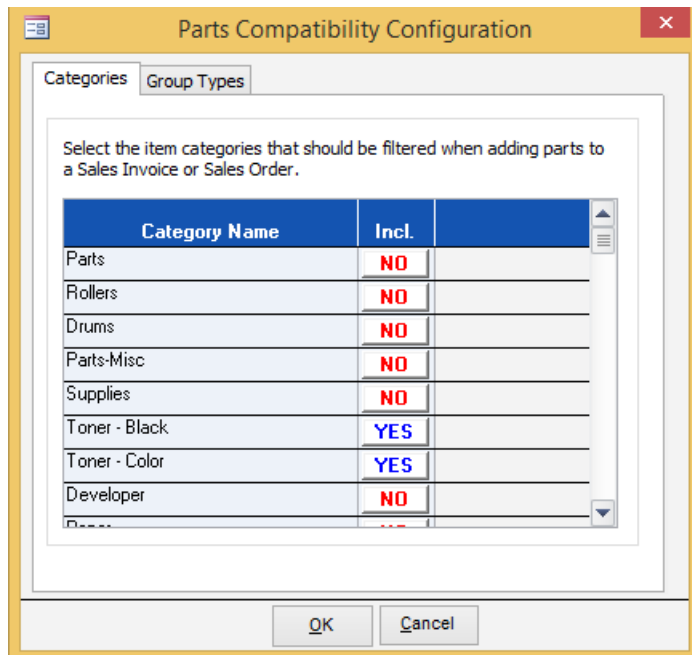
Sales Order/ Invoices

Pricing ☒ Automatically calculate and set the line item price on Sales Orders.
 Setting the option to automatically calculate the line item prices on Sales Orders will take into consideration whether or not the Sales Order is attached to a service contract, if the customer is set up for Quantity Pricing or a specified Price Group. Without this option the line item prices will default to zero dollars.

Compatible Parts ☒ Limit available parts on Sales Orders and Sales Invoices to customers based on their Special Pricing setup. Configure

OK

Compatible Parts: This feature helps users select the correct parts for customers. The feature will filter parts available in defined categories when the parts is listed in the Special Pricing list for each customer. Once the feature is selected click the ‘Configure’ button to configure which Inventory Categories should be filtered when creating Sales Orders and Sales Invoices.



Parts Compatibility Configuration

Categories **Group Types**

Select the item categories that should be filtered when adding parts to a Sales Invoice or Sales Order.

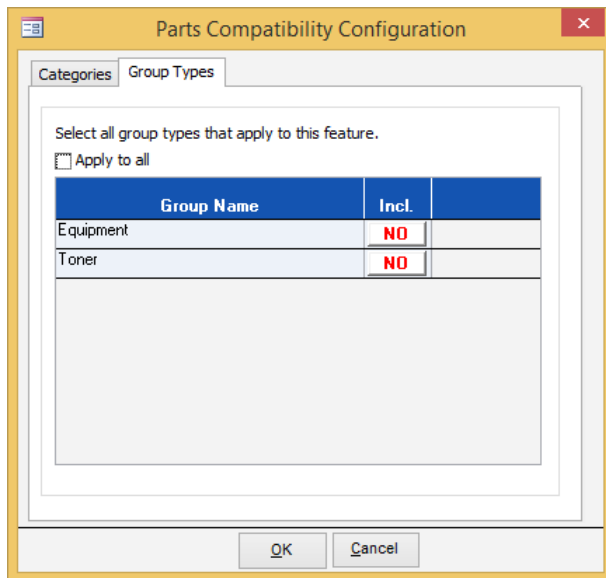
Category Name	Incl.	
Parts	NO	
Rollers	NO	
Drums	NO	
Parts-Misc	NO	
Supplies	NO	
Toner - Black	YES	
Toner - Color	YES	
Developer	NO	
...	...	

OK Cancel

This feature can be further refined to only apply to specific Group Types of Sales Order. Select ‘Apply to all’ if the Groups should not determine if the filter should be applied, or select a specific Group Name or multiple names if the filter should apply to those selected groups.

When this feature is active, the inventory items in the selected categories will be filtered to show only the items selected in the Special Pricing list for each customer. If a category is not selected, it will list all items in those categories as they will not be filtered.

If the Group Types are active, the filter will only apply when the Sales Order or Sales Invoice Group Type matches the Group Types selected in the Group Types listing.



Group Type Sales Orders and Sales Invoices are typically used to help differentiate the different types of orders to help facilitate smoother transaction processing by the Order or Invoice Group Type.

Once the Compatible Parts feature is activated and a category selected, it is important to then update the Special Pricing list for each customer to define the compatible parts for each customer. See the Special Pricing feature in the Customer section of this manual.

Sales Order Terms and Conditions

Terms and Conditions can be automatically added to every sales order printed. This feature enables companies to ensure their standard terms and conditions of sale are printed with every Sales Order.

Sales Order Terms and Conditions

Terms and Conditions	
Name	Text
▶ Default	Prices guaranteed for 30 days from date of Sales Order.
*	

OK

The Terms and Conditions Text field is a free form text box where you can enter your full and complete Terms and Condition of the sale. Multiple Terms and Conditions can be defined and selected to be used on individual Sales Orders.

Defaults

Default Inventory Settings

Default Inventory Settings

Purchase Order Printing ☐ Automatically print part labels when receiving a Purchase Order.

Landed Cost ☐ Set the item's landed cost on Purchase Orders.

Supplier Cost ☐ Set the item's purchase cost by Supplier.

Linking Purchase Order ☐ Enable linking Purchase Order(s) from a Sales Order.
☐ Enable linking Purchase Order(s) from Service Task parts needed.

Price Book Importer ☐ Store separate parts list with ability to import into inventory listing.

Faulty Parts ☐ Mark serviceable parts as 'faulty' when adding Parts Used to a service call with the option to link the part to a specified Warehouse/Carstock or to continue without returning the part. Faulty parts can then be transferred to active inventory or can be discarded from Miracle Service.

OK

Purchase Order Printing: Setting this option on will automatically print part labels when a Purchase Order is received.

Landed Cost: Activating this feature will allow users to set the item's landed cost on Purchase Orders. The Landed Cost will be used as a cost of the part for profitability analysis while the last cost will still be used to as the cost of the part next time the part is added to a Purchase Order.

Supplier Cost: . Activating this feature will allow users to set the cost per supplier in the Alternate Supplier button in the inventory section.

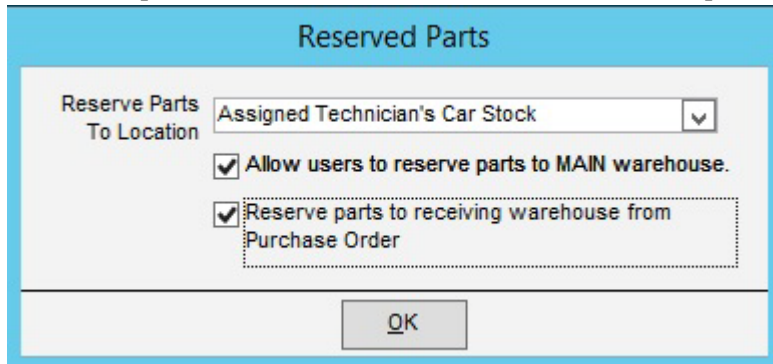
Linking Purchase Order: Activating these features will allow users to link a Purchase Order to a Sales Order or a Service Task when Parts are needed on a Service Task.

Price Book Importer: Activating the Price Book Importer will turn on this feature in the Inventory section of the Miracle Service client.

Faulty Parts: Users can activate the feature to track faulty parts within the system. If you do not track faulty parts, then leave this option turned off.

Reserved Parts

A reserved parts location can be defined when the reserved parts feature is active.



The screenshot shows a dialog box titled "Reserved Parts". It contains a label "Reserve Parts To Location" followed by a dropdown menu currently set to "Assigned Technician's Car Stock". Below the dropdown are two checked checkboxes: "Allow users to reserve parts to MAIN warehouse." and "Reserve parts to receiving warehouse from Purchase Order". At the bottom of the dialog is an "OK" button.

See the Reserved Parts section in the manual for more details.

Price Groups

This feature allows the sales and service department to associate different retail pricing to groups of customers. The Price Group feature allows the administrator to create general profit margins for each inventory category. Unlimited Price Groups may be set-up.

The Price Group feature is used for a generalization of pricing. This feature insures that all items receive a margin for retail pricing.

Creating Price Groups

Price Group

Description

Comments

Category Prices		
Category Name	Select	Margin
Parts	☐	+5%
Toner	☐	+5%
Developer	☐	+5%
Drums	☐	+5%
Paper	☐	+5%
Supplies-Misc	☐	+5%

[Change Margin](#)

Price Group

Enter a unique alphanumeric Price Group identifier, for example BBB.

Description

Enter a brief price group description, Better Business Bureau.

Comments

Enter additional comments if needed.

Category Name

The category name lists is the inventory category list created earlier. This list groups similar items, regardless of the manufacturer, together as a group.

Select

To edit a margin, select the category, by checking the box. Multiple categories, with the same margin may be selected.

Markup

To insert a margin, enter 0.4 = 40% margin. All selected categories will change to this margin. Select another category to insert a different margin.

Important Note: Items that are not selected in a price group mean that inventory items that belong to the non-selected category retain their standard pricing, or that of the customer's special pricing.

The Margin is calculated as follows:

$$R = C / (1 - M)$$

R = Retail Price C = Cost M = Margin (%)

For Example

If the Cost Price C is \$10, and your Margin M is 10%, then R is calculated as follows:

$$R = \$10 / (1 - 0.1) = \$10 / 0.9 = \$11.11$$

The Retail Price is \$11.11 in this example.

If the Cost Price C is \$10, and your Retail Price R is \$15, then M is calculated as follows:

$$M = (\$15 - \$10) / \$15 = 0.3333 = 33.33\%$$

The Margin is 33.33% in this example.

'OK' creates a new 'Price Groups Data Entry' screen.

Select 'Exit' to return to the 'Inventory Administration Menu'.

Warehouses and Vehicle Stocks

A 'MAIN' warehouse is already added. The Multi-warehouse Module option allows an unlimited number of warehouses and/or car stocks. Car stocks in particular are important, as they inform the service dispatcher as to what items are in their vehicles.

Warehouse Type	
Warehouse ☐	Warehouse ID Dave/Pacifica
Car Stock ☒	Technician Dave Cheswick

When closing service calls, the application can be opted to decrement the car-stock or the main warehouse. Minimum and maximum levels can be tracked by each warehouse or car stock. Parts usage reports (sales) can also be generated on multiple-warehouses.

Creating Car Stock or Warehouses

Select Car Stock to create an additional warehouse as a car stock. Enter a Warehouse Identifier for example, satellite warehouse, car stock 1, License Plate information etc. If car stock is selected, select through the drop-down list, the technician that is responsible for this car stock. Car stock and technicians relationships may be changed. If the warehouse is fixed, enter a warehouse identifier, the location and other relevant information.

Select 'Exit' to return to the 'Inventory Administration Menu'.

Select 'Back' to return to the 'Main Administration Menu'.

Taxes

The application uses Tax Codes, Tax Categories, and Tax Groups to satisfy the various tax laws. As Miracle Service is sold in several dozen countries around the world, it is capable of tracking complex tax systems than most companies require. Since this is one of the most complex things to set-up, read this section entirely before beginning.

Tax Groups are for Customers and Suppliers.

Tax Categories are for Parts and Inventory Items.

Tax Codes are the individual taxes used to create Groups and Categories.

When goods or services are purchased or sold, a single tax or multiple taxes may apply. When customers and suppliers are entered into the application, the tax or taxes that must be collected or paid are set with each customer and supplier record.

In the most simplest tax scenario, only one tax is charged on invoices or paid on purchase orders, and all positive balances are owed to one government agency. In this scenario, there is only one Tax Group and one Tax Code.

In the second simplest tax scenario, multiple taxes, for example two, are charged on invoices or paid on purchase orders, and all positive balances are owed for each tax are paid to separate government agencies. In this scenario, there are two Tax Groups and two Tax Codes.

In more complex tax scenarios, a single tax is charged on invoices or paid on purchase orders, and a percentage of all positive balances are owed to various government agencies. In this scenario, there is only one Tax Group and multiple Tax Codes.

Note: the above examples apply if goods and services are purchased and sold in one tax jurisdiction. For each example above, if goods and services are purchased and sold in multiple tax jurisdictions, the amount of Tax Groups and Tax Codes multiply accordingly.

Tax Codes consist of local tax name information, percentages and the tax department information. Consult your accountant for the different tax payable information.

In the event the taxes collected on invoices is greater than the taxes paid on purchases, for a specified period of time, the tax codes determine the amount of taxes that are owed and to what government agency the amount that department is owed. Tax code records are for the exchange of information and money between the dealership and the government.

Tax Groups consist of the local sales tax names and the tax codes associated to the individual sales taxes. Consult your accountant for the different tax receivable and payable information.

In the 'What' section above, we noted three of the most commonly used tax scenarios. Below we will provide brief examples.

In the first example, only one tax is charged on invoices or paid on purchase orders, and all positive balances are owed to one government agency. In this scenario, there is only one Tax Group, for example, 'Sales Tax' and one Tax Code, for example, 'State Sales Tax'.

In the second scenario, multiple taxes are charged on invoices or paid on purchase orders, and all positive balances are owed for each tax are paid to separate government agencies. In this scenario, there are multiple Tax Groups, for example, 'Sales Tax A' and 'Sales Tax B' and multiple Tax Codes, for example, 'State Sales Tax A' and 'State Sales Tax B'.

In more complex tax scenarios, a single tax is charged on invoices or paid on purchase orders, and a percentage of all positive balances are owed to various government agencies. In this scenario, there is only one Tax Group, for example, 'Sales Tax' and multiple Tax Codes, for example 'State Sales Tax' and 'County Sales Tax' and 'City Sales Tax'.

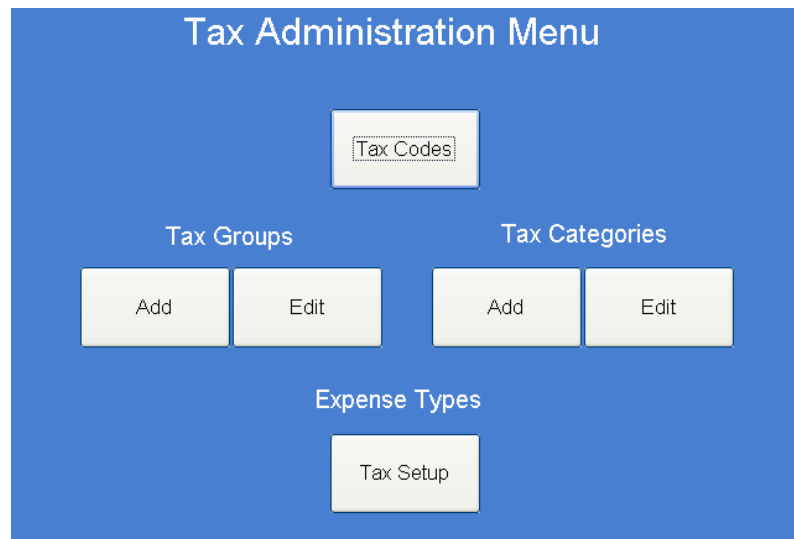
Tax Categories refers to taxation laws when items are taxed at various levels based on minimum or maximum quantities purchased or sold and/or at various levels based on minimum or maximum monetary values purchased or sold.

Taxes can be calculated on invoices or purchase orders by line item or on the total amount of the invoice order.

Note: It is not possible to offer every taxation method every government requires. For example Miracle Service cannot currently perform taxation calculations on cost, which is done by a few regions in the world. To handle this and a few other situations we've encountered, reports are available that provide the value, retail and cost, of items sold or used in service calls. These reports can be exported to Excel for custom calculations.

Setting up Taxes

Select button '5. Taxes' to enter the 'Tax Administration Menu.' Tax Codes must be created before Tax Groups. Tax Groups must be created before Tax Categories.



Tax Codes

Depending on the taxation methods illustrated above, enter the various tax codes. Note: the examples apply if goods and services are purchased and sold in one tax jurisdiction. For each example, if goods and services are purchased and sold in multiple tax jurisdictions, the amount of Tax Codes multiple accordingly.

Example 1 - if one tax is charged on invoices or paid on purchase orders, for example at 7%, and all positive balances are owed to one government agency then enter a unique Tax Code name, enter the rate at 7%, enter the government agency it is payable to, enter a sort order and enter a brief description.

Example 2 - If more than one tax is charged on invoices or paid on purchase orders, for example 5% and 6%, and all positive balances are owed for each tax is paid to separate government agencies then enter a unique Tax Code name for the 5% tax, enter the rate at 5%, enter the government agency it is payable to, enter a sort order, enter a brief description and then do the same for the 6% tax.

Example 3 - If a single tax is charged on invoices or paid on purchase orders, for example 8%, and a percentage of all positive balances are owed to various government agencies then enter a unique Tax Code name, enter the rate at 8%, enter the government agency it is payable to, enter a sort order and enter a brief description.

To Set-up Tax Codes

Select button '5. Taxes' to enter the 'Tax Administration Menu.' Select the 'Tax Codes' button to create and view the 'Tax Codes'.

Tax Code	Rate	Payable To	Refundable	Sort Order
Exempt	0.0000%		☐	
Description	No Tax applies			
State	7.0000%	New York State Tax Department	☐	
Description	Sales tax			
Federal	4.0000%	United States Department of Taxes	☐	
Description	Federal taxes			
*			☐	
Description				

Use Blended Tax Method ☐

Use Tax By Line Item Method ☒

OK

Tax Code: Enter a unique tax code identifier to differentiate this tax code from others. If there are several different tax codes, use short, easy to understand and easy to differentiate alphanumeric codes.

Rate: Enter the amount of the tax to be collected expressed in terms of a percentage, e.g. 0.07 for 7%. Enter taxes that are a flat fee manually through the 'Other Charges' feature on Invoice and PO screens.

Payable To: Enter the name of the government institution that the taxes collected are paid to. The government institution can appear under multiple tax codes.

Refundable: Is used only for the Simplay Accounting Exporter routine to identify the Tax codes that are refundable.

Sort Order: The sort order applies if the 'Blended Tax' method is used. It is the order in which the blended tax calculations will be performed. If the blended tax method is not used, disregard the sort order.

Description: Enter a description of the tax code; this description could explain how the tax applies, what region or circumstances it applies, or a more detailed description than the tax code identifier.

Blended Tax Method: Another name for this could be 'Tax on Tax'. This applies when a billed item is taxed, and then the combined total of the item + tax is taxed again. When this function is used, tax codes are calculated based on the sort order from lowest to highest. Tax codes with a higher sort order are calculated on tax codes with a lower sort order.

Tax by Line Item: The most common taxing method is when taxes are calculated by multiplying the sub-total on an invoice by a tax percentage. The 'Tax Category' assigned to items plus the customer 'Tax Group' determines the taxes payable per line item. If pencil and books are sold to a customer, Miracle Service will calculate the taxes due on the pencil and then on the books. The application then adds the line item tax totals. The reason for this is because the category for pencils may be subject to tax A, B, and C, and the category for books might may be subject to tax A and C. Therefore, independent calculations are necessary.

If 'Tax by Line Item' is not checked, the taxes will be calculated on the sub-total of the invoice only.

Select 'OK' to return to the 'Tax Administration Menu'.

Tax Groups

Tax Groups are the combinations of tax codes to form a single tax. This single tax group may simply be called 'Sales Tax'. These tax groups, or combination of taxes, are what we charge customers when they purchase goods or services or when we purchase goods or services from suppliers. For example, members of tax group 'A' might be subject to tax code '1', '3', and '5', while members of tax group 'B' are subject to tax codes '1', '3', and '4'. (See 'Tax Codes' above as they must have already been setup to create Tax Groups.) Tax groups can be edited at any time.

The strength of this method of tax set-up is that, if a Tax Code percentage is modified, all Tax Groups and Tax Categories containing that Tax Code are automatically updated.

In the first example, only one tax is charged on invoices or paid on purchase orders, and all positive balances are owed to one government agency. In this scenario, there is only one Tax Group, for example, 'Sales Tax' and one Tax Code, for example, 'State Sales Tax'.

In the second scenario, multiple taxes are charged on invoices or paid on purchase orders, and all positive balances are owed for each tax are paid to separate government agencies. In this scenario, there are multiple Tax Groups, for example, 'Sales Tax A' and 'Sales Tax B' and multiple Tax Codes, for example, 'State Sales Tax A' and 'State Sales Tax B'.

In more complex tax scenarios, a single tax is charged on invoices or paid on purchase orders, and a percentage of all positive balances are owed to various government agencies. In this scenario, there is only one Tax Group, for example, 'Sales Tax' and multiple Tax Codes, for example 'State Sales Tax' and 'County Sales Tax' and 'City Sales Tax'.

Setting up Tax Groups

Select button '5. Taxes' to enter the 'Tax Administration Menu.' Select the 'Tax Codes' button to create and view the 'Tax Codes'.

Group: Enter a unique Tax Group Name (not identifier), such as Sales Tax. This name will appear on all invoices and purchase orders. If goods and services are purchased and sold in multiple tax jurisdictions, we recommend that the home tax jurisdiction be called Sales Tax and other jurisdictions have their name in the Group Name.

Description: Enter a brief Tax Group description to identify where this tax is applicable. An understandable description is useful, to quickly select the applicable Tax Group, when new customers or suppliers are entered.

Sales Tax Codes included in Group: Select the Tax Codes included in the Sales Tax by toggling the 'No' in the various Tax Codes to 'Yes'. Remember, multiple Tax Codes may be included in a single Tax Group.

Total Tax Rate: The total tax rate is calculated and displayed in the window to the right.

Group: Exempt
Description: Exempt from tax

☐ Show Included Only

Tax Code	Description	Tax Rate	Incl.
Federal	Federal taxes	4.0000%	NO
State	Sales tax	7.0000%	NO
Tax Exempt	No Tax applies	0.0000%	YES

Total Tax Rate: 0.00%

Use Blended Tax Method: ☐

New Edit Delete Exit

Use Blended Tax Method: If you have a specific tax region that requires you to blend the taxes, you can just define this for a single tax group.

Show Included Only: Select this to show only the tax codes that are included in the group. This is a temporary filter to display only the items currently included in the Tax Code Group.

Note: if goods and services are purchased and sold in multiple tax jurisdictions, depending on the local tax laws, multiple Tax Groups may need to be set-up. When the Tax Group selections are complete, select 'Save'. To create additional Tax Groups select the new 'Tax Group Entry'. When new customers and suppliers are entered into Miracle Service, the application will request which 'Tax Group' to apply.

In the first example, only one tax is charged on invoices or paid on purchase orders, and all positive balances are owed to one government agency. In this scenario, there is only one Tax Group, for example, 'Sales Tax' and one Tax Code, for example, 'State Sales Tax'.

In the second scenario, multiple taxes are charged on invoices or paid on purchase orders, and all positive balances are owed for each tax are paid to separate government agencies. In this scenario, there are multiple Tax Groups, for example, 'Sales Tax A' and 'Sales Tax B' and multiple Tax Codes, for example, 'State Sales Tax A' and 'State Sales Tax B'.

In more complex tax scenarios, a single tax is charged on invoices or paid on purchase orders, and a percentage of all positive balances are owed to various government agencies. In this scenario, there is only one Tax Group, for example, 'Sales Tax' and multiple Tax Codes, for example 'State Sales Tax' and 'County Sales Tax' and 'City Sales Tax'.

In the event that customers or suppliers do not pay taxes, for example charities, government agencies etc., they must have a Tax Group that reflects 0%. In these cases, set-up a 'No Taxes' Tax Group with '0%' taxes entered. For this Tax Group, do not select any Tax Codes.

Select 'Exit' to return to the 'Tax Administration Menu'.

Tax Categories
Tax Category Maintenance Category Name

Category

Description

Tax Code	Rate	Selected	Min / Max Quantity Criteria	Min / Max Value Criteria	Tax min/max value by Quantity	Tax Only the Portion That Matches Criteria
Exempt	0.00%	☒			☐	☐
Description	No Tax applies					
State	7.00%	☐			☐	☐
Description	Sales tax					
Federal	4.00%	☐			☐	☐
Description	Federal taxes					

Tax Categories

Tax Categories refer to taxation laws when items are taxed at various levels based on minimum or maximum quantities purchased or sold and/or at various levels based on minimum or maximum monetary values purchased or sold.

The major difference between 'Tax Categories' and Tax Groups' is:

- ▶ 'Tax Groups' are combinations of tax codes that we charge customers on sales or suppliers charge us on purchases.
- ▶ 'Tax Categories' are combinations of tax codes that can be charged on inventory items, service, or contracts.

For an individual Tax Code to be billed, both the item and the customer must be taxable. The minimum and maximum columns provide the opportunity to limit taxes charged based on quantities. (See 'Min and Max Quantities' below)

For Example,

Note: 1, 2, and 3 are separate tax codes in this example.

Taxable Item Category has tax codes	1	2	3
Customer Tax Group has	1	and 3	
Customer only Pays Taxes	1	and 3	
Taxable Item Category has tax codes	1	and 3	
Customer Tax Group has	1	2	3
Customer Pay Only Taxes	1	and 3	

In both cases, only taxes 1 and 3 were payable as only 1 and 3 applied to both the customer and the item.

Setting up Tax Categories

Select the 'Add Tax Categories' button to enter the 'Tax Category Data Entry' screen.

Category: Enter a unique Tax Category identifier.

Description: Enter a brief Tax Category description that reflects the applicable taxation criteria, for example state the minimum or maximum quantity or minimum or maximum monetary value that affects the taxation.

Tax Code: The alphanumeric name differentiating the various Tax Codes.

Rate: The Taxation Rate associated to the Tax Code.

Selected: Toggle the applicable Tax Codes from the red 'No' to the blue 'Yes' if minimum or maximum quantity of items sold or purchased or minimum or maximum monetary value sold or spent affects the taxation.

Min/Max Qty: In some regions, tax laws apply taxes at different rates depending on the quantity of an item purchased and/or sold.

Example 1 - If 6 or less of the same item is purchased or sold and is tax exempt, enter the minimum quantity on the top line. Do not enter a maximum quantity on the line below.

Example 2 - If 12 or more of the same item is purchased or sold and is tax exempt, enter the maximum quantity on the bottom line. Do not enter a minimum quantity on the line above.

Min/Max Value: In some regions, tax laws apply taxes at different rates depending on the monetary value of an item purchased and/or sold.

Example 1 - If \$5.00 or less of the same item is purchased or sold and is tax exempt, enter the minimum monetary value on the top line. Do not enter a maximum quantity on the line below.

Example 2 - If \$5000.00 or more of the same item is purchased or sold and is tax exempt, enter the maximum monetary value on the bottom line. Do not enter a minimum quantity on the line above.

Tax Only the Portion that Matches the Criteria: These columns are for taxes charged at different rates through a series of increments in quantities or monetary value.

Example 1 - If 1 - 10 items are purchased or sold and is taxed at a specific rate, enter the minimum quantity (1) on the top line and enter the maximum quantity (10) on the bottom line. If 11 - 100 items are purchased or sold and is taxed at a specific rate, enter the minimum quantity (11) on the top line and enter the maximum quantity (100) on the bottom line. Repeat the increments as necessary.

Example 1 - If \$.01 - \$100.00 of an item is purchased or sold and is taxed at a specific rate, enter the minimum value (.01) on the top line and enter the maximum value (100.00) on the bottom line. If \$100.01 - \$500.00 of an item is purchased or sold and is taxed at a specific rate, enter the minimum quantity (100.01) on the top line and enter the maximum quantity (500.00) on the bottom line. Repeat the increments as necessary.

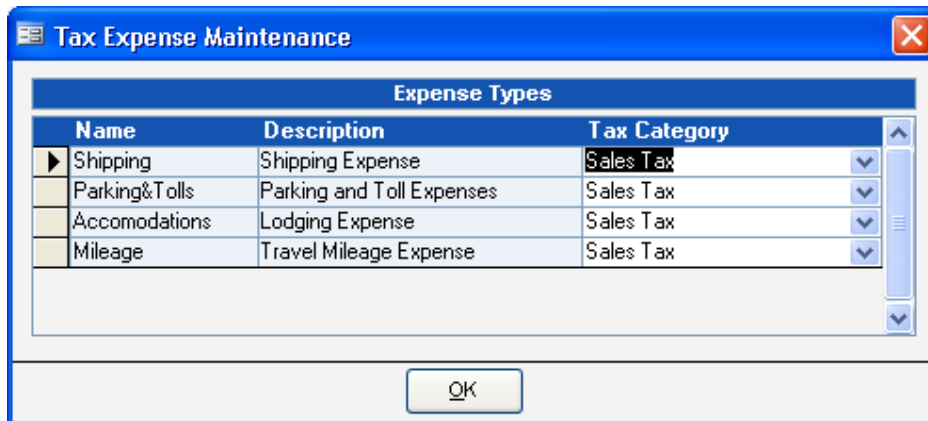
Description: The description was populated from the 'Tax Codes Data' screen.

Select 'Exit' to return to the 'Tax Administration Menu'.

Select 'Back' to return to the 'Main Administration Menu'.

Expense Types

You can defined the default tax treatment given to the various Expense Types you have created.



For each Expense type you have set-up, you must define the Tax Category that must be used when the expense is included as a chargeable item on a Service Task Ticket.

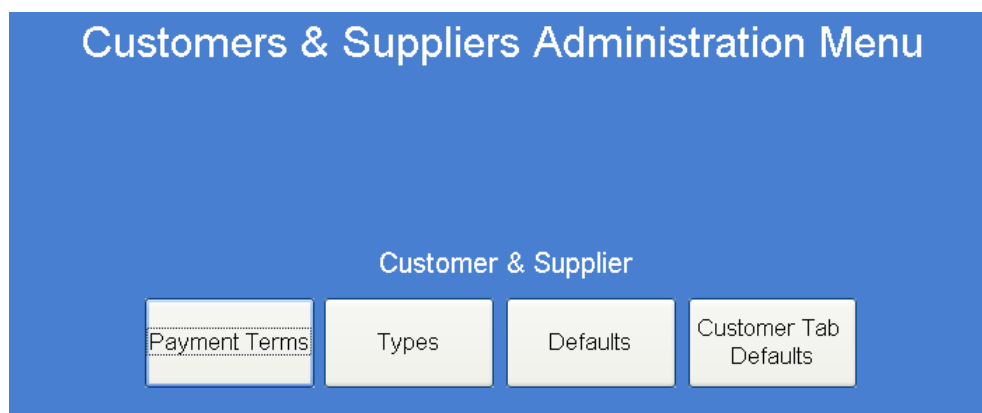
To set-up the taxes, you can use the pull down list on the right of the screen.

Customers & Suppliers

The application allows users to create and track purchases, sales and service transactions between your company and customers and suppliers. Customers and suppliers may be manually entered or imported in advance or entered on the fly.

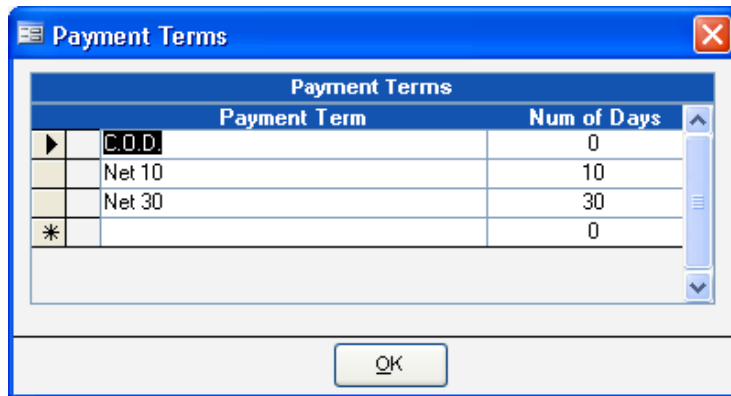
To set-up the Customer and Supplier defaults select the '6. Customers & Suppliers' button on your 'Setup' menu to enter 'Customers & Suppliers Administration Menu.'

Select from the buttons displayed.



Payment Terms

Enter customer and supplier 'Payment Terms' for example, C.O.D., Net 30 etc. The application requires 'Payment Terms' to be selected when customer records and supplier records are entered.



Enter every payment term and the number of days, which purchasing and sales may experience.

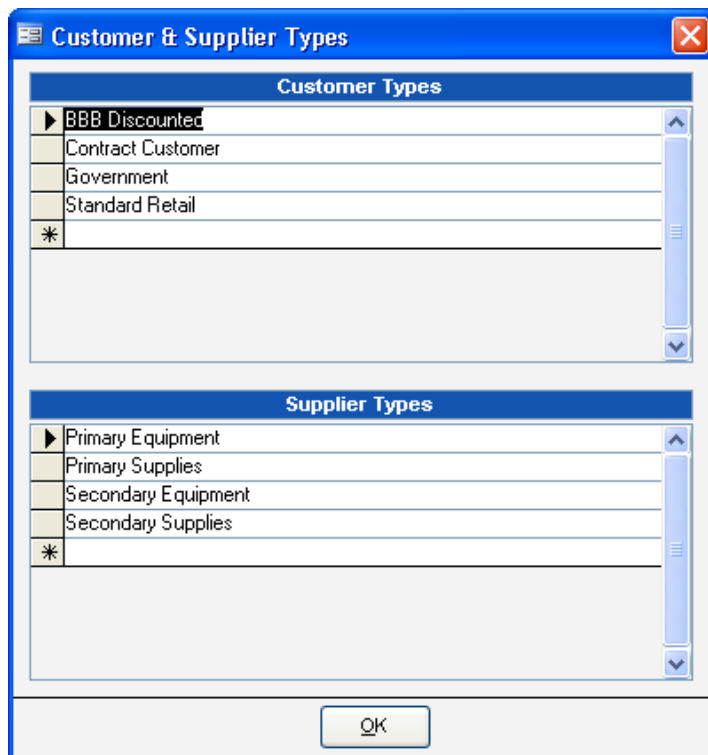
DO NOT DELETE THE C.O.D., NET 10, AND NET 30 PAYMENT TERM DEFAULTS.

New payments payment terms may be added on the fly within the purchase order and invoicing modules. When new payment terms are added on the fly within the application, the application will prompt the user if the new term should be added to this list.

Select 'OK' to return to the 'Customers & Suppliers Administration Menu'.

Customer & Supplier Type

Select the 'Type' button in the 'Customer & Supplier' group and two windows appear. The windows are labeled 'Customer Types' and 'Supplier Types'.



These drop-down lists appear when entering new customers or suppliers. They are secondary identifiers are for differentiating customers and suppliers for example, Retail, Government, School-Board etc. (for customers) and Manufacturer, Wholesaler etc. (for suppliers).

Select 'OK' to return to the 'Customers & Suppliers Administration Menu'.

Customer & Supplier Defaults

Customer and Supplier Defaults

Customer Defaults

Customer Tax Group: Sales Tax (dropdown) State Sales Tax - 7.00%

Default Payment Term: Net 30 (dropdown) 30 Days

Default Payment Type: Cash (dropdown)

Default List By Field: Customer ID (dropdown)

Default Search Parameter: Customer Name (dropdown) Advanced binocular search parameter

Requester Order By: First Name (dropdown)

Requesters: ☐ When adding requesters, automatically add BillTo requester to all ShipTo locations

Exclude BillTos: ☐ When creating a Sales Invoice, Sales Order and Service Task.

Customer Notes: ☐ Include BillTo notes when viewing ShipTo customer notes.

Customer Numbering:
☒ None
☐ Sequential (12345)
☐ Prefix + Sequential (CUST12345)
☐ Name Prefix + Sequential (UNI0001)

Any Additional Charges for Labor? Flat Charge ☐ Flat Charge by Zone ☐ No Surcharge ☒ Flat Charge if Applicable: \$0.00

Any Additional Charges for Travel? Flat Charge ☐ Flat Charge by Zone ☐ No Surcharge ☒ Flat Charge if Applicable: \$0.00

Supplier Defaults

Supplier Tax Group: Sales Tax (dropdown) State Sales Tax - 7.00%

Default Payment Term: Net 30 (dropdown) 30 Days

OK

Select the 'Default' button in the 'Customer & Suppliers' screen and a pop up labeled 'Customer and Supplier Defaults' appears.

Select the 'Default List By Field' will modify the focus field in the various screens to use either the Customer Name or the Customer ID. If you reference your customers by name today, this should be set to Customer Name. If you refer to their Account Number or Site ID you should select the Customer ID version.

Select the 'Requesters' check box will automatically copy the new Requesters added to any Bill To Requester list to all of the associated Ship To Requester list(s).

Select the 'Exclude BillTos' will filter the list of companies presented to show only Shipto Locations. This is useful if the Billto locations are never used as equipment sites. It is more common to leave this box unchecked. This can be turned on later if it is needed.

Select 'Customer Notes' to include the BillTo notes when viewing a ShipTo customer notes.

Remember these are only defaults, which can be modified in the application. These fields contain the choices available from those entered in previous 'Setup' screens. Depending on the combinations of selections, the application will determine which options apply.

Customer Numbering: is used to define the method for assigning the CustomerID (customer account number) to each customer record. If 'None' is selected then the CustomerID works in the traditional method and users are required to define the CustomerID. Selecting the other methods will automate the process of assigning customer numbers.

Select 'OK' to return to the 'Customers & Suppliers Administration Menu'.

Select 'Back' to return to the 'Main Administration Menu'.

Customer Tab Defaults

Customer Tab Defaults

Show # of Results Number of records to display

Transaction Days Number of days to include in date range from current date

Inactive Equipment ☐ Check to show inactive Service Equipment

Inactive Contracts ☐ Check to show inactive and cancelled Service Contracts

Closed Tasks ☐ Check to show closed Service Tasks

Printed Invoices ☐ Check to show printed Invoices

Zero Amount Invoices ☐ Check to show zero amount Invoices

Converted Sales Orders ☐ Check to show converted Sales Orders

OK

Define the Tab behaviour in the customers tabs.

Show Results: Sets the number of records to display.

Transaction Days: Sets the default number of days to display in the default date range.

Inactive Equipment: Sets either to show or not show Inactive equipment by default.

Closed Tasks: Users can set the default condition to always initially show closes jobs or not.

Printed Invoices: Users can set the default condition to show Printed invoices or not.

Zero Amount Invoices: Users can set the default condition to show Zero Amount Invoices or not.

Converted Sales Orders: Users can set the default condition to show Converted Sales Orders or not.

General Lookups

Users can populate many fields throughout the application, such as cities, states, telephone number and etcetera. General look up screens provide quick reviews of information.

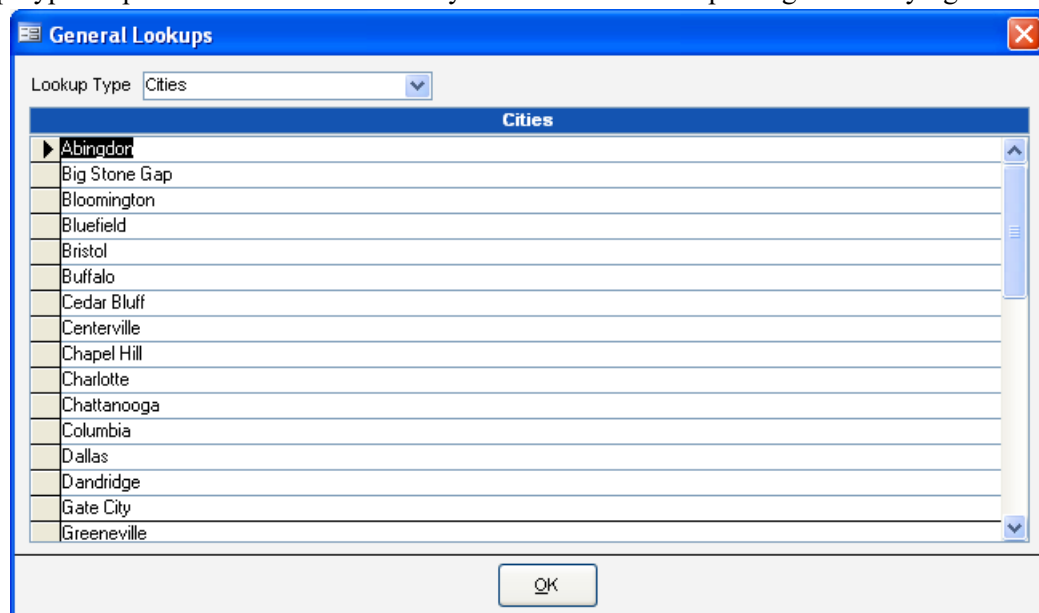
General Lookups

The General Lookups screens allow you to define or modify various lookup tables used in the Miracle Service Application. There are none (9) different lookup tables that can be modified.

These are:

- Cities
- Countries
- Group Types
- Return Order Reasons
- Return Order Status
- Salesperson
- Shipped Via
- States/Provinces
- Source of Order

Select the Lookup Type drop down and select the table you are interested in updating or modifying.

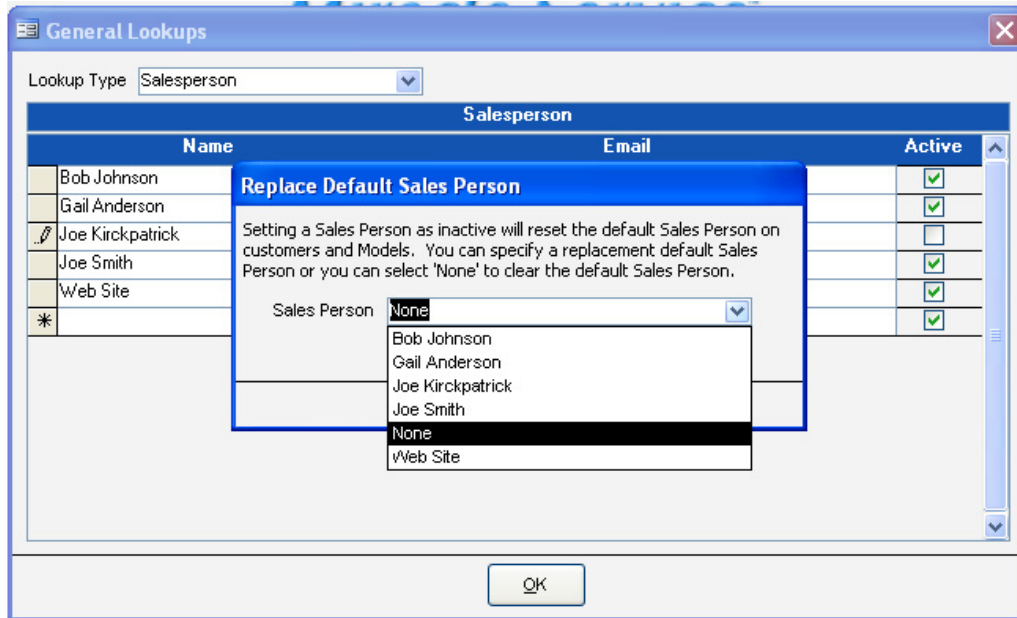


The information in these tables can be entered initially or entered on the fly. The purpose of having these seven tables of information available in this format is to easily edit or change information in one place and affect every record with the edit.

Information such as a City Name cannot be deleted, (only edited), if there are customers attached to that City Name. First ensure all customers are no longer attached to that city. This protects users from deleting important information from Miracle Service.

Salesperson

In the Salesperson Lookup Type you can set-up the company Salespersons. When a Salesperson leaves the company and you make that person inactive the system will let you re-assign the accounts currently assigned to that salesperson to another newq sales person.

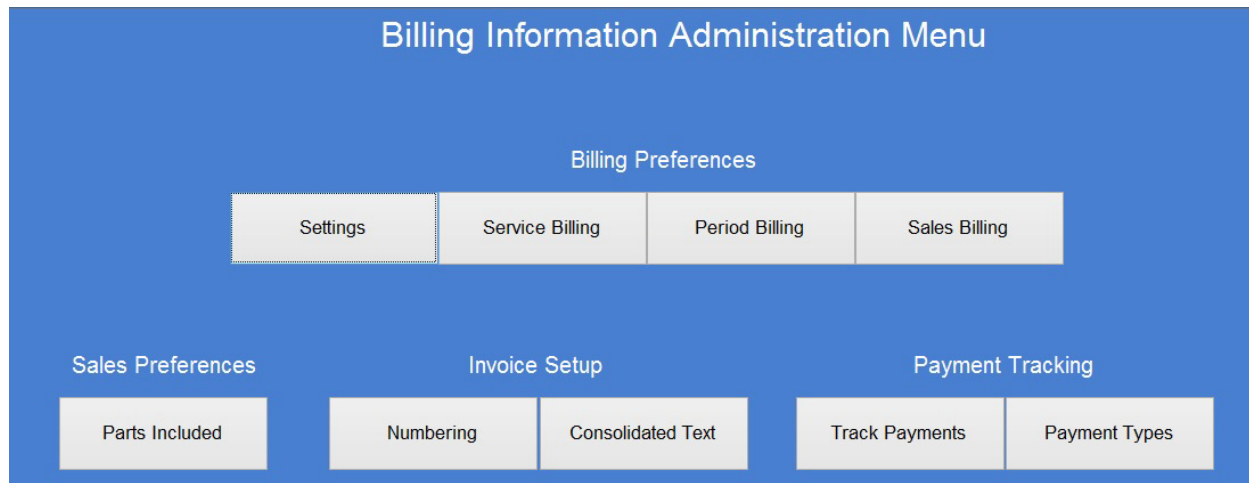


When a Salesperson is made inactive a “Replace Default Sales Person” window will pop-up. A replacement sales person can be selected and this will update all of the customer and Models with that sales person to the selected Salesperson. Note: this cannot be undone so only do this when the new Salesperson is known.

Billing Information

In order to manage the service department more efficiently, set up the following service billing and period billing preferences. These defaults auto fill specific fields during these processes.

To set-up the service billing and period billing preferences select button '8. Billing Information' to go to the 'Billing Information Administration Menu'.



Settings

Enable Automatic Invoice Billing (Optional Module)

Check this option to enable the Automatic Billing Feature. This is an Optional Module. When this is enabled users can defined the preferred billing method for each customer. The supported methods are: Print, E-mail, and Fax (note the fax uses Microsoft Fax Server Technology only). Once these preferences are set, the invoices will be generated in the Invoice Review Screen based on these preferences.

Invoice Billing Settings

Automatic Invoice Billing will allow users to specify a preferred billing method for each customer which will be automatically processed from within the Invoice Review screen. Once the invoices have been processed according to the customer's preferred billing method they will be marked as printed.

Billing methods include: Print, Email and Fax.

☒ Enable Automatic Invoice Billing.

Group Type ☐ Indicates the Group Type is a required field on Invoices.
☐ Indicates the Group Type is a required field on Sales Orders.

Invoice Print Approval ☒ Invoices must be approved prior to being flagged as printable from the Invoice Review screen. Users are required to have permission to modify an approved invoice.

OK

Group Type

Group Types are used on Sales Order and Invoices to help classify the invoice in to specific groups. This can help segment Sales Order and Invoice handling by type of transaction or region (department) of the transaction. Turning on this feature means the Group Type is mandatory on that transaction.

Invoice Print Approval

Activating this feature will add an additional step in the invoice process requiring the invoice to be approved by a user with permission to approve invoices. The invoice is not available for printing or distribution to the end customer until the invoice has been approved.

Service Billing

The following default settings are used to manage information regarding service-billing issues related to service calls.

Select the most commonly applicable tax category settings and tax groups for service billings. These defaults may be modified on the individual service billings. Select whether or not zero amount service billings are to be generated.

Tax Defaults - Service Billings

Labor Tax Category:. Select the most commonly applicable tax category applied to labor charges on service billings. If a different labor tax category applies to a specific customer, the setting may be modified on actual customer's record.

Travel Tax Category:. Select the most commonly applicable tax category applied to travel charges on service billings. If a different travel tax category applies to a specific customer, the setting may be modified on actual customer's record.

Service Dept. Tax Group:. Select the most commonly applicable tax group applied to service billings for services performed in house.

Tax Group for Service Billing:. Select the most commonly applicable tax group applied to service billings for services performed at the customer's site. If a different tax group applies to a specific customer, the setting may be modified on actual customer's record.

There are three tax groups options applicable to service billings. They are Service Department, Bill-To and Ship-To. If Service Department is selected, field-service, service billings will be taxed at the service department's rate. If Ship-To is selected, field-service, service billings will be taxed at the rate where the service is performed. If Bill-To is selected, field-service, service billings will be taxed at the rate where the service billing is being sent.

For example: Your company is located in a 5% tax region, and a service was performed at a company located in a 4% tax region. If the service billing is being sent to a region where the tax amount is 3%, which tax group should be used as a default when the service billing is being created? If it is your local tax group, select 'Service Department', and this will override the customer tax groups. If it is the location where service was performed, select 'Ship-to'. If it is where the invoice will be going, select 'Bill-to'. If you're uncertain, contact your local taxation office.

Allow Zero Amount Invoices:. In almost every case, the Allow Zero Amount Invoices, feature should be checked on. When Zero Amount Invoices are generated, COGS, Asset Accounts and Service Contract Profitability are affected.

If the Allow Zero Amount Invoices feature is checked off then zero amount invoices will not be generated and COGS, Asset Accounts and Service Contract Profitability are not updated. Regardless of the setting, the service billings must be approved. This will drastically affect the information being exported if Miracle Service is exporting invoices to accounting applications.

Select 'OK' to return to the 'Billing Information Administration Menu'.

Period Billing

The following default settings are used to manage information regarding period-billing issues related to service contracts.

Period Billing Defaults

Contract Tax Category: **TAX** All Taxes Apply

Which Tax Group to use for Period Billings: **Ship To** ☐ Apply each location tax

Parts Tax Category for 'Contract Percent' invoicing (if used): **TAX** All Taxes Apply

Allow Zero Amount Invoices: ☒ **Automatically email meter due notices**

Hide Cost Per Copy information in PB Invoices: ☒ ☒ Selected contracts ☐ All contracts ☐ No contracts

Estimate Meter Readings For Billings: ☐

Cost Per Copy Decimals: **4**

Call Buffer (Days): **15**

Emailing frequency: Every **2** day(s) within call buffer

Automated Email Send Buffer: **15** day(s) added to the Contract End Date for expired meter contracts

Automated Email Notification Aging: **10** day(s) added to the current date to get meters that are due

Period Billing Sort Field: **Customer Name**

One-Time Charge Invoice	Line Description
	One-Time Charge

OK

Contract Tax Category

Select the most commonly applicable tax category applied to service contract billings. If a different contract tax category applies to a specific customer, the setting will be automatically modified on the specific service contract record. Therefore we recommend that the All Tax be selected for this field.

Which Tax Group to use for Period Billings

Select the most commonly applicable tax group applied to service contract period billings.

There are three tax group options applicable to period billings. They are Service Department, Bill-To and Ship-To. If the Service Department is selected, period billings will be taxed at the service department's tax rate. If Ship-To is selected, period billings will be taxed at the rate where the service is performed. If Bill-To is selected, period billings will be taxed at the rate where the period billing is being sent.

IMPORTANT NOTE: If the Ship-To tax group is selected and consolidated meters are used, then only machines in the same Tax Group can be consolidated on to the same consolidated meter. If other meters are included the tax will not be calculated correctly. Users must be trained to check this as no Tax Group validation will occur when adding meters to a consolidated meter.

Parts Tax Category for 'Contract Percent' Invoicing (If used)

Select the most commonly applicable tax category applied to parts used in services under contract. If a different contract tax category applies to a specific customer, the setting will be automatically modified on the specific service contract record. Therefore we recommend that the All Tax be selected for this field.

Allow Zero Amount Invoices

In almost every case, the Allow Zero Amount Invoices, feature should be checked on. Regardless of the setting, the period billing must be approved.

Hide Cost Per Copy Information in Period Billing Invoices

Allows you to print your Period Billing Invoices without indicating the specific cost per copy used to calculate the charges.

Estimate Meter Readings for Billings

Allows the service contract administrator to use an auto-generated meter-reading estimate based on the customer's daily average from the past 6-months. The estimate feature can only be used if the previous meter reading was an actual reading (not an estimate).

This feature allows the continuous flow of contract revenue regardless of whether your customers reply with meter readings on time.

Meter readings are identified as an estimate or actual reading.

Cost Per Copy Decimals

Allows the service contract administrator to define the maximum number of decimal places allowed in a cost per copy metered contract (maximum is 9 decimal places). Note: most reports are defined and formatted for a maximum of 4 decimal places. Users selecting greater than 4 decimals places acknowledge and accept the limitation in the built in reports.

Call Buffer for Meters only

This is the number of days before or after the current billing period that the application will search for a meter reading. If a meter reading is found within the call buffer, that reading will be used for the period billing meter charge calculation. If no reading is found within the call buffer, the application will notify the contract administrator to contact the customer for a current reading.

Select 'OK' to return to the 'Billing Information Administration Menu'.

E-mailing Frequency

This defines how often you want the automated e-mail process to send an e-mail to remind clients that their meter reading is due. The e-mails begin at the start of the call window and end either when the customer enters a meter reading or until the end of the call window.

Automated E-mail Send Buffer

This defines the number of days at the end of the contract when an automated email will be sent. This is used to ensure the notifications stop sending if a contract is not renewed.

Automated E-mail Notification Aging Days

This defines the number of days before the meter reading is due that the automated meter readings will start to be generated. For example if your reading is due on the 30th of the month and you set this to 10 days, the E-mails will start generating on the 20th of the month.

Automatically e-mail meter due notices (Optional Module)

This allows you to establish defaults to either mark all contracts to send the e-mail, to never automatically send the automatic reminder emails or to send automatic emails to selected contracts only. You are able to choose on one of these options.

Period Billing Sort Field

This allows users to define the default sort field in the Period Billing screen.

Sales Billing

Set the tax group that should be used for Sales Invoices and Sales Order Billings.

Group Type: The Group Type can be set to define the default Group Type used on Sales Orders and Invoices.

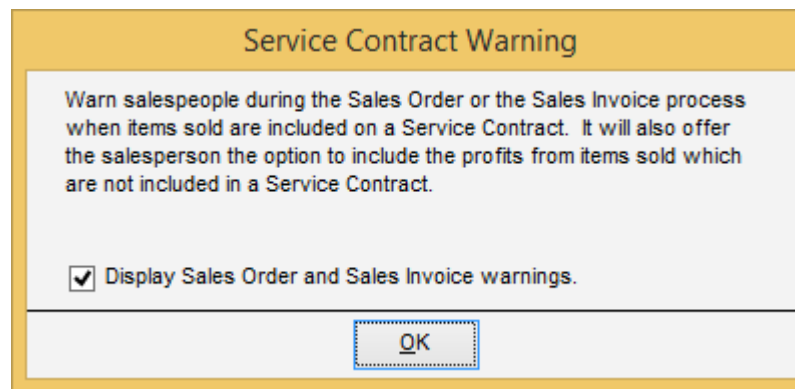
Parts Included

Service Contract Warnings

Check this option to warn salespeople during the Sales Order or the Sales Invoice process when items sold are included on a Service Contract.

It will also offer the salesperson the option to include the profits from items sold which are not included in a Service Contract.

Attaching the revenues and the COGS from the sale of items is important. Sales of items included in service contracts or not included both positively and negatively affect the service contract profitability.



Example: This feature was included to offer more accurate service contract analysis. Companies that sell and service high volume equipment may only analyze the costs of parts included in service contracts. If the sale of high margin items such as accessories and consumables are not factored in, the service contract profitability analysis may reveal that the contract wasn't profitable. However, after the sale of high margin accessories and consumables are factored in, the service contract profitability analysis may reveal that the contract was very profitable. (See attaching items to a contract in the Sales Order and Invoicing Module). Select 'OK' to return to the 'Billing Information Administration Menu'.

Numbering

Purchase Orders, Sales Orders, Sales Invoices, Service Invoices, Consolidate Service Invoices and Service Contract Invoices must be numbered to identify one document from another. ***Once a numbering scheme is selected, the scheme cannot be changed.*** The most commonly used method is Date Sequential. Date Sequential allows 9999 invoices to be used in a single day, and enters the date in which the invoice was created.

Setting up Numbering

The application offers four numbering formats to select from. Each accounting application imports information differently. If documents created in Miracle Service will be exported to an accounting application, verify that the numbering format selected is compatible with the version of the accounting application. Note: the document number format cannot be changed once documents are generated using that numbering format.

None: If 'None' is selected, users are required to enter a unique number when orders or invoices are created. If a unique number is not entered, the application will enter the next available number. This method is used in very rare circumstances. If an accounting application is being used, we do not recommend this method. Accounting applications typically do not use this export/import format.

Sequential [12345]: If Sequential Numbering is selected, orders and invoices will start at 00001 and ascend sequential by one. The application will prompt for a starting number, allowing the system to start at a number other than 00001, for example 01234. Purchase Orders, Sales Orders, Sales Invoices and Service Contract Invoices will have their own starting numbers. This is one of the more commonly used export/import formats that accounting applications use.

Prefix + Sequential [INV12345]: If Prefix + Sequential is selected, orders and invoices will be prefixed with the defined prefix such as INV, SO, PO...etc. Invoices, Sales Orders and Purchase Orders can have their own specific prefixed defined.

Date Sequence [051231-0001]: If Date Sequential #1 is selected, the date will be inserted prior to the numerical sequence. For example, documents created on December 31st, 2005 will appear as YYMMDD-0001 or 051231-0001, 051231-0002 and so on. Accounting applications periodically use this export/import format.

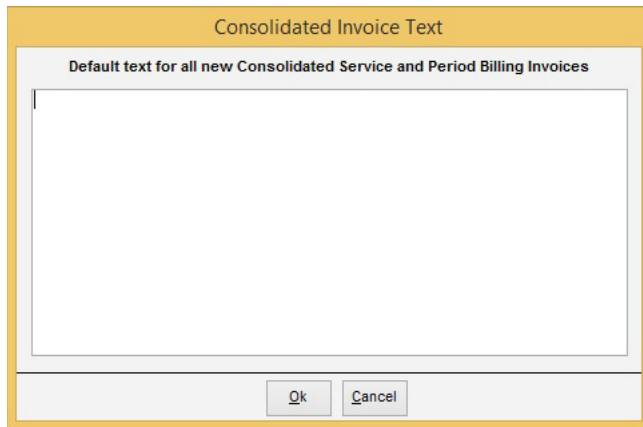
Date Sequence #2 [051231-S001]: If Date Sequential #2 is selected, the date will be inserted prior to the numerical sequence. A suffix, indicating the type of document, will be inserted prior to the numerical sequence. For example, sales documents created on December 31st, 2005 will appear as YYMMDD-S001 051231-S001, 051231-S002 and so on. Accounting applications rarely use this export/import format.

Select 'OK' to return to the 'Main Administration Menu'.

Select 'Back' to return to the 'Main Administration Menu'.

Consolidated Invoice Text

When using the new Consolidated Invoice format users can define a standard message to be printed on the

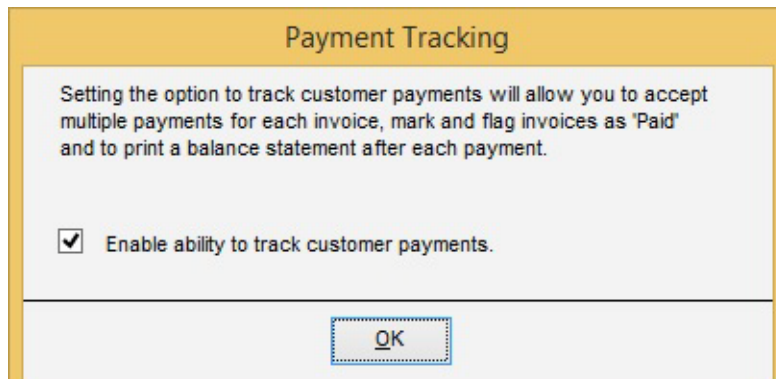


The screenshot shows a dialog box titled "Consolidated Invoice Text". Inside the dialog, there is a text area with the label "Default text for all new Consolidated Service and Period Billing Invoices". Below the text area are two buttons: "Ok" and "Cancel".

first Summary page of the invoice. Enter the default text that will appear on the new Consolidated Service Invoice screen.

Payment Tracking (optional module)

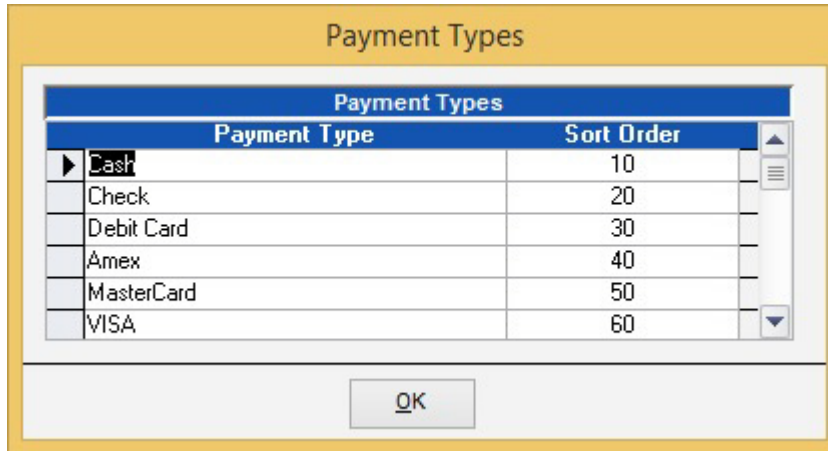
Payment tracking can be activated when the Accounting Exporter module is purchased. This will let users track multiple payments against any invoice. Activate the Payment Tracking Feature by marking the box in the Payment Tracking window.



The screenshot shows a dialog box titled "Payment Tracking". Inside the dialog, there is a text area with the following text: "Setting the option to track customer payments will allow you to accept multiple payments for each invoice, mark and flag invoices as 'Paid' and to print a balance statement after each payment." Below this text is a checkbox that is checked, with the label "Enable ability to track customer payments." At the bottom of the dialog is an "OK" button.

Payment Method

The methods of acceptable payments can be defined in the Payment Types Window. Users can define any and all acceptable Payment Types.



The screenshot shows a window titled "Payment Types" with a yellow border. Inside, there is a table with two columns: "Payment Type" and "Sort Order". The table lists six payment methods: Cash, Check, Debit Card, Amex, MasterCard, and VISA, with sort orders 10, 20, 30, 40, 50, and 60 respectively. The "Cash" row is selected. Below the table is an "OK" button.

Payment Type	Sort Order
Cash	10
Check	20
Debit Card	30
Amex	40
MasterCard	50
VISA	60

Equipment & Contracts

Miracle Service needs to know how it should treat the 'typical' Service Equipment and/or Contracts. All of the information entered in these screens will be used as default values for later activities. The purpose is to simplify the typical equipment inclusions or exclusions and the typical contracts types.



Select button '9. Equipment and Contracts' to enter the 'Equipment and Contracts Administration Menu'.

Time & Material - Preferences

This screen deals with the various aspects of billable time and material service invoices. With this option, even though the equipment is not covered by a contract, labor and travel can be non-billable for service calls. Some customers use Miracle Service for in-house service calls. In these cases, no charge is ever rendered on a service call. In this case select 'All-Included'. Remember that this is only a default. If 'Not Included' selected, changing this value when it appears in the equipment or contract record can include Labor or Travel.

Select the 'Preferences' button under 'Time and Material' and enter the 'Time and Material Preferences' screen.

The screen displays two windows, one for 'Labor' and one for 'Travel'. The fields in each are identical.

Are Labor (Travel) Hours Included?

If labor or travel is indicated as not included, Miracle Service calculates the total charge based on time and the labor rate table.

Labor Rate

All 'Labor Rates' entered in the 'Service Preferences' setup will appear in the drop down box here. Select the most common Labor Rate as a default Labor Rate for new equipment being added in the application. The Labor Rate can be modified in the application. Some companies have a different labor rates for various categories of equipment. When equipment is added at the customer's site, select a labor rate applicable to this type of equipment.

Select 'OK' to return to the 'Equipment and Contracts Administration Menu'.

Meter Call Views

A standard Meter Call View can be configured in this window. This is used in the Period Billing screen

Meter Call Views					
View Name	Field 1	Field 2	Field 3	Field 4	Field 5
▶ Default View	SE ID	SEC ID	Meter Name	Next Bill Date	Reading Type
*					

OK

when the user selects the Call screen. Multiple different views can be defined and users can select the view they prefer to use in the screen. These views can be changed if a different configuration is desired.

Defaults

Service Equipment and Contract Defaults

Service Equipment

Equipment Status ☒ Automatically set Active status on when saving Service Equipment.

Lifetime Meter ☒ Maintain a running count of actual readings for each meter. This option should only be enabled if you reset meters.

Service Contracts

Prorate Period Charges ☐ Calculate period charge based on the date the Equipment was added to the Service Contract.

Equipment Status ☐ Set Service Equipment as inactive when removed from a Service Contract via the Update Wizard.

Meter Call Screen Default Date

Penalty Fee ☒ Apply a penalty fee (to the period charge) when a meter reading is missed for the billing interval. Note that the period and meter invoice must be generated together.

Profitability

Equipment & Contract ☒ Enable Advanced Profitability Reporting

OK

Service Equipment:

Equipment Status: This setting defines the behavior used when saving a modified equipment record. When using the Returns Management module, it is recommended to turn this feature off to avoid activating an equipment record unintentionally during the return process. If this happens, there will be an inconsistency with the state of the serialized item in your inventory. If the Returns Management module is not used, this can be left checked.

Lifetime Meter: Activating this setting will add a running total clicks of actual meter readings for each meter. This option should only be used if the practice is to reset the meters regularly.

Service Contracts:

Prorate Period Charges: This setting activates the prorated feature for the Period Billing. This will automatically prorate the Period Charge for equipment added to a contract part way through a billing cycle. If the contract is set to charge the Period Charge is advance

When a Period Bill is run it look at the equipment 'Date Added' on the contract and calculates the charge based on the Period Charge for the equipment.

The number of days used to calculate the prorated value is based on the following:

Billing Interval	Number of Days
Monthly	30
Quarterly	91
Bi-Annually	182

Billing Interval	Number of Days
Annually	365
2 Year	730
3 Year	1095
4 Year	1460
5 Year	1825
10 Year	3650

The prorated calculation will use the Equipment Date Added date and the Billing End date to determine the number of days that the equipment was added and then use the added number of days divided by the Number of Days in the table times the Equipment Period Charge to determine the prorated charge. This is a straight line calculation.

When equipment is removed from a contract the prorating calculation will not generate a credit and cancellations are not prorated if they are billed in Advance only if they are billed in arrears.

Equipment Status: The Equipment Status setting defines how a Service Equipment item is handled when it is removed from the contract using the Update Wizard. If this is checked the status will be set to Inactive when the item is removed from a contract. If it is unchecked, it will be always left as Active.

Meter Call Screen Default Date: This defines if the meter reading date is defaulted to the current date or the Aging date for the Call Screen when entering meter readings in the Meter Call screen. When entering a meter reading the meter reading date will default to the current date if this option is selected. If the Aging Date is selected, it will default the meter reading date to the Aging Date selected for the Meter Call screen.

Penalty Fee: Enables a feature to charge a penalty fee when a meter reading is missed for a billing interval. The penalty fee is added directly to the Period Charge and is not displayed or listed separately on the Period Billing Invoice. This feature will only work correctly if the period charge and meter are invoiced together.

Profitability:

Equipment & Contract: Enable Advanced Profitability Reporting will switch Miracle Service to use the new profitability reporting method. This new method was implemented to address the greater complexity being demanded in the contract. Since many of the details were not being captured previously, its possible the new Advanced Profitability Reporting will not produce the correct results and using the original method is preferred. Use can switch between these options if needed to generated the reports they desire.

Yield Tracker Defaults (Optional Module)

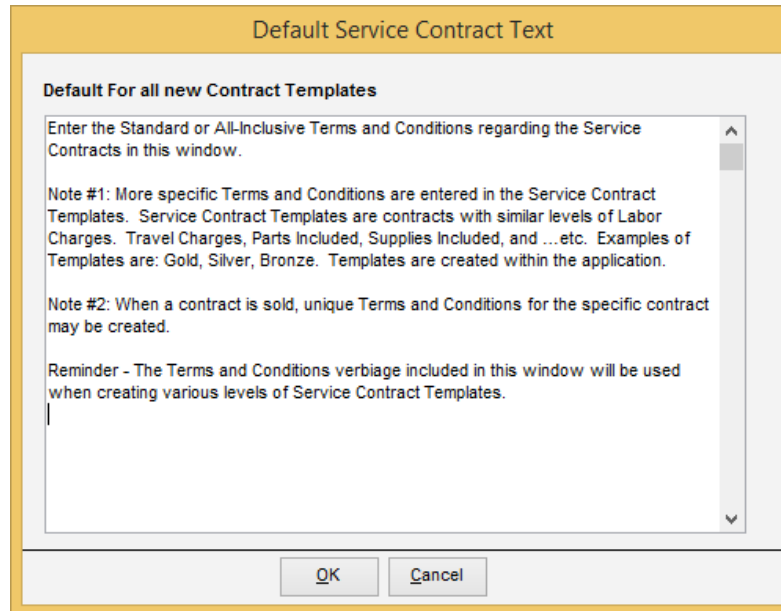
When the Yield Tracker is purchased you are able to configure the default settings for the Yield Tracker. See the section on the Yield Tracker for more details on this module and the configuration.

Return Orders (Optional Module)

When Return Orders is purchased you are able to configure the default settings for Return Orders. See the section on the Returns Order Manager for more details on this module and the configuration.

Contracts Default Text

This is the service contract terms and conditions between your service department and customers. Service Contract terms and conditions may vary by service contract template. Individual contracts may be edited to include customer specific terms and conditions. Each customer's service contract's terms and conditions are saved individually.



Select 'OK' to return to the 'Equipment and Contracts Administration Menu'.

Contracts Header

This is the information printed at the top of the service contract, prior to the listing of equipment included in the contract.

Select 'OK' to return to the 'Equipment and Contracts Administration Menu'.

Contract Templates

Contract templates allow the service department to create various types of service contracts to offer to customers. Service Contract Templates can vary with the inclusion or exclusion of labor, travel, parts or meters. Although only a few Service Contract Templates will be created, such as Gold, Silver and Bronze, these templates are the basis for specific contracts, which will be slightly modified and sold to customers.

To create Contract Templates select button '9. Equipment and Contracts' in Administration set up to get to the 'Equipment and Contracts Administration Menu'.

Creating new Contract Templates is simple. Enter the Contract Template screen and enter a Contract Template ID.

Contract Template ID: All Inclusive		Description: Base + Overage & Supplies Included	
Labor Charges Are Labor Hours Included? ☐ Not Included ☒ All Included ☐ Incl. per Term Hours Incl. if Applicable: 0		Travel Charges Are Travel Hours Included? ☐ Not Included ☒ All Included ☐ Incl. per Term Hours Incl. if Applicable: 0	
Any Additional Charges for Labor? ☒ No Surcharge ☐ Flat Surcharge ☐ Flat Surcharge by Zone Flat Charge if Applicable: \$0.00		Any Additional Charges for Travel? ☒ No Surcharge ☐ Flat Surcharge ☐ Flat Surcharge by Zone Flat Charge if Applicable: \$0.00	
Labor Rate: STANDARD		Travel Rate: STANDARD	
Charge Per Mile (or KM): \$0.00		☐ Apply Zone Charge to Total Contract Value	
Contract Term: Annual		☐ Copy Block Contract	
Billing Interval (Period): Monthly		☐ Period Billing in Arrears	
Billing Interval (Motor): Monthly		☐ Exclude Period Billing Charges (Meter only)	
Base Charge (Period): \$0.00		☐ Use CPC Charge Levels	
Group Type:		☐ Accumulate Clicks Included	
Comments: Period and Meter Billed only. All else included		☐ Combine Base Charge	
Contract Text		Categories Included	
Expenses Included		Contract Tax Info	

Hint: 'Categories' are the only item that cannot be modified when service contract templates are converted to an actual service contract.

Contract Template ID: Enter a name, (for example Gold, Silver or Bronze), or enter an alphanumeric identifier, (for example SC-01, SC-02, SC-03), to differentiate one template from another.

Decide upon a standard format for a service contract. Variations in service types or levels must each have their own template. For example, if the service department offers three levels of service contract, they may be called 'Gold', 'Silver', and 'Bronze'. For example, 'Gold' could represent full service including parts, labor and some inventory items. 'Silver' on the other hand might offer parts and labor and fewer supplies while 'Bronze' includes labor (time and travel) only, but no supplies.

Create as many templates as necessary. The basic information terms and conditions for the contract template can be edited on a sold service contract agreement.

Miracle Service sorts service contract templates ID's alphanumerically. If several service contract templates are created we suggest entering a prefix to sort the names in alpha or numeric order.

Labor Charges Box: This field identifies if Labor Charges are included in the service contract template. Select between, 'Not included', 'All Included' and 'Included Per Term'. The service contract template Labor Charges and the values may be edited on activated service contract.

Flat Surcharge:. This field identifies if Flat Surcharges are included in the service contract template. Select between, 'No Surcharges', 'Flat Surcharge', 'Flat Surcharge by Zone'. The service contract template Flat Surcharges and the values may be edited on activated service contract.

Flat Surcharge by Zone:. Zone Surcharges are calculated from information entered in '2. Zones and Regions' from the Main Administration Menu. This surcharge can vary depending on the location of the customer or other considerations set up as zones. Zone Surcharges are most commonly set up geographically. Customers closest to the office pay a lesser zone surcharge while customers furthest from

the office pay a higher zone charge. There may also be other degrees of zone surcharges. If 'Flat Surcharge by Zone' is selected, when a service call is closed, customers belonging to a Region A, will be charged the Zone charges created in the Zones and Regions relating to Region A. This method replaces billing for travel time.

Regardless of whether this service contract template is billing for labor, select a labor rate. Note that service contracts can be modified to include or exclude labor. In the event that labor is included on the service contract template and labor is not included on an actual service contract, Miracle Service will not know which labor rate to default.

The default setting for 'Rate' is 'STANDARD'. The 'STANDARD' and other rates have already been entered in the 'Labor Rate Maintenance' screen. To enter this screen select the 'Zoom [+]' button to the right of the 'Labor Rate' box. If the standard rate is appropriate, select it. If it is not, select another rate or create a new one. See 'Labor Rates' in Administration Set up. (Button '2. Service Preferences')

Hours Incl. if Applicable: This field established a minimum number of hours that are included in the contract. When you select Incl. per Term in the Labor Charges Box or the Travel Charges Box, you will be able to edit/enter the Hours Incl. if Applicable parameter. This parameter defines the total number of hours included in the contract. For example, if you input 10 hours, Miracle Service will not invoice for service work until the total hours exceeds 10 hours. There are independent controls for labor and travel.

Travel Charge Box: Each feature works in the same manner as Labor Charges above.

Charge per Mile (or KM): This field establishes the charge per mile used when completing a Service Task for a piece of equipment on a Service Contract. When a piece of equipment is on a contract, this mileage charge will override the mileage charge set-up on the individual piece of equipment.

Note: Charge per Mile (or KM) in Service Contracts Templates may be modified at any time and this will carry over to all active Service Contracts using the specific template. Modifications made at the Service Contract Template are effective immediately and will affect all active contracts.

Special Info Buttons: These buttons control access to the details of the contract that will default into every agreement until overridden in individual contracts. View the details from the 'Contract Maintenance' screen or enter into the 'Edit' mode to edit.

The Special Info buttons are:

- ▶ **Contract Text** – The Contract Text is defaulted from the general template. Edit the terms and conditions of this service contract template to fit this contract type. Additional edits may be made when service contracts are sold.
- ▶ **Categories Included** – There are a few important notes included in this section. Select the inventory categories included in this service contract template. The default setting for each category is 'NO'. For inventory categories included in a service contract template, toggle the 'No' to 'YES'. Each inventory category needs to be activated separately.

Note: Inventory categories included or excluded in Service Contracts Templates may be modified at any time and this will carry over to all active Service Contracts. Modifications made at the Service Contract Template are effective immediately and will affect all active contracts.

- ▶ **Expenses Included** - Select the expenses that are included on the contract. This will allow you to add expenses to Service Tasks performed under the contract. Then they are added, you will see a check mark in the field showing that the category is included in the contract.

- ▶ **Contract Tax Info** – Miracle Service calculates taxes on period billing invoices using the Template Tax Category. This default is configured in the Billing Information, Billing Preferences, Period Billing section. If Meter readings are to be taxed, the 'Tax Meters' box should be checked. The Period Billing's Contract Tax Category cannot be overridden as this default is set in the contract templates.

Some companies are required to calculate taxes on contracts using a percentage of parts, labor, and travel. In such a case, Miracle Service calculates each of the percentages. Then the taxes are calculated based on the tax categories for each. The tax categories are set up in 'Taxes'.

Contract Term Defaults: This is the contract length and billing details of the agreement between the dealership and the customer including how and when billings will take place. These are defaults only for this template.

Contract Term: The term of the contract is the agreed upon length of time the contract will exist, for example two-years.

Period Billing Default: The period billings are the agreed upon billing frequency of the contract. For example a two-year contract may be monthly, quarterly, semi-annually, annually. If a two-year contract was billed monthly, there would be 24 billings, if a contract was billed quarterly, there would be 8 billings and etc. After the billing frequency is set, the contract is activated and the first period billing is created, the frequency cannot be edited.

Meter Billing Default: In addition to the contract period billings, a contract may also generate contract billings for 'cost-per-click' or 'by the meter', called metered billings. The frequency options for the meter billings are similar to the period billings. The actual meter billing frequency may be different than the period billing. After the meter frequency is set, the contract is activated and the first meter billing is created, the frequency cannot be edited.

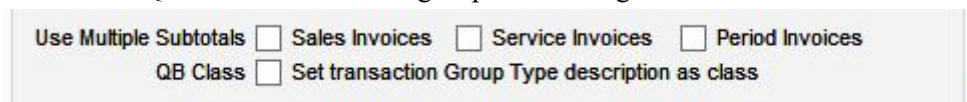
If a service contract has both period and meter billings included in the contract, the charges will be noted on separate lines on one invoice.

Base Charge Default: This Base Charge feature should only be used if either of the following two-scenarios applies:

Scenario 1 - If there's a standard administrative charge billed for each contract. This Base Charge will be billed in addition to the equipment values.

Scenario 2 - If similar model classes of equipment, with similar contract terms and billing frequencies are sold, simply enter a base charge for each type of service contract template. Note this method can only be used if one piece of equipment is included per service contract.

Group Type: select the Group Type to use used for this contract if this feature is being used. This feature is set in the QuickBooks Accounting Exporter Configuration.



Use Multiple Subtotals ☐ Sales Invoices ☐ Service Invoices ☐ Period Invoices
QB Class ☐ Set transaction Group Type description as class

This will set the Group Type on the Period Billing Invoice automatically when the Period Invoice is generated based on the Group Type setting on the associated contract template.

Apply Zone Charge to Total Contract Value: Check if Zone Charges apply to this style of service contract template. See Administration Set-up button 'Zones and Regions'

Copy Block Contract: Check if Copy Blocks are included in this style of service contract template. A Copy Block contract may expire when a predetermined amount of copies are used. Copy Block contracts may also include a predetermined amount of time. Therefore the contract may expire based on usage of time, whichever comes first.

Period Billing in Arrears: Check if the period billings are to be generated at the end of the billing frequency.

Exclude Period Billing Charges (Meter only): Check if the contract template is used on CPC contracts only. This will drop the Period Billing field in the contract and avoid the need to generate the \$0 Period Billing invoice.

Use CPC Charge Levels: Check to activate the CPC charge levels. By default you can enter one level and a clicks included. However, if you will be adding more levels to the CPC charges you will need to activate this feature. Check this box to enable the ability to add more CPC levels for CPC billing.

Accumulate Clicks Included: Check to activate the Accumulate Clicks Included. When this feature is active it will accumulate the clicks included and roll them over to the next billing period if no meter reading is obtained in the billing period. If a meter reading is obtained no clicks are rolled over. If this feature is activated on a Consolidated Meter then clicks Accumulated clicks are only rolled over if no readings are obtained on all of the equipment linked to the consolidated meter. If even one reading is obtained for any of the equipment, then no clicks are rolled over to the next billing period. This is a specialized contract setting.

Combine Base Charge: Check to activate the Combine Base Charge. When this feature is active it will combine the base charge across all meters being billed on an individual machine. This is effectively a minimum meter billing charge applied to both meters. If the combined billing charge of the two meters is less than the Base Charge, then no overage is billed. If the total charge for the two meters is greater than the Base Charge, then the difference is charged on the Period Billing invoice.

Note: Combined Based Charge does not support Clicks Included. Adding clicks included will skew the billing results and is not supported with this feature. Combined Based also does not support consolidated meters since the concept of the combined base is charging the overage by device once the base charge on the device is exceeded.

Accumulated Base: Check to activate the Accumulated Base. When this feature is active it will roll the base charge over to the next billing period if no meter readings is obtained in the billing period. If a meter reading is obtained the base change is not rolled over and billed normally.

Note: This feature cannot be active with a Combined Base Charge feature also active since the Combine Base Charge does not support clicks included.

Select 'OK' to return to the 'Equipment and Contracts Administration Menu'.

Select 'Back' to return to the 'Main Administration Menu'.

Email and Report Settings

Miracle Service offers the capability to e-mail Miracle Service generated documents and reports to applicable customers, suppliers and technicians (when applicable). This feature uses the Report Viewer and is standard in supported modules to help user productivity and increase efficiency.

This feature is supported in Miracle Service Client version 6.2.0 and later

The following reports are included with this feature and do include type-related custom reports:

- Invoices (Sales, Service and Period Billing)
- Sales Orders
- Purchase Orders

- Service Contracts
- Task Tickets
- Customer Statements

Supported Email Clients:

E-mailing PDF files using the Report Viewer does not require any specific e-mail client. Miracle Service is migrating all of its reports and documents to support the Report Viewer as the only tool for viewing and e-mailing documents and reports. We recommend all users use this method going forward. If you are using the traditional reports and methods Miracle Service currently supports two of the most popular email clients available:

- Microsoft Outlook
- Microsoft Outlook Express*

*Outlook Express must be installed to Microsoft's default location. The Outlook Express file "msoe.dll" must exist at this location: "c:\program files\outlook express\msoe.dll".

Supported File Types (traditional report method):

The report file type supported by the traditional report method is important, as this is the standard method your customers and suppliers will use to view the attachments you will be sending to them. We have selected three (3) common viewer types; however, it is likely that your customers will be using a variety of these. To ensure your clients can always read the attachments we recommend you educate your clients on the viewer requirements you are choosing. All of the viewers we have selected are available to download free of charge on the Internet. It is simply a matter of advising your clients on the viewer you prefer they use.

- Portable Document Format (PDF)*
- Word Document
- SnapShot Viewer

*PDF file types are handled differently as they require the use of a PDF writer or distiller configured as a printer. Miracle Service currently supports Adobe Acrobat 5.0 and 6.0, as well as other PDF writers such as CutePDF. Additional settings are required to convert a Miracle Service generated report to PDF format (see below). Note: if you are using the PDF method we recommend using the Report Viewer which has a built in PDF distiller and eliminates the need to install any other PDF Distiller technology. The Report Viewer method is the method supported for new installation by Helpdesk.

Email & Report Settings

The report template documents (often referred to as repx file) are stored in the Reports folder in the database folder. All users share this location and need to access it in order to print report. To ensure the path to this folder is common we require the report folder be defined as a Universal Naming Convention (UNC) path. A UNC path is seen the same by all users on the network making this path the same for all users.

The following will describe the Report Settings:

Company Name: Check this to print the company used in Miracle Service on the various reports. This generally refers to documents such as Invoices, PO's, Sales Orders, Contracts and Service Task Tickets. This is usually checked when not using a logo file on your documents. See below for the Logo File for Reports.

UNC Patch for Reports: This is the path that defines the location of the Reports folder in your Miracle Database (MiracleDB) folder. The import part here is the first section is the server or computer name. (i.e. \\[ComputerName]\MiracleDB\Reports).

Logo File for Reports: This defines the path for the logo file. This is also shared by all users and should also be a UNC path to define the location of this file. If a path such a C: is used, then the Logo file must to must be copied to each computer and stored on the local C: drive. Using a network path and a UNC path will allow you to have just one Logo stored on a network drive and shared by all users.

General Printing Options: are set to configure Miracle Service to behave as needed for your company. This feature allows physically un-printed invoices to be posted and exported. The default settings are checked, meaning invoices will be printed.

There are three options:

Option 1 - allows the physical printing of invoices from the Invoice Review screen. If the option is not checked, invoices can be marked as printed, posted, and exported without physically printing them.

Option 2 - allows the physical printing of zero amount invoices from the Invoice Review screen. If this option is not checked, zero amount invoices can be marked as printed, posted and exported without physically printing them.

Option 3- provides the ability to include the Payment information when re-printing invoices.

Period Billing Print Options: This is a setting to allow the equipment location, Description and Serial Number to be printed on the Period Billing Invoice. Check the field to be displayed on the Period Billing Invoice. These can be changed at any time; however, invoices printed before the settings are changed will still print based on the settings they had when the invoice was generated. This is because the information is copied to an invoice line item field.

Service Billing Print Options

Invoice Print Options

General Print Options

- Physically print invoices from the Invoice Review screen. If this option is not checked, invoices can be marked as printed, posted and exported without physically printing them. ☒
- Physically print zero amount invoices from the Invoice Review screen. If this option is not checked, zero amount invoices can be marked as printed, posted and exported without physically printing them. ☒
- Include Payment history when re-printing invoices. Fields include Amount, Date, Payment Method and Reference. ☐

Period Billing Print Options

- Include Service Equipment Location ☐
- Include Service Equipment Description ☒
- Include Service Equipment Serial Number ☒

Service Billing Print Options

- Hide Labor and Travel ☐
- Hide Labor and Travel when zero amount ☐
- Remove "Parts Used at this Service Call" ☐

OK

This is a setting to determine the fields that are shown on the Service Billing Invoice when it is printed. Check the fields to be displayed or hidden on the Service Billing Invoice. These can be modified at any time, however, the invoices printed before the settings are changed will still print based on the settings they had when the invoice was generated. This is because the information is copied to an invoice item field.

Select 'OK' to return to the 'Reports and Email Configuration' Menu.

Address Setup

There are several options available to define how the address is printed on the documents generated in Miracle Service. There are 3 groups of settings. The first for Invoices, Sales Order and Service Contract Address Setup. The second for Purchase Order Address Setup. The third for the Service Task Address Setup. These are set company wide and will affect the printed documents. These can be modified at any time and the changes will be immediately reflected when a document is printed or re-printed.

Address Setup

Invoice, Sales Order and Service Contract Address Setup

☐ Customer ID	☐ Country	☐ Requester Name (SB ShipTo only)
☒ Attention Field	☒ Zip Code	☐ Service Slogan (SB only)
☒ Company Name	☐ Phone Number	☐ A/R Contact
☒ Address Line 1	☐ Fax Number	Name Andrew Millnick
☒ Address Line 2	☐ E-Mail Address	☐ Billing Dept (Bill To)
☒ City		
☒ State		
☒ Short State Format		

Purchase Order Address Setup

☒ Supplier ID	☒ Country	☒ Warehouse ID (Ship To)
☒ Attention Field	☒ Zip Code	☐ Warehouse Name (Ship To)
☒ Supplier Name	☒ Phone Number	☒ Warehouse Attention (Ship To)
☒ Address Line 1	☒ Fax Number	☒ Supplier Customer Number (Bill To)
☒ Address Line 2	☒ E-Mail Address	☒ P/O Contact (Bill To)
☒ City		Name Bill Smith
☒ State		☐ Reference - Drop Ship (Ship To)
☒ Short State Format		☐ Reference - Warehouse (Ship To)

Service Task Address Setup

☒ Customer ID	☐ Country	☐ Service Slogan
☒ Attention Field	☒ Zip Code	
☒ Company Name	☒ Phone Number	
☒ Address Line 1	☒ Fax Number	
☒ Address Line 2	☒ E-Mail Address	
☒ City		
☒ State		
☒ Short State Format		

Select 'OK' to return to the 'Reports and Email Configuration' Menu.

Traditional E-mail Document Format (Being Phased Out)

When using the Traditional Document Report Email method it is essential to define the format and distiller (Printer Name) for the format.

Report File Type: The file type that your Miracle Service report(s) will be converted to for e-mailing purposes.

Printer Name: Defined the PDF or other document distiller of choice for this format.

Delete report file after sending: Specifies whether or not to delete the report file once the report has been successfully sent.

Wait Interval: The wait time for converting the Miracle Service report to a PDF file. Default is 5 seconds (5000 milliseconds). This setting is usually sufficient; however, depending on your PC it may be necessary to extend this Wait Interval. The Wait Interval should be adjusted to allow your PDF writer/distiller enough time to generate the output file before sending it. Example of printer settings:

<u>Device Name</u>	<u>Driver Name</u>	<u>Port</u>	<u>Wait Interval</u>
Acrobat 5	PDFWRITR	c:\MSReports\	5000
Acrobat 6	PDFWRITR	c:\MSReports\	5000
CutePDF	CPW2	c:\MSReports\	5000

Select 'OK' to return to the 'Main Administration Menu'.

Email Settings

You can define your e-mail settings in Miracle Service's Administration application. From the Main Administration Menu select the 'E-mail & Report Settings' button to open the settings screen.

Email Client: The e-mail client that is currently installed and configured in your business environment. Miracle Service only support Outlook™ and Outlook Express™. If you are using the Report Viewer for e-mailing documents and report select 'SMTP'

Internal Sending Settings

Configure the action to occur when sending documents. This setting will copy the document sent based on the setting selected. The actions are 'None', 'Copy to Sending User' or 'Copy Default Email Account'. These settings can be changed at any time to change the application behavior.

Automatic Billing

Configure the Sender e-mail address used when sending documents from the Automatic Billing feature. This setting can be changed at any time to update the proper Sender address.

SMTP Server Settings

Host

Enter the host name of your SMTP server (usually supplied by your ISP). This is also referred to as your Outgoing Mail Server

Port

Specifies the TCP port for outgoing messages. The default is 25.

Timeout

Specifies the time allowed before an inactive connection is closed. Time is measured in milliseconds. A value of -1 indicates no timeout period.

Server Uses SSL

If the email server requires the communication to use the secure socket layer (SSL) technology check the box.

Server Requires a Login

If this option is checked, the username and password fields are used to authenticate the connection to the SMTP server.

Username

If the email server requires a login, enter the username.

Password

If the email server requires a login, enter the password.

Test

Once you have configured your SMS settings, you can test your setup to ensure that sending to a technician will function properly once implemented. From the Main Administration Menu select the 'Technician Messaging' button to open the settings screen. To run a test follow these steps:

1. Select the 'Test' button.
2. Once prompted, enter the receiver's email address. For initial testing purposes, entering your email address will provide quicker results while troubleshooting. Click the 'OK' button.
3. Upon successfully sending a message, a dialog box will appear stating that the message has been sent to the recipient.

A standard message will be sent to the recipient with the subject as 'Miracle Service SMTP Messaging Test' and the message body as 'This message has been sent using Nexent Innovations's Messaging Module'.

Use the 'Test' button to confirm the SMTP settings are correct and no errors are generated. Errors usually indicate the user name and password are not configured correctly or that the computer or company fire wall is not enable to send these messages. If you use an e-mail hosting provider, they may have security enable to block the relay of SMTP messages. Check with your e-mail provider to determine if they support SMTP Relay services and what security features are used to ensure you have configured Miracle Service correctly.

Select 'OK' to return to the 'Main Administration Menu'.

Message Configuration

The Message Configuration is the default configuration used in the e-mail Subject and Body when a document is e-mailed from Miracle Service. These settings are used with the Traditional Reports and the Report Viewer.

The screenshot displays the 'Reports and Email Configuration' window with the 'Message Configuration' tab selected. The window contains several sections, each representing a different report type. Each section has three input fields: 'Subject', 'Output Path', and 'Body Text'. The 'Invoice' section is currently active, showing the following values: Subject: 'Your new Miracle Service Invoice.', Output Path: 'C:\Invoice.pdf', and Body Text: 'Attached, please find your latest Invoice.' Other sections like 'Purchase Order', 'Sales Order', 'Service Contract', 'Task', 'Customer Statement', and 'Return Order' are also visible but not expanded.

Default Subject: The email message default subject text. Maximum is 50 characters. Although Miracle Service limits the length of the subject field, users will have the opportunity to modify this setting prior to sending the email. It is suggested, however, that the lengths of these fields be limited to avoid sending errors due to size.

Output Path: Is only required for the Traditional Reports and is not used for the Report Viewer. It specifies the path, filename and extension for saving reports prior to sending them (i.e. c:\MSReports\Customer Invoice.snp). The indicated path must be valid. It is suggested to use the Port path when using PDF report types.

The screenshot shows a close-up of the 'Default Body' text field. The field is a simple rectangular box with a light gray border. The text 'Find Attached your Miracle Service Invoice' is entered into the field.

Default Body: The e-mail message default body text. Maximum is 255 characters. Although Miracle Service limits the length of the body field, users will have the opportunity to modify this setting prior to sending the e-mail. It is suggested, however, that the lengths of these fields be limited to avoid sending errors due to size.

Use Full File Extensions

The file extension must be included when specifying the Output Path directory. Use one of the following extensions for all report types:

- .snp (SnapShot),
- .pdf (Portable Document Format) or

- .doc (Word document).

It is suggested that the Word report type not be used for standard Miracle Service reports as many reports are not formatted to use this type. The Word report type may be used for some custom reports.

With some PDF writers/distillers you may need to change the Save path the first time you generate the PDF report.

Some PDF writers/distillers allow you to view the PDF results once created. To increase efficiency this setting should be turned off.

The default file name for each report is the report caption. Therefore it is suggested that the report caption be used as the report name to be as efficient as possible. An example follows using SnapShot as the file type:

Invoices: c:\MSReports\Customer Invoice.snp

Sales Orders: c:\MSReports\Customer Sales Order.snp

Purchase Orders: c:\MSReports\Purchase Order.snp

Service Contracts: c:\MSReports\Equipment Service Contract.snp

Task Tickets: c:\MSReports\Service Call Work Order.snp

Additional Miracle Service Settings

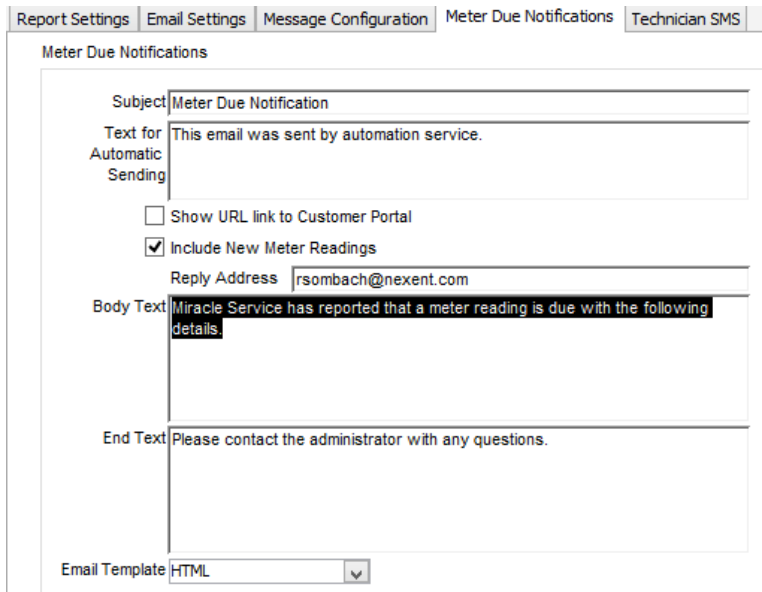
Users must select the option to preview a report prior to printing. You can set this option from the 'Options' menu in the Miracle Service Client application. Select 'Print Preview' from the list and check the box to turn this setting on.

A valid e-mail address must be assigned to customers and suppliers in order to e-mail them successfully.

Note that service contracts and invoice type reports will be e-mailed to the assigned BillTo customer, sales order and task tickets will be e-mailed to the assigned ShipTo customer and purchase orders will be e-mailed to the assigned supplier.

Select 'OK' to return to the 'Main Administration Menu'.

Meter Due Notification (Optional Module)



Report Settings | Email Settings | Message Configuration | **Meter Due Notifications** | Technician SMS

Meter Due Notifications

Subject: Meter Due Notification

Text for Automatic Sending: This email was sent by automation service.

☐ Show URL link to Customer Portal

☒ Include New Meter Readings

Reply Address: rsombach@nexent.com

Body Text: Miracle Service has reported that a meter reading is due with the following details.

End Text: Please contact the administrator with any questions.

Email Template: HTML

The Meter Due Notification supports the Customer Web Portal or and Meter Center service. This tab is used to configure the E-mail due notification sent to the customer with the Meter Due Notification.

Subject: is the e-mail subject of the e-mail Due Notification.

Text for Automatic Sending: Enter the text for automatic sending.

Show URL link to Customer Portal: Check this when you have installed the Customer Web Portal. This feature will include the URL (web address) in the meter due email notifications for the user to click to access your Customer Web Portal and enter their meter readings. Only enter this if a valid web address exists. **Note:** This feature will only support the **Standard** (non-HTML) Email Template format.

Include New Meter Readings: Check this if you are requesting the user to enter their meter reading in the **reply e-mail**. This feature is only used with the Meter Center and will only appear if the Meter Center Module (optional) is registered (contact sales@nexent.com for purchasing information).

Reply Address: defines the reply address for the Meter Center service.

Body Text: defines the e-mail body text to let your customer know the purpose of the e-mail and include any instructions or information.

End Text: defines the e-mail text for the bottom of the e-mail.

Email Template: Users can select between a standard Text Template or HTML Template to provide details on the meter readings that are required.

Select 'OK' to return to the 'Main Administration Menu'.

Technician Text/Short Message Service (SMS)

Miracle Service allows dispatchers to send task information using by text to technicians' phones. This ensures that technicians have the right customer, equipment and service contract information at their fingertips.

To implement this module you will require an internet connection, as well as an established email server.

Report Settings | Email Settings | Message Configuration | Meter Due Notifications | **Technician SMS**

Message Settings

Sender Name
Miracle Service Dispatcher

Subject Text
Your latest work order.

Subject Data

☐ Customer ID
☐ Customer Name
☐ Task Number
☒ None

Sender Address
dispatch@miracleservice.net

Message Data

☐ Customer ID	☐ Unit ID
☒ Customer Name	☒ Unit Location
☒ Address and Phone Number	☐ Last Meter Reading/Date
☒ Problem Description	☒ Last Call Comments
☒ Requester	☒ Target Time
☒ Requester Phone	☒ Call Type
☐ Customer PO	☒ Task Number
☒ Serial Number	☐ Contract Type
☒ Model Number	☒ PM Due
☐ Contract ID	☐ Task Priority
☐ Contract End Date	

Technician Text Settings

Enter the Technician Text/SMS settings to enable dispatchers to send task information to technician's text message enabled cell phones.

Sender Name

Enter the name that will display in the email indicating from whom it was sent (usually the dispatcher's name).

Sender Address

The complete email address associated with the sender's account. It must be a valid account on the SMTP server specified in the host. This is generally the dispatcher's email address.

Subject Text & Subject Data

Option 1. Subject Text. Enter the standard subject text for outgoing messages

Option 2. Subject Data. To include task specific data in the subject line, select from Customer ID, Customer Name or Task Number.

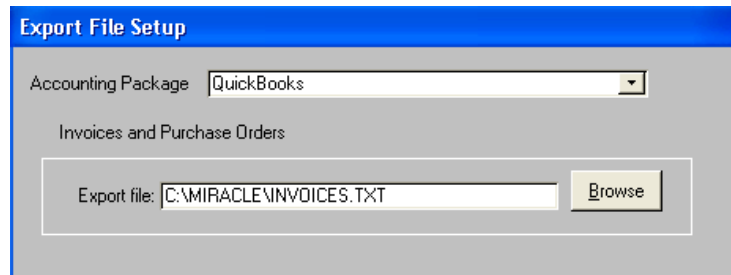
Message Data

Select any combination of the task specific data to form the body of the message.

Select 'OK' to return to the 'Main Administration Menu'.

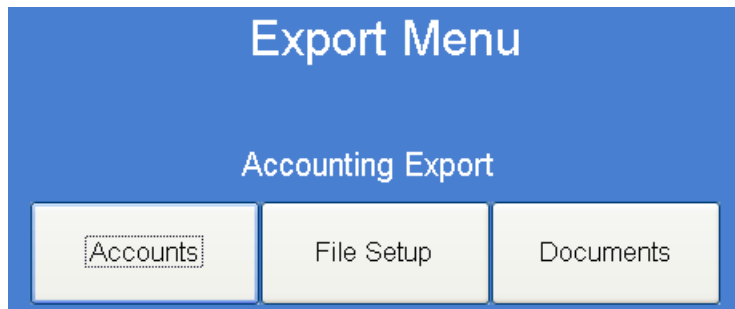
Accounting Exporter

This optional module exports invoice and purchase order information to many of the more popular accounting applications. The invoice and purchase order information is exported in unique export file formats determined by the accounting application. Each accounting application requires a unique format. For more information on how this information and what information is exported, visit the technical support website for additional white papers on each accounting application.



Configuring the Accounting Exporter must not be started until the other 10-buttons in the Administration Module are complete.

First, click the 'Export Files' button. Select the accounting application from the drop-down list. Second, click the 'Accounts' button. Enter the General Ledger account name or number. The number or name must be taken directly from the accounting application that Miracle Service will be exporting to. Any deviation from the proper account number or name and the export routine will generate errors.



Export Files

Select the 'Export Files' button and enter the 'Export File Layout' screen. Select the accounting application that Miracle Service will be exporting to from the drop-down list. Ensure the proper accounting application and version is selected.

GL Accounts: For some accounting packages this setting will force Miracle Service to use the General Ledger (GL) Accounts assigned to the Contract Template when exporting Service Billing Invoice details to the accounting package. This is used by some companies that prefer to show the Revenue and COGS for a part used on a contract service job to be charged against the Contract GL codes instead of the Parts GL

Codes. This help provide better contract profitability information in the Accounting application. This is generally not required by many companies as Miracle Service already provides contract profitability information which includes the parts used on Service Tasks associated with the Service Contract.

Accounts

Caution, errors will occur if the prior 10-buttons of the Administration Module are not completely set-up. Company Information, Zones & Regions, Service Preferences, Inventory, Taxes, Customers & Suppliers, General Lookups, Billing Information and Equipment & Contracts all affect the export file layout and the Account Types created. Do not proceed until you're completely satisfied that the application was set-up properly.

Select the 'Account Setup' button and enter the 'Account Listing' screen. The first column of information is the Account Types. The Account Types list is compiled after the accounting application was selected and the way Miracle Service was set-up.

Account Listing		
Accounting Package: QuickBooks 2002(U.S.)(By Company Name)		
Type	Account	Account Number/Name
-	Accounts Payable	12000
-	Accounts Receivable	11000
-	Expense	Expense
-	Labor Revenue	48700
-	Other Revenue	48700
-	Period Billing Revenue	45010
-	Suspense	48700
-	Travel Revenue	48700
Asset	Computers	12100
Asset	Copiers	12100
Asset	Developer	ASSETS
Asset	Drums	12100
Asset	Fax	12100
Asset	Multi-Function	12100
Asset	Other Equipment	12100
Asset	Paper	12100
Asset	Parts	ASSETS
Asset	Parts-Misc	12100
Asset	Printers	12100
Asset	Rollers	12100
Asset	Supplies	ASSETS
Asset	Supplies-Misc	ASSETS

Note: the account number or account name in Miracle Service must be exactly the same as the accounting application's account number or account name for the export/import routine to work error free.

Permanent and Dynamic Accounts:

Permanent Accounts are general ledger accounts that appear in the account types column regardless of the accounting package selected. The Permanent Accounts consist of Accounts Receivable, Expense, Labor Revenue, Travel Revenue, Period Billing Revenue, Other Revenue, and Suspense. The Dynamic Accounts are the general ledger accounts that are created based on how the first 10-buttons of the Administration Module is set-up. The Dynamic Accounts differ from company to company and branch to branch. The Dynamic Accounts are created from Inventory Categories created in button 4 and Tax Codes created in button 5 of the Administration Module.

The Accounting Exporter automatically creates three accounts for each inventory category (Asset, Cost of Goods Sold, and Revenue), and two accounts for each tax code (Collected and Paid Out).

Note 1: The same Account Number or Name may be used for multiple Account Types.

Note 2: The Suspense Account must have a unique Account Number or Name. The Suspense Account is used during the export process for unidentified values. If a Suspense Account is not initially created new or unique transactions cannot be exported.

Export Invoices/Purchase Orders/Credit Memos

Select the 'Export Documents' button to enter the 'Export Invoices/Purchase Orders' screen. Display Invoices, Purchase Orders, Credit Memos or All by clicking the appropriate selection box.

Display Only Invoices ☒ POS ☒ Service ☒ Period ☒ Text ☒ Purchase Orders ☐ Credit Memos

Accounting Package: QuickBooks Direct (US by Company Name)

Type	Document Number	Customer/Supplier ID	Company Name	Date	Amount	Exported	Select
I	161025-0001	AIR001	Airlines International	10/25/2016	\$367.00	No	
I	161027-0001	AIR001	Airlines International	10/27/2016	\$428.00	No	
I	161101-0001	AIR001	Airlines International	11/01/2016	\$260.00	No	
I	161101-0002	AIR001	Airlines International	11/01/2016	\$363.80	No	
I	161103-0001	AIR001	Airlines International	11/03/2016	\$341.32	No	
I	161116-0001	AIR001	Airlines International	11/16/2016	\$367.00	No	
I	161122-0002	AIR001	Airlines International	11/22/2016	\$467.58	No	
I	170127-0001	FLE001	Fleet Painting & Supplies	01/27/2017	\$0.00	No	
I	170127-0002	AIR001	Airlines International	01/27/2017	\$0.00	No	
PO	150626-0001	ABC	ABC Equipment Suppliers	06/26/2015	\$577.93	No	
PO	160321-0001	ABC	ABC Equipment Suppliers	03/21/2016	\$279.57	No	
PO	160321-0002	ABC	ABC Equipment Suppliers	03/21/2016	\$24.88	No	

☐ Show Exported Documents
 ☐ Show for A Date Range
 ☐ Export Customer Message to QuickBooks (SB)

☐ Hide Zero Dollar Invoices
 ☐ Hide Zero Dollar P.O.s
 ☐ Show Paid Invoices

All documents that have not yet been exported will be displayed. The table displays each Invoice or Purchase order, one per row, with the following fields:

Document Type

This indicates whether the document is an Invoice, Purchase Order or Credit Memo.

Document Number

This is the unique document identifier.

Customer/Supplier ID

This is the unique customer or supplier identifier.

Company Name

This is the company that the invoice has been billed-to or the supplier that the purchase order was created for.

Date

This is the date of the transaction.

Amount

This is the total value of the transaction

Exported

A red 'No' indicates this document has not been exported. When the document has been exported, a green 'Yes' is displayed.

Select

Click on this white box to select an individual document for export. The word 'Export' indicates that the document has been selected for exporting.

Other features at the top of the screen are:

Flags: There are two flags:

- ▶ # Invoices/PO's – This number reflects the total amount of documents in the list.
- ▶ # to be Exported – This number reflects the total number of documents selected for the current export.

Show Exported Documents: Toggle this button to add previously exported documents to the list.

Hide Zero Dollar Invoices: Toggle this button to hide invoice with a value of zero dollars.

Hide Zero Dollar P.O.'s: Toggle this button to hide purchase orders with a value of zero dollars.

Show Paid Invoices: Toggle this button to show only invoices that have been fully paid in the list.

Show for a Date Range: Toggle this button and enter a start and end date.

Export Customer Message to QuickBooks (SB): will send the TaskID, Task End Date and Requester (if there is one) to the Customer Message box on the invoice in QuickBooks. This will not include the Task Description due to the limited space in this field in QuickBooks.

Select All and Deselect All: To select all documents displayed in the table for export, click the 'Select All' button. To clear all selections, click 'Deselect All'.

Report Button: If there is at least one document selected to export, click the 'Report' button to generate an export report. This report illustrates which accounts will be affected in the accounting application.

Account Totals	Account Name/Number	Total Amount
	Accounts Receivable	\$308.88 DB
	Asset Developer	\$66.00 CR
	Asset Paper	\$6.00 CR
	Asset Toner	\$46.00 CR
	COGS Developer	\$66.00 DB
	COGS Paper	\$6.00 DB
	COGS Toner	\$46.00 DB
	Developer Revenue	\$79.90 CR
	GST Collected	\$18.19 CR
	Paper Revenue	\$90.00 CR
	PST Collected	\$20.79 CR
	Sales Discounts	\$10.00 CR
	Toner Revenue	\$90.00 CR

Export Button. After the export report has been printed, select the 'OK' button to execute the export routine. All selected documents will be exported to the accounting package specified in the top left.

Mark Exported: Any invoice or purchase that is not to be exported can be flagged as exported so it is removed from the list of documents to be exported.

Credit Memos: Are only supported for QuickBooks Direct export links. It is not a standard feature and must be activated separately before it is available for users. Contact Technical Support for more details on this feature.

Click 'Exit' to return to the 'Administration Accounting Exporter' menu.

Data Export

The Data Exporter enables the exporting of customer, supplier and inventory data into a select accounting applications.

Caution: Prior to exporting or importing data, make a back up of both databases.

How to Export Accounting Information

Select button '11. Exporting' to enter the Export Menu.

Select the Customer, Supplier or Inventory button for the information to be exported. The tables will be created in a .txt file. Individually select the records, by toggling the blank white field to a white field with EXPORT displayed, or click the 'Select All' button. After all the desired records are selected, click the Export button along the bottom center of the screen. The export file will be defaulted to C:\MIRACLE\CUSTOMER-SUPPLIER-INVENTORY).TXT unless otherwise stated.

To import the customer, supplier or inventory data, refer to the accounting manual.

Export file: C:\CUSTOMER.TXT	Browse	☐ Show Exported Documents
Export Specification: General Customer List		

CustomerID	Company Name	Bill-To ID	Exported	Select
AIR001	Airlines International	AIR001	No	
BAIL002	Bail & Well Business Solutions	BAIL002	No	
BKS001	BK's Law Office	BKS001	No	
BOM001	Bank of Marion	BOM001	No	
CAMP001	Camp Processing	CAMP001	No	
CAV001	Cave Office Products	CAV001	No	
CVC001	Credit Woodland Cancer Centre	CVC001	No	
DMA001	Dr. Mable Anderson	DMA001	No	

Note: Data is exported in a standard .txt export file layout. It is the responsibility of the person converting the data to reformat and import the data based on the instructions the importing application provides.

Select 'Back' to return to the 'Main Administration Menu'.

Importing

The data importer currently supports the following areas:

- Customers
- Customer Contacts
- Customer Notes
- Suppliers
- Inventory
- Service Equipment
- Invoice Payments
- Meter Readings
- Accounts
- Weight Kits (**Only Available in Weights and Measures Edition**)

The data importer is located in the Miracle Service Administration application. Run the application and select the 'Importing' button to open the Data Import screen. See Figure 1 to view the Data Import screen.

- **Import Type** defines the data type that you are importing.
- **Import File** indicates the source import file
- **Defaults for Null Values** defines the default values that will be used if a null value is encountered for one of the required fields. This is not applicable to all data types.
- **Exclude field on updates** defines the fields that should not be updated when the record already exists in your database. This is not applicable to all data types.

As you will notice a grid appears that lists the column headers that are defined in your source file. Another grid appears with the specific Miracle Service fields that are available for the import type that you have selected. Next is the Column Number from the source file for the mapped field.

To map a column to a Miracle Service Field, simply select the column name and the corresponding Miracle Service Field. Click the right-pointing double arrow button (>>) to bind the column to the field. Click the left-pointing double arrow button (<<) to remove the bind.

Select the Preview First Record box to preview the first record that will be imported.

Notes

- The data importer assumes the first record in your file is the header for the columns therefore the first record will not be imported.
- An asterisk (*) in the Miracle Service Fields list indicates that it is a required field.
- A double asterisk (**) in the Miracle Service Fields list indicates that only one of these fields is required.

Customer Import

Data Import

Import Type: Customer
Import File: C:\CUSTOMER.TXT Browse

Defaults for Null Values:

Tax Group Tax Exempt

Payment Term C.O.D.

Billing Method Email

Payment Type Cash

Exclude field on updates:

☒ Region

☒ Attention

☒ CRM Screens

☒ Long Distance

*required
**one is required

Map the File Column Headers to Miracle Service Fields

Column Headers	Miracle Service Fields	Column Headers	Column #
Customer ID	CustomerID *	Customer ID	0
Name	Company Name *	Name	1
Address 1	BillTo CustomerID **	Bill ID	16
Address 2	BillTo Company Name **		
Address 3	Type of Customer		
City	Address1	Address 1	2
State	Address2	Address 2	3
Zip	City	City	5
BPD	ZipCode	Zip	7
Tax	State	State	6
Country	Country	Country	10
Phone 1	Region		
Phone 2	Email	Email	14
Phone 3	Tax Group	Tax	9
Email	Active		
Website	Comments		
Bill ID	Credit On Hold		
Bill Address 1	Held By		
Bill Address 2	Held Date		
Bill city	Payment Term		

☒ Preview First Record

Field	Data
CustomerID *	FCC001
Company Name *	Forward St. Chruch
BillTo CustomerID *	FCC001
Address1	BBB Discounted
Address2	10325 Bold Camp Rd
City	Pound
ZipCode	24279
State	VA
Country	Giles County
Email	forward@poikmju.com
Tax Group	Federal

Figure 1 - Customer Import

Service Equipment Import

The data importer for Service Equipment has a unique setting that allows users to specify whether each Service Equipment in the source file should be marked as a main system unit. If this option is selected, all of the system configuration fields will be ignored. If this options is not selected, you must define values for 'Main System Unit Flag', 'Main Serial Number' and if applicable 'Main Unit ID'.

Data Import

Import Type: Equipment

Import File: C:\MiracleDB\TestEquipment.txt Browse

*required
**one is required

Map the File Column Headers to Miracle Service Fields

Column Headers	Miracle Service Fields	Column Headers
Unit ID	Cost	
Description	Price Per Mile	
Customer ID	Main System Unit Flag	Main System U
Location Phone Number	Main Serial Number	
Install Date	Main Unit ID	
Purchase Date	Model Class	Model Class
Active	Model Number	Model Numbe
Metered	Metered Model	Metered
Labour Rate ID	Number of Meters	Number of Me
Travel Rate ID	PM Frequency	
Labour Included Flag	PM Period	
Travel Included Flag	PM Start Date	
Main System Unit Flag	PM Clicks	
Model Class	PM Days	
Model Number	PM Last Meter Reading	
Metered	Last PM Date	
Number of Meters	PM Fixed Schedule	PM Fixed Sch
PM Fixed Schedule	IP Address	
Email	Email	Email

☒ Preview First Record

Field	Data
Serial Number *	33050125
Unit ID	
Description	HC PRINTER MAIN UNIT 50
Customer ID *	AIR001
Location Phone Number	864-233-5332
Install Date	28-Jan-13
Purchase Date	28-Jan-13
Active	TRUE
Metered	TRUE
Labour Rate ID	STANDARD
Travel Rate ID	STANDARD
Labour Included Flag	0
Travel Included Flag	0
Main System Unit Flag	TRUE
Model Class	PRINTER
Model Number	HC PRINTER
Metered Model	TRUE
Number of Meters	2
PM Fixed Schedule	FALSE
Email	danica@schaeffersville.org

Figure 2 - Equipment Import

Supplier Import

Data Import

Import Type: Supplier
 Import File: C:\supplier.TXT Browse

Defaults for Null Values:
 Tax Group Tax Exempt
 Payment Term C.O.D.

Exclude field on updates:
☒ Attention

*required
**one is required

Map the File Column Headers to Miracle Service Fields

Column Headers	Miracle Service Fields	Column Headers	Column #
Supplier ID	Supplier ID *	Supplier ID	0
Name	Supplier Name *	Name	1
Address 1	Type of Supplier		
Address 2	Address 1	Address 1	2
Address 3	Address 2	Address 2	3
City	City		
State	ZipCode		
Zip	State	State	6
BPD	Country		
Tax	Email	Email	14
Country	Payment Term		
Phone 1	Tax Number/ID		
Phone 2	Comments		
Phone 3	Account Number		
Email	Tax Group		
Website	Phone		
Bill ID	Fax		
	Other Phone		
	Credit Limit		
	Attention		

Preview First Record

Field	Data
Supplier ID *	DUN009
Supplier Name *	Duncan
Address 1	BBB Discounted
Address 2	10325 Bold Camp Rd
State	VA
Email	forward@poikmju.com

Figure 3 - Supplier Import

Customer Contact Import

Data Import

Import Type: Contacts
 Import File: C:\Contacts.txt Browse

*required
**one is required

Map the File Column Headers to Miracle Service Fields

Column Headers	Miracle Service Fields	Column Headers	Column #
First Name	Customer ID **	Customer ID	2
Last Name	Company Name **		
Customer ID	First Name	First Name	0
Phone1	Middle Initial		
Phone2	Last Name	Last Name	1
Phone2	Comments		
Email	Phone	Phone1	3
Title	Extension		
	Main Contact		
	Fax	Phone2	5
	Other Phone		
	Pager		
	Email		
	Title	Title	7

Preview First Record

Field	Data
Customer ID **	FLE001
First Name	Jake
Last Name	Thomas
Phone	(777) 698-9874
Fax	
Title	Coordinator

Figure 4 - Contact Import

Customer Note Import

Data Import

Import Type: Customer Notes
 Import File: C:\CNNotes.txt Browse

*required
 **one is required

Map the File Column Headers to Miracle Service Fields			
Column Headers	Miracle Service Fields	Column Headers	Column #
About	Customer ID **	Customer ID	2
Text	Company Name **		
Customer ID	Created By User		
Date	Subject	About	0
Phone2	Created Date	Date	3
Phone2	Last Modified Date		
Email	Note	Text	1
Title			

>>
<<

☒ Preview First Record

Field	Data
Customer ID **	FLE001
Subject	Order 123
Created Date	10/29/2010
Note	Customer has inquired about the

Figure 5 - Customer Note Import

Meter Readings Import

To import meter readings into Miracle Service you will need to define a list of meter names for the Serial Numbers that appear in the source file. These meter names must be defined in Miracle Service but do not need to be defined in the source file. Once you have defined your list click the 'Reset Field List' button that will populate the Miracle Service Fields list with these meter names. For each meter name that you define, you will notice that a Reading and Date field appears.

- **Add Meter Names** list of meter names that are defined in Miracle Service for the Serial Numbers that are in the source file.
- **Min days between readings** will limit the number of readings updated in Miracle Service. This helps minimize the amount of meter readings being stored to keep the data file smaller and faster to process.
- **Ignore Nulls** indicates fields that are left blank can be ignored.
- **Customer File** will limit the import to equipment belonging to a customer matching the Customer ID in the import file.

You will notice that two new buttons (+ and -) appear when the Reading field is selected for a meter. These buttons are used to create a simple calculation in the case where a meter reading column contains the summed reading for multiple meters. In the example below, the Black Reading is calculated by subtracting the 'color' value from the 'total' value.

Data Import

Import Type: Meter Readings
 Import File: C:\MiracleDB\msmotor (8).csv Browse
 Date Format: mm/dd/yyyy

Add Meter Names

Black
Color
*

Reset Field List

Options:
☐ 30 Min. days between readings
☒ Ignore Nulls
☐ Customer File

*required
 **one is required

Column Headers	Miracle Service Fields	Column #
Date	Serial Number *	
IP Address	Unit ID	
Manufacturer	IP Address	
Model	Customer ID	
Serial Number	Equipment Location	
Description	Accessories_Part No	
Location	Accessories_Description	
Total Pages		
Monopages		
Color Pages		

>> <<

☐ Preview First Record

Figure 6 - Meter Reading Import

Invoice Payment Import

The invoice payment import will also update the 'Paid' flag on the invoice if the total payments received equals the invoice total.

Data Import

Import Type: Invoice Payments
 Import File: C:\InvoicePayments.txt Browse

Defaults for Null Values:
 Payment Type: Cash

*required
 **one is required

Column Headers	Miracle Service Fields	Column Headers	Column #
Invoice Number	Invoice Number *	Invoice Number	0
Date	Payment Date	Date	1
Amount	Payment Amount *	Amount	2
Payment Type	Payment Type	Payment Type	3
Ref	Reference	Ref	4

>> <<

☒ Preview First Record

Field	Data
Invoice Number *	200024
Payment Date	10/10/2010
Payment Amount *	25.36
Payment Type	Cash
Reference	

Figure 7 - Invoice Payment Import

Inventory Import

Data Import

Import Type:
 Import File:

Defaults for Null Values:
 Category:
 Warehouse:
 Supplier ID:
 Model:
 Tax Category:

Exclude field on updates:
☒ Bin Location

*required
**one is required

Map the File Column Headers to Miracle Service Fields

Column Headers	Miracle Service Fields	Column Headers	Column #
Item	Item Number *	Item	0
Description	Description *	Description	1
Cost	Category		
Retail	Supplier ID		
Location	Supplier Name		
QIS	Supplier Part Number		
Reorder Amt	Unit of Measure		
Serialized	Comments		
	Tax Category		
	Model Class		
	Model Number		
	Metered		
	Number of Meters		
	Retail	Retail	3
	Cost	Cost	2
	Warehouse ID		
	Bin Location	Location	4
	Reorder Point		
	Reorder Quantity	Reorder Amt	6
	Quantity in Stock	QIS	5

Preview First Record

Field	Data
Item Number *	954754
Description *	Lever (coiled)
Retail	129.59
Cost	69.99
Bin Location	A26-1
Reorder Quantity	1
Quantity in Stock	2
Serialized	1
Serial Number	

Figure 8 - Inventory Import

Accounts Import

Data Import

Import Type:
 Import File:

Exclude field on updates:
☒ Null Accounts

*required
**one is required

Map the File Column Headers to Miracle Service Fields

Column Headers	Miracle Service Fields	Column Header	Column #
	Category Name *		
	Revenue Account Number		
	COGS Account Number		
	Asset Account Number		

Preview First Record

Figure 9- Accounts Import

Accounts Import is used to import the Revenue, COGS and Asset accounts to the Category names in Miracle Service. This is helpful when setting up an accounting integration with a large list of categories and related General Ledger accounts.

Weight Kit Import

Data Import

Import Type: Weight Kits
 Import File: C:\MiracleDB\WKit\ImportFileTest.txt

Defaults for Null Values:
 Unit of Measure: lb

*required
 **one is required

Map the File Column Headers to Miracle Service Fields			
Column Headers	Miracle Service Fields	Column Headers	Column #
Kit No	Kit Number *	Kit No	0
NIST	NIST Number *	NIST	1
Cal Date	Calibration Date *	Cal Date	2
Cal Due	Calibration Due Date *	Cal Due	3
Desc	Description	Desc	4
Wt Class	Weight Class	Wt Class	5
Wt Amount	Weight Amount	Wt Amount	6
UOM	Weight Unit of Measure	UOM	7
Wt Tol	Test Weight Tolerance	Wt Tol	8
Heaviest Weight in Kit	Heaviest Weight In Kit	Heaviest Weight	9

☒ Preview First Record

Field	Data
Kit Number *	1212
NIST number *	A55443234
Calibration Date *	2/15/2016
Calibration Due Date *	2/15/2017
Description	50 lb Kit
Weight Class	F
Weight Amount	50
Weight Unit of Measure	lb
Test Weight Tolerance	0.23
Heaviest Weight In Kit	50

Figure 9- Accounts Import

Weight Kit Import is used to import weight kits for use in Miracle Service. This can be done regularly to import kits as new calibration data is updated. The previous kits will remain in the application and should be marked as not active once the update kit and calibration information is imported.

Administration

The 'Administration' features maintain the system security, system messages, table maintenance and database purging.

To access the Administration features select the '13. Administration' button to enter the 'Main Administration Menu' screen.

Main System Administration Menu

Security System Messages

Table Maintenance Purge Database

Security

The 'Security' button enables the administrator to control roles, individual user security and passwords. From the 'Administration Preferences' screen select the 'Security' button to go to the 'Security-Maintenance' menu, where you will see the selection for Roles and Logins displayed.

The screenshot shows the 'Security Maintenance' window. On the left is a sidebar with 'Roles' and 'Logins' options. The main area contains a table with columns 'Role' and 'Description'. The table lists several roles, with 'Contract Administrator' selected. At the bottom, it says 'Showing 6 records' and has an 'OK' button.

Role	Description
Contract Administrator	Contract Administrator Role
Inventory	Inventory Role
Mobile Field Technician admin	Allows administration access to the Mo
Mobile Field Technician standard	Allows access to the Mobile Field Tech
Sales	Sales Role
Service	Service Role

Roles

The Roles feature allows the Miracle Service administrator to create Roles. For example, the Parts Role may only have the ability to add, edit, view or delete Inventory, Supplier and PO related data. Another example, the Service Role may only have the ability to add, edit, view and delete Service, Customer, and Invoice related data.

By creating Security Roles by department or function, whenever new employees are added to Miracle Service, the administrator simply needs to assign them to a Security Role. Use the user Logins screen to assign specific users to a Security Role.

There are two Standard Roles which are dedicated to the Mobile Field Technician Module. They are:

- Mobile Field Technician admin logins - typically used by supervisors as this level grants the user access to all calls open for all technicians in the Group Region.
- Mobile Field Technician standard logins - this is the standard login typically granted to all technicians.

Security Role

Role Name:

Description:

Modules: **Customer** | Service | Inventory | Invoice | Supplier | Purchase Order | Misc

Permission List	
☐	Manage eForms
☐	Miracle Service Administration
☐	Manage Events
☒	Miracle Service
☐	CRM (Manager Level)
☐	CRM (See Own Records)
☐	Mobile Field Technician Console (See Own Records)
☐	Mobile Field Technician Console (Manager Level)

Permission List: The Permission List, defines the departmental add, edit, view and delete functions together for easier assigning of permissions.

The Permission List includes all permissions within the 'Security Role' selected. If the check mark is toggled, the permission is granted for that item. Several Permission Lists offer 'Add', 'Edit', 'View' and 'Delete' functions. Each function can remain off without a check mark or toggled on with a check mark.

When one of the six departmental areas is selected, the 'Permission List' inside the window will change to list the available permissions for that area. The actual permission may be toggled from on or off or the Select All or Deselect All may be clicked. If 'Select All' or 'Deselect All' is clicked, only that departmental area is included.

Modules: The Modules list provides users access to various optional modules in Miracle Service. While all modules are listed, users will only have access to the modules purchased.

To Edit Roles, double click the Role.

Select 'OK' to return to the 'Security Maintenance' menu.

Add New Roles

To add a new Role, click the 'Add New' button to create new Roles as needed. Enter a unique Role Name and Description. Move to each individual tab to grant the needed permissions but checking the items in the Permission Lists.

Logins

The Logins screen is a listing of all individual users with some level of permission to access Miracle Service modules. The users actual permission is based on the Roles they are assigned.

Adding New Users

Click 'Add New' and enter the Login Name in the field provided. This is the name the user will use to login to the module. Enter the password for the user and then enter it again in the Confirm Password field that will appear when you enter a password. Select whether this user is a standard user (User) or a site administrator (SiteAdmin). Select the Roles by checking the box beside the Login Roles item in the list. Another option is to click the 'Select All' or 'Deselect All' buttons. After the Roles have been selected for the User Name, click 'OK'.

To 'Edit' or 'Delete' a User, select the blue left or right arrows to scroll to the proper record and click 'Edit' or 'Delete'.

SiteAdmin: If 'SiteAdmin' is selected, the role permissions stage is skipped as all permissions are turned 'On'. After SiteAdmin is selected, the application will allow the fields to be completed including the password. After the password is entered, click 'OK' to return to the 'Login Security' screen.

Technician: If the user is defined as a technician, click the drop down to link the user login to their technician profile. This now becomes the login for this technician for the Mobile Field Technician Console.

Email: Enter the email for the user. This will be used when sending messages and events to the user.

Region Group: If the users scope of work is limited to a specific Group Region, select their Region Group from the drop down list. This will limit the users view to customers, tasks, invoices, contracts, and sales orders that are linked to the Group Region only.

Select 'OK' to save and return to the 'Security Maintenance' menu.

Change Password

Users with a 'SiteAdmin' permissions can change passwords. Password edits can be performed by selecting the user by double clicking the user in the Logins list. To edit a password from the 'Login Security' screen, select the 'Password' field and enter a new password.

Click the Tab key and the 'Confirm Password' field will display to re-enter the password to confirm the password. If both fields match, the password change will be completed.



Select 'OK' to save and return to the 'Security Maintenance' menu.

System Messages

From the 'Main System Administrative' menu screen select the 'System Messages' button to enter the 'Front End Setup' screen. The path to the server displays in an un-editable blue field. The path information is defaulted from the login database path.

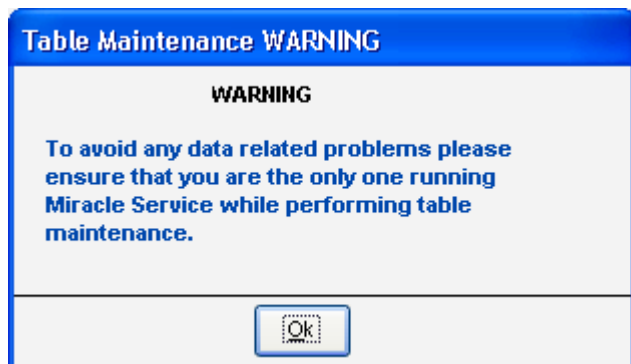
Enter the system and network administrators in the two white fields under the path.

In the event of system or network error, these names will appear on the error messages.

Select 'Exit' to return to the 'Main System Administration Menu'.

Table Maintenance

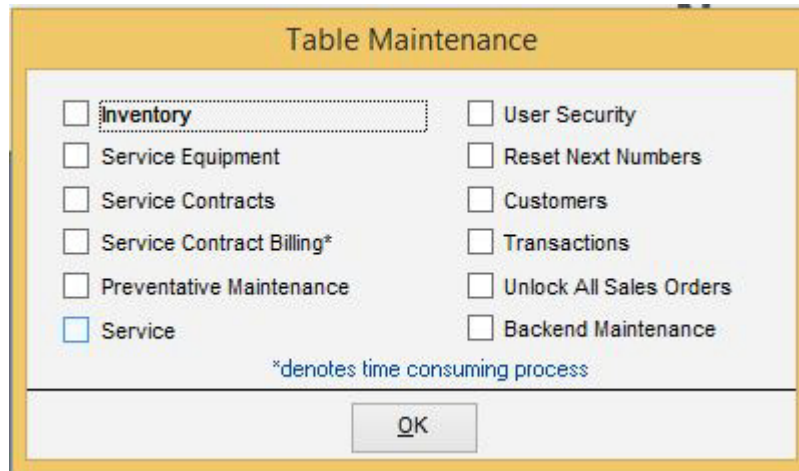
It is highly recommended that the table maintenance feature is run periodically to maintain optimum speed and reduce database anomalies. It is suggested that the table maintenance be run every 60-180 days. It is mandatory to backup your database and ensure no other users are logged in to Miracle Service while Table Maintenance is being completed. Do not proceed past this point if users are still logged in or a backup has not been taken of the database.



Select 'OK' to open the 'Table Maintenance'.

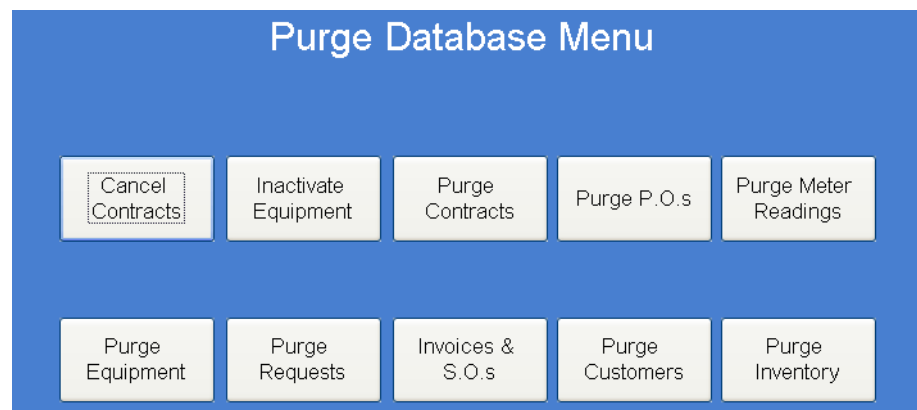
Select any combination of the twelve items to verify. Select 'OK' to start the function. Initially, the process will require a few seconds. Over time as more customers, inventory, equipment, and service contracts are entered into the database this process will require more time to verify the database. Service Contract Billing, which can take a significant amount of time, can be selected once or twice per year for validation and run over a weekend to minimize down time.

Select 'Back' to return to the 'Main System Administration Menu'.



Purge Data

This feature allows the system administrator to periodically purge old and worthless data from the system, thus maintaining optimum speed and conserving storage space.



Each of these screens displays the records that can be purged in a table with the most pertinent information illustrated. The data purge function is laid out in the order in which the data must be purged, working from left to right, top to bottom.

For example:

If you want to purge a piece of equipment, you must first cancel all the contracts for that service equipment. Then you must inactivate the equipment. Next you purge the contracts. Now you can purge the equipment.

Do not attempt to purge data out of sequence.

Purging data removes worthless data and optimizes the application's speed. Data that is purged is permanently removed and deleted from the database. It cannot be restored to the database.

Select 'Back' to return to the 'Main Administration Menu'.

Purge Inventory

Users can Purge only inventory items if needed. This purge is used to remove obsolete inventory items from the database. Since it is likely that the items is also being used on a sales order, sales invoice or service billing, this routine will update all of the related records to point to the 'ZPurgedItem' record in the database. This process enables the removal of the obsolete part number while maintaining the historical information integrity. When you purge an inventory item, all related records are changed and will no longer show the original part number. This processed is used so the pricing of the part can remain part of the profitability analysis of the previous jobs.

If you are purging an obsolete item because it was replaced by a new part number, we recommend using the 'Superseded Part Number' feature. This lets you remove the obsolete part number from the inventory select list, however, it will remain in the superseded list so it can remain linked to historical records.

Automatic E-mail Notification Scheduler

Automatic E-mail Notification Scheduler is designed to be used with either the Customer Web Portal or Meter Center. It is integrated with the contracts module and will check the contracts on a defined schedule to determine if a meter reading is required. When a meter reading is required, the Notification Scheduler will generate an email to the email address on the equipment notifying them that a meter reading is required. If you have purchased the Customer Web Portal or Meter Center service, you are able to configure the E-Mail Notification Scheduler. The following describes the step to configure this E-mail Notification Scheduler.

Add a Scheduled Task

1. Select "Start" from Windows.
2. For Windows 7, select "Control Panel" from the list. Select "System and Security" from the list. Select "Administrative Tools". Select "Task Scheduler" from "Administrative Tools Panel".
3. Select "Create Basic Task" from the Scheduled Tasks panel to open up "Create Basic Task Wizard" window. Enter a Name and Description for the Task.

Create Basic Task Wizard

Create a Basic Task

Use this wizard to quickly schedule a common task. For more advanced options or settings such as multiple task actions or triggers, use the Create Task command in the Actions pane.

Trigger

Action

Finish

Name: Meter Due Notification

Description: This is a scheduled task to check if Meters are due and send an email to advise the user a meter reading is due.

< Back Next > Cancel

Create Basic Task Wizard

Task Trigger

Create a Basic Task

When do you want the task to start?

Trigger

Action

Finish

☒ Daily

☐ Weekly

☐ Monthly

☐ One time

☐ When the computer starts

☐ When I log on

☐ When a specific event is logged

< Back Next > Cancel

Create Basic Task Wizard

Daily

Create a Basic Task

Start: 6/1/2016 10:23:53 AM ☐ Synchronize across time zones

Trigger

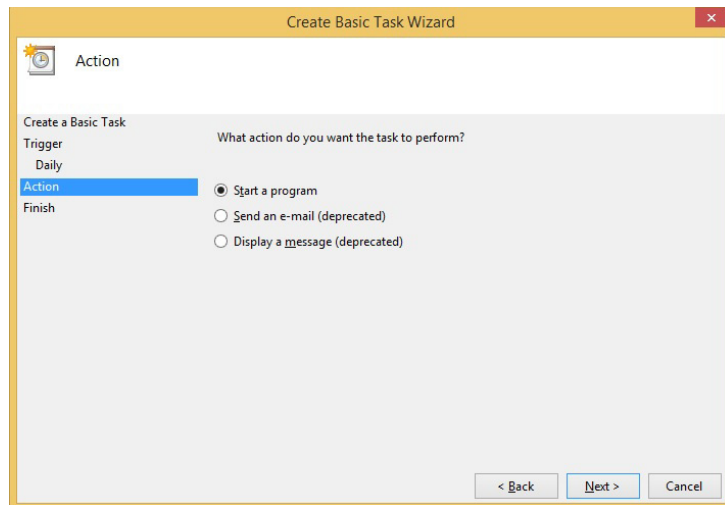
Daily

Action

Finish

Repeat every: 1 days

< Back Next > Cancel



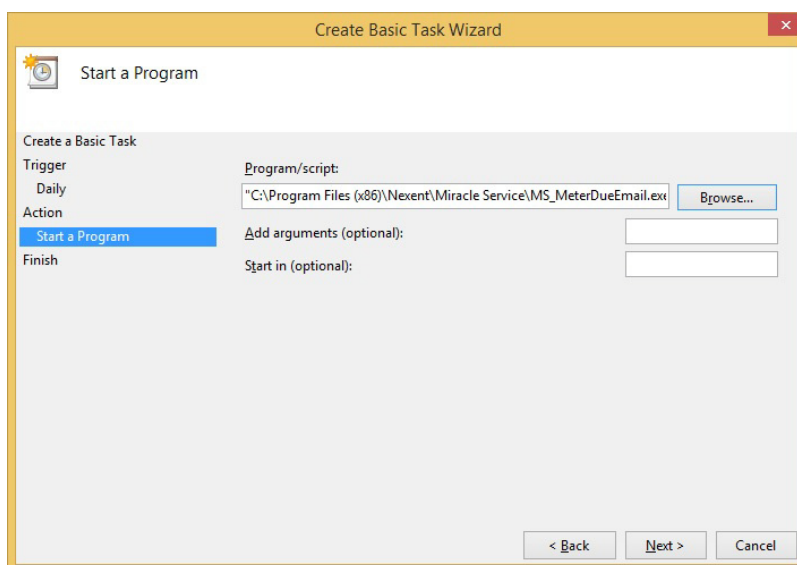
Configure Task Frequency

4. Select “Daily” for “Task Trigger” and click “Next”.

5. Select the time for “Start time”. Enter the ‘Recur every’ number of days

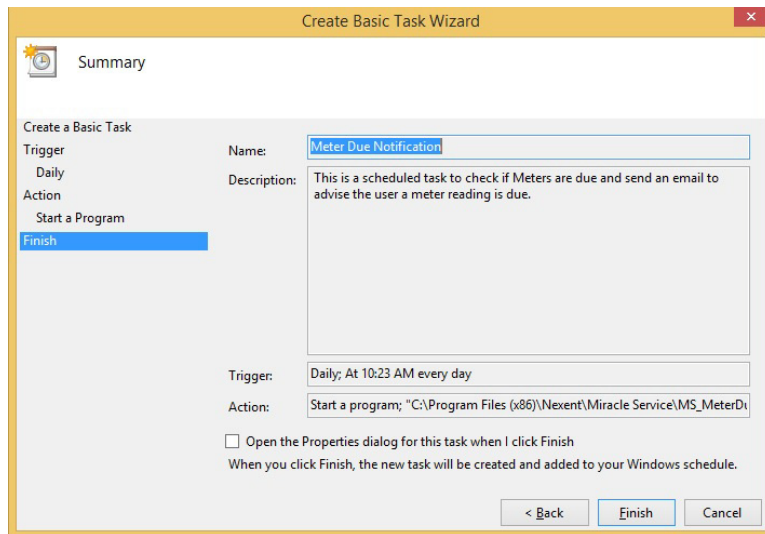
Note: we recommend setting a schedule start time during off hours when there are no or few users in Miracle Service. We also suggest scheduling this time around any automated back-up process you may have established within your organization. This scheduler must not conflict with any database back-up process.

6. Click “Next”. Select “Browse” button and locate the “MS_MeterDueEmail.exe” file. (It should be in your Miracle installation folder, e.g. C:\Program Files (x86)\Nexent\Miracle Service).

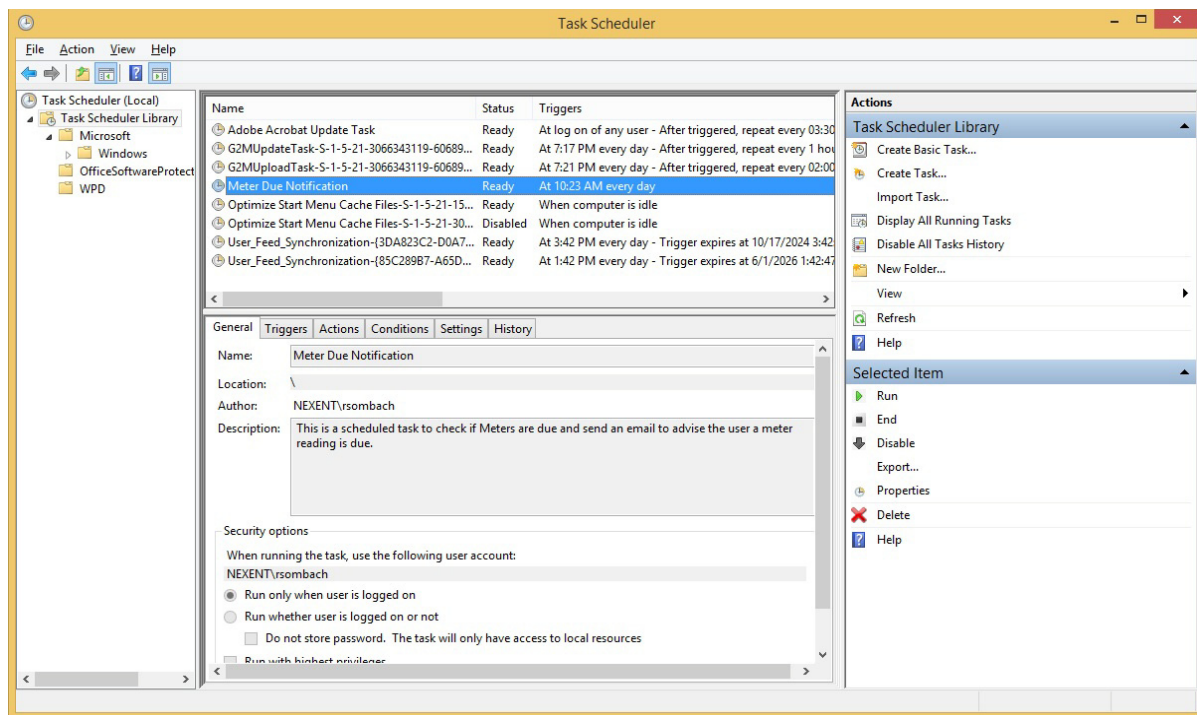


7. Click ‘Next’

8. Click ‘Finish’ button to complete the scheduled task setup.



9. Once the scheduled task is created it will display in the list of Schedule Task set-up in the computer.

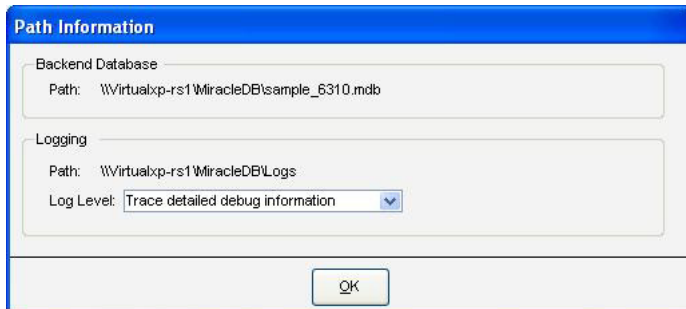


10. Note: Within Task Scheduler panel, you can also view "Name, Schedule, Next Run Time, Last Run Time and Status information. Right click the 'Meter Due Notification' and select "Run" will allow you manually run this task at any time. Right click the 'Meter Due Notification' and select "Properties" to view the Scheduled task window which allows you to make changes on the current settings for the specified task.

Set-up Logging / Trace File Path

The e-mail scheduler support a logging / tracing file that is useful in reviewing the scheduler activity. The scheduler activity logging will provide details on the e-mails that were send along with any errors encountered. To define the location where the log file we be create follow these procedures:

- 1.Open the Miracle Service Administration
- 2.Select Tab 13. 'Administration'
- 3.Select Log Settings.
- 4.Click "Browse" and then browse to the directory folder where you would like the log file to be generated.
- 5.Define the Log Level. There are 5 levels.
 - a.Trace off
 - b.Trace Error
 - c.Trace error and warning information
 - d.Trace debug error
 - e.Trace detailed debug information



Note: the higher the trace level is set, the more information is generated and stored in the log file. We recommend setting this at the "Trace error and warning information" level initially and then modifying this higher or lower depending on the how well the process is working.

- 6.Click OK to save the setting and exit this screen.

Establish E-mail Frequency in Period Billing

Miracle Service has defaults established for the e-mail frequency for the Period Billing Meter Reads. However, it is important to review these settings along with the Contract 'switch' to ensure the system is properly configured for your business. To configure the e-mail frequency and set-up the contract switch, please follow these instructions:

- 1.Open Miracle Service Administration
- 2.Select Tab 8. "Billing Information"
- 3.Select Billing Preference - Period Billing.

This screen contains the set-up parameters for the Emailing Frequency and to define which contracts are included in the Email process.

Period Billing Defaults

Contract Tax Category: TAX All Taxes Apply

Which Tax Group to use for Period Billings: Ship To ☐ Apply each location tax

Parts Tax Category for 'Contract Percent' invoicing (if used): TAX All Taxes Apply

Allow Zero Amount Invoices: ☒

Hide Cost Per Copy information in PB Invoices: ☒

Estimate Meter Readings For Billings: ☐

Cost Per Copy Decimals: 4

Call Buffer (Days): 15

Emailing frequency: Every 2 day(s) within call buffer

Automated Email Send Buffer: 15 day(s) added to the Contract End Date for expired meter contracts

Automated Email Notification Aging Days: 10 day(s) added to the current date to get meters that are due

Period Billing Sort Field: Customer Name

One-Time Charge Invoice Line Description: One-Time Charge

Automatically email meter due notices

Selected contracts: ☒ All contracts: ☐ No contracts: ☐

OK

4. Select the Email frequency using the drop down selection. The E-mailing frequency works with the call buffer set-up on the contract. The number of days will establish how often an e-mail will be sent to remind your customers that a Meter Reading is due. The default is every 2 days. Modify this frequency by selecting the appropriate setting using the drop down list. The options are 1, 2, 3 and 5.

Note: E-mail's will be sent to your customers requiring meter readings starting at the beginning of the call window and will be repeated based on the E-mailing frequency setting. These will continue until the customer updates their meter reading, or until the end of the call window.

5. Next define if you would like to have only 'Selected contracts' e-mailed or 'All contracts' sent an e-mail automatically.

6. Click OK to save the setting and exit.

Event Manager (Optional Module)

Event Manager is a powerful module designed to provide alerts to events occurring within the Miracle Service system. While users are able to identify many of these situations viewing the various screens in Miracle Service, the Event Manager module is designed to push these notifications to users via e-mail. The following events can be monitored and actions triggered with the Event Manager Module:

- Contract Expiry
- Create New Sales Order
- Create New Task

- Document Added
- Login Assistance
- Modify Note
- Modify Sales Order
- Modify Task
- Modify Task by Other
- Note Added
- Overdue Task
- Parts Below Min
- Parts Needed
- PM Due
- Sales Order Converted
- Sales Order Status Update
- Select Customer (Contract)
- Select Customer (Inv)
- Select Customer (SO)
- Select Customer (Task)
- SLA Warning
- Task Assigned
- Task Cancelled
- Task Completed
- Task Rescheduled
- Task Unassigned
- Task Web Closed
- Uploaded Invoice

Description	Event Type	Action
-------------	------------	--------

Buttons: Add Event, OK

Users can add events and also setup the same event multiple times with the required to send the events to different individuals.

Create Events

Click Add Events to create a new event definition.

Event Notification Definition

Description: ☒ Active

Event:

Apply To: ☒ All Customers

Module: ☐ Miracle Service ☐ Customer Portal ☒ Mobile Field Technician Console

Action: ☐ HTML

Use the help buttons (?) to include data fields in the 'Recipients', 'Subject' or 'Email Text' fields (do not modify the data fields). To send to multiple email recipients, use a semicolon (;) to separate the recipients. You can also type in an email address directly.

Recipients:

Subject:

Email Text:

B *I* U

Buttons: Save, Cancel

Description: Create a description of the event rule. This is free form and should help users recognize the purpose of the defined event notification.

Event: Select the event type from the drop down events. Some events also required additional parameters to be set such as number of days before a a contract expires do you want the notification to be sent.

Apply To. Selects if the event will apply to all items in the select group.

Module: Some event type are only available to be used with specific modules. This area will identify which module the Event Type is available to use. If multiple modules are supported, the user will need to check the modules where the event will be triggered.

Action: Select the action that should occur when the event is triggered. Currently email is the only selectable action for many of the Actions. Some also support Highlight and Alert Actions.

Recipients: Specific Recipients email addresses can be entered. Also users can click the [?] fields button to select to use data fields where the Recipients will be different for each alert notification event. For example the alert can be sent tot he SalesPerson for a contract expiry.

Subject: Define a subject for the notification message. The subject can include field variables which can be entered or the field variables selected by clicking the field variables [?] button. Field variables will be added to the end, but can be copied and pasted in to the text of the Subject as needed.

Email Text: Define the body of the email for the notification message. The Email Text can include field variables which can be entered or selected by clicking the field variables [?] button to the right of the field. Field variables will be added to the end, but can be copied and pasted in to the text of the Subject as needed.

Event Notification Definition

Description: Certificate Notification ☒ Active

Event: Task Completed Include Documents: None

Apply To: ☒ All Customers

Module: ☒ Miracle Service ☐ Customer Portal ☐ Mobile Field Technician Console

Action: Email ☐ HTML

Use the help buttons (?) to include data fields in the 'Recipients', 'Subject' or 'Email Text' fields (do not modify the data fields). To send to multiple email recipients, use a semicolon (;) to separate the recipients. You can also type in an email address directly.

Recipients: [EQUIPMENTEMAIL] [EQUIPMENTMULTIEMAIL]

Subject: [TASKID] is Completed

Email Text: [TASKID] is completed. Attached are the documents for this task.
[TASKDESCRIPTION]

Save Cancel

Once the Event Notification Definition is created click 'Save'. Event Notifications can be modified or deleted at anytime.

Event Notification Definitions

Show Action: All Customer: All Module: All ☐ Show Only Apply To All

Description	Event Type	Action	Module	Customer
+ Email Test	Email Test	Email	CP, MFTC	
+ New Job Confirmation	Create New Task	Email	MS, CP, MFTC	
+ New Sales Order	Create New Sales Order	Email	CP	
+ New Task for Equipment	Create New Task	Email	MS, CP, MFTC	
+ PO Required	Select Customer (Task)	Alert	MS	Airlines International
+ Request for Login Assistance	Login Assistance	Email	CP	
+ Request Job Cancel	Task Cancelled	Email	CP	
+ Request Sales Order Update	Sales Order Status Update	Email	CP	
+ Unassigned for 3 minutes - Filtered	Task Unassigned	Email	MS	BK's Law Office

To Modify an event click the zoom [+] button and modify the event information or click the 'Delete' button to remove the event from the event notification list.

Note: Events will only be triggered if the Server Console is active and running on the server where the database is installed. The Server Console is an optional module installed separately.

Chapter 6

My Preferences

My Preferences provides users the ability to define how Miracle Service will work for them. Users can configure their preferences and this will define how they can view and search in Miracle Service to meet their specific needs.

This allows each user the ability to configure how they would like to view standard information. User can define the fields to view and the order of the fields to suit their specific preferences. These can be configured for the following main screens. These are called Area:

- Customers
- Service
- Equipment
- Contracts
- Inventory
- Suppliers
- Purchase Orders
- Sales Orders
- Sales Invoices

- Service Invoices
- Period Invoices
- Open Work Orders
- Billing & Invoicing

Make this my Start Screen. This setting will let users define the first screen they see when they start Miracle Service. So if a user primarily uses the Service Area, they can set Service as their start screen.

My Email. Users can set their e-mail address. This will be used when the created user's e-mail is used in Miracle Service.

Region Group. Users can be assigned to a Region Group. Region Groups are configured in the Miracle Service Administration. When a user is assigned to a Region Group, they will be able to only view information for customers that belong to that Region Group. The Region Group for a customer is based on the Shipto Region of each customer so if a customer has multiple sites, a user will be able to see the sites that are within their Region Group only.

Region Groups are useful for companies that have multiple offices or manage groups of customers.

Select Fields to Display for this Area. Users can define the fields they will be able to view in the Data Sheet View of each area. They can select a field from the Available Fields list and click the arrow to add it to the Your Displayed Fields list. There can be a maximum of 20 fields in Your Displayed Fields list.

Users can adjust the order of the fields by selecting a field in the Your Displayed Fields list and then move the field up or down by clicking the Move Up or Move Down button.

Display Sort Order. This will let users define the primary sort order of the data sheet view as Ascending or Descending. The sort will be set on the first field in the data sheet view.

Date Range. When the records have a date associated with them the user can limit the date range of the records to view. This will select records for a date range from the current date back to the oldest in the date range.

Date Range Field. This will define the date field that the Date Range is using in the filter selection.

List Search versus Field Search

There is a primary view selection users can make to each Area. Users can select to use a List Search view or a Field Search view.

List Search View

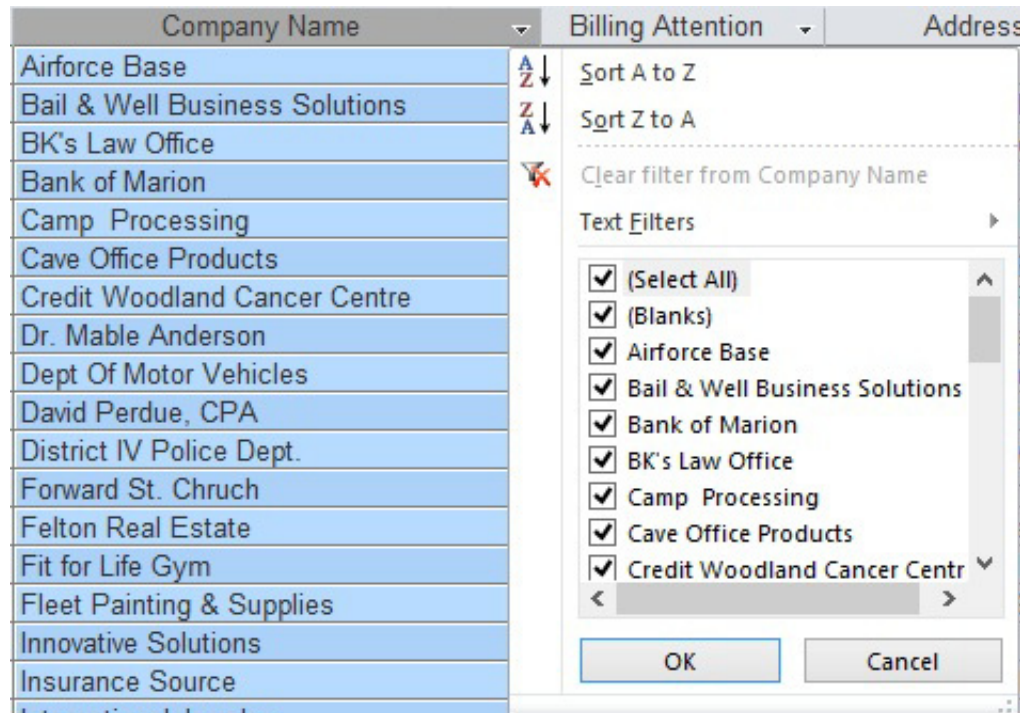
The List Search view is the default view setting. With this view users can select to filter this view based on the available settings below in the List Search view settings. These will be different for each Area.

Refresh Interval. In the List Search view users can define to have the screen refresh automatically. If this is left at 0 the list will not automatically refresh and users will need to manually refresh those screens. To have the screen refresh automatically they can define the refresh interval in milliseconds. We recommend this be set quite high such as 60000 milliseconds; however, users can set this to meet their preference.

Quick Search Clear All Views Add New													
Customer ID	Company Name	Billing Attention	Address 1	City	State	Zip Code	Phone	Salesperson	Payment Term	Vertical Market	VIP		
AIRO01	Airforce Base	BETH	10368 Wallace Alley Street	Kingsport	TN	37663	5552790788	Bob Johnson	Net 30	Government	No		
BAIL002	Bail & Well Business Solutions	Richard Wade	4001 Steelburgh Highway	Cedar Bluff	VA	24609	5559637336	Sheila Fraser	Net 30	Contract Customer	No		
BKLS001	BK's Law Office		634 Middle Creek Rd	Sevierville	TN	37862	(655) 248-7632	Gail Anderson	Net 30	BBB Discounted	No		
BOM001	Bank of Marion		102 W Main St	Marion	VA	24354	5557833116	Gail Anderson	Net 10	Contract Customer	No		
CAMP001	Camp Processing		2146 Kings Mill Pike	Bristol	VA	24201	5554662311	Gail Anderson	Net 10	Standard Retail	No		
CAV001	Cave Office Products	Jimmy Mitchell	1235 VA KY Opry Building	Norton	VA	24273	(655) 393-2967	Bob Johnson	Net 30	BBB Discounted	No		
CVC001	Credit Woodland Cancer Centre		1 Professional Park Dr	Johnson City	TN	37604	5559260063	Bob Johnson	Net 30	Government	No		
DMA001	Dr. Mable Anderson	Teresa Gates	512 Cherry Street	Bluefield	WV	24701	5553242719	Bob Johnson	C.O.D.	Standard Retail	No		
DMV001	Dept Of Motor Vehicles		45568 Jefferson Blvd	Big Stone Gap	VA	24219	(655) 523-8119	Sheila Fraser	Net 30	Government	No		
DPC001	David Perdue, CPA	Dixie Parks	225 Park Boulevard	Marion	VA	24354	(655) 783-1551	Sheila Fraser	Net 30	Contract Customer	No		
DST111	District IV Police Dept.	Brenda Muncy	4453 Lee Highway	Marion	VA	24354	(655) 783-7157	Bob Johnson	Net 30	Government	No		
FCC001	Forward St. Chruch		10325 Bold Camp Rd	Pound	VA	24279	5557969201	Sheila Fraser	Net 30	BBB Discounted	No		
FEL001	Felton Real Estate		1228 Gay Street	Dandridge	TN	37725	(655) 397-7555	Gail Anderson	Net 30	Contract Customer	No		
FIT001	Fit for Life Gym		1760 Mooreville Hwy	Lewisburg	TN	37091	5553599806	Gail Anderson	Net 30	Standard Retail	No		
FLE001	Fleet Painting & Supplies		207 West 8th Street	Columbia	TN	38401	(655) 452-8723	Joe Smith	Net 30	Standard Retail	No		
INN001	Innovative Solutions		9040 Executive Park Drive	Knoxville	TN	37923	(655) 542-8639	Sheila Fraser	Net 10	Standard Retail	No		
INS001	Insurance Source		967 Dollywood Parkway	Sevierville	TN	37862	(655) 428-2301	Bob Johnson	Net 30	BBB Discounted	No		
INT001	International Jewelers	Chad Barr	851 French Moore, Jr Blvd	Abingdon	VA	24210	(655) 706-1680	Sheila Fraser	Net 30	Contract Customer	No		
INTER001	International Computer Sales		5032 S Davey Crockett High	Morristown	TN	37813	5553181200	Gail Anderson	Net 30	BBB Discounted	No		
INTEX001	Intex Canada Corp.		7430 Copenhagen Rd.	Mississauga	ON	L5N 2C9	(655) 814-8204	Bob Johnson	Net 30	BBB Discounted	No		
KEL003	Keller Wilson Realty		2010 Elmer Pogue Dr.	Columbia	TN	38401	5553888898	Sheila Fraser	Net 30	Standard Retail	No		
KFD001	K's Foods	David Werth	26331 Hillman Highway	Abingdon	VA	24212	5556235000	Bob Johnson	Net 10	Standard Retail	No		
KING001	Kingsway Trucking	TOM LARSON	1350 King College Road	Bristol	TN	37620	5556524765	Bob Johnson	Net 30	Standard Retail	No		
KING002	King Dentistry	Kecia Salyers	1119 Commonwealth Avenue	Bristol	VA	24702	5554663014	Bob Johnson	Net 10	Contract Customer	No		
KIS001	Kissinger Furniture	Gary Kiser	619 West Main Street	Abingdon	VA	24210	(655) 628-7341	Gail Anderson	Net 30	Standard Retail	No		
LAND001	Land and Sea Tours	Joe Hogan	1291 New Cut Rd.	Spartanburg	SC	29305	(655) 576-6280	Bob Johnson	Net 30	Contract Customer	No		
MSP001	Mike Smith Pontiac	Daniel Johnson	1201 Tusculum Boulevard	Greenville	TN	37745	(655) 639-5151	Sheila Fraser	Net 30	Standard Retail	No		
TAS001	The After School Place	Melinda Turner	910 Alpha Drive	New Tazewell	TN	37825	(655) 626-3323	Sheila Fraser	Net 30	BBB Discounted	No		

A 'Quick Search' feature is available in the List Search screens. Once a List Search is generated user can enter a Quick Search string which will search all field in the List Search view and return the records that match the Quick Search parameter.

List Search also provides users with a dynamic filtering feature. When viewing a List Search view, users can filter the list by setting a filter on each column. Records can also be easily sorted by selecting a column and selecting either to be sorted in ascending or descending order.



The filtering presented to the user will be based on the field format. If the field is a text field it will present Text Filters, if it is a date field it will present Date Filters and if it is a numeric field it will present Number Filters.

Field Search View

Field Search view should be used in lists that have a large number of records. This will ensure users are not waiting while a large list of records is being generated from the database. This will help with overall performance.

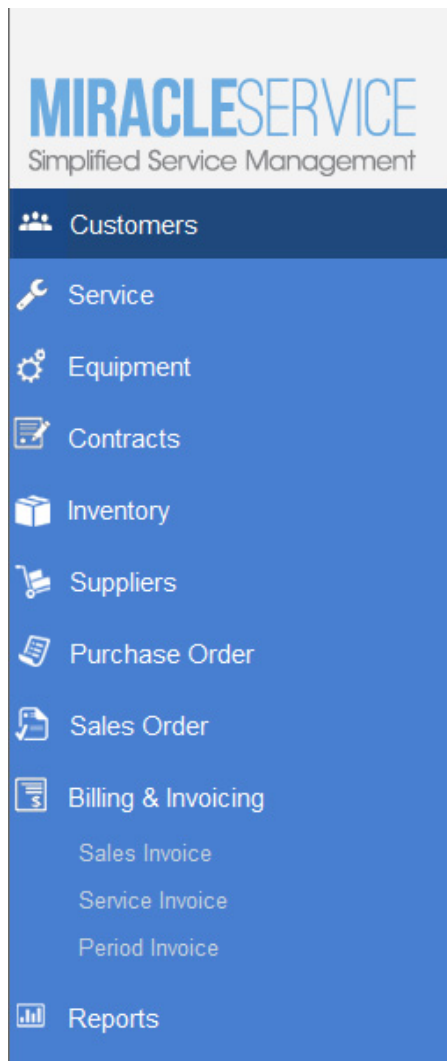
When using the Field Search method, users can define the 5 primary fields to search. User can also define on the search screen if the field 'Contains', 'Equals' or 'Starts With' the search criteria entered in the field giving users greater control over how information can be search for in Miracle Service.

New Search Search

Invoice Number		Contains
Invoice Date		Equals
Bill To ID		Starts With
Bill To Name		
Cust PO		
Choose Field		
	and	

Chapter 7

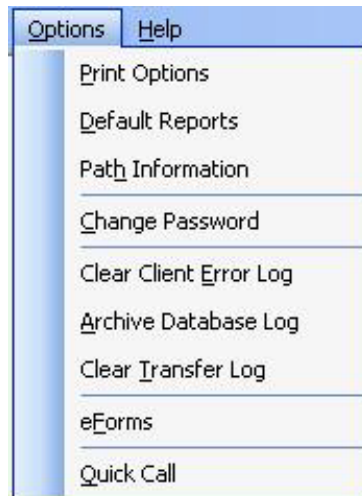
Miracle Service Application Main Menu



This is where the operations of the Miracle Service application take place. Prior to entering any information in this section, the Administration Application must be 100% complete. Any attempt to enter information in the Miracle Service application will result in database errors.

Options Menu

In the Top Left corner of the Main Menu is a drop down menu called Options. This menu is available from any screen in Miracle Service.

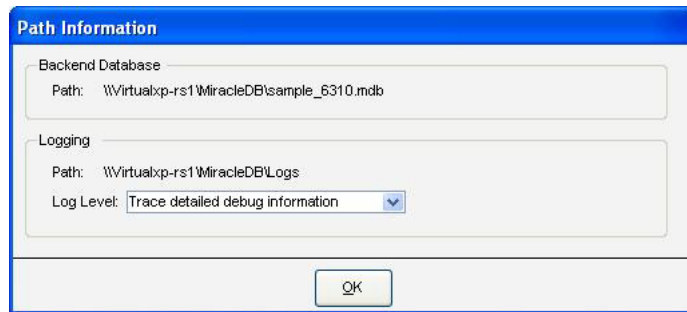


Print Options: Configures the Print Preview mode for many of the documents in Miracle Service.

Default Reports: Select the default report to be used when printing various documents in Miracle Service.

Path Information: Identified the Backend Database path and the log settings.

Logging Settings



The screenshot shows a 'Path Information' dialog box. It contains two main sections: 'Backend Database' and 'Logging'. In the 'Backend Database' section, the 'Path' is set to '\\Virtualxp-rs1\MiracleDB\sample_6310.mdb'. In the 'Logging' section, the 'Path' is set to '\\Virtualxp-rs1\MiracleDB\Logs' and the 'Log Level' is set to 'Trace detailed debug information' via a dropdown menu. An 'OK' button is located at the bottom right of the dialog.

These settings will define the path for the log file and its Log Level. The 'Log File Path' must be an existing directory. If the directory is not existing, it must be created using your Windows File Explorer. The 'Log Level' defines level of information you would like to log with the application. There are five levels of tracing:

1. Trace off
2. Trace error
3. Trace Error and warning information
4. Trace debug error
5. Trace detailed debug information

The higher the trace level is set the more detail is collected by the process. It is recommended to keep this tracing low unless you are experiencing problems and can then reset the level higher to capture more information.

Change Password: Is used to change the user's password.

Clear Client Error Log: Is used to clear the Client Error log. This is a log file unique to a user's desktop that stores the error messages the user receives.

Archive Database Log: Is used to archive the database log. The database log captures transaction events which identify user activities.

Clear Transfer Log: Is used to clear the inventory transfer log. This log captures the movement of inventory between locations. This is generally not cleared, but may be cleared after a stock count period.

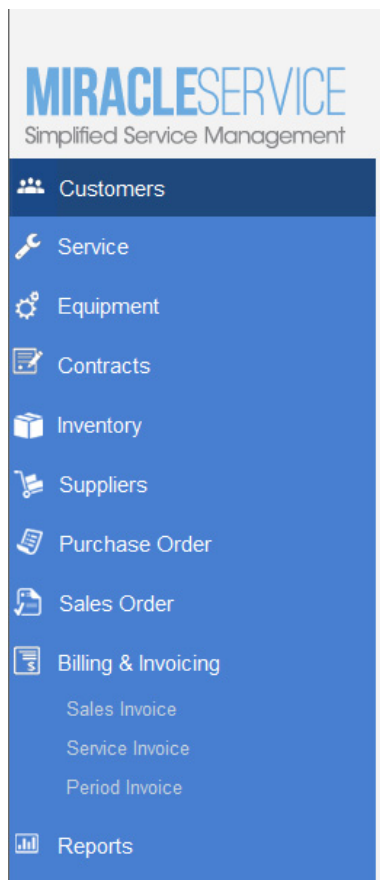
eForms: Is used to set-up and configure the eForms that will be used in Miracle Service. eForms is an optional module and detailed information on the set-up of the eForms is in the eForms section later in this manual.

Quick Call: Is used to launch a Quick Call from anywhere in the application. This lets users immediately launch a Quick Call at any time from anywhere in the application.

Chapter 8

Customers Menu

From the Main Menu, click on the Customers button to display the customer view.



The Customer Center holds information on the people or companies your company sells to or provides services for. The Customer Center also provides a roll-up of information on the customer and is a convenient center to review the details on a specific customer site.

Customer Center Screens

The screenshot shows the 'Customer Center' interface. At the top, there's a blue header with 'Customer Center'. Below it, a navigation bar includes 'Customer Type', 'Bill To' (selected), and 'Ship To'. The 'Customer ID' is 'AIR001' and the company name is 'Airlines International'. A menu bar includes 'Main', 'Requesters', 'Invoices', 'Equipment', 'Service Tasks', 'Service Contracts', 'Sales Orders', 'Sites', and 'Return Orders'. The main form area contains fields for 'Company Name', 'Billing Attention', 'Address', 'City', 'State', 'Zipcode', 'Country', 'Long Dist.', 'Phone', 'Fax', 'Email', 'Website', 'Region', 'Vertical Market', and 'Sales Person'. There are also checkboxes for 'Active Customer' and 'VIP Customer', a 'Comments & Location Directions' text area, and fields for 'Start Date', 'Web Active', 'Web Password', and 'Miles Away'. At the bottom, there are buttons for 'Financial Info', 'Pricing Info', 'User Screens', 'Documents', 'Notes', 'Export Templates', 'Events', 'Map', 'New Customer', 'Edit Customer', 'Delete Customer', 'Reports', 'Print Statement', and 'Exit'.

Click 'New Customer' to add a new customer and 'Edit Customer' to edit the existing customer. To complete the Customer screens, supply the information requested.

Note: Additional data entry fields appear after required fields are properly populated. This method reduces data entry error.

Bill to – Ship to

The screenshot shows a selection interface with two radio buttons. The first is labeled 'Bill To' and is selected. The second is labeled 'Ship To'.

Select whether this record is a Bill-To or a Ship-To customer.

Bill To

These are customers who purchase goods and services as well as pay for those goods and services.

If this customer purchases goods and services as well as pay for those goods and services, they should be identified as a Bill-To customer. Enter a unique Customer ID.

Ship To

These are customers who purchase goods and services, however, the sales invoices or the service invoices are sent to another location.

The screenshot shows two input fields. The first is 'Bill To ID' with the value 'DMV001'. The second is 'Company Name' with the value 'District IV Police Dept.'.

If this customer will purchase goods and services but the sales invoices or the service invoices are sent to another location, (for example a regional office or head office), they should be identified as a Ship-To customer. Enter a unique Customer ID.

Customer ID

The Customer ID is a unique alphanumeric identifier. The Customer ID can be used to differentiate between customer records with the same company name.

Customer ID	ABC200
--------------------	--------

Most accounting applications use the Customer ID to import information. If your company plans to use the accounting exporter function in Miracle Service, the unique Customer ID must be the same in both applications.

After the customer record has been identified as a Bill-To or a Ship-To record, enter a unique Customer ID.

Enter an alphanumeric identifier. Letters, numbers, spaces, and underscores are acceptable characters. Do not use special characters, such as quotes and apostrophes. For example, ABC Company may be ABC-001 or ABC001. Enter the customers name when the field appears. Select [Enter] to continue with your 'Data Entry' screen.

Tab Navigation

Main	Requesters	Invoices	Equipment	Service Tasks	Service Contracts	Sales Orders	Sites
------	------------	----------	-----------	---------------	-------------------	--------------	-------

The Tabs contain a view of the related information for the customer displayed on the 'Main' tab. Click on the tab to view the specific related details for this customer. The default filtering for the information displayed in the Tabs is configured in the Administration setup.

Main Tab Fields

Ship to – Sometimes Bill to?

These are customers who purchase goods and services, however, the sales invoices or the service invoices are periodically sent to a third party. Check this box when adding companies, which periodically want invoices, sent to third parties for payment.

If this customer will purchase goods and services but the sales invoices or the service invoices are periodically sent to another location, they should be identified as a Sometimes Bill-To customer. For example, Equipment Sales are billed to head office, Service Contract Renewals are billed to regional offices and consumables are billed to the location that purchased the items.

Sometimes Bill To ☐

Active Customer ☒

VIP Customer ☐

Active/Inactive Customer

This flag identifies customers as active or inactive. Sales Invoices, Service Calls and Service Contracts can be created for active customers. Customers no longer purchasing goods or requesting services may be identified as inactive.

The 'Active Customer?' box appears on the 'Customer Data Entry' screen.

The default setting is checked to indicate Active.

Miracle Service will not allow sales invoices or service calls on inactive accounts. Bill-To records cannot be de-activated if it has an active Ship-To record associated to it. Likewise a Ship-To record cannot be activated if it has an inactive Bill-To record associated to it.

Customer records cannot be de-activated with activity associated to it.

VIP?

This flag will identify VIP customers when creating Service Calls. This helps ensure customers needing specialized attention can be identified during the Service Call creation process.

Vertical Market

This optional field identifies customers, belonging to different groups, for example, Retail, Government, School Board etc.

Select the Vertical Market this customer record is best associated to.

The Vertical Market field may be used to differentiate customers by types of organizations or by level of patronage.

Other Fields

Enter the Address and Other Customer Information. This information will print on all customer reports or invoices.

Billing Attention

Enter information that will help direct billing to the proper person. When creating an envelope or invoice, for example, the 'Billing Attention' line will appear.

Web Active Customer?

If you have purchased the optional Customer Self Service Portal you will see the options that enables a customer to access the Customer Self Service Portal. If you check the 'Web Active' customer box, this identifies this customer as a customer that can access the Customer Self Service Portal.

If you have marked the customer as a 'Web Active' customer, it is critical that you set-up a password for this customer. This is just the initial password, as the customer is able to change this password once they first log into the Customer Self Service Portal.

Miles Away

This field is only displayed if the feature is selected in the Service Call Default setup in Miracle Service Administration - Service Preferences menu. If the setting "Calculate charges based on defined customer mileage and expense rates." is set, this field will display. The value entered in this field is the default mileage that will be added to a task as the mileage used for this customer location to calculate mileage.

Special Info Buttons



The Special Information Buttons offer additional information. There are four buttons available for customer information. (See 'Application Conventions' for 'Special Info Buttons')

Financial Info

This screen provides details of the financial relationship between the dealership and their customers.

The first things to attract attention are the 'Release' and 'Hold' buttons. These refer to the account status. All customer accounts are defaulted to 'Release' Mode. To put a customer on credit 'Hold', click the Hold button. The yellow plus key, next to the 'Hold' status will inserts the user, date and time that the account was put on 'Hold'. Clicking the 'Release' button removes the credit hold.

If an account is on 'Hold', a warning light is displayed on the service call request screen when a service call is being created. The flag informs service call takers that the customer is on 'Hold'.

The 'Tax Group' and 'Payment Terms' are defaulted. Select a different 'Tax Group' and/or 'Payment Term' if applicable. Enter the Credit Limit for this customer.

Pricing Information

This determines the customer specific pricing information on inventory items.

Select the 'Pricing Information' button to open the 'Edit Customer's Pricing Information'.

Retail: If 'Retail' is selected, the customer receives regular retail pricing. New customers are automatically defaulted to 'Retail' pricing.

Quantity Pricing: If 'Quantity Pricing' is selected, this customer receives quantity pricing on specific inventory items identified in this feature. Quantity pricing levels are set up in the 'Inventory' module under 'Quantity Pricing'. (See the 'Inventory' section.)

Price Group: If 'Price Group' is selected, an additional Price Group ID field appears. Select the applicable price group from the drop down list.

Select the 'Zoom [+]' button, next to the drop down box, to view the 'Price Group' screen. Use the blue arrows or the search fields to view the list of price groups. Price Groups are maintained in the Administration program.

Special Pricing: The 'Special Pricing' feature allows specific pricing for a set amount of time on specific items. This feature is useful for making special deals with customers. For example, if sales won a contract from a local school board with a condition to hold prices for specific items for a year, those items would be identified here.

Item Number	Retail Price	Cost Price	Special Price	Expiry Date
A147258	\$15.99	\$9.68	\$12.95	
A369852	\$42.99	\$20.65	\$35.00	5/15/2012
	\$0.00	\$0.00	\$0.00	

Note: When items are entered on a sales or service invoice, customer specific pricing is determined in the following order...

1. Does the customer have a valid 'Special Price' for this item? If so, use this price.
2. Does the customer belong to a Price Group with a margin on this item category? If so, use this price.
3. Does the customer receive item quantity breaks, and is quantity pricing applicable? If so, use this price.

4. If none of the above rules apply, use the item's retail price set up in inventory.

The Special Pricing list is also used with the Compatible Parts feature. When the Compatible Parts feature is active, the list will also be used to filter parts in selected categories so only those specific items can be selected for a customer. See the Compatible Parts feature in the Inventory setup section of the manual.

Service Billing Defaults: When a service call is taken and no equipment is selected, these charges will apply for labor and travel. When a call is taken and equipment is selected, Miracle Service will use the equipment (or contract) labor and travel charges instead of these values. When new equipment is added to a customer's serviceable equipment table, this default charge will apply.

User Screens

These user-defined screens may be used to store addition customer specific data.

See 'User Screens' in your 'Application Conventions' screen.

Requesters

These are the people who call to request service. The information for these fields may be entered later when entering service calls.

When service calls are entered, select the person requesting the service from the drop down list or enter the new requesters name and information.

Opt-in can be checked on the Requester to identify which requester would like to receive e-mail information for your company. When you generate reports with Requesters, this field may be included and used to identify which customers have agreed to receive e-mail from your company. This is intended to help your company be compatible with various SPAM legislation that may be in place in your area.

Print Statements

It is possible to print receivable aging statements if the payments are being tracked. When invoice payments are entered in the invoice screen, it is possible to print a current statement for the customer at any time. When you print a statement on a Bill to record it will contain all of the invoices for work or contracts at all of the related sites.

Documents (Optional)

Documents can be attached and viewed in the documents screen. Selecting the documents button will open the Document Management screen. The Document Manager is integrated throughout the application. It is possible to attach documents to customers, contracts, equipment, sales orders, and service tasks. From the Documents button in the Customer Maintenance screen, users can find all the documents relating to the customer.

Notes

Notes can be recorded in various areas of the application. They can also be recorded in the Customer Center. All Notes can be viewed in the Customer Center and the Notes are can be filtered to only show notes for specific areas.

Notes
System Notes

Subject: [Navigation icons]

Show: Customer ID: **AIR001**
Airlines International

☐ Show for A Date Range

Record Count: 1

Subject	Note	Date Created	Added By User	Note Type	Record ID	Last Updated
Discussion with custom	This is a record of the discussion with the cus	12/21/2010 12:09:39 P	siteadmin	Task	46-1	12/21/2010 12:09:39 P

Users can select the filter to view just Task Notes or All Notes.

Notes can also be filtered by date range. Select the 'Show for a Date Range' and then enter a start and end date range.

Finally Notes can also be searched using the Search feature at the top right of the window. Wildcard characters can also be used in the search to find where the text is at the beginning, middle or end of the text being searched.

It is also possible to sort the notes by clicking the arrow at the top of the column. The highlighted arrow shows which column is the sort column and the up or down arrow indicates if the sort order is ascending or descending order.

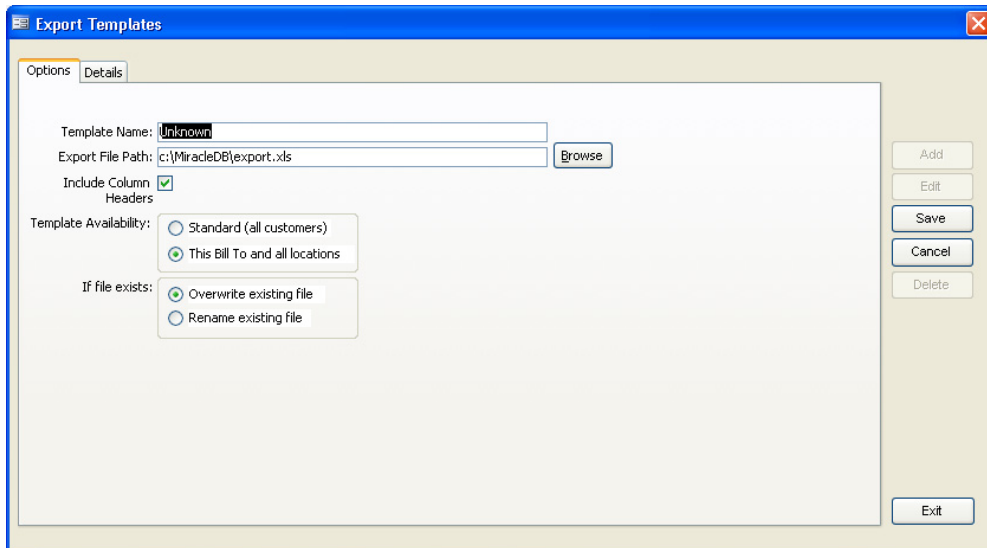
When Notes exist for a customer record the 'Notes' will be displayed in a green font.

Export Templates

The Export Templates supports the Period Billing Exporter. It is a powerful tool that allows users to create custom detail billing Excel export files. User can add all of the necessary fields required to report the details of a Period Billing invoice and export this to Excel.

Export Templates can be defined by Customer or as a standard template available for use on all customers Period Billing Invoices.

To create a new Export Template, click the 'Export Templates' button and click Add.



The 'Export Templates' dialog box is shown with the 'Options' tab selected. It contains the following fields and controls:

- Template Name:** A text box containing 'Unknown'.
- Export File Path:** A text box containing 'C:\MiracleDB\export.xls' with a 'Browse' button next to it.
- Include Column Headers:** A checked checkbox.
- Template Availability:** Two radio buttons: 'Standard (all customers)' and 'This Bill To and all locations' (which is selected).
- If file exists:** Two radio buttons: 'Overwrite existing file' (which is selected) and 'Rename existing file'.
- Buttons:** 'Add', 'Edit', 'Save', 'Cancel', 'Delete', and 'Exit' are located on the right side of the dialog.

Define the following report options:

Template Name: enter a name for the template

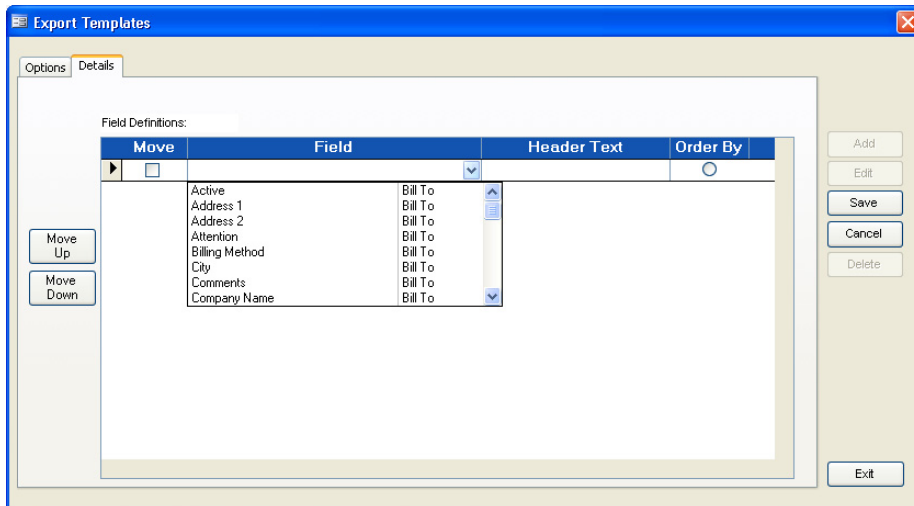
Export File Path: enter a path where the report is to be exported. Please consider any Network specific issues in defining this path. If you select the C: drive, it will always be exported to the users local drive. If you prefer to export to a network drive, it is best to use a standard Mapped drive that is defined the same on all PC desktops.

Include Column Headers: check this box if you want the column headers included in the exported Excel file.

Template Availability: Select "Standard" if all customers should have access to this template or select "This Bill To and all locations" if the template should only be available to the Bill to and related ship to locations.

If file Exists: Select how you would like to system to handle the situation where the export file already exists.

Next click the 'Details' tab to select the fields to be exported in the template being defined.



The 'Export Templates' dialog box is shown with the 'Details' tab selected. It displays a table of field definitions for export.

Move	Field	Header Text	Order By
☐	Active	Bill To	☐
☐	Address 1	Bill To	
☐	Address 2	Bill To	
☐	Attention	Bill To	
☐	Billing Method	Bill To	
☐	City	Bill To	
☐	Comments	Bill To	
☐	Company Name	Bill To	

Buttons on the left: 'Move Up', 'Move Down'. Buttons on the right: 'Add', 'Edit', 'Save', 'Cancel', 'Delete', 'Exit'.

Field: Select the drop down to choose the field to include in the export.

Header Text: Type in the field header text to modify the column header name.

Order By: Click the field if this is the field to be used to sort the export file.

Move Up or Move Down: You can select a field and move its order on the exported list.

Once all of the fields are defined and positioned correctly, you can click 'Save' to save this template format.

To modify an existing Export Template, select the Template and then click 'Edit'. Once the changes are made click 'Save' to save the changes.

The Export Template can now be use to export the billing detail in your Period Billing Invoice screen.

Events (Optional Module)

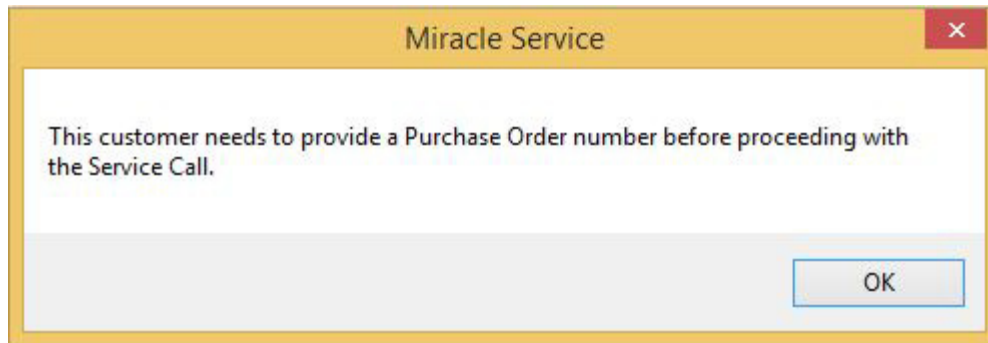
When the Event Notification Manager users can define customer specific event messages. These messages will pop-up to alert users to customer specific information. Events can be configured for Contracts, Invoices, Sales Orders and Tasks. When an event is configured for a customer, an alert pop-up will be generated when a user selects the customer for one of the areas above.

An example of an event may be when a Purchase Order number is required before you can open a new task for a customer. This can be configured on the customer record as shown above.

Attac	Customer ID	Company Name	Address	City
☒	AIR001	International Airlines	10368 Wallace Alley Street	Kingsport
☒	BKS001	BK's Law Office	634 Middle Creek Rd	Sevierville

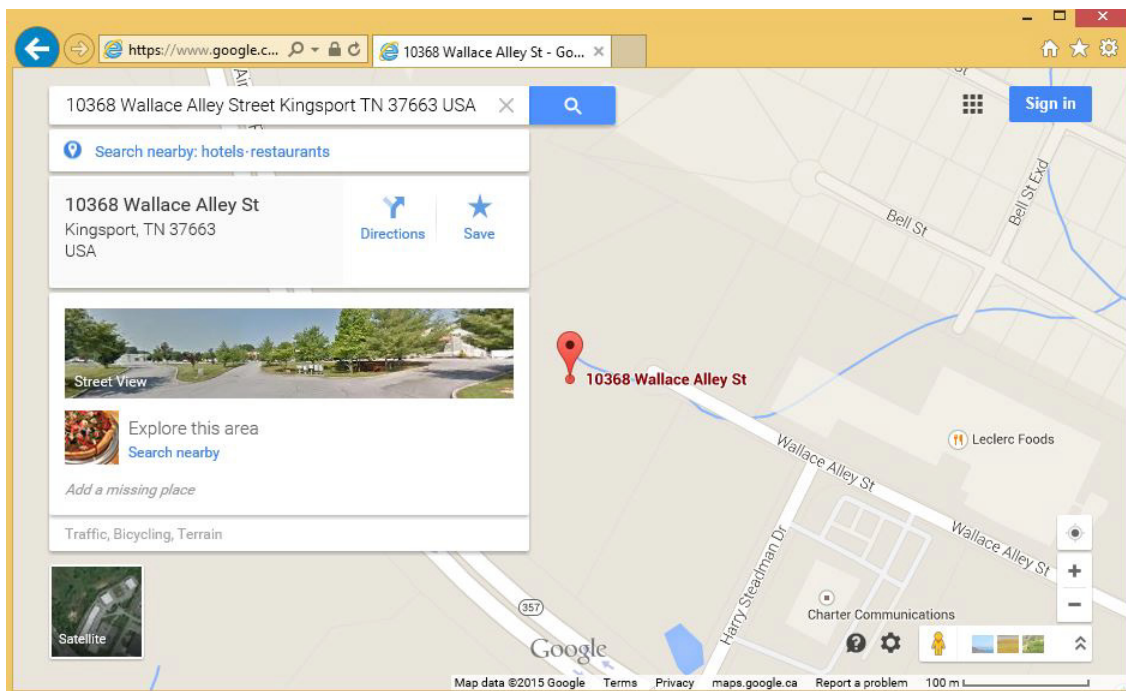
Users can select which bill to and ship to records this will apply to.

When a user creates a Service Task and select the customer a pop-up will be presented showing the event messages.



Map (Miracle Service SQLversion Only)

The Map button will launch a Google map of the customers location. This will open in the default browser on the users desktop.



Chapter 9

Sales Orders

Miracle Service provides Sales Orders to provide customers a copy of a sales transaction prior to invoicing. Once approved, the sales order can be converted to an invoice very easily. Only one user can be accessing the sales order screen at a time.

Sales Order Type POS ☒ Text ☐ Project ☐

SHIPPED TO Bank of Marion
Bank of Marion
102 W Main St
Marion, VA 24354

Requester
Sales Order Date 07/03/2018
Group Type
Payment Terms Net 30
Customer Order No.
Sales Person Gail Anderson
Order Source Customer Call
Shipped Via
Dept.
Terms & Conditions
Created By
Comments

Flags Not Printed Not Converted to Invoice

Sales Order # 080703-0001

Return Order # Create New
Purchase Order # Create New

Bill-To Company BOM001
Bank of Marion
102 W Main St
Marion, VA 24354

Subtotal	\$750.00
Discounts	\$0.00
Other Charges	\$0.00
Total Tax	\$52.50
Total Sales Order	\$802.50

Line Items Other Charges Attach Tax Info User Screens Documents

Some companies elect to use the Sales Order Module as a quoting system. While the intent of this module was not for this purpose, sales orders not converted to an invoice remain outstanding just like a quote would remain outstanding until it is voided. The words 'Sales Order' may be replaced 'Quote'. To cancel a sales order, simply void it.

Note: There is no functionality associated with making quotes in Miracle Service.

Sales Order Types

There are basically two styles of sales orders and invoices: 'Point Of Sale' or 'POS' and 'Text'. POS invoices, are used to pull and invoice for inventory items. Text invoices, are used to invoice for services or non-tangible goods (such as consultancy). The only difference between the two documents is how the line items are laid out.

There is a third type of Sales Order called Project Sales Order. Project Sales Orders are used to manage typical installation projects and can be viewed as a project management module. A Project Sales Order mostly defines a Work Flow Process. The Project Sales Order itself is basically a POS style Sales Order; however, when the invoices are generated, they are created as POS Invoices with just the progress payment on the invoice. We will discuss the Project Sales Order process in more detail at the end of this section.

POS Line Item Screen

A point of sale (POS) order is used to sell inventory items. The items are searched, selected or added-on-the-fly from inventory database.

Edit Sales Order Line Items						
Item Number	Quantity	Customer Ordered	Unit	Suggested Retail Per Unit	Average Price Per Unit	Amount
A369841	3		Each	\$1.47	\$1.47	\$4.41
Description Connectors						
Discount						\$0.00
Tax						\$0.00
A147258	3		Each	\$11.39	\$11.39	\$34.17
Description Toner						
Discount						\$0.00
Tax						\$0.00

TEXT Line Item Screen

A Text order is used to sell non-inventory items, such as consulting services. Enter the description of the item up to 255 characters per line item, which should be sufficient even for very detailed explanations of your services. Please note that in the Text Style of sale, there are also accounting integration specifics to be considered. If the accounting export module was purchased, review the following carefully.

Edit Sales Order Line Items				
Description	Quantity	Unit	Avg Price Per Unit	Amount
► Consultancy Inspection Services City Planning Proposal #548154 Inspection	2	Each	\$75.00	\$150.00
			Discounts	Discount
			Tax	Tax
				\$0.00
► Consultancy Recommendation Report Services City Planning Proposal #548154 Report	2	Each	\$75.00	\$150.00
			Discounts	Discount
			Tax	Tax
				\$0.00
► Consultancy City Planning Authorization Services City Planning Proposal #548154 For Forward Authorization	1	Each	\$75.00	\$75.00
			Discounts	Discount
			Tax	Tax
				\$0.00
*	0	Each	\$0.00	\$0.00
			Discounts	Discount
				\$0.00

Notice the difference in the screens.

Sales Order – Creating

Select the 'New' button under 'Sales Orders' from the 'Sales Order and Invoices Menu'. Select the sales order type (POS or Text).

Sales Order

The Sales Order number will be defaulted from the Administrator Module settings.

Shipped To

Select the customer that the goods will be shipped to. Miracle Service will enter and display the address information below and print it on the sales order.

Customer Bill-to Number

When the customer's Ship-To ID is selected, the customer's Bill-To address is displayed on the right. In most cases, the Ship-To and the Bill-To are the same, however the Bill-To address may be modified on the sales order. In the event this customer is a 'Ship-To sometimes Bill-To', select the proper Bill-To address.

The button with five dashes across it allows the salesperson to select another Bill-To address to send the invoice. Selecting other Bill-To addresses through this method creates only a temporary relationship with the Bill-To for the single invoice.

Requester

This is used in the Project Sales Order. The Requester is added to the Work Order generated from the Project Sales Order when you click the “Convert to Request” button. See Project Sales Orders later in the chapter.

Sales Order Date

The current date is the default entry for this field, but it is an editable white field.

Group Type

This is used to help differentiate between Sales Orders types in the Sales Order Review screen. Group Types can be defined by entering the group name in the field as you work with the Sales Orders. An example of how Group Types help differentiate between critical order. They can help differentiate ‘Equipment’ orders from ‘Parts’ orders and then from ‘Supplies’ orders. This will let users focus on critical orders first.

Payment Terms

Select a payment term from the drop down list or add a new payment term on the fly.

Customer Order Number

If the customer requires their PO Number or sales documents enter their number here. This is an optional field.

Request Type

The Request Type is used in the Project Sales Order. The Request Type is added to the Work Order generated from the Project Sales Order when you click the “Convert to Request” button. See Project Sales Orders later in the chapter.

Sales Person

Select from the drop-down list or add a new sales person on the fly. This is an optional field.

Order Source

Select from the drop-down list or add on the fly, the source of the order for example, customer called-in, web site, walk in etc. This demographic information may be important for custom created reports. A drop down box will display past sources, or you can add one on the fly.

Shipped Via

Select from the drop-down list or add on the fly the method the goods were shipped for example, Fedex, UPS, etc.

Dept.

Enter a department reference. This can be included in the Ship To address to help deliver the shipment to the correct location.

Terms & Conditions

Selecting the Terms & Conditions provides a list of standard Terms and Conditions that can be linked to a Sales Order. Users can select from a standard list and will also have the option to modify the text from the standard version. The Sales Order will retain the changes and leave the original version intact.

Created By

Created By will display the User ID of the original user that created the Sales Order.

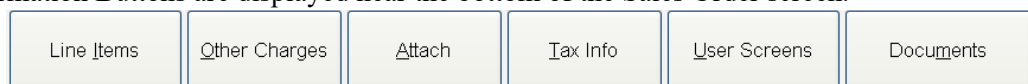
Comments

Comments can be added at the bottom of the sales order.

Special Info Buttons

The Special Information Buttons offer additional information. There are four buttons available for sales orders. (See 'Application Conventions' for 'Special Info Buttons')

They Special Information Buttons are displayed near the bottom of the Sales Order screen.



Line Items

The Line Items screen offers information such as a description of the goods or services, quantity, average price and actual price. The POS and the Text screens look slightly different. The POS screen offers the selection of inventory items and the Text screen allows the salesperson to enter the description of the goods or service. We will review the POS line item screen.

Item Number	Quantity Customer Ordered	Unit	Suggested Retail Per Unit	Average Price Per Unit	Amount	Included In Contract
A369841	3	Each	\$1.47	\$1.47	\$4.41	☐
Description Connectors						
			Discount	Discount	\$0.00	!
			Tax	Tax	\$0.00	!
A147258	3	Each	\$11.39	\$11.39	\$34.17	☐
Description Toner						
			Discount	Discount	\$0.00	!
			Tax	Tax	\$0.00	!
	0		\$0.00	\$0.00	\$0.00	☐
A123456		Paper			166	0.00
A147258		Toner			121	0.00
A234567		Drum			15	
A32014856		Copier			3	
A369841		Connectors			41	
A369852		Toner			43	
A521485		toner			38	

Select the down arrow, and a drop down box displays a list of all inventory items on file in the main warehouse listed alphanumerically by item number. It shows the 'Item Number', a brief description of the item, and the 'Quantity in Stock'. Enter one and the information is added to the 'Sales Order'. Type a partial part number, the auto-expand feature will assist.

Select the 'Zoom' [+] button and the application will open the 'Inventory Maintenance' screen where items can be searched for or added one on the fly. When 'Exiting' back from inventory to the 'Edit Sales Orders Line Items' screen notice the details of the inventory item have already entered.

Line Item Kits

Line items can also be added as complete inventory Kits. This will add multiple line items at the same time. To add Kit you need to select the 'Add/Edit Inventory Kits' button at the bottom of the Edit Sales Order Line Items window.

Item Number	Quantity Customer Ordered	Unit	Suggested Retail Per Unit	Average Price Per Unit	Amount	Included In Contract
A147258	1.5	Each	\$11.39	\$11.39	\$17.09	☐
Description Toner						
			Discount	Discount	\$0.00	!
			Tax	Tax	\$0.00	!
*	0		\$0.00	\$0.00	\$0.00	☐
Description						
			Discount	Discount	\$0.00	!
			Tax	Tax	\$0.00	!

Add/Edit Inventory Kits Ok

When you click the 'Add/Edit Inventory Kits' it will present a list of available kits. Only the Kit name is shown on the line item. You can edit the quantity of items in the Kit by selecting the Zoom [+] button for the kit.

Item Number	Description	Quantity
A369841	Connectors	10
X654321	Controllers	5
X852321	Drum	3
X987654	D. Roller	5
A234567	Drum	1

You can modify the Quantity only. This will also update the Kit Price. The Kit Price is calculated based on the total price of the Kit items.

Text Based Line Items: For a Text based sales order, enter the text into the line item. To add another line with more text, simply click on the next blank text box.

Description

'Description' and 'Item Number' are attached to each other. The 'Inventory Data' screen fills 'Description' by default when the 'Item Number' is selected.

Quantity Customer Ordered

Enter the quantity of the item ordered. Use the up and down arrows to increase or decrease the figure shown, or simply edit the number. If the quantity ordered to the point that the quantity price should take affect, the price will automatically change in the 'Suggested Retail per Unit' field.

Units

Units of measure default from the item selected.

Suggested Retail per Unit

This blue field displays information from the 'Inventory Data' screen. When the inventory item and quantity of items are entered into the 'Inventory Data' screen, the retail pricing, based on the customer's settings, are automatically calculated.

Average Price Per Unit

This is the price your customer will pay for this item on the sales order.

Amount

Quantity Ordered x Average Price per Unit = The Amount in this Field.

Discount

Discounts are applied by line item not the entire sales order. Select the discount button to enter the 'Edit Sales Order Line Item's Discounts' screen. Enter the description and the discount as a percentage or dollar amount. If you enter the percentage it dollar amount will be calculated. If you enter a dollar value the system will calculate the percentage.

Edit Sales Order Line Item's Discounts

Description	Rate	Amount
Trade-in Allowance	15.00%	\$149.25
	0.00%	\$0.00

Ok

Tax

This button only applies if the 'Tax by Line Item' option was selected in Administration Set-Up. Select the 'Tax' button to go to the 'Edit Line Item's Tax Information' pop-up. Taxes collected vary depending on to which tax categories and tax groups these items and purchasers belong. If you're creating a Text Sales Order, select this option if tax is applicable to the Sales Order. For POS sales orders, all relevant taxes have been automatically selected.

Edit Line Item's Tax Information

Tax Code	Rate	Selected	Min/Max Qty	Min/Max	Tax min/max value by Quantity	Tax Only the Portion That Matches Criteria
Exempt	0.00%	No			☐	☐
Description No Tax applies						
State	7.00%	No			☐	☐
Description Sales tax						
Federal	4.00%	No			☐	☐
Description Federal taxes						

Ok Cancel

To edit taxes, select the Yes/No button.

The Min./Max Qty for Tax and Min./Max Value for the Tax are explained in the Tax Categories setup instructions.

Select 'OK' to return to the 'Sales Order' screen.

Other Charges

This field allows additional items to be billed on the sales invoice, for example, brokerage fees, insurance, freight, etc.

To add Other Charges select the 'Other Charges' button and enter the table labeled 'Edit Sales Orders Other Charges'.

Description	Amount	Tax	Tax Amount
City Inspector - Auth Fee	\$75.00	Tax	\$8.25
	\$0.00	Tax	\$0.00

Ok

The table displays individual 'Other Charges'.

Description: Enter a short description of the billable item.

Amount: Enter the 'Amount' of the other charge.

Tax Button: Select the appropriate tax, if the 'Tax by Line Item' taxes method is being used, (See the 'Tax' button of the 'Administration Set up'. Select 'OK' to return to the 'Edit Sales Orders Other Charges' screen where Miracle Service has calculated and displayed the tax.

Tax Amount: This is where Miracle Service displays the taxes it calculated in the 'Tax' button.

Select 'OK' to return to the 'Sales Order' screen where the 'Other Charges' and 'Tax' on the charge are already entered.

Attach Button

If the sales order is directly related to a piece of equipment belonging to a customer, there is an option to attach this sale to an existing contract or piece of equipment. This will affect the calculation of the profitability of the contract and the equipment. If the sale is not attached to the contract or equipment, Miracle Service will not include the proceeds in the profitability calculation. The value (cost/revenue) of the entire order is attributed to the contracts and/or equipment. Select the 'Attach' button and choose the contract and/or the piece of equipment.

Edit Sales Order Attachments

Attach Sales Order to a Service Equipment Contract and/or a Service Equipment Item

Contract ID: 43

Simple Arrears Meter Billing & Supplies

Equipment ID: 52

A6325987/A21587/Second Floor Reception/A521069/Multi Function High

Ok Cancel

Both windows have drop down boxes. Select the down arrow of the Contract ID window and all contracts held by the customer, (Bill-to and Ship-to), will display.

When a 'Contract ID' is selected, each piece of equipment that is attached to that contract displays in the 'Equipment ID' window. If a contract is not selected, then all the active equipment at this customer's site can be selected.

For contracts, the first number shown is the ID number assigned by Miracle Service. Next is the contract template type, followed by the 'Customer ID' and Name on the Contract.

For equipment, the first number displayed is the Equipment ID assigned by Miracle Service. Next is the serial number, followed by Unit ID (if used), model number, and description. Select the piece of equipment that is the subject of the 'Sales Order'.

Select 'OK' to return to the 'Miracle Service Order'.

Tax Info

After the 'Tax Info' button is selected a window appears asking if the 'Blended Tax' method applies. (See the 'Tax' menu in your Administration Set Up.) If the 'Tax by Line Item' tax method is not being used, a list of taxes that may apply will appear. (See 'Line Items'). The correct taxes based on the customer and the items selected will be selected by default. The tax defaults may be edited.

'OK' takes returns to the 'Sales Order'.

User Screens

This is used to add under defined data entry fields on to the Sales Order. If a new User Screen is created and defined with a name of "Main", this is a special User Screen and the fields and labels associated can be added to the printed Sales Order using the Report Designer.

Documents

This is part of the optional Document Manager module. After the Documents button is selected a window appears where you can attach documents directly to the sales order. This enables users to attach electronic documents such as product literature, specification sheets and other documents to a sales order. Once documents are attached, they are available to be e-mail as attachments if the Sales Order is emailed to the customer.

Totals

Notice the blue fields and a 'Recalculate' button in the lower right corner of the 'Sales Order'. The 'Sub-total', 'Discounts', 'Other Charges' and 'Tax' fields reflect the values entered through the 'Special Info' buttons. The 'Total Sales Order' is the sum of those fields. See the 'Application Conventions' for more information on 'Recalculate' buttons.

Return Order - Create New

The Create New Return Order is only displayed if the Return Order module is purchased. This is an optional module used to manage a higher volume of items being returned and replaced. If a Sales Order is being generated to replace an item being returned, user can generate and link the Return Order by clicking the 'Create New' button. See the Return Order section of the manual for more details on the Return Order feature.

Purchase Order - Create New

The Create New Purchase Order (PO) is an optional feature that can be activated to link a Purchase Order directly to a specific Sales Order. With this feature it is possible to link a single or multiple Purchase Orders to a Sales Order. If multiple PO's are being linked, they can be linked to individual line items on the Sales Order. With this it is possible to generate a PO for different suppliers for each line item on the Sales Order. It is not possible to split an individual line item between multiple suppliers. Once all of the Purchase Orders linked to a Sales Order are received, the Sales Order can be converted to an invoice. See the Purchase Order section of the manual to learn more on handling Purchase Orders.

Buttons on the Sales Order Screen

Save or Save and Print a Sales Order

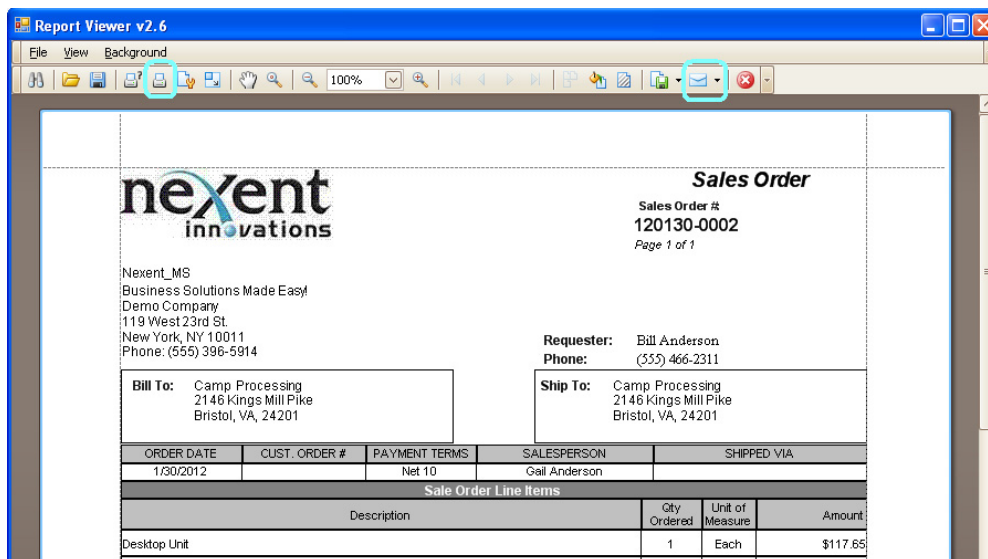


After the 'Sales Order', is complete, the 'Save and Print' buttons appear at the bottom of the screen, beside the 'Save', 'Cancel' and 'Exit' buttons. The 'Sales Order' may be printed now or later, (or by-pass the print stage - see the 'Flags' section below). The options to 'Cancel' and 'Exit' are also available. If 'Save and Print' is selected, Miracle Service will send the sales order to the printer or to the screen for print preview, depending on the option selected. Miracle Service will exit to a new 'Sales Order' screen.

Upon return to the Sales Order screen through the 'Edit' button, the other changes have taken place. The 'Save and Print' button has disappeared. In its place are three other buttons.

Email Sales Order

If you are viewing the Sales Order in the Print Preview mode, you have the option to either print a copy to your printer, or to send it as an attachment in your e-mail.



To send it as an e-mail attachment select 'Email' option from the 'File' menu while you are in the print preview mode of the Sales Order

When you select this option you will be presented with a list of e-mail address to which you can send the Sales Order. If you have the Document Manager module you will also have a Document List showing a list of documents that can be attached to the Sales Order.

You can select one or both of these addresses to include on the e-mail distribution. These e-mail addresses relate to the Ship-to and Bill-to addresses related to the customer record select for the Sales Order.

Email

To:

Type	Name	Email
☒ BillTo	Camp Processing	camp@asdlg.com

Attach:

Subject: Your New Miracle Service Sales Order.

Body: Attached please find your latest Sales Order.

Send

You can select one or multiple documents to include as attachments on the e-mail distribution. Please note that you are sending the actual document so it may be important to consider the size of the document you are sending as a e-mail attachment.

Convert to Invoice

This button will prompt Miracle Service to print an invoice. This invoice contains all information entered into the 'Sales Order' screen.

Select the warehouse from which to decrement the inventory, unless the 'Sales Order Inventory' was selected in the 'Administration'. In this case inventory will always draw from the main warehouse. Insufficient 'Quantities in Stock' will affect Miracle Service's ability to carry out this function. If there is insufficient inventory in stock, the invoice will only include the quantity of items in stock, not the number ordered. There is no warning message, as this is set as a default.

When a 'Sales Invoices' are created, by converting 'Sales Orders', the 'Sales Orders' cannot be deleted or edited.

Print Sales Order

In the event a 'Sales Order' needs to be re-printed, Miracle Service allows re-prints of the document. When you are printing a Sales Order, you can also attached your standard Terms and Conditions of the sale. The Terms and Conditions are set-up in the Administration set-up and will be printed automatically with every printed Sales Order.

Print Picking Slip

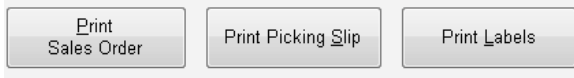
Select the 'Print Picking Slip' button to print a picking slip for the warehouse. The document contains information relating to the customer and sales order. The picking slip report has a space for the warehouse staff to enter the serial number, if it is relevant.

You can also e-mail the picking slip to the warehouse or the Ship-to or Bill-to location in a similar manner we discussed for e-mailing Sales Orders above.

Print Labels

Select the 'Print Labels' button to

print a standard DYMO label. This is designed to print packing label on to a standard DYMO label. It will print a separate label for each line item on the Sales Order.



Nexent Demo
 3270 Electricity Drive,
 Windsor, Ontario N8W5J1
 Phone: 866-639-3689 Fax: 519-974-1711

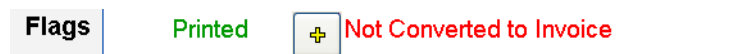
SO #: 050712-0002
 Date: 07/12/05
 Part#: 031300408
 Desc: PHILIPS PAN HEAD SCREW - M3X4
 Qty: 5
 PO#:
 Bin:

The Printed Label (shown above) provides the basic details of the item(s) being shipped. It will identify the Sales Order number (SO #), date, Part Number (Part#), Description (Desc), Customers Purchase Order Number (PO#) and the Bin location of the item.

Void

If the sales order should not be completed, the 'Void' button is available. This is not a delete button. There is a number on each sales order and some record of the entry will remain even if the 'Sales Order' is selected as 'Void'.

Flags 'Not Printed' and 'Not Converted to Invoice'



Several flags warn the salesperson of the different 'Sales Order' statuses.

They are located at the top right of the 'Sales Order' screen, just above the sales order number. Not Printed [+]

The 'Save and Print' button is at the bottom of the screen. Selecting this button prompts Miracle Service to print a hard copy of the sales order, and the red 'Not Printed [+]' turns to a green 'Printed [+]' (See the paragraphs on the 'Sales Order Print and Save' button above).

Occasionally you may want to skip the printing step. Select the [+] button next to the 'Not Printed' flag, (it looks like a 'Zoom [+] button'), the red letters will turn to a green 'Printed' as though the 'Save and Print' button had been selected. Miracle Service will treat the sales order as though it was printed, but no hardcopy will be produced.

Not Converted to Invoice

Miracle Service will turn the red 'Not Invoiced' flag to a green 'Converted to Invoiced' flag after the sales order has been converted.

If the Sales Order is a Project Sales Order, Miracle Service will turn the red 'Not Invoiced' flag to a green 'Converted to Request' flag after the user selects the 'Convert to Request' button. The following section explains more about the process of converting a Sales Order to a Service Request.

Project Sales Orders

Project Sales Orders combine the Line Item Style Sales Order (POS), the Text Invoice Format and a work flow process to establish a unique Project Sales Order functionality. Project Sales Orders are designed with the intent to simplify the work flow as it moves from the Sales Order phase to an installation work order. The Project Sales Order includes a number of unique features that will benefit users when managing typical installation projects. The main features of the Project Sales Order are the:

- Ability to Recording Deposits for Orders,
- Automated creation of Project Work Orders, and
- Tracking of your progress payments.

The screenshot displays the 'Project Sales Order' form. The 'Sales Order Type' is set to 'Project'. The 'SHIPPED TO' address is 'Camp Processing, 2146 Kings Mill Pike, Bristol, VA 24201'. The 'Sales Order Date' is '30/01/2012'. The 'Payment Terms' are 'Net 10'. The 'Sales Person' is 'Gail Anderson'. The 'Requester' is 'Bill Anderson'. The 'Technician' is 'Een Wilson'. The 'Request Type' is 'FJT'. The 'ETA Date' is '01/02/2012'. The 'Payment Schedule' is 'Time and Material'. The 'Subtotal' is '\$158.45', 'Discounts' is '\$0.00', 'Other Charges' is '\$0.00', and 'Total Tax' is '\$9.50'. The 'Total Sales Order' is '\$167.95'. The form includes tabs for 'Line Items', 'Other Charges', 'Attach', 'Tax Info', 'User Screens', 'Documents', and 'Deposit'.

The Project Sales Order's workflow is defined first by the Sales Order type (i.e Project Sales Order) and then by the Payment Schedule selected for the Sales Order.

The Project Sales Order has a number of additional fields that are unique to the Project

Requester

This is used in the Project Sales Order. The Requester is added to the Work Order generated from the Project Sales Order when you click the “Convert to Request” button. See Project Sales Orders later in the chapter.

Technician

The Technician is the technician that will be the primary person responsible for the delivery of this service. When the technician is selected it also defines the Reserved Parts warehouses based on the specific system configuration.

Request Type

The Request Type is used when generating the initial Service Task. If the Request Type is the default Request Type for the Project Order, it will also determine the billing expectations for this project.

ETA Date

The ETA date is used to generate the first Service Task scheduled date.

Comments

Comments are used uniquely on a Project Sales Order. When a Project Sales Order is converted to a Request, the Comments become the Description of work for the Service Request.

Payment Schedule

The Payment Schedule will define the method of payment for the project.

Payment Schedule	Percentage Complete
	Date Complete
	Percentage Complete
	Time and Material

There are three Payment Schedule types: Date Completed, Percentage Completed, and Time and Material. The following will review the unique work flow process associated with each Payment Schedule.

Project Sales Order General Work Flow

All Project Sales Orders follow the same basic work flow process. First, the Sales Order is created using a typical POS style Sales Order. Second, a

Date To Bill	Percent Complete	Invoice Date	Amount Billed	Invoice Number	Notes	Create Invoice?
1/10/2011	25.00%		\$0.00		25% On Order	☐
2/10/2011	25.00%		\$0.00		25% On Equipment Delivery	☐
3/10/2011	50.00%		\$0.00		50% On System Completion	☐
*	0.00%		\$0.00			☐

Create Invoice

Ok Cancel

completed Sales Order can be easily converted to a Service Task (Work Order) by clicking the “Convert to

Request” button. Third, the Sales Order is converted to a standard Text invoice. Forth, e-mail notifications can be generated to notify your parts department and service dispatcher that you have received a new order for processing. Many of these capabilities are configurable and can be used or not depending on your specific needs.

Convert to Request

When the user selects ‘Convert To Request’ they are approving the Sales Order. When ‘Convert To Request’ is selected a new Service Request with a single Service Task is created in the system. The Service Request is generated using the parameters configured in the Project Preferences screen in the Miracle Service Administration module. These preferences will determine the Service Request Type and Priority. It will define if the labor or travel is chargeable. It will also define if the parts and material is chargeable or included. All of these are uniquely configurable so you can establish a work flow process that works best for your business.

While the service Request Type default is defined in the Preferences of the Administration set-up, the user can modify the Request Type by using the drop down on the Project Sales Order.

During the Convert to Request process the inventory items selected on the Project Sales order are either Reserved (when inventory is available) or listed as Parts Needed for the task.

Time and Material Payment Types: For Time and Material Payment Types, users will need to consider the best approach for themselves for handling labor. When a Project Sales Order is created with labor, it will need to be based on a labor item in inventory. Since the task can bill labor separately, we recommend the Labor line item be deleted on the Work Order to avoid a duplication in billing labor. Alternatively, users can invoice the Labor based on the line item, but then need to set the Labor Rate to a \$0 rate to avoid the duplication in billing. Either approach is fine to use and it’s the users preference that should decide on the best approach for their business.

Reserved Parts: When parts are Reserved for a task they can be used through the ‘Parts Used’ button of the Service Task. Parts will first deplete the reserved parts before using any parts from active inventory. Please refer to the Reserved Parts section of this manual for more details on managing Reserved Parts.

Parts Needed: When parts are Needed for a task they are added to the Parts Needed report. This allows purchasing to order parts required for specific tasks. When the order part is received, it can then be Reserved for a specific task. Please refer to the Purchase Order Receipt section of this manual for more details on receiving Parts Needed.

Project Progress Payment Process

When the user selects ‘Convert To Request’ they are approving the Sales Order. When ‘Convert To Request’ is selected additional buttons are created in the Sales Order screen to access the additional workflow functions for the Project Sales Order.

Specifically a Payments Button and a Profitability Button will appear.

Payment Button

The Payment Button is used to generate and track the progress invoices for the Project Sales Order. The functionality within the Payment area depends on the Payment Schedule selected for the Sales Order.

When a Time and Material payment schedule is selected, no Payment Button is available. This is because a Time and Material order is intended for small jobs that are billed through the standard Service Billing Process.

When the Payment Schedule is selected as 'Date Completed' the Payment button is active. When you select the Payment button, the Project Sales Order Payment Schedule is presented. This will display all previously generated invoices and also provide a screen to enter new Invoice details.

To generate a new progress invoice for a Date Completed Sales Order, enter the Date to Bill, the Percent Complete, and the Notes. Check the box if you would like to create the invoice now. Click "Create Invoices" to generate the new invoice or select OK to save the information and close the window.

When the Payment Schedule is selected as 'Percent Completed' the Payment button is active. When you select the Payment button, the Project Sales Order Payment Schedule is presented. This will display all previously generated invoices and also provide a screen to enter new Invoice details.

To generate a new progress invoice for a Percent Completed Sales Order, enter the Date to Bill, the Percent Complete, and the Notes. Check the box if you would like to create the invoice now. Click "Create Invoices" to generate the new invoice or select OK to save the information and close the window.

Profitability

The user is able to click the profitability button at any time to view the current project profitability. The Profitability will consider the total revenue collected to date along with the cost associated with this revenues. The profitability will also include the labor and travel time associated with the projects themselves. To include the travel and labor time in the profitability calculation, you will need to enter the Labor Burden factor.

Labor Burden is typically calculated using the total costs associated to a technician over the past year divided by the total billable hours for that technician. The costs typically include the paid hours plus other expenses including vehicle costs, telecommunication costs, insurance costs and any per diem costs. Depending on your business there could also be health plan and other employee costs paid by the company that should be included in the Labor Burden rate.

Chapter 10

Sales Order Review

The 'Sales Order Review' screen allows approval, printing, and converting of sales orders, individually or in batch. See the 'Application Conventions' for 'Review Screens'.

Reviewing Sales Orders

From the 'Sales Order' group of the 'Sales Orders & Invoices Menu', select 'Review'. This will take open a screen labeled 'Sales Order Review'.

The Sales Order Review screen displays each 'Sales Order' and keys to drill down for details. By default, Miracle Service shows only unconverted sales orders. All of your sales activity is available at a glance.

Sales Order Review

SOs17

Marked to be Converted0

Marked to be Printed0

Show Group TypeAll

☒ Show Only Non-Converted SOs

☐ Show Only Back Orders

☐ Show All SOs

☐ Show for A Date Range

Sales Order Number	Date	Bill-To ID	Ship-To ID	Shipped Via	Total	Converted	Printed	Mark for Conv. / Print	
120404-0002	04/04/2012	CAV001	CAV001		\$17.11	No	Yes		
120404-0001	04/04/2012	BAIL002	BAIL002		\$31.20	No	No		
120130-0003	30/01/2012	AIR001	AIR001		\$20.57	No	Yes		
120130-0001	30/01/2012	AIR001	AIR001		\$7.47	No	Yes		
120125-0002	25/01/2012	AIR001	AIR001		\$11.23	No	Yes		
120125-0001	25/01/2012	AIR001	AIR001		\$25.33	No	Yes		
111219-0002	19/12/2011	AIR001	AIR001		\$660.47	No	Yes		
111121-0001-BC01	21/11/2011	AIR001	AIR001		\$26.22	No	No		
111116-0001	11/11/2011	AIR001	AIR001		\$0.10	No	Yes		
111114-0001	11/11/2011	AIR001	AIR001		\$31.97	No	No		
110902-0001	02/09/2011	AIR001	AIR001		\$6,717.94	No	Yes		
110830-0003	30/08/2011	AIR001	AIR001		\$25.16	No	No		
110830-0001	30/08/2011	AIR001	AIR001		\$76.47	No	Yes		
110829-0001	29/08/2011	AIR001	AIR001	UPS Blue	\$0.00	No	Yes		
110718-0001	18/07/2011	BOM001	BOM001		\$902.50	No	Yes		
080703-0004	03/07/2008	DMV001	DST111		\$0.00	No	No		

Field Column Information

Sales Order Number [+]

This is the auto-assigned Sales Order number. To view details of the Sales Order select the 'Zoom [+]' button.

Date

This is the date the Sales Order was created.

Bill To ID [+]

This is the Sales Order's Bill-To ID. To view details of the 'Bill-To' customer, select the 'Zoom [+]' button.

Ship To ID [+]

This is the Sales Order's Ship-To ID. To view details of the 'Ship-To' customer, select the 'Zoom [+]' button.

Shipped Via

This is the shipping method selected for the Sales Order.

Total

This is the total value of the Sales Order.

Convert to Invoice

This indicates the invoice status of the sales order.

Printed

This displays the print status of the Sales Order.

Mark for Conversion/Print

These columns, allow individual sales orders to be converted to invoices or printed. The word 'Conv.' or 'Print' will appear in the appropriate box.

Printing Sales Orders

To batch print a number of sales orders, select each one from the list.

To physically print the documents, select the 'Print' button along the bottom of the screen next to the 'Print Approval Report'.

Flags, Buttons and Check Boxes

There are several other flags, buttons and check boxes along the top of the screen.

of SOs

This is the total number of outstanding Sales Orders.

Marked to be Converted

This is the total number of Sales Orders already marked for conversion.

Marked to be Printed

This is the total number of Sales Orders already marked for printing.

Mark All

Select this button, to convert all Sales Orders to Sales Invoices and to Print for this date range.

Mark All Unconverted

In the event there is some unconverted Sales Invoices, select this button, to convert all remaining sales orders to Sales Invoices and to Print for this date range.

Mark All Un-Printed

In the event there are some unprinted Sales Invoices, select this button, to print all remaining Sales Invoices for this date range.

Unmark All

Select this button, to 'Unmark' all Sales Orders for conversion and printing.

Sales Order Review Options box

Show Group Type. Group Types can be setup and assigned to different Sales Orders. Selecting the Show Group Type drop down will let the user filter the Sales Order for a specific groups of orders.

Show Only Non-Converted SOs, Show Only Back Orders and Show All SOs: These mutually exclusive fields change the display field of the screen. 'Show Only Non-Converted SOs' narrows the field for the date period shown. 'Show All SOs' shows all invoices including those that have been converted. 'Show Only Back Orders' will show just the Back Ordered Sales Orders.

Show For a Date Range: Select this option to limit the number of records displayed. Miracle Service will prompt to enter a start date and an end date. All Sales Orders in the date range are displayed.

Other Buttons

Along the bottom of the screen, see the following:

Print Approval Report

Select this button, to produce a hardcopy of the table of data displayed with a line at the end of each row. This work sheet allows the sales manager to approve Sales Orders without working from the screen. The information would then need to be entered into the application.

Cancel

This exits the table without completing the changes entered.

OK

This button appears if there are one or more Sales Orders marked for converting and printing. Click 'OK' to convert and print marked Sales Orders.

Exit

Exit will return to the menu.

Chapter 11

Invoices

There are three kinds of Invoices: 'Sales Invoice', 'Service Billing Invoice', and 'Period Billing Invoice'. All can be reviewed or printed from the same 'Invoice Review' screen. This is available from the 'Sales Orders and Invoices Menu'. Only one user can create invoices at a time.

Hint: To view an invoice from the invoice review screen, click the [+] button next to the invoice number. You can then print the invoice while viewing it.

Hint: You can review previously printed invoices in the Invoice Review by selecting the 'Show Printed Invoices' box.

Of the 3 kinds of invoices, only the Sales Invoices can be created from scratch in a single screen. This is because the other types of invoices have costing data that is posted for profitability review and analysis. These other invoices also activate other screens during their creation.

Service Billing Invoices

Approving service calls creates service-billing invoices. Service-billing invoice information is then sent to the invoice review screen to be printed at a later time. Review the service-billing invoices by clicking on 'Service' (below Billing Invoices) from the 'Sales Orders and Invoices Menu'.

Steps to Create and Print a Service Billing Invoice

Open and Close a Service Call

Approve the service-billing invoice (from the 'Service Menu' click on the 'Service Billing' button). Once approved, this will create an invoice to be printed.

Print the invoice from the Invoice Review Screen, or from the 'Service' button below 'Billing Invoices' within the 'Sales Order and Invoicing Menu'.

Period Billing Invoices

Approving a period billing charge creates period billing invoices. This is sometimes known as reoccurring invoices. For example, a yearly contract billed in 12 equal payments, or some other form of payment such as a per-click charge. This sends the data and amount to be billed, (including zero dollar amount), to the invoicing review screen for printing at a later date. Period billing invoices can also be reviewed by clicking on 'Period' (below Billing Invoices) from the 'Sales Orders and Invoices Menu'.

Steps to Create and Print a Period Billing Invoice

Approve the period charges from the 'Period Billing' screen (from the 'Service Equipment and Contracts Menu'). Once approved, this will create an invoice to be printed.

Print the invoice from the Invoice Review Screen, or from the 'Period' button below 'Billing Invoices' within the 'Sales Order and Invoicing Menu'.

Sales Invoices

Approving and converting a 'Sales Order' or by creating a 'New Sales Invoice' from the 'Sales Orders and Invoices Menu' creates a Sales Invoice.

To create a 'Sales Invoice', click on 'New' Sales Invoice. (Not a Sales Order). Select between a POS and a Text Sales Invoice.

Sales Invoice Types

There are two types of 'Sales Invoices', Point of Sale and Text.

Invoice Type	POS ☒	Text ☐
--------------	--------------------------------------	----------------------------

POS Style Differences

A point of sale is an invoice used for the sale of an inventory item. It allows the salesperson to select the items from inventory locations or from car stocks. (Multi-Warehouse Option Required) The actual warehouse screen will be different if the item is serialized or non-serialized.

TEXT Style Differences

This is for the sale of a non-inventory item such as consulting services. (See Sales Orders)

Invoice - Creating

Select the 'New' Sales Invoice button from the menu. Enter the information in the first screen the same way as new sales orders. Click on the 'Line Item' Button at the bottom. Depending on the invoice type selected, (POS or Text), one of two screens will appear.

POS Line Item

This is similar to the 'Edit Sales Order Line Items' screen.

View Line Items

Item Number	Quantity Customer Ordered	Quantity on this Invoice	Quantity Back Order	Quantity Selected To Ship	Unit	Average Price Per Unit	Amount	Included In Contract
A123456	2	2	0	2	Each	\$10.00	\$20.00	☐
Warehouse Description Paper						Discount	Discount	\$0.00
						Tax	Tax	\$0.00
167288	1	1	0	1	Each	\$29.41	\$29.41	☐
Warehouse Description Drum						Discount	Discount	\$0.00
						Tax	Tax	\$1.76

Ok

Item Number [+]

This is the inventory item identifier or part number. The item number may be entered or selected from the drop-down list.

Finding the Correct Item: The 'Zoom [+]' button will open the 'Inventory Maintenance' screen for viewing. Search for the correct item by using the Search buttons on the top right of the Inventory Screen. When the correct item is located, click 'Exit' and the correct item number will be automatically placed into the item field in the 'Line Item' screen.

Adding a New Item on the Fly: Periodically customers want to order special items. Miracle Service allows items to be entered on the fly. When creating the invoice, add the item at the time of sale. Just click the item [+] button and go into inventory, then click the 'New' button in inventory.

Note: You can also add a new item on the fly when closing a service call and adding the parts used. This is important, as there may be times when your technicians have gone to a store to buy a new part to solve a problem. You can now add that part number on the fly, expense it, and collect the revenue in one step, not three.

Superseded Items: Periodically, manufacturers and suppliers change their part numbers. If a part number has been changed, do not delete the old or superseded part number. To change a part number go to the Inventory Maintenance Screen and click on the Edit button. Change the current part number to the replacement (new) part number. See the Superseded Parts section in the Inventory chapter in this manual.

In the future, when a superseded part number is entered on a sales invoice or a service invoice, a warning appears indicating there's a more current number being used.

Description

The description of the item is defaulted from the inventory module. Additional information may be entered in the description field. This feature allows the salesperson to add a note after the part description for the customer's benefit. The additional information entered on the invoice will only appear on this specific invoice. To change the description for all future invoices click the [+] button next to the item number field and make the necessary changes from the inventory maintenance screen.

Quantity Customer Ordered

Enter the quantity of items ordered. The up and down arrows increase or decrease the quantity incrementally or enter the quantity with the keyboard's numerical pad.

Quantity on This Invoice

Unlike the 'Sales Order' screen, only the quantity of items currently in stock, (by all warehouses), may be purchased. Sales Orders allow for infinite quantities, however, sales orders converted to sales will not exceed quantity in stock. (See the Warehouse section below.)

Quantity Back Order

If a Back Order was raised for the invoice, this will let the user see the quantity on the back order.

Quantity Selected to Ship

When exiting the 'Edit Warehouse Selection' screen, (see the Warehouse section below), the application will total the items selected from the various warehouses and enter the total items in this field.

Unit

This is the unit of measure for this inventory item. It is defaulted from the inventory field, however it may be edited.

Average Price Per Unit

This is the amount per unit that will be charged on the invoice. It is entered in the 'Edit Warehouse Selection' screen (see the Warehouse section below).

Amount

This is the value calculated by Miracle Service of the 'Average Price per Unit' multiplied by the 'Quantity Selected to Ship'.

Warehouse Button in Line Items

Notice the 'Warehouse' button to the left of 'Description'. Select the 'Edit Warehouse Selection' button to open and select a warehouse.

Note: This screen will display different information, depending on whether the item is serialized or non-serialized.

Non-Serialized Item Warehouse Selection

Selected	Warehouse ID	Qty In Stock	Qty Selected	Cost	Sugg. Retail	Price/Unit
☐	BEN	2	0	\$9.68	\$0.00	\$0.00
☐	MAIN	116	0	\$9.68	\$0.00	\$0.00

This dialog box shows every warehouse that holds the inventory item entered and the quantity in each warehouse. (Multi-warehouse option allows inventory to be tracked in multiple warehouses or car stocks).

Selected: Select, which warehouse the item, is to be decremented from. After the warehouse is selected, the item's price is calculated.

Warehouse ID: This column displays the warehouse identifier where the inventory item is located. If the multiple warehouse option was purchased, multiple Warehouse ID's are listed.

Quantity in Stock: This blue field displays information calculated by the 'Warehouse Data' screen.

Quantity Selected: Enter the quantity of the inventory item desired from the warehouse in this editable white field. If a quantity is selected that is greater than the stock level, a warning appears.

Cost: This blue field displays information entered through or calculated by the 'Inventory Data' screen.

Suggested Retail: This price takes into account what the item should be charged according to the quantity being selected based on the customers pricing structure and the inventory quantity pricing levels.

Note: How a Customer Receives an Items Price

If a customer belongs to a price group, and they are buying a category 'ABC' item, several conditions are examined before the 'price' is determined automatically.

1. Does the customer have a valid 'Special Price' for this item? If so, use this price.
2. Does the customer belong to a Price Group with a margin on this item category? If so, use this price.
3. Does the customer receive item quantity breaks, and is quantity pricing applicable? If so, use this price.
4. If none of the above rules apply, use the item's retail price as set up in inventory.

Price/Unit: This is the average amount per unit that will be charged on the invoice. It is an editable white field therefore the price may be modified.

Select 'OK' to return to the 'Edit Sales Invoice Line Items' screen and select 'OK' to return to the 'Miracle Sales Invoice' screen. Continue to complete the 'Miracle Sales Invoice' screen (See the Miracle Sales Order section for instructions.)

Serialized Item Warehouse Selection

Edit Line Items							
	Selected	Warehouse ID	Serial Number	Status	Cost	Sugg. Retail	Price/Unit
	☐	MAIN	A785418569	In Stock	\$100.00	\$250.00	\$0.00
	☐	MAIN	A74218556	In Stock	\$0.00	\$0.00	\$0.00
	☐	MAIN	A632549871	In Stock	\$100.00	\$250.00	\$0.00
	☒	MAIN	A365874125	In Stock	\$100.00	\$250.00	\$187.50

Items that are serialized must be pulled from the warehouse using the above selection screen. All the warehouses display each serialized item with a default status of 'In Stock'. Just click the 'Selected' box, and edit the white Price/Unit field if you wish to change the defaulting retail price.

Tax Button: This button only applies if the 'Tax by Line Item' option was selected in Administration Set Up. Select the 'Tax' button to go to the 'Edit Line Item's Tax Information' pop-up. Do not enter this area if the customer's tax group and the inventory item's tax category are already set-up. Taxes identified as 'Yes' vary depending on to which tax categories and tax groups these items and purchasers belong to. When Text Invoices are created, select the applicable taxes. When POS Invoices are created, all relevant taxes have been automatically defaulted.

To edit tax codes, clicking on the word 'Yes' or 'No' to toggle.

The Min./Max Qty for Tax and Min./Max Value for the Tax are explained in the Tax Categories setup instructions.

User Screens: This is used to add under defined data entry fields on to the POS Sales Invoice. If a new User Screen is created and defined with a name of "Main", this is a special User Screen and the fields associated can be added to the printed POS Sales Invoice using the Report Designer.

Discount Button: Discounts are applied to line items. Discounts are not applied to the entire invoice. Select the discount button to enter the 'Edit Sales Invoice Line Item's Discounts' screen. Enter the discount as a percentage or dollar value with a description. If you enter a percentage the dollar value is calculated. If you enter a dollar value the percentage is calculated.

Documents Button: This is part of the optional Document Manager module. After the Documents button is selected a window appears where you can attach documents directly to the sales invoice. This enables users to attach electronic documents such as product literature, specification sheets and other documents to a sales invoice. Once documents are attached, they are available to be e-mail as attachments if the Sales Invoice is e-mailed to the customer.

Printing Invoices: The following 'New', 'Edit', 'Void', 'Reports', and 'Print' buttons are located at the bottom of the 'Sales Invoice' screen. The fastest way to print an invoice is to select the 'Save and Print' button, which will print the default Sales Invoice onto the default printer. If the 'Save' button is selected, the invoice can be printed from the Invoice Review screen, or from the Invoice screen by selecting the Print button.

Emailing Invoices: You are able to e-mail invoices while viewing the Invoice in the Print Preview Mode only. When viewing an invoice in Print Preview, select the 'File' menu item and then 'Email'. A list of acceptable e-mail addresses will be presented and you have the option to select the ones to which you would like to e-mail the invoice. Note that the E-mail feature must be configured in your Administration area before this feature will work correctly.

Voiding Invoices: If the 'Void' button is selected on any of the three invoice screens, Miracle Service will void the invoice. Since Miracle Service numbers the invoices, the information will remain and is viewable from a report. This is not the same as delete, but the process is irreversible. Inventory items will be returned to the main warehouse.

Chapter 12

Consolidated Invoices

Using the Consolidated Invoices function will enable users to consolidate their Service Billings and Period Billings so they can send one invoice to a customer for multiple service or period bills.

Steps to Create a Consolidated Billing Invoice

Consolidating Invoices

Once you have approved multiple Service Billings or Period Billings, any of these individual invoices are available to be consolidated if needed.

IMPORTANT: You can consolidate only 'Not Printed' invoices for the same Bill-to Account. Once an Invoice is Printed, it cannot be consolidated.

Service Invoice and Period Invoices that are shown as 'Not Printed' and 'Not Consolidated' can be consolidated

Service Billing Invoice

Invoice Number: [dropdown] [Navigation Buttons]

Flags: **Not Printed** **Not Consolidated** **Not Paid**

Invoice Type: Service Billing

SHIPPED TO: AIR001
Airlines International
ATTN: BETH
10368 Wallace Alley Street
Kingsport, TN 37663

Bill-To: AIR001
Bill-To Company: Airlines International
ATTN: BETH
10368 Wallace Alley Street
Kingsport, TN 37663

Invoice Date	Request Date	Task Start	Task End	Serial No.	Model No.	Description
20-Dec-10	11/29/2010	12/20/2010	12/20/2010	544564DS54A45K	Segment	Desktop-Black
Problem	Mechanical--test 1			Work Performed	Call Complete - additional work details.	

Under the Billing & Invoicing main menu bar, select either 'Service Invoice' or 'Period Invoice' as applicable. From there, select the 'Consolidate' button.



This will open the Consolidated invoice window. From this window select the 'New' button.

By selecting 'New' the system will generate a new consolidated invoice number. The Consolidated Invoice numbering is separate and distinct from the standard invoice numbering. This number is system generated and is not editable.

Select the Bill-To Company for the invoices you wish to consolidate using the pull-down in the Consolidated Billing-Data Entry screen. You can also start typing the Bill-To ID in the Bill-To Company field and this will move you to that Company.

Hint: You can search for a company using other criteria by selecting the zoom ('+') button beside the field.

Next you need to select the type of invoices you wish to consolidate. Click the drop down arrow on the right of the 'Invoice Type' field to list the invoice types available to be consolidated.

Next you can define the 'Consolidated Date' and the 'Customer Order No.' These can be left with the default values or modified to suit your needs.

Next you can select the filter for the invoices to be listed. This can be set to Unprinted Invoices or Unpaid invoices. If the invoice was printed but not set to a customer, you can select the Unpaid filter so the invoice can be selected and added to the consolidated invoice. .

Next you need to select the invoices you wish to consolidate. Click the down arrow on the right of the Invoice field to list all of the invoices available to consolidate.

Consolidate Billing Data Entry

Consolidated Number 161128-0001

Bill-To Company AIR001 +

Invoice Type Service v

Consolidated Date 11/28/2016

Customer Order No.

Invoice List

Invoice Number	Date
130724-0004	07/24/2013
150612-0002	06/12/2015

Invoice Number	Company Name	Request #	Task #
130724-0004	International Airlines	31	0000031-1
150612-0002	International Airlines	36	0000036-1

This will display a list of Invoices along with the Ship-To ID, Request # and Task #. Select the first invoice to consolidate.

Repeat this until you have selected all of the invoices you wish to consolidate.

Select Save to Save the consolidated invoices.

Consolidated Billing Maintenance

Consolidated Number 161128-0001

Consolidated Date 11/28/2016

Customer Order No.

Invoice List

Invoice Number	Date	Company Name	Request #	Task #
130724-0004	07/24/2013	International Airlines	31	0000031-1
150612-0002	06/12/2015	International Airlines	36	0000036-1

Viewing Consolidated Invoices

Viewing Consolidated Invoices is possible in both the Consolidated Billing Maintenance screen and in the Invoice Review Screen. The image above shows an example of how a consolidated invoice appears in the Consolidated Billing Maintenance screen.

You can view the Consolidated invoice in the Invoice Review screen by checking the 'Show Consolidated Invoices Only' selection box. Please review this further in the Invoice Review chapter.

Service Billing Invoice

Invoice Type Service Billing +

SHIPPED TO International Airlines +

International Airlines
ATTN: BETH
10368 Wallace Alley Street
Kingsport, TN 37663

Flags Approved + Printed Consolidated Not Paid

Invoice # 150612-0002

Bill-To AIR001

Bill-To Company International Airlines
ATTN: BETH
10368 Wallace Alley Street
Kingsport, TN 37663

When you view the original Service or Period Invoice screen, you can easily see that an invoice has been consolidated with other invoices by viewing the status in the status bar. If the invoice is consolidated, you will see the Status as 'Consolidated'. If it is not consolidated the status will be 'Not Consolidated'.

Printing Consolidated Invoices

Users can print a Consolidated Invoice from either the Consolidated Billing Maintenance screen, from an invoice that has been consolidated or from the Invoice Review screen (if the customer preferred billing method is 'Print').

Chapter 13

Invoice Review

The 'Invoice Print Approval' screen will allow administrators to view all the invoices at a glance. The invoice types include Sales Invoices, Service Billing Invoices, and Period Billing Invoices. Only invoices that have not been printed will appear. Print or re-print invoices as a group or individually.

See 'Application Conventions' for 'Review Screens'

View Types	All	☐ Show Printed Invoices	☐ Show for A Date Range
Show Group Type	All	☐ Show Consolidated Invoices Only	
Sort By	Invoice Number	☐ Show with PO Numbers	

Invoice No	Date	Bill-To ID	Ship-To ID	Task ID	Consolidated Number	PO Number	Total	Printed	Select
160317-0002	3/17/2016	BAIL002	BAIL002				\$140.74	No	
151020-0005	10/20/2015	BOM001	BOM001	0000054-			\$214.00	No	
151020-0004	11/10/2015	BOM001	BOM001				\$189.26	No	
151020-0003	10/20/2015	BOM001	BOM001				\$100.00	No	
151020-0002	10/20/2015	BOM001	BOM001				\$802.50	No	
150731-0001	7/31/2015	AIR001	AIR001				\$11.15	No	
150612-0001	6/12/2015	BAIL002	BAIL002				\$91.65	No	
150525-0001	5/25/2015	CVC001	CVC001				\$87.81	No	
080723-0003	7/23/2008	INTER001	INTER001				\$14.71	No	
080723-0001	7/23/2008	CVC001	CVC001				\$4.46	No	
080722-0002	7/22/2008	BOM001	BOM001				\$57.35	No	

The table allows a general view of all invoices or the separation of invoices into one of three groups.

The default view, when opening this screen, displays all unprinted invoices. The 'Sales Invoices', 'Service Billing Invoices', or 'Period Billing Invoices' can be viewed separately by selecting the 'View Types' drop down list and selecting the specific invoice type to view.

Show Group Type. Can be used to show only invoices belonging to a specific Group Type defined on the individual invoice.

Sort By. is used to sort the invoice list by Invoice Number, Date, Bill-To ID, Ship-To ID, Task ID, Consolidated Number, PO Number or Total. User can click to sort in descending order as well.

Note: Only approved service billing invoices and period billing invoices are shown. If you have not yet approved the service call, which is done in the 'Service Menu' by clicking on the 'Service Billing' button, then selecting approve on the service call, it will not appear here as an invoice waiting to be printed. Similarly, you must approve the period charge from the Period Billing screen in order to see it here.

Field Column Information

The table has a row for each invoice displayed. Columns offer additional invoice information. (The default is 'All' unprinted invoices).

The columns are:

Invoice No [+]

This is the auto-assigned Sales Invoice number. To view details of the Sales Invoice select the 'Zoom [+]' button.

Date

This is the date the Sales Invoice was created.

Bill To ID [+]

This is the Sales Invoice's Bill-To ID. To view details of the 'Bill-To' customer, select the 'Zoom [+]' button.

Ship To ID [+]

This is the Sales Invoice's Ship-To ID. To view details of the 'Ship-To' customer, select the 'Zoom [+]' button.

Task ID

This is the Service Task Ticket Task ID for the invoice.

Consolidated Number

This is the Consolidated Invoice number for this invoice.

PO Number

This is the customer Purchase Order number reference for the specific invoice.

Total

This is the total value of the Sales Invoice.

Printed

This displays the print status of the Sales Invoice.

Select

In this column, select the invoices to be printed. To select one for printing, click the white button. The word 'Print' will appear.

Note: if you have the Automated Invoice Billing module, it may alternatively show Fax or Email. See Automated Invoice Billing section for more details.

Flags, Buttons and Check Boxes

There are several other flags, buttons and check boxes along the top of the screen.

#Invoices

This is the total number of outstanding Sales Invoices.

#Marked to be printed

This is the total number of Sales Invoices already marked for printing.

Select All

Select this button, to print all Invoices, regardless of whether they have been printed already or not, for this date range.

Select All Unprinted

In the event there are some unprinted Invoices, select this button, to print all remaining Invoices for this date range.

Clear All

Select this button, to 'Clear All' Sales Invoices for printing.

View Types	All	☐ Show Printed Invoices	☐ Show for A Date Range
Show Group Type	All	☐ Show Consolidated Invoices Only	
Sort By	Invoice Number	☐ Show with PO Numbers	

Invoice No	Date	Bill-To ID	Ship-To ID	Task ID	Consolidated Number	PO Number	Total	Printed	Select
100317-0002	3/17/2016	BAIL002	BAIL002				\$140.74	No	
151020-0005	10/20/2015	BOM001	BOM001	0000054			\$214.00	No	
151020-0004	11/10/2015	BOM001	BOM001				\$189.26	No	
151020-0003	10/20/2015	BOM001	BOM001				\$100.00	No	
151020-0002	10/20/2015	BOM001	BOM001				\$802.50	No	
150731-0001	7/31/2015	AIR001	AIR001				\$11.15	No	
150612-0001	6/12/2015	BAIL002	BAIL002				\$91.65	No	
150525-0001	5/25/2015	CVC001	CVC001				\$87.81	No	
080723-0003	7/23/2008	INTER001	INTER001				\$14.71	No	
080723-0001	7/23/2008	CVC001	CVC001				\$4.46	No	
080722-0002	7/22/2008	BOM001	BOM001				\$57.35	No	

Show Printed Invoices.

Select the 'Show Printed Invoices' button to display all printed Sales Invoices.

Show Consolidated Invoices Only

Select the 'Show Consolidated Invoices Only' button to display all Consolidated Invoices.

Show with PO Numbers

Select the 'Show with PO Numbers' button to display all invoices with a PO Number listed.

Show for a Date Range

Select this option to limit the number of records displayed. Miracle Service will prompt to enter a start date and an end date. All Sales Invoices in the date range are displayed.

Print Approval Report

Select this button, to produce a hardcopy of the table of data displayed with a line at the end of each row. This work sheet allows the sales manager to approve Sales Invoices without working from the screen. The information would then need to be entered into the application.

Cancel

This exits the table without completing the changes entered.

OK

This button appears if there are one or more Sales Invoices marked for printing. Click 'OK' to print the marked Sales Invoices.

Exit

Exit will return to the menu.

Automated Invoice Billing

Description

The Automated Invoice Billing feature in Miracle Service allows users to automatically bill customers based on the customer's preferred billing method. The three methods supported include:

1. Email: Invoices are emailed to the customer's BillTo email account.
2. Fax: Invoices are faxed using the customer's BillTo fax number.
3. Print: Invoices are printed directly to the default printer.

The default billing method is set to directly print the invoices to the default printer.

The following provides the Steps to set-up and use of the Automatic Billing feature.

Steps:

1. Enable Automatic Invoice Billing
2. Configure Email and Fax Settings
3. Configure SMTP Settings
4. Setting Customer Billing Preference
5. Start Automatic Billing Process
6. Tracing

Enable Automatic Invoice Billing

In order to run the Automatic Invoice Billing feature within Miracle Service you must first enable the feature.

Run the Administration application and select 'Billing Information -> Billing Preferences - Automatic Billing'. A form will be displayed that will allow you to enable the feature by checking the provided box (see Figure 1). ** This form will not appear if the module has not been purchased. It is available to be added as an optional module.*

Invoice Billing Settings

Automatic Invoice Billing will allow users to specify a preferred billing method for each customer which will be automatically processed from within the Invoice Review screen. Once the invoices have been processed according to the customer's preferred billing method they will be marked as printed.

Billing methods include: Print, Email and Fax.

☒ Enable Automatic Invoice Billing.

Group Type ☐ Indicates the Group Type is a required field on Invoices.
☐ Indicates the Group Type is a required field on Sales Orders.

Invoice Print ☐ Invoices must be approved prior to being flagged as
Approval printable from the Invoice Review screen. Users are required to have permission to modify an approved invoice.

OK

Configure Email and Fax Settings

The following information is required in order to successfully run Automatic Billing

Reports and Email Configuration

Report Settings | **Email Settings** | Message Configuration | Meter Due Notifications | Technician SMS

Invoice Subject: Your New Miracle Service Invoice. Output Path: C:\Invoice.pdf	Body Text: Attached, please find your latest Invoice.
Purchase Order Subject: Your New Miracle Service Purchase Order. Output Path: C:\Purchase Order.pdf	Body Text: Attached, please find our latest Purchase Order
Sales Order Subject: Your New Miracle Service Sales Order. Output Path: C:\Sales Order.pdf	Body Text: Attached, please find your latest Sales Order.
Service Contract Subject: Your New Miracle Service Contract Output Path: C:\Equipment Service Contract.pdf	Body Text: Attached, please find your latest Contract.
Task Subject: Your New Miracle Service Job Request Output Path: C:\Service Call Work Order.pdf	Body Text: Attached, please find your latest Job Request.
Customer Statement Subject: Customer Statemenet Output Path: C:\Customer Statemenet.pdf	Body Text: Attached, please find your latest Statement
Return Order Subject: Output Path:	Body Text:

OK Cancel

Email Client:

Miracle Service ignores the value assigned here for the Automatic Invoice feature only. The email client that is used for the Automatic Invoice process is SMTP (Simple Mail Transfer Protocol). SMTP is fast and does not require user intervention when sending email, thus allowing this process to be automatic to the

user. Please note that a message will not appear in your sent items of your email client. To verify that a message has been sent to your customer you can view the log file discussed later in this document. You can also configure Miracle Service to copy the logged in user or a default email each time an invoice is emailed.

To properly configure your SMTP settings please see section '**Configure SMTP Settings**'.

Fax Server:

The name of the computer that is connected to the fax modem. This computer must also have installed Microsoft's Fax Services component. For help with this component see <http://support.microsoft.com/kb/306550>. The computer that is set-up as the Fax Server is the only computer that can actually fax the invoices so it is important to run the Automated Billing on that computer. This computer will also require a fax modem card connected to a phone line.

Invoice Message Settings:

Default Subject - The message subject used for emailing/faxing invoices.

Default Body - The message body used for emailing/faxing invoices.

Output Path - The path and the name of the file generated.

Note that the report name must be 'invoice' (i.e. c:\invoice.snp, d:\invoice.pdf).

Setting Customer Billing Preference

By default a customer's billing preference will be set to 'Print'. To modify the billing preference, run Miracle Service Client and select 'Customers & Suppliers -> Edit'. Once the Customer Maintenance screen is open, select the 'Financial Information' button to display the following screen:

Edit Customer's Financial Information

Tax Group	Sales Tax	Account Status	+
Payment Term	Net 30	Credit Limit	\$3,000.00
Payment Type	MasterCard	Billing Method	Print
Any Additional Charges for Labor ?		Charges for Travel ?	
Flat Charge by Zone ☒ No Surcharge ☐		Flat Charge by Zone ☐ No Surcharge ☒	
Flat Charge if Applicable \$0.00		Flat Charge if Applicable \$0.00	
Ok			

The 'Billing Method' drop down control lists the available billing methods. Select the appropriate type and select the 'Ok' button.

Validation occurs when you save the customer's record from the Customer Maintenance screen. If a customer is set to bill by email, then a valid email address must be supplied for the customer. If a customer is set to bill by fax, then a valid fax number must be supplied. If the customer is not local you must specify a long distance number for the customer. When a fax is sent it will use the long distance number and the fax number. The long distance number must be left blank for local customers.

Start Automatic Billing Process

Automatic Invoice Billing is processed from the Invoice Review screen.

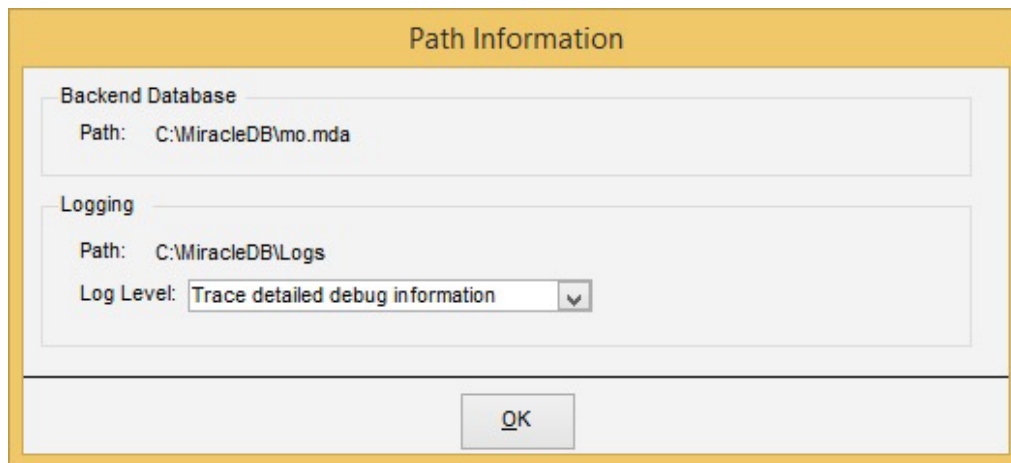
Invoice Print Approval							# Invoices 11	# Marked to be Processed 11	
View Types	All	☐ Show Printed Invoices	☐ Show for A Date Range						
Show Group Type	All	☐ Show Consolidated Invoices Only							
Sort By	Invoice Number	☐ Show with PO Numbers							
Invoice No	Date	Bill-To ID	Ship-To ID	Task ID	Consolidated Number	PO Number	Total	Printed	Select
100317-0002	3/17/2016	BAIL002	BAIL002				\$140.74	No	Fax
151020-0005	10/20/2015	BOM001	BOM001	0000054-			\$214.00	No	Fax
151020-0004	11/10/2015	BOM001	BOM001				\$189.26	No	Fax
151020-0003	10/20/2015	BOM001	BOM001				\$100.00	No	Fax
151020-0002	10/20/2015	BOM001	BOM001				\$802.50	No	Fax
150731-0001	7/31/2015	AIR001	AIR001				\$11.15	No	Print
150612-0001	6/12/2015	BAIL002	BAIL002				\$91.65	No	Fax
150525-0001	5/25/2015	CVC001	CVC001				\$87.81	No	Fax
080723-0003	7/23/2008	INTER001	INTER001				\$14.71	No	Email
080723-0001	7/23/2008	CVC001	CVC001				\$4.46	No	Fax
080722-0002	7/22/2008	BOM001	BOM001				\$57.35	No	Fax
Select All Select All Unprinted Clear All									

To start billing simply identify the invoices that you want to process by clicking the 'Select' box for the corresponding record. The billing method of the BillTo customer will appear as you click the box to give an indication of how the invoice will be processed. Once the invoices have been selected click the 'Ok' button. Invoices will be marked as 'Printed' once they have been successfully processed.

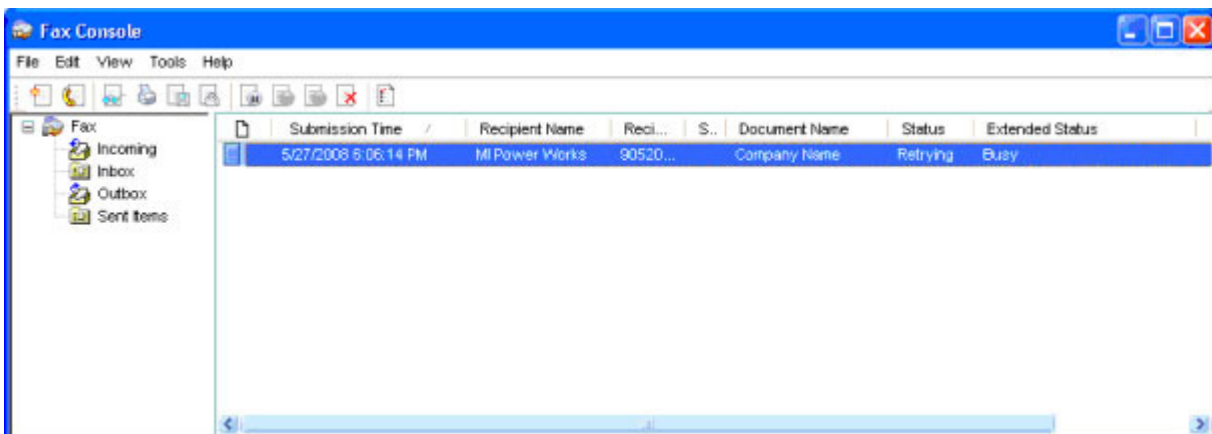
Tracing

A log file is generated to trace the activity of each invoice selected to be faxed or to be emailed. From this log file users will be able to determine the cause of any failures or confirmation that the invoice was properly processed.

To activate logging run the Administration application and select "Log Level:" from "Options ->Path Information" screen.



Microsoft's Fax Services component offers a console that enables users to view the status of each fax that is currently in the queue to be sent.



Credit Memo - (Optional Feature)

***Must be activated separately before it is available for users.**

A Credit Memo can be created for Printed Sales Invoices. From the Credit Memo screen select the New button.

[illegible]

Once the 'New' is clicked, you will be presented with a search window. User can enter either an Invoice Number or a Customer to locate the invoice to Credit.

In the search window a list of invoices will be presented. To create a Credit Memo double click the desired invoice to open the Credit Memo window for that invoice.

Credit Memos can be created, edited or deleted until they are approved. Once a credit memo is approved it cannot be modified or deleted.

Approving a Credit Memo will either accumulate a credit on the Bill To account in Miracle Service or queue a credit memo to be export to QuickBooks depending on the system configuration.

Invoice Number

Customer

AIR001

Search

Invoice Number	Invoice Date	Bill To ID	Bill To Name	Customer ID	Company Name	Total
160930-0001	09/30/2016	AIR001	International Airlines	AIR001	International Airlines	\$56.65
160722-0001	07/22/2016	AIR001	International Airlines	AIR001	International Airlines	\$63.94
151020-0001	10/20/2015	AIR001	International Airlines	AIR001	International Airlines	\$228.08
130724-0003	08/24/2013	AIR001	International Airlines	AIR001	International Airlines	\$8.06
130724-0002	07/24/2013	AIR001	International Airlines	AIR001	International Airlines	\$5.54
080722-0003	07/22/2008	AIR001	International Airlines	AIR001	International Airlines	\$159.86

The Credit Memo windows will allow users to create a credit memo for all or part of an invoice.

Credit Memo

Credit Memo

Line Items

Invoice Number

160930-0001

SHIPPED TO

International Airlines

ATTN: BETH

10368 Wallace Alley Street, Unit 1

Kingsport, TN 37663

Bill-To Company

International Airlines

ATTN: BETH

10368 Wallace Alley Street, Unit 1

Kingsport, TN 37663

Credit Memo Date

05/08/2017

Refund Terms

Return Warehouse

BEN

Customer Order No.

Created By

siteadmin

Comments

Requester

Sales Person

Bob Johnson

Shipped Via

Subtotal

\$0.00

Discounts

\$0.00

Total Tax

\$0.00

Total Credit Memo

\$0.00

On the Credit Memo window there are two (2) tabs. There is a 'Credit Memo' tab and a 'Line Item' tab.

Credit Memo Tab

Credit Memo Date: Is the date of the transaction. This date is editable so it can be set to the appropriate date of the transaction.

Refund Terms: The Refund Terms field allows the user to select how the refund will be provided.

Refund Terms

Credit on File

Issued Check

Credit Card Refund

This is a notation field only and is not tied to specific business logic. The options listed are default options and users can modify these terms in the General Lookups in Miracle Service Administration to suit their own internal business needs.

Return Warehouse: Provides a list of warehouses so a part can be returned to the appropriate warehouse.

Return Warehouse	BEN
Customer Order No.	BEN
Created By	DropShip
	JOSH
	KEVIN
Comments	MAIN
	SCOTT
	TYLER

When the Credit Memo is processed, the items on the Credit Memo will be returned to the warehouse selected in this drop down. Non-serialized and serialized parts will be returned directly to the warehouse. Serialized Equipment will be returned to the Faulty Parts function for testing before being returned to inventory.

Customer Order No.: Is a free form field and enables users to enter a reference to customers original order number if needed.

Requester: Enables the user to select the person requesting the refund for possible future reference.

Sales Person: This field will default to the sales person defined for the account; however, an alternate sales person can be selected.

Shipped Via: This field can be used to identify the method of return shipping. This list is customized using the General Lookups setup in the Miracle Service Administration.

Line Item Tab

The Line Item tab allows the user to select the items to be included in the Credit Memo.

Credit Memo										
Credit Memo		Line Items								
Item Number	Serial Number	Quantity Returned	Quantity From Invoice	Unit	Average Price Per Unit	Amount	Discount	Tax		
A88920001		0	0		\$0.00	\$0.00	\$0.00	\$0.00		

Users are presented with just the item numbers on the associated invoice. User can select an item and then identify a quantity returned. The quantity can be less than or equal to the original quantity supplied on the original invoice. The user will see the 'Quantity From Invoice'

Line items will exclude Service Equipment that are attached to an active (non-cancelled) Service Equipment Contract. The Service Equipment must be removed from the contract before a Credit Memo can be generated for that item.

Items can only be fully credited with the intention of being returned and added back to inventory. Partial item credits are not supported as these are considered item discounts and should be handled using the line item discount feature on the Invoice. Note: if multiple items are supplied, a portion can be returned for credit.

Customer Credits

Credit Memo's will accumulate to the Bill To customer record. Credits can be used as payment against any future invoice generated for the customer. Note: if the customer system is configured to export Credit Memos to QuickBooks, it will not accumulate these credits in Miracle Service.

QuickBooks Integration of Credit Memo's

Users can configure Miracle Service to export Credit Memo's to QuickBooks. Once a Credit Memo is exported to QuickBooks it is removed as a Credit in Miracle Service as it is expected it will be applied to a payment in QuickBooks. This is designed to ensure a double credit is not accidentally applied to a customer.

Credit Memo's can only be exported to QuickBooks if the related invoice was previously exported. If the invoice has not been exported, the Credit Memo will not be listed to be exported to QuickBooks.

Chapter 15

Payment Tracking

Payment Tracking is a feature activated with the Accounting Exporter module. It offers users a simple method of tracking the payments made against the invoices created. Users can track full and partial payments using the Payment Tracking feature. This ensures you can easily identify invoices which are not paid or not fully paid.

The other main feature of Payment Tracking is the ability to print customer statements to show outstanding balances owing.

The main payment table allows a general view of all invoices which have an outstanding balance greater than zero. This list can be sorted using the "Sort By:" drop down list.

The default view, when opening this screen displays all unpaid invoices sorted by the Invoice Number.

Note: Only approved service billing invoices and period billing invoices are shown. If you have not yet approved the service call, which is done in the 'Service Menu' by clicking on the 'Service Billing' button, then selecting approve on the service call, it will not appear here as an invoice waiting to be paid. Similarly, you must approve the period charge from the Period Billing screen in order to see it here.

Sort By:	Invoice Number									
Invoice Number		Date	Bill-To ID	Ship-To ID	Total Amount	Balance Owing	Make Payment	Mark Paid	Print	
100310-0001	+	3/10/2010	CAV001	CAV001	\$267.98	\$267.98	Add			
100310-0002	+	3/10/2010	KING001	MSP001	\$0.00	\$0.00	Add			
100311-0001	+	3/11/2010	KING001	TAS001	\$26.22	\$26.22	Add			
100311-0003	+	3/11/2010	KING001	TAS001	\$19.26	\$19.26	Add			
100317-0001	+	3/17/2010	CAMP001	CAMP001	\$0.00	\$0.00	Add			
100317-0003	+	3/17/2010	MAN001	MAN001	\$10.70	\$10.70	Add			
100401-0002	+	4/1/2010	LAND001	LAND001	\$270.03	\$270.03	Add			
100408-0001	+	4/8/2010	LAND001	LAND001	\$216.68	\$216.68	Add			
100819-0001	+	8/19/2010	KING001	TAS001	\$5.35	\$5.35	Add			
100820-0001	+	8/20/2010	AIR001	AIR001	\$0.00	\$0.00	Add			
100823-0001	+	8/23/2010	FLE001	FLE001	\$0.00	\$0.00	Add			
100825-0001	+	8/25/2010	AIR001	AIR001	\$0.00	\$0.00	Add			
100831-0001	+	8/31/2010	AIR001	AIR001	\$0.00	\$0.00	Add			
100901-0001	+	9/1/2010	AIR001	AIR001	\$0.00	\$0.00	Add			
100901-0002	+	9/1/2010	AIR001	AIR001	\$0.00	\$0.00	Add			
100902-0001	+	9/2/2010	AIR001	AIR001	\$0.00	\$0.00	Add			

Field Column Information

The table has a row for each invoice displayed. Columns offer additional invoice information. (The default is 'All' unprinted invoices).

The columns are:

Invoice No [+]

This is the auto-assigned Invoice number. To view details of the Sales Invoice select the 'Zoom [+]' button.

Date

This is the date the Invoice was created.

Bill To ID [+]

This is the Sales Invoice's Bill-To ID. To view details of the 'Bill-To' customer, select the 'Zoom [+]' button.

Ship To ID [+]

This is the Sales Invoice's Ship-To ID. To view details of the 'Ship-To' customer, select the 'Zoom [+]' button.

Total Amount

This is the total value of the Sales Invoice.

Balance Owing

The is the unpaid balance for the invoice.

Mark Paid

In this column, select the invoices that are being paid. To select one for payment, click the white button. The word 'Pay' will appear.

Print

In this column, select the invoices to print a Statement. To select one for a Statement, click the white button. The word 'Print' will appear. Statements marked for printing on this screen will be outputted directly to a printer.

Flags, Buttons and Check Boxes

There are several other flags, buttons and check boxes along the top of the screen.

#Invoices

This is the total number of outstanding invoices.

#Marked to be printed

This is the total number of invoices already marked for printing.

#Marked to be paid

This is the total number of invoices already marked for payment processing.

Mark All Paid

Select this button, to mark all invoices as paid.

Mark Print Printed

Select this button to mark all of the invoices for statement printing. This will cause a statement to be printed for all of the invoices in the list.

Clear All

Select this button, to 'Clear All' invoices that are marked to be printed or paid.

Print Statements

Once an invoice is marked for printing, the 'Print Statement' button will become present. Click this button to initiate the printing of the statements for all marked invoices.

Managing Partial Payments

The interface enables users to track partial payments as well as full payments. Click the 'Pay' button on the line associated with the invoice for which you have received payment. The 'Invoice Payments' window will appear showing all previous payments. Users can enter more payments as required.

Payment Date	Payment Amount	Method	Reference
12/21/2010	\$200.00	Cash	
12/21/2010	\$0.00	Cash	

Users select or enter the Payment Date, Payment Amount, Method and Reference.

Payment Date

Enter the date the payment was made. This date is used in determining the invoice aging for the Invoice Aging report.

Payment Amount

Enter the amount of the payment.

Method

Select the method of the payment. Options are Cash, Cheque, Debit Card, Amex, MasterCard or VISA.

Reference

Enter the reference for the payment. This may be a cheque number, credit card number or authorization number.

Print Customer Statement

Once a payment is recorded users can click the 'Print Customer Statement' to print an updated statement to send to the customer showing the balance owing.

Sample Company

Service Management Made Easy
 2087 Dundas Street East
 Mississauga, Ontario L4X 2V7
 Phone: 877 263 9368 Fax: 905 206 0701

Statement**Date****5/5/2008****Page 1 of 1**

BILL TO: Service Point Limited
 6321 Indian Road
 Anytown 00000

Amount Due	Amount Enc.
\$49.19	

Date	Description	Amount	Balance
4/1/2008	Service Billing Invoice# 080401-0001 Due 5/1/2008	\$124.19	\$49.19
5/5/2008	Payment - Cash	\$75.00	

Current	1-30 DAYS PAST DUE	31-60 DAYS PAST DUE	61-90 DAYS PAST DUE	OVER 90 DAYS PAST DUE	AMOUNT DUE
\$0.00	\$49.19	\$0.00	\$0.00	\$0.00	\$49.19

Payments on Invoices

Users can work directly with invoices to track the payments. When viewing an invoice, the payment button will be active at the bottom of the screen. Click the Payment button to open the 'Invoice Payment' screen. This will list all past payments and allow the user to enter new payments against the invoice. The user also have the option to print a customer statement by selecting the button.

Chapter 16

Purchase Orders

The Purchase Order Module deals with the managing of Purchase Orders and the Reconciliation of Purchase Orders. Purchase Orders are created from the 'Purchase Order' main menu bar.

To create a Purchase Orders, select the 'Add New' button for purchase orders.

The screenshot shows a web-based form for creating a Purchase Order. At the top, there are status flags: 'Approved' (green), 'Not Printed' (yellow), 'Not Received' (red), and 'Not Invoiced' (red). The form is divided into several sections:

- Order From:** A dropdown menu showing 'ABC' with a 'Zoom [+]' button. Below it, the supplier details are listed: 'ABC Equipment Suppliers', 'PO Box 840927, Dallas, TX, 75284-0927, 5558897900'.
- Ship To:** A dropdown menu showing 'MAIN' with a 'Zoom [+]' button. Below it, the warehouse details are listed: 'Main Warehouse', '119 West 23rd St, New York, NY, 10011, (555) 396-5916'.
- P.O. #:** A text field containing '120604-0001'.
- P.O. Date:** A date field showing '04/06/2012'.
- Date Received:** An empty date field.
- Payment Terms:** A dropdown menu showing 'Net 30'.
- Due Date:** A text field showing 'Not Received'.
- Notification Date:** A date field showing '15/06/2012'.
- Comments:** A text area containing 'Toner and supplies.'.
- Ordered by:** A text field showing 'Will Smith'.
- Reference:** A text field showing '2899101'.
- FOB:** A dropdown menu showing 'Destination'.
- Shipped Via:** A dropdown menu showing 'FedEx'.

At the bottom right, there is a summary table:

Subtotal	\$109.00
Discounts	\$0.00
Other Charges	\$0.00
Total Tax	\$4.32
Total P.O.	\$113.32

At the bottom left, there are three buttons: 'Line Items', 'Other Charges', and 'Tax Info'.

PO

The Purchase Order number will be defaulted from the Administrator Module settings.

Back Order PO Numbers

Notice that in the example above, this is a back order Purchase Order, as indicated with a BO- (backorder) number. It is generated automatically only if receipt a shipment was not filled completely. At that point there's a prompt to create a back order.

Ordered From

Select the supplier from which the items are being ordered. Lists of all suppliers are available through a drop down box, or enter a new supplier on the fly through the 'Zoom [+]' button.

Ship To

This field offers, through a drop down box, the listing of all the warehouses entered into the application. After the 'Ship To' is selected, a series of fields appear requesting information about the purchase.

The 'Ship To' also allows users to select 'DropShip' as a option. When this is selected, 'Order by' field is replaced with a Customer and Requester field to select the Customer and Requester for the drop shipment.

When a DropShip is selected, the standard process for Receiving and Reconciling the purchase order remains the same.

P.O. Date

The current date is the default entry for this field, however the date may be modified.

Date Received

When items are received, and the 'Receive' button is selected, the 'Date Received' field is automatically entered with that date, (see paragraph on 'Purchase Order Receipts').

Payment Terms

The Supplier's payment term is automatically entered with the pre-agreed terms. A different payment term may be selected from the drop down list or add a new payment term on the fly.

Due Date

The due date is calculated based on the date the items were received plus the payment term. For example, suppliers expect items received today with Net 30 to be paid in 30 days from today's date. This field is not editable.

Notification Date

Enter the negotiated date that the items are to be delivered. This expected delivery date would appear on the bottom of the Purchase Order. This field is used in the event the supplier is obligated to contact your parts department in the event of a delay. This is an optional field.

Ordered by

Enter your first name, title or department. The 'Ordered By' information will appear on the Purchase Order to assist the supplier in the event they need to contact someone regarding the order. This is an optional field.

Reference

The Reference is a free form text field that is used to add customer or vendor reference information.

FOB

FOB stands for Freight on Board. Enter who is responsible for paying freight and to what point? This is an optional field.

Ship Via

Select the method of delivery from the drop down list.

Special Info Buttons

These buttons allow access for additional information regarding this Purchase Order.

The 'Special Info Buttons' are located on the bottom left of the 'Purchase Order' screen.

Line Items	Other Charges	Tax Info
------------	---------------	----------

They assist in creating the details of the 'Purchase Order. They are:

Line Items Button

Select 'Line Items' and a table labeled 'Edit PO's Line Items' appears.

Edit P.O.'s Line Items									
Item Number	Total Quantity Ordered	Qty On This P.O.	Quantity Received	Unit	Warranty	Average Cost Per Unit	Amount		
A369841	2	2	0	Each	☐	\$1.25	\$2.50		
Suppliers Part Number					Serialized	Discount	Discount	\$0.00	!
Description Connectors						Tax	Tax	\$0.18	
A5221478	2	2	0	Each	☐	\$25.40	\$50.80		
Suppliers Part Number					Serialized	Discount	Discount	\$0.00	!
Description Toner						Tax	Tax	\$3.56	
*	0	0	0		☐	\$0.00	\$0.00		
Suppliers Part Number					Serialized	Discount	Discount	\$0.00	!
Description						Tax	Tax	\$0.00	

Ok

Each line item uses three rows of information and additional buttons to further describe the line item purchase.

Item Number

This is the identifier for the inventory item to be purchased. All inventory items appear if the down arrow is selected.

Searching: Search for items by clicking on the [+] button and using the Search buttons on the inventory screen. (See 'Search Fields').

Supplier Part Numbers: Select the item from the drop down list. Miracle Service will enter the supplier's item ID in the Suppliers Part Number field automatically, if applicable.

If a part from a new supplier is ordered, Miracle Service will ask if you that supplier is an alternate supplier for the part number. If 'Yes' is selected, enter the supplier part number, in the event it is different from the main supplier's, or your own internal part number.

Superseded Part Numbers: If a superseded number is entered, the correct new item ID number will appear.

The 'Zoom [+]' button will open the 'Inventory Maintenance' screen for viewing. From here edit the record on hand, go to another record, or enter a new inventory item. When exiting the screen of the inventory item viewed, note Miracle Service has entered the item number information.

Total Quantity Ordered

Enter the number of items to be purchased. See also 'Quantity on This PO' and 'Quantity Received' and 'Amount'.

Quantity on This PO

This figure is usually the same as 'Total Quantity Ordered'. The blue field displays information calculated from figures received from other fields.

If the supplier partly fills an order (see the 'Inventory Receipts' screen), Miracle Service will offer the opportunity to place a 'Back Order'. This order will carry its own PO number and will order the remaining quantity on order by calculating the quantity received from the quantity ordered. The Total Quantity Ordered will reflect the amount in the original order. The 'Quantity on this PO' will show a different value.

For example, ten items are ordered from a supplier but only six were received, Miracle Service will prompt the creation of a back order. The back order will show Total Quantity ordered as ten and Quantity on this PO as four. Miracles Service will repeat this process until all items are received.

Quantity Received

This blue field displays information entered in the 'Inventory Receipts' screen.

Unit

This blue field displays information entered in the 'Inventory Data' screens. Units of measure may be 'each' or 'box', for example.

Warranty

Selecting the Warranty check box allows you to indicate if a part being purchased is under warranty. When under warranty, the last cost of the item is not recalculated using the reduced cost. Also, when indicating that a Part Used is under warranty the cost associated to the Service invoice is set to \$0 for accurate profitability analysis. This feature is intended to handle parts being supplied by the OEM or Vendor where it is being supplied at no cost as it is part of the warranty provided by the OEM or Vendor.

Average Cost per Unit

This is the cost figure quoted by your supplier. Edit this amount through the inventory receipts screen when the order arrives, using the reconciliation screen when the invoice arrives from the supplier.

Note: Do not confuse this with the average cost per unit that Miracle Service calculates when a non-serialized item arrives and the price charged is combined with the cost of old inventory left in stock.

Amount

This is the 'Average Cost per Unit' multiplied by the 'Quantity on this PO'.

Supplier's Part Number

The supplier's part number is automatically defaulted from the 'Inventory Data' screen.

Description

This can be a single word or brief explanation of the item. This will default in from the 'Inventory Data' screens but is editable.

Serialized

This feature is disabled until the inventory item is received and serial numbers are available to be entered from here or the 'Inventory Receipt' screen

Discount

This is a discount of the line item cost. By selecting this button, enter the description of the discount being offered and either the percentage or the dollar value of the discount. If the percentage is entered the dollar value is calculated. If the dollar value is entered the percentage is calculated.

Tax

This button only applies if the 'Tax by Line Item' option was selected in Administration Set Up. Select the 'Tax' button to go to the 'Edit Line Item's Tax Information' pop-up. Taxes paid vary depending on to which tax categories and tax groups these items and supplier belong. All relevant taxes have been automatically selected.

If taxes need to be edited, the Yes/No button can be toggled.

The Min./Max Qty for Tax and Min./Max Value for the Tax are explained in the Tax Categories setup instructions.

Recalculation button

See the 'Application Conventions' regarding 'Recalculate' buttons

Totals

Notice the blue fields and a 'Recalculate' button in the lower right corner of the 'Purchase Order' screen. The 'Sub-total', 'Discounts', 'Other Charges', and 'Total Tax' fields reflect the values entered through the 'Special Info' buttons. The 'Total PO' is the sum of those fields. See the 'Application Conventions' for more information on 'Recalculate' buttons.

Other Charges Button

Select the 'Other Charges' button, to enter the table labeled 'Edit PO's Other Charges'.

Description	Amount	Tax	
▶ Freight	\$25.00	Tax	\$1.75
*	\$0.00	Tax	\$0.00

Ok

Enter freight or other handling charges, or other miscellaneous expenses. Select the applicable taxes from the 'Tax' button if 'Tax by Line Item' in the 'Administration Set Up' was selected.

Tax Info Button

The 'Administrative Set Up' allows the choice of using the blended tax method, (Tax on Tax in the sort order selected). If necessary, edit the tax order here for this specific 'Purchase Order'.

Printing the Purchase Order

After the line items are added on the Purchase Order, save the PO before printing it. There are two buttons from which to select 'Approve and Save' and 'Save'. There are also two ways to print a PO.

Approve and Save Button

When a purchase order is 'Approved and Saved', the transaction will be recorder in Miracle Service as 'Approved' within the 'PO Print Preview' screen. When the 'Approved and Saved' button is selected, the User ID will appear with the date that the PO was. Once the PO is approved, there are two options to print. The first is from the PO Print Preview Screen from the Inventory Control Menu. Notice that the User ID will appear in the column 'App'd By' in the 'PO Print Preview' screen. The second method to print the PO is to click the Edit button on the Inventory Control Menu for the PO's, locate the PO, and click the 'Print' button.

If a printed hard copy of the PO is not required, click the [+] button to the right side of the 'Not Printed' flag in the PO Flags area of the screen.

Save Button

Miracle Service will record the purchase in the 'PO Print Review' screen for approval later.

Emailing the Purchase Order

Once the Purchase Order (PO) is ready, you have the ability to e-mail the PO to your supplier or warehouse. You can e-mail the PO when you are viewing the PO in the Print Preview screen. While viewing the PO, select the 'File' menu item and then select 'Email' from the list. This will present you with a list of available e-mail addresses to which you can send the PO.

Cancel a Purchase Order

This cancels the entire PO so to start again.

At the bottom of an Edit or View Purchase Order screen, notice the other function buttons. See 'Application Conventions' for 'New', 'Edit', 'Delete', and 'Reports'.

Voiding a Purchase Order

If the 'Void' button is selected, Miracle Service will void the purchase order. Since Miracle Service numbers Purchase Orders the information will remain in the tables. This is not the same as delete, but the process is irreversible.

Flags and Button on the Purchase Order Screen

When the 'Ship to' in the new 'Purchase Order' is entered, a series of new fields opened. At the same time, words printed in red appeared across the top of the 'Purchase Order'. These are flags that communicate the status of the PO. The flags appear in green when activity on the flag has been completed.

(Not) Approved [+]: A 'Purchase Order' is invalid until a user ID with approval permissions approves the order. By selecting the [+] button (looks like a 'Zoom [+] button), the red 'Not Approved' will turn green 'Approved'. The [+] button will bring up a small window to show the login name of the person who approved it and when. A user with permissions can approve the PO using the 'Approve and Save' button at the bottom of the Purchase Order New or Edit screens, or from the 'Print Review' screen.

(Not) Printed [+]: There is a 'Print' button at the bottom of the purchase order screen. Selecting this button prompts Miracle Service to print a hard copy of the order. PO can also be printed from the Print Review Screen.

Hint: Occasionally this step may be skipped (for an across the counter purchase, or a verbal order), but further handling by Miracle Service requires that the PO be printed. By selecting the [+] button (looks like a 'Zoom [+]' button) the red 'Not Printed' will change to a green 'Printed' without actually creating a hard copy. Miracle Service will handle the 'Purchase Order' as though it had printed it. You can now go to the 'Receive' screen to receive the item into inventory. (Note: If you are not using a linked accounting system, and you did not want to record the purchase order, you could have just added the item directly into inventory.)

(Not) Received: This red flag turns green 'Received' when the items on the PO are received and the button in the 'Inventory Receipts' screen is selected.

(Not) Invoiced [+]: If the PO has been received and all the prices are correct, the reconciliation screen may be bypassed. On those occasions select the [+] button next to the red 'Not Invoiced' flag. Notice the red 'Not Invoiced' turns to a green 'Invoiced'. Miracle Service will prompt to enter the invoice information in a pop up window. The information may be accessed when the [+] button is selected.

Chapter 17

Purchase Order Print Review

See the 'Application Conventions' for 'Review Screens'.

The 'Purchase Order Print Review' screen allows the approval and printing of purchase orders individually or in batch. From the 'Purchase Orders' group of the 'Inventory Control' menu, select 'Print Review'.

PO Number		Date	Supplier ID		Warehouse ID		Total	Approved By	Printed	Mark for Printing	Approve
080723-0002	+	7/23/2008	ABC2	+	MAIN	+	\$51.09	siteadmin	No		Approve

All of the purchase activity is available at a glance. Review previously printed purchase orders for reprinting, or quickly approve and print all outstanding purchase orders.

Field Column Information

PO No [+]

This is the number that Miracle Service assigned when a new 'Purchase Order' is created, according to the numbering system set up in 'Administration'. A 'Zoom [+]' button allows viewing of the PO.

Date

This is the date shown on the 'Purchase Order'.

Supplier ID [+]

This is information from the 'Order From' field of the 'Purchase Order'. The 'Zoom [+]' button will enter the 'Supplier Maintenance' screen.

Warehouse ID [+]

This is the 'Ship to' field of the 'Purchase Order'.

Total

This displays the purchase total figure calculated by Miracle Service.

App'd By

This displays the 'log-in' name of the person who approved the purchase. Whoever selected the 'Approve and Save' button when creating the PO, their name will appear in this field. Whoever approves a PO, their User ID will appear here.

Prnt'd

This indicates whether or not the 'Purchase Order' has already been printed.

Mark for Printing

With this column, mark each PO for printing separately by selecting the empty box. A pink 'PRINT' will appear. If a message says, 'This Purchase Order has not been Approved' when the PO is selected, then approve it by clicking the button to the far right side of the PO line within this screen.

App'v (Approve Button)

Clicking this button will allow a person with approval permissions to approve the PO, which will then allow it to be printed. Purchase orders can be approved from this screen by selecting the button at the end of the row marked 'App'v'. If the PO was previously approved, the approval may be edited.

Flags, Buttons and Check Boxes**Mark All**

If this button is selected, Miracle Service will mark all approved entries in the 'PO Review' for printing. This includes previously printed PO's if the 'Show Printed PO's' box is checked.

Mark All Unprinted

Some purchase orders may already be printed, select 'Mark All Unprinted' and the application will mark unprinted PO's for printing.

Unmark All

This button will Unmark for printing all of the Purchase Orders listed.

PO Review Section**Show Printed PO's**

The PO Review Section displays all PO's, printed and unprinted. Select 'Show Printed PO's' to display only those documents.

Show For A Date Range

Select this option to limit the number of records displayed. Miracle Service will prompt to enter a start date and an end date. All purchase orders in the date range are displayed.

Print Approval Report

This feature prints a report with each purchase orders' details for someone to review and authorize manually.

Select 'Exit' to go back to the 'Inventory Control' menu.

Chapter 18

Purchase Order Receipts

The PO Receipt table is a table listing all outstanding and approved purchase orders (or back orders) with a 'Receipt' button to receive the PO when it arrives.

It is located in the 'Purchase Order Menu'.

How to Receive Inventory

When the inventory item(s) have arrived, you need to mark the Purchase Order as 'Received'. To mark a Purchase Order as Received, click on the 'Receive' button under Purchase Orders

PO Number	Date	Supplier ID	Warehouse ID	Total	
100820-0001	8/20/2010	TechData	MAIN	\$57.85	Receive

This is a listing of all outstanding Purchase Orders. All entries are in blue fields indicating that Miracle Service has taken the information from other screens. The columns are:

PO Number [+]

This is the auto-generated PO number that Miracle Service issued. The 'Zoom' [+] button enters the 'Purchase Order' for viewing.

Date

The date the 'Purchase Order' was entered into Miracle Service.

Supplier ID

This field displays the 'Order From' information entered into the 'Purchase Order' screen. The 'Zoom' [+] button enters the supplier's information as entered in the 'Supplier' screen.

Warehouse ID

This is the 'Ship to' information entered in the 'Purchase Order' screen. The 'Zoom' [+] button enters the 'Warehouse Maintenance' screen for viewing.

Total

This is the total amount of the 'Purchase Order'.

Receive Button

The last column in each row contains a button marked 'Receive'. When a purchase order arrives, select the 'Receive' button for that purchase order. When the button is selected, the 'Purchase Order Receipt' opens a screen that displays un-editable blue fields.

Non-Serialized Items on a Purchase Order

If the PO was complete with no changes, select 'Exit' to return to the PO Receipt screen. If the 'Edit' button is selected, this allows the 'Line Items' and 'Other Charges' to be edited. This permits changes to the price or quantity received in the event that the supplier does not fill the order as requested. If other charges are applicable add or edit them.

In the case of an incomplete order of a non-serialized item, Miracle Service will offer the opportunity to create a 'Back Order' to make up the shortfall. It will bear the original PO number with suffix BO and a two-digit number created by Miracle Service. The original PO is closed with this new Purchase Order Number.

Receiving Items that are Serialized

When a purchase order contains serialized items, select the 'Edit' button on the Purchase Order screen. The edit button appears after the 'Receive' button on the P.O. Receipts screen is selected. Click on the line item for the serialized item, click on the 'Serialized' button, and enter the serial number. A table appears with a row for each of the serialized items ordered divided into columns. In the 'Serial Number' column, the code MILL-UNKNOWN-001 (or 002-or 003 as the case may be) appears. Replace the MILL-UNKNOWN-001 serial number with the serial number of each item received

Note: You must delete the code MILL-UNKNOWN-###, for any serialized item not received, from the table. Failure to replace or remove the MILL-UNKNOWN code will block the completion of this receipt function. This is done so that you maintain a record of serialized inventory, with the correct serial number associated with the item.

After closing the purchase order, Miracle Service will ask if an invoice has been received from the supplier. If an invoice was received, enter the invoice number here. Otherwise, the Purchase Order can be reconciled and assigned an invoice from the 'Reconcile Purchase Orders' screen.

Receiving Parts Needed

During the receiving process parts may be needed to complete a Service Task. During the receiving if a part is needed on a Service Task a dialog box will be displayed asking to reserve a quantity of parts for any open Service Task showing the part as being needed.

Task ID	Sales Order Number	Reserve To Warehouse	Qty Needed	Qty To Reserve
24-1	080703-0003	MAIN	5	0

When receiving Parts Needed it will check both Non-Serialized and Serialized needs.

When receiving Non-Serialized parts, if they are needed on a Task the Task ID will be shown along with the Sales Order number and Quantity Needed (Qty Needed). The user receiving the quantity will need to select the Warehouse where they want to reserve the part to and the Quantity to reserve. Any excess quantity will be receiving to the warehouse normally.

When receiving Serialized parts, if they are needed on a Task, the user must select the Serial number and the Task on which the part is needed and select the Warehouse where the part is stored.

Selected	Serial Number	Task ID	Reserve To Warehouse
☐	BRG118928819		
☐	BRG928277181		

When selecting the Task ID the user can View all Task where the part is needed and the associated Sales Order number.

Selected	Serial Number	Task ID	Reserve To Warehouse
☒	BRG118928819	24-1	
☒	BRG928277181		

Task Number
24-1
Sales Order Number
080703-0003

After selecting the items the user clicks 'OK' and the parts are Reserved on the selects tasks and the remaining parts are returned to inventory.

Please refer to the Manage Reserved Parts section of the manual for more details on managing reserved parts. Also refer to the Sales Order - Project Sales Orders on how to establish needed parts.

During this process a Picking Slip is generated for Service Task that the part(s) are reserved for. This is to ensure the warehouse control picks the parts and places them aside for the task identified.

Chapter 19

Purchase Order Reconciling

This is an important step for more accurate costing and profitability analysis.

This feature accommodates invoices that have arrived after the product(s) have arrived, or invoices that might have different prices for the ordered items. In other words, the items were received in the recent past, and several items may already been sold, but the invoice arrived today or the cost of the item is different from previous orders. In these cases, the costs of these inventory items on the PO must be reconciled.

PO Number		Date	Supplier ID		Warehouse ID		Total	
080723-0001	+	7/23/2008	XYZ2	+	MAIN	+	\$256.69	Reconcile

Select 'Reconcile' to bring up the 'PO to Supplier Invoice Reconciliation' screen.

Note regarding costing of items:

If you receive an item prior to receiving an invoice from the supplier, you need to be aware of some accounting implications, whether or not you have the Accounting Export Module. If you sold an item before you knew the correct cost of the item that was ordered, the invoice created for the customer will not reflect the true cost-of-goods sold. Therefore, the accounting exporter will not know how much to expense for the cost (i.e. how much to debit or credit to the asset account for the inventory item(s), and the cost of goods sold account. It will know the revenue generated from the item, but at that point, it will not know the accurate cost of the item.)

In this case, where you sold an item without knowing its actual cost, Miracle Service sends to the accounting software the average cost of the item based on the quantity you had in stock at the average cost pricing, and the new quantity added into stock at the new cost. E.g., 1 item in stock at \$1.00 plus one ordered at \$0.50 equals an average cost of \$0.75. Since you already sold the item to a customer, this cost information was sent to the accounting program via the optional Accounting Export Module. The cost information sent is the average cost so a journal entry will need to be made for the difference. Miracle Service always keeps a running average cost for non-serialized items, and the actual pricing for all serialized items, since each item can have a different price.

This table displays a list of all non-invoiced, received purchase orders.

PO Number [+]

This is the auto-generated identifier Miracle Service created. Select the 'Zoom [+]' button to view details of the PO.

Date

This is the PO creation date.

Supplier ID [+]

This is the supplier ID number. Select the 'Zoom [+]' button to view details about the supplier.

Warehouse ID [+]

This column displays the 'Ship to' warehouse for the PO. Select the 'Zoom [+]' button to view details about that warehouse.

Total

This is the total amount of the purchase order.

Reconcile Button

Select this button to enter the 'Purchase Order To Supplier Invoice Reconciliation' screen.

		P.O. # 080723-0001	
Order From	XYZ2 	Ship To	MAIN 
XYZ2 Supplies NW-9414, Minneapolis, MN, 55485-9414, 5553282965		Main Warehouse 119 West 23rd St, New York, NY, 10011, (555) 396-5916	
P.O. Date	7/23/2008	Date Received	3/23/2010
Payment Terms	Net 30	Ordered by	
Notification Date		FOB	
Comments			Shipped Via
		Subtotal	\$239.90
		Discounts	\$0.00
		Other Charges	\$0.00
		Total Tax	\$16.79
Line Items Other Charges		Total P.O. 	\$256.69 

Purchase Order to Supplier Invoice Reconciliation Screen

Click the 'Reconcile' button on the 'PO Receipts' screen to view this screen. This is the same as the 'Purchase Order' screen. The fields displayed are non-editable blue fields.

No Changes to PO Required (Non-Serialized Parts Order Only)

If the prices for the items from the supplier were the same for each line item that appeared on the purchase order, (and there are no serialized items), simply press Exit on this screen. No reconciliation is required for the PO.

For non-serialized items, the average cost is added for each line item

Receiving PO's with Serialized Items

Select the 'Edit' button at the bottom of the screen and then click on the 'Serialized' button for each serialized line item. Remember to change the temporary serial number to the actual serial number. Miracle Service creates the temporary serial numbers so that the program can accept the equipment. If 5 serialized items are ordered and three are received, delete the other two lines by clicking in the box to the far left of the line item and pressing the delete button. Once the prices have been edited, if required, the application will be prompt to create a back order for the items not received (the deleted items).

Receive P.O.'s Line Items

Item Number	Total Quantity Ordered	Quantity on this P.O.	Quantity Received	Unit	Landed Cost	Average Cost Per Unit	Amount
A32014856	2	0	2	Each	\$450.00	\$450.00	\$900.00
Suppliers Part Number					Serialized	Discount	Discount
Description Copier					Tax	Tax	\$0.00
A8459862	3	0	3	Each	\$285.00	\$285.00	\$855.00
Suppliers Part Number					Serialized	Discount	Discount
Description Desktop Unit					Tax	Tax	\$0.00

Ok

When all the information is correct, exit the screen and Miracle Service will ask to reconcile the PO with the changes made. If 'NO' is selected, the changes are cancelled. If 'YES' is selected, Miracle Service removes the PO from the reconciliation screen. If the supplier's invoice number was not entered during the reconciliation step, select edit and enter the supplier's invoice number. This information will be used when exporting the PO information to the accounting software. (Specific Account Exporter Module required).

The last cost table in inventory is updated with the price for non-serialized items. The average cost per item is also updated based on the quantity received and the current quantity in total stock. For serialized items, the actual cost of each individual item is recorded and used throughout Miracle Service.

Using Landed Cost

The Landed Cost feature allows users to separate the internal (Landed) cost of a part from the purchase cost of the part from the supplier. This feature is only important to clients that have high costs that need to be added to the parts due to shipping, duties and taxes. This allows companies to load the internal cost of the part with the additional shipping, duties and taxes needed to more accurately reflect the cost of a part when it is received.

Note: if you make the Landed Cost and Average Cost per Unit the same when receiving a Purchase Order (PO) and this is the cost of the part on the PO, then this will essentially work the same as Miracle Service did before the Landed Cost feature was added.

When a PO is received the Landed Cost is factored in to the Avg Cost / Unit based on the current dollar value in the Avg Cost / Unit and the Quantity in Stock (QIS). The application will average the cost of the QIS and the new items being received.

For example, if you have one (1) item in stock with a Avg Cost / Unit of \$10.00 and receive 2 with a Landed Cost of \$9.00, then the Avg Cost / Unit after receiving the 2 new items will be \$9.33 with 3 items in stock.

$$((\$10 \times 1) + (\$9.00 \times 2)) / 3 = \$9.33$$

The Average Cost per Unit in the Receive P.O.'s Line Items is used to update the Avg Cost / Unit in the View Stock Level screen. This is an important cost in the system and is used as the part cost when a part is used or sold to a customer. This cost will then affect the Profitability calculation for Contracts and Equipment.

The following is an example of Landed Cost calculation.

View Stock Level

Warehouse: **Main**

Item Number: **PART3**

QIS: **1**

Avg Cost / Unit: **\$10.00**

Avg Retail / Unit: **\$20.00**

Last Cost / Unit: **\$0.00**

Ok

Before PO is received. Note the Average Cost per Unit is \$10.00 for the current item in stock.

Item Number	Total Quantity Ordered	Quantity on this P.O.	Quantity Received	Unit	Landed Cost	Average Cost Per Unit	Amount
PART3	2	0	2	Each	\$9.00	\$9.00	\$18.00

Suppliers Part Number:
Description: PART3

Serialized:
Discount:
Tax:
Discount:
Tax:

PO being Received. Note two items are being received at \$9.00 per unit.

View Stock Level

Warehouse: **Main**

Item Number: **PART3**

QIS: **3**

Avg Cost / Unit: **\$9.33**

Avg Retail / Unit: **\$20.00**

Last Cost / Unit: **\$9.00**

Ok

After PO is received. Note the Average Cost per Unit is now \$9.33 per unit.

Similarly the Average Cost per Unit on the PO will directly update the Last Cost / Unit on the View Stock Level screen and should be equal to the price you paid your supplier for the part. The purpose of the Last Cost / Unit is to track the last cost paid to a supplier for the part. This is helpful when creating then next PO for the part as it will let the user know what price they paid last time for this part. The Last Cost / Unit on the View Stock Level screen and the Average Cost per Unit on the Receive P.O.'s Line Items is directly link and not used in any other part of Miracle Service.

Chapter 20

Supplier

The supplier module will allow the business to add and modify equipment and consumable suppliers.

Supplier Screens

The screenshot displays the 'Supplier Maintenance' window. At the top, there's a title bar 'Miracle Service - [Suppliers]' and a menu bar with 'Options' and 'Help'. Below the menu bar is a header area with 'Supplier Maintenance' and a 'Supplier ID' dropdown menu. The main content area is divided into two sections. The left section contains a form with the following fields: 'Active Supplier' (checkbox), 'Supplier Type' (dropdown menu), 'Customer Number' (text field), 'Address' (text field), 'City' (text field), 'State' (dropdown menu), 'Zipcode' (text field), 'Country' (dropdown menu), 'Phone' (text field), 'Fax' (text field), 'Email' (text field), and 'Attention' (text field). The right section is labeled 'Comments & Location Directions' and contains a large text area. At the bottom of the form, there is a button labeled 'Financial Information'. Below the form, there is a row of buttons: 'New Supplier', 'Edit Supplier', 'Delete Supplier', 'Reports', and 'Exit'.

Supplier ID

The Supplier ID is a unique alphanumeric identifier. The Supplier ID can be used to differentiate between supplier records with the same name.

Most accounting applications use the Supplier ID to import information. If your company plans to use the accounting exporter function in Miracle Service, the unique Supplier ID must be the same in both applications.

Enter an alphanumeric identifier. Letters, numbers, spaces, and underscores are acceptable characters. Do not use special characters, such as quotes and apostrophes. For example, XYZ Company may be XYZ-001 or XYZ001. Enter the Supplier Name when the field appears. Select [Enter] to continue with your 'Data Entry' screen.

Active Supplier ? ☒		Supplier ID PCS-001		
Supplier Type Primary Supplier		Supplier Name Primary Consumables Supplier		
Customer Number				
Address 90238 Outer Drive Road		Comments and Location Directions Primary Equipment, Parts and Consumable supplier. Ron VanDercan is our Account Executive. If Ron's out-of-the-office, contact Kevin Briggs. Kevin was our former Account Manager he's our secondary contact.		
Gate 11				
City Anytown	State AS			Zipcode 00000
Country USA	State			Zipcode
Phone (555) 845-4545	Other			
Fax (555) 845-4546	Email ron@primary.com			
Attention Ron VanDercan				

Supplier Type

This optional field identifies suppliers, belonging to different groups, for example, Manufacturer, Primary Supplier, and Secondary Supplier etc.

The Supplier Type field may be used to differentiate suppliers by types of organizations or by average shipping time.

Other Fields

Enter the Address and Other Supplier Information. This information will print on all customer reports or invoices.

Attention

Enter information that will help direct mailings to the proper person. When creating an envelope or purchase order, for example, the 'Attention' line will appear.

Financial Information

This screen provides details of the financial relationship between the dealership and the supplier.

Select the 'Financial Information' button to enter the 'Edit Suppliers Financial Information' screen.

Edit Supplier's Financial Information

Tax Group	1-Sales Tax	Credit Limit	\$0.00
Payment Term	Due Upon Receipt		

Ok Cancel

The 'Tax Group' and 'Payment Terms' are defaulted. Select a different 'Tax Group' and/or 'Payment Term' if applicable. Enter the dealership's company's Credit Limit with this supplier.

Requesters

Requesters can be added to Suppliers. These are the individual supplier contacts at the supplier. Each Requester can have a a unique phone number, e-mail address and other details related to the specific supplier contact.

Chapter 21

Inventory

The inventory module will allow the business to gain valuable information on parts usage and parts needs based on this usage. Reports inform which technicians use the most parts, the exact requirements to keep the inventory at its peak levels, and much more. This module allows tracking of superseded numbers. It also allows the importing of supplier part files for review and for ordering. Usage reports will inform which parts that are not being used, and therefore should not be restocked at the current quantities.

The 'Inventory' modules are under the 'Inventory Control' button from the 'Main' menu. Notice that the Inventory group of the 'Inventory Control' menu has five buttons (The standard 'New' and 'Edit' plus 'Transfer', 'Reconcile' and 'Import'). This allows movement of inventory into and between warehouses.

Quick Search		Clear All	Views	Add New	Price Book	Faulty	Reserved	Kits	Reconcile	Transfer
Item Number	Description	Serial	Category	Model Class	Model Number	Total QIS	Cost	Retail	Supplier Name	Tax Cate
A123456	Paper	No	Paper	N/A	N/A	163	\$0.50	\$1.99	ABC2 Supplies	TAX
A147258	Toner	No	Toner - Black	Segment 3	A19573512	136	\$9.68	\$15.99	ABC2 Supplies	TAX
A234567	Drum	No	Drums	Segment 4	A42068953	14	\$7.55	\$15.99	ABC2 Supplies	TAX
A32014856	Copier	Yes	Printers	Segment 3	A19573512	6	\$500.00	\$750.00	ABC Equipment Suppliers	TAX
A369841	Connectors	No	Parts-Misc	Segment 2	A521489	51	\$1.25	\$5.50	ABC2 Supplies	TAX
A369852	Toner	No	Toner - Black	Segment 4	A42068953	45	\$20.65	\$42.99	XYZ2 Supplies	TAX
A521485	toner	No	Toner - Black	Segment 1	A225596314	37	\$5.99	\$16.99	ABC2 Supplies	TAX
A5221478	Toner	No	Toner - Black	Segment 5	A521069	20	\$25.40	\$40.00	ABC2 Supplies	TAX
A654874	Toner	No	Toner - Black	Segment 2	A205896423	75	\$16.75	\$36.99	ABC2 Supplies	TAX
A8459862	Desktop Unit	Yes	Printers	Segment 1	A225596314	5	\$100.00	\$250.00	ABC Equipment Suppliers	TAX
X2369854	toner	No	Toner - Black	Segment 2	X5554896321	30	\$9.99	\$18.99	XYZ2 Supplies	TAX
X325985	toner	No	Toner - Black	Segment 4	X3652148	23	\$8.99	\$17.99	XYZ2 Supplies	TAX
X4325567	Developer	No	Developer	Segment 3	X214569	20	\$13.25	\$22.00	XYZ2 Supplies	TAX
X5269874	toner	No	Toner - Black	Segment 1	X100258	35	\$5.99	\$11.99	XYZ2 Supplies	TAX
X6257418	Developer	No	Developer	Segment 4	X3652148	45	\$15.15	\$28.99	XYZ2 Supplies	TAX
X65214877	Copier	Yes	Copiers	Segment 1	X100258	4	\$250.00	\$500.00	XYZ Equipment Suppliers	TAX
X654321	Controllers	No	Parts	Segment 3	X214569	62	\$10.63	\$24.99	XYZ2 Supplies	TAX
X741585	toner	No	Toner - Black	Segment 3	X214569	25	\$16.50	\$28.99	XYZ2 Supplies	TAX
X789321456	Copier	Yes	Copiers	Segment 2	X5554896321	5	\$845.00	\$1,000.00	XYZ Equipment Suppliers	TAX
X852321	Drum	No	Drums	Segment 5	X123456987	29	\$23.99	\$48.99	XYZ2 Supplies	TAX
X865217	toner	No	Toner - Black	Segment 5	X123456987	15	\$23.99	\$30.99	XYZ2 Supplies	TAX
X963789	Developer	No	Developer	Segment 4	X3652148	172	\$2.67	\$5.50	XYZ2 Supplies	TAX
X987654	D Roller	No	Rollers	Segment 2	X5554896321	43	\$14.87	\$35.00	XYZ2 Supplies	TAX

Entering Inventory

There are three ways to enter inventory for resale.

1. Enter the item into your warehouse.

From the 'Inventory Maintenance' screen, add the item directly into the warehouse using the 'Edit Quantity in Stock' button.

2. Complete a Purchase Order.

From the 'Inventory Control' menu create and receive a new 'Purchase Order.' Add an inventory item on the fly here, if it is not already in the inventory database.

3. Import Parts from Disk(s) from your Supplier.

See Importing Parts.

Adding Inventory

Select 'Add New' in the 'Inventory Menu' to open the 'Inventory Data-Entry' screen.

Serialized ☐ **Non-Serialized** ☒

Select whether the item that is being adding is a serialized piece of equipment or a non-serialized inventory item.

Serialized Items

These are items with serial numbers that need to be track. It is possible that an item may have a serial number, but it is not a serviceable piece of equipment. This item should not be tracked. Miracle Service tracks all items that bear serial numbers assigned by manufacturers as individual items. This way cost and retail prices are associated with each unit, and each has its own Manufacturer Warranty End date. This warranty date follows the product even if it is sold using a Sales Invoice from Miracle Service. If a service call appears with a warranty date, a warning light will appear automatically on the service call screen. A serialized item can be converted to a piece of service equipment by using a sales invoice.

Serialized inventory can have several different inventory statuses: 'In Stock', 'Sold', 'RMA' (returned to manufacturer), 'Lost', on Loan, on Trial, or being Rented. The inventory status and Q.I.S. (quantity in stock) is selected in the Warehouse Information button.

Select the Modify Q.I.S. button to view the table displaying the items entered.

Modify Stock Level

Warehouse: Item Number: ☐ Show In Stock only

Serial Number

Serial Number	Unit ID	Location	Date Received	Cost	Supplier No.	Mnf Warr. End Date	Retail	Status
X369258123			27/06/200E	\$845.00	XYZ		\$1,000.00	IN STOCK
X485745152			30/06/200E	\$845.00	XYZ		\$1,000.00	IN STOCK
X741369456			27/06/200E	\$845.00	XYZ		\$1,000.00	IN STOCK
X951753852			27/06/200E	\$845.00	XYZ		\$1,000.00	IN STOCK
X987123753			27/06/200E	\$845.00	XYZ		\$1,000.00	IN STOCK
*			01/06/2012	\$0.00	XYZ		\$0.00	IN STOCK

Select the 'Zoom [+]' button next to the status to view or edit the status.

Edit Serialized Item Info

ItemNumber: Serial Number:

Serialized Item Status - In Stock

☒ In Stock ☐ Loan

☐ Trial ☐ Rental

Serialized Item Status - Not In Stock

☐ Sold ☐ RMA

☐ Lost

Select the 'Details' button. By selecting a setting other than 'In Stock', another window permits the entering of physical location information.

Serialized Item Rental Details	
ItemNumber	A32014856
Serial Number	A652148574
Customer	AIR001
	Airlines International 10368 Wallace Alley Street Kingsport, TN 37663 5552790788
Rental Start Date	Dec 15, 2010
Rental End Date	Jun 15, 2011
Contact	Brian Olsen
Representative	John
Description	Special Loaner for Sales Evaluation
Ok Cancel	

Non-Serialized Items

Normally non-serialized items are purchased in quantity, so Miracle Service allows for bin numbers, as well as Min. and Max level reporting.

Miracle Service averages the costs of non-serialized items instead of recording them individually like serialized items. When non-serialized parts are received using the Purchase Order system, Miracle Service reviews the quantity currently in stock and the current unit price, and then recalculates this figure based on the new cost. This allows inventory valuations to be more accurate. When an item is sold, Miracle Service decreases the quantity in stock value for this item in the warehouse it was 'pulled' (sold) from.

Item Number, Description, and Unit of Measure

Whether 'Serialized' or 'Non-Serialized' is selected, Miracle Service will prompt for an item number. This is a unique alphanumeric code assigned manually. It could be a number that the supplier uses or it could be your own numbering system. As the suppliers' own part numbers are also tracked, we suggest using your own numbering system.

The 'Description' and 'Unit of Measure' information will be displayed during internal processes. It can be edited during invoicing.

Category

This is a very important aspect of Miracle Service. Every inventory item must belong to a category. (See 'Categories' set up in 'Administration Set Up'.)

Select the appropriate category for the item here.

A category is a group of inventory items with similar characteristics. For example, a category called 'paper' could include everything from butcher paper to bond. The category is used in pricing considerations (see Price Groups), in accounting considerations (see Accounts Exporter), and in contracts to determine items included (see Contract Templates).

Tax Category

Every item must have a tax category. Enter Tax Categories through your 'Administration Set Up'. Refer to Tax Categories for further information.

Model Class/Model Number

These are mandatory fields. Miracle Service will not allow the continuation of data entry until this information is entered. Model class/model numbers may be added on the fly. If this item's category is 'Tracked' and 'Serialized' (see Categories), then when this item is sold using a sales invoice, a record can be automatically created in the service equipment table. Default PM frequency and track service bulletins, etc. for this equipment are created from the Model Class/Model Number information. See the 'Model Class/Model Number' section in 'Administration Set Up'.

If this information is not relevant, N/A (not applicable) is an acceptable entry. N/A is appropriate for parts and supplies. (Note: You can use the default NA/NA Model Class/Model Number if desired).

Primary Supplier, Primary Supplier Part Number

This information is used when ordering and searching. The Primary Supplier's part number does not need to be the item number used in the first field to track the item. When parts are ordered using the PO system, the item number that will appear on the PO line item is your internal number and the supplier's part number if applicable. This way both parties know what item is being ordered. Alternative suppliers and their own part numbers can also be tracked under the Alternate Suppliers. The correct item number will appear in the PO according to from whom the item is ordered.

Repairable

When an inventory items is marked as Repairable and service is performed on this item, the system will prompt the user to ask if the faulty part should be tracked. Please see Faulty Part Tracking section in this manual.

Customer Portal Part

When an inventory part is marked as a Customer Portal Part, this indicates that customers can order this part through the Customer Web Portal. If you are not using the Customer Web Portal, this setting is not critical.

Prefix Category

When the Prefix Category is marked, the Inventory Category name will be prefixed to the Account Name in the QuickBooks export file. This setting is only applicable to QuickBooks users and can be ignored in all other circumstances.

Warehouse Summary Box

This is a monitor that calculates and displays current stock levels in all warehouses. It shows the number of items in stock and the value.

This is located on the right side of the Inventory Maintenance screen.

Warehouse Summary	
Total Qty in Stock	3
Average Cost Per Unit	\$500.00
Average Retail Per Unit	\$750.00
Total Ins. Valuation	\$1,500.00
Total Sales Valuation	\$2,250.00
Total Reserved Parts	0
Total Faulty Parts	0

The cost to purchase the item is the average cost per unit. This value multiplied by the total quantity in stock produces the total insurance valuation (the cost to replace). The average retail per unit times the total quantity in stock produces the total sales valuation (sales revenue this item would generate if sold at retail).

Serialized items are added up per item for actual costing.

Main Warehouse Stock Level

Main Warehouse Stock Level	
QIS	116
Min	45
Max	125
Bin	Asile 4 Shelf 3

This is a summary of your main warehouse levels of this item. The numbers reflect the quantity of this inventory item in stock as compared to how many you have determined it is prudent to keep in stock in the main warehouse.

Special Info Buttons

Alternate Suppliers	Quantity Pricing	Warehouse Info	User Screens	Superseded Parts	History
-------------------------------------	----------------------------------	--------------------------------	------------------------------	----------------------------------	-------------------------

Alternate Suppliers

This is a list of suppliers, other than the primary supplier, that are also selling this inventory item.

Every piece of inventory must have one and only one primary supplier. This is the supplier that usually supplies this part; all other suppliers of this item are 'Alternate Suppliers'. Selecting the 'Alternate Supplier' button displays a table with the name of alternate suppliers for this part.

Alternate Supplier No.	Supplier's Part Number
TechData	32432
ABC	ABC Equipment Sup
ABC2	ABC2 Supplies
TechData	TechData
XYZ	XYZ Equipment Sup
XYZ2	XYZ2 Supplies

The alternate supplier probably has a different part number for this part and Miracle Service provides that information too. Selecting the down arrow opens the drop box from which can select a supplier. Then, enter the supplier's part number. If an item is purchased from a supplier that was not already entered in the Alternate Supplier screen, it will be added automatically.

Quantity Pricing

When an inventory item is sold, Miracle Service will bill the purchaser, but it needs to know how much to bill. Selecting this button calls up a table where quantity pricing can be entered.

Often a company will give a price break to a purchaser who buys quantities of stock. Enter price increments for the different quantities. For example, an item can sell for one price if 1 to 100 items are sold, a lower price if 101 to 200 items are sold, and still a lower price if over 201 items are sold. Enter the three increments here. Enter as many price plateaus as required.

Min	Max	Margin	Price	Calc. Price
1	25		\$15.99	\$15.99
26	50		\$14.59	\$14.59
51	100		\$13.29	\$13.29
101	9999	+10.00%		\$10.76

Determine prices by entering a dollar value, or by adding a percentage markup. If a 'Mark up' is entered, Miracle Service will calculate the selling price based on the 'Warehouse' information on the purchase price. If a dollar amount is entered, Miracle Service will display that price. The amount to be billed will appear in the last column of the table. It has a blue field. This indicates the field is un-editable from this screen, but the values that were used to make this calculation may be edited.

Important Note - Price Groups and Special Customer Pricing

A customer may receive the inventory item retail pricing, or the above QTY/margin based pricing. However, a customer may also receive the Price Group pricing or Special Pricing for a certain item. Refer to Customer Pricing for more information.

Note: Retail prices can be overridden.

Warehouse Information

Miracle Service will store your inventory items in multiple warehouse locations. This feature requires the optional Multi-warehouse Module. Designate or view the warehouse location particulars and stock levels with the 'Warehouse Info' button. Maintain stock levels and bin numbers, minimum and maximum inventory levels, and pricing for items in each warehouse.

Every item must have a listing in the 'Main' warehouse, even if zero items are stored in the main warehouse. If a warehouse or car stock is ever deleted, all quantities in stock will automatically move to the main warehouse. This ensures that items are not inadvertently deleted or lost. A message prompts the user before it moves the stock and deletes the warehouse.

View Item Number's Warehouse Levels

Add Stock Go To Warehouse Main
Delete Location

Last Inventory Date 4/29/2008
Min 45 Max 125
Bin Location Asile 4 Shelf 3
Quantity In Stock 116
Insurance Valuation \$1,122.88
Sales Valuation \$1,854.84

Stock Level
93%
100%
50%
0%

Modify Q.I.S.

Ok

Managing Warehouse Inventory

Enter or move items into and out of warehouses. The default setting is the MAIN warehouse. The 'Add/Delete' button allows the opportunity to select any warehouse Miracle Service has entered.

Do not add any other warehouse. This is too time-consuming, and there is an easier way. Just deal with the main warehouse, which is the default anyway. When items are transferred to another technician (car stock), or another warehouse the new warehouse stocking location is added automatically.

Enter minimum and maximum stock levels for each warehouse location. Miracle Service uses these when creating re-order reports. This will ensure excessive parts are not ordered. There are several reports available that will help enforce good ordering procedures.

A field for Bin Location is available. This will appear on reports and reconciliation screens.

The bar graph at the right is a visual representation of the quantity in stock compared to the minimum and maximum stock levels desired. For example, if ten of a particular item is an ideal stock level, and currently there are five, the meter will indicate the stock level is at 50%. Colors will change from green to yellow to red as the stock levels approach zero.

Modify Quantity in Stock: This feature is available from the 'Warehouse Info' button. It is intended for viewing or making minor adjustments to stock level records and is not intended for making major entries. Bear in mind any adjustments made here will not be reflected in an export to the accounting package.

If you are making the adjustments as a result of a physical inventory count, you should update the 'Last Inventory Date' to reflect the most current date of the physical inventory count. The 'Last Inventory Date' is initially set when you first add the inventory item. This date can only be changed manually.

The 'Modify Stock Level' screen is different for serialized stock than it is for non-serialized.

Serialized: As stated above, when serialized equipment is purchased, each item has an individual price, purchase date (which affects the warranty date), resale value, and perhaps even supplier. Selecting the 'Modify Q.I.S.' button (or 'View Q.I.S.') displays a list of all items in stock ordered by serial number.

On occasion, defective parts need to be returned to the manufacturer (RMA), and parts may go missing (lost). The last column shows 'Status' with a 'Zoom [+]' button next to it. To view or alter the status, select the 'Zoom [+]' button. A chart displaying the four in stock status options and three out of stock status options appears. Enter the 'Edit' mode on the inventory item to change the status.

Non-Serialized: Non-serialized items are periodically purchased in gross and resold individually. This presents different tracking challenges than serialized items.

Modify Stock Level	
Warehouse	Main
Item Number	A147258
QIS	116
Avg Cost / Unit	\$9.68
Last Cost / Unit	\$9.69
Avg Retail / Unit	\$15.99
Ok Cancel	

Tracking of such items are not as exact as with serialized items. Selecting the 'Modify Q.I.S.' button brings up a chart displaying details of the inventory. The screen identifies the item, where the item is stored, quantity and costs. Every time items are purchased; the average price paid may vary depending if the purchase price has changed. Miracle Service displays the average cost per unit, last price paid, and average retail price per unit. This information is entered through the 'Purchase Order' screen of the 'Inventory Control' menu.

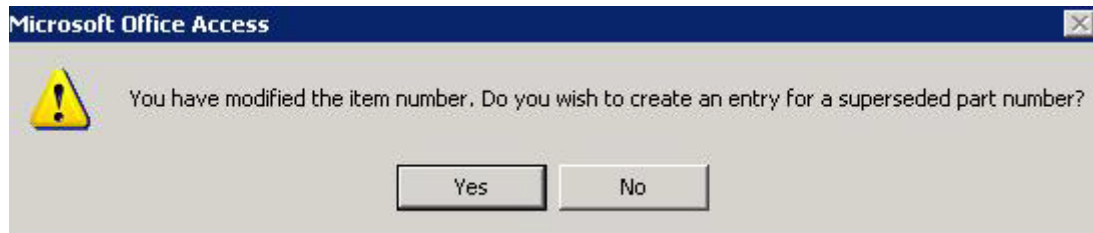
User Screen

See the 'User Screen' paragraphs under 'Application Conventions'.

Superseded Parts

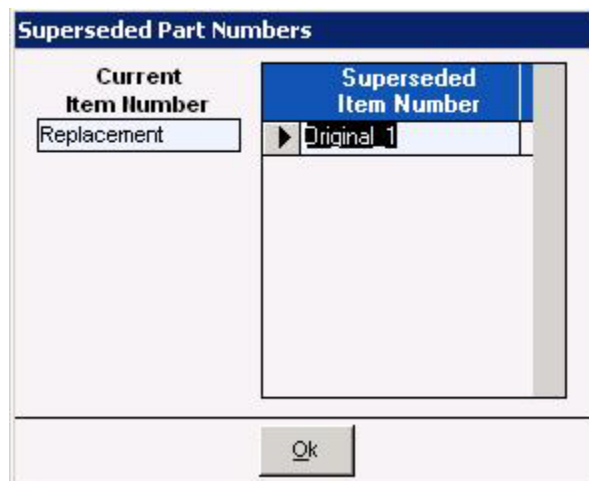
When suppliers change their part numbers, the technical staff may only know the old part numbers by memory. This feature will allow the tracking of several old part numbers for the same item number. 'Superseded Parts' is a list of previous item numbers for the part you are holding in your 'Inventory Data' screen.

On learning a manufacturer has discontinued a part and/or another part replaced it, enter the 'Inventory Maintenance' screen for the item and change the item number. When the item number is changed Miracle Service will ask if it should add this information to the 'Superseded Parts' screen. If 'yes' is selected, the information will be added.



When the old part number is entered, Miracle Service will inform the user that a new part number is now used, and confirm that new part number be used.

To view the superseded parts list, click on the Superseded parts button in the Inventory Maintenance screen and the following window will let you view a complete history of Superseded part numbers.



In the future, when a superseded (original) part number is entered on a Sales Invoice a warning appears indicating there's a more current number being used.

History

The History button provides information on the sales and purchases history of a part. This information is helpful when making new purchases or evaluating the sale of an item.

Invoice History provides a listing of whom that part was sold to, the quantity sold and the invoice on which it was sold.

Item History
Inventory Item History

Customer ID

Type: Sort: Show:

Customer ID	Customer Name	Invoice Number	Date	Qty	Unit Price
▶ AIR001	Airlines International	101012-0001	10/12/2010	1	\$25.00
AIR001	Airlines International	100901-0001	9/1/2010	1	\$0.00
AIR001	Airlines International	100831-0001	8/31/2010	1	\$0.00
BAIL002	Bail & Well Business Solutions	101013-0002	10/13/2010	0	\$0.00
BAIL002	Bail & Well Business Solutions	100907-0001	9/7/2010	1	\$0.00
KING001	Kingsway Trucking	100311-0005	3/11/2010	1	\$0.00
KING001	Kingsway Trucking	100311-0004	3/11/2010	1	\$0.00
KING001	Kingsway Trucking	100308-0009	3/8/2010	1	\$0.00
KING001	Kingsway Trucking	100304-0009	3/4/2010	2	\$0.00
KING001	Kingsway Trucking	100304-0002	3/4/2010	1	\$0.00
KING001	Kingsway Trucking	100304-0001	3/4/2010	1	\$0.00
MAN001	Manatee County Schools	100317-0002	3/17/2010	1	\$0.00

The Purchase History provides a listing of whom the part was purchased from, the quantity purchased and the PO on which it was ordered.

Item History
Inventory Item History

Supplier ID

Type: Sort: Show:

Supplier ID	Supplier Name	PO Number	Date	Qty	Unit Price
▶ ABC2	ABC2 Supplies	080617-0001	6/17/2008	5	\$9.69

QuickBooks Direct Integration Feature

Customers using the QuickBooks Direct integration feature will see additional fields used to define the type of item the Miracle Service item will link to in QuickBooks.

Since QuickBooks supports different inventory types, you can allow Miracle Service to link to these items so using the items will not impact inventory valuations in QuickBooks.

Miracle Service - [Inventory]

Options Help

Inventory Maintenance

Inventory Item Type Serialized ☐ Non-Serialized ☒

Item No. A369852

Description Toner

Unit of Measure Each

Category Toner - Black

Tax Category TAX

Model Class Segment 4

Model No. A42068953

Primary Supplier ID XYZ2

Primary Supplier Part No.

Export to Accounting as ☒ Inventory Part ☐ Non-Inventory Part ☐ Service Item

Typically an item in Miracle Service is linked to the Inventory Part item in QuickBooks. While the majority of the time this is the best option, there are times when user prefer not to track inventory items in QuickBooks or need additional options for Service items.

When the QuickBooks Direct setting is used for the accounting exporter, users will see additional setting to 'Export to Accounting as' settings. These settings just define the QuickBooks account type the accounting exporter will use when the items to being exported to QuickBooks. This feature is currently only available to the QuickBooks direct integration setting in Miracle Service.

Chapter 22

Kits

Kits are used to define a group of inventory parts that can be selected as Required Parts when creating a Service Request. This list of items is added to the Parts Required list for the Work Order.

How to Create a Kit

To create a Kit select 'Kits'. Enter a Name and Description for the Kit. Select each Item Number and Quantity that you would like to be included in the Kit. Select a many Items as required to build up the Kit. Select "Save" to save the Kit.

Name	Basic Kit														
Description	Basic Service Kit														
Kit Items	<table><thead><tr><th>Item Number</th><th></th><th>Description</th><th>Quantity</th></tr></thead><tbody><tr><td>CPU</td><td>+</td><td>CPU</td><td>1</td></tr><tr><td>Memory</td><td>+</td><td>Memory 2GB</td><td>1</td></tr></tbody></table>	Item Number		Description	Quantity	CPU	+	CPU	1	Memory	+	Memory 2GB	1		
Item Number		Description	Quantity												
CPU	+	CPU	1												
Memory	+	Memory 2GB	1												

Name: Enter a short name that will display in a drop-down list when you are creating a task.

Description: is intended to provide an area to write a more details description of the kit. It is limited to 50 characters.

Quantity: Provides the quantity of the selected item to be included in the kit. When the kit is selected, it will add that quantity of items on to the Sales Order or Work Order (Quick Call Screen only).

Transferring Inventory

Manually

Automatically

Move From

Main Warehouse

WarehouseID: MAIN
Main Warehouse
ATTN: Lou Bradford
119 West 23rd St
Back Entrance
New York, NY 10011

Move To

Josh Gordon

ABC Company
Ben Wilson
Josh Gordon
Kevin Norton
Main Warehouse
Scott Davis
Tyler Roberts

123 Main Street, Abingdon,

119 West 23rd St, New York

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Select	Item Number	Serial Number	Item Description	QIS	Quantity
☐	A147258		Toner	116	0
☐	A234567		Drum	15	0
☐	A32014856	A652148574	Copier	1	0
☐	A32014856	A654998712	Copier	1	0
☐	A32014856	A963258741	Copier	1	0
☐	A369841		Connectors	37	0
☐	A369852		Toner	43	0
☐	A521485		toner	38	0
☐	A5221478		Toner	19	0
☐	A654874		Toner	75	0
☐	A8459862	A632549871	Desktop Unit	1	0
☐	A8459862	A74218556	Desktop Unit	1	0
☐	A8459862	A785418569	Desktop Unit	1	0

Lookup and/or select the item(s) to transfer by selecting the box on the left of each line item. Enter the quantity to be transferred in the quantity column at the right. Execute the transfer by clicking 'OK'.

Selecting the dark red double-headed arrow that has appeared between the two warehouse fields will allow the user to reverse warehouses for a subsequent transaction. What was the gaining warehouse becomes the losing warehouse, and vice versa.

At the completion of the inventory transfer, Miracle Service will offer to create a hardcopy of the transaction.

Chapter 24

Reconciling Inventory

This is a method of altering the record of quantity in stock of a large number of non-serialized inventory items. Stock Reconciliation is typically a process whereby a company verifies its physical stock on hand with the stock listed in Miracle Service.

The Reconcile button is in the 'Inventory Control' menu.

Taking Inventory

Reconciling Inventory is most commonly called 'taking inventory'. This feature of Miracle Service can be invaluable.

By selecting the 'Reconcile' button of the 'Inventory' group of the 'Inventory Control' screen, this allows access a summary of inventory for a warehouse.

Select the warehouse to be reconciled from a drop down box at the top of the screen. Another drop down box allows the user to sort the items by item number, bin location, or category.

Item Number	Description	Bin Location	QIS	Unit of Measure	Avg Cost Per Unit	Avg Retail Per Unit
A147258	Toner	Asile 4 Shelf 3	116	Each	\$9.68	\$15.99
A234567	Drum		15	Each	\$7.55	\$15.99
A32014856	Copier		1	A963258741	\$500.00	\$750.00
A32014856	Copier		1	A654998712	\$500.00	\$750.00
A32014856	Copier		1	A652148574	\$500.00	\$750.00
A369841	Connectors		37	Each	\$1.25	\$5.50
A369852	Toner		43	Each	\$20.65	\$42.99
A521485	toner		38	Each	\$5.99	\$16.99
A5221478	Toner		19	Each	\$25.40	\$40.00
A654874	Toner		75	Each	\$16.75	\$36.99
A8459862	Desktop Unit		1	A74218556	\$0.00	\$0.00
A8459862	Desktop Unit		1	A632549871	\$100.00	\$250.00
A8459862	Desktop Unit		1	A785418569	\$100.00	\$250.00
ABS2137-4734	LANYARDBLUE		152	Each	\$1.43	\$0.00
B123456	Paper		164	Each	\$0.64	\$1.99

Note the button at the bottom of the inventory list labeled 'Worksheet'. If you select this button Miracle Service will produce a hard copy list of your inventory to give to your stock takers. Reports are also available from the report selection screen for worksheets that do not show the actual quantity in hand.

Stock takers can make handwritten entries of stock item quantities to be submitted to the authorized person to make entries into Miracle Service.

To quickly find a part number use the 'Search Fields'. Miracle Service displays the part number where the necessary adjustments can be made.

Adjustments in an accounting package must be done manually, however the reports will now calculate the new actual inventory costing.

Reconciling Serialized Items

Because reconciliation of serialized items requires deleting and adding items with status flag changes, they can only be reconciled from the 'Inventory Maintenance' screen.

Serialized items can be identified in the Reconcile Inventory screen using the Unit of Measure field. Each serial number will be listed individually in the Inventory Reconcile screen and the serial number listed in the Unit of Measure field. Since a serialized item will always be an individual item ('each'), we use the Unit of Measure field to provide the user with the specific serial numbers of items currently listed as In Stock. This helps the users quickly identify with serial numbers are in stock.

Chapter 25

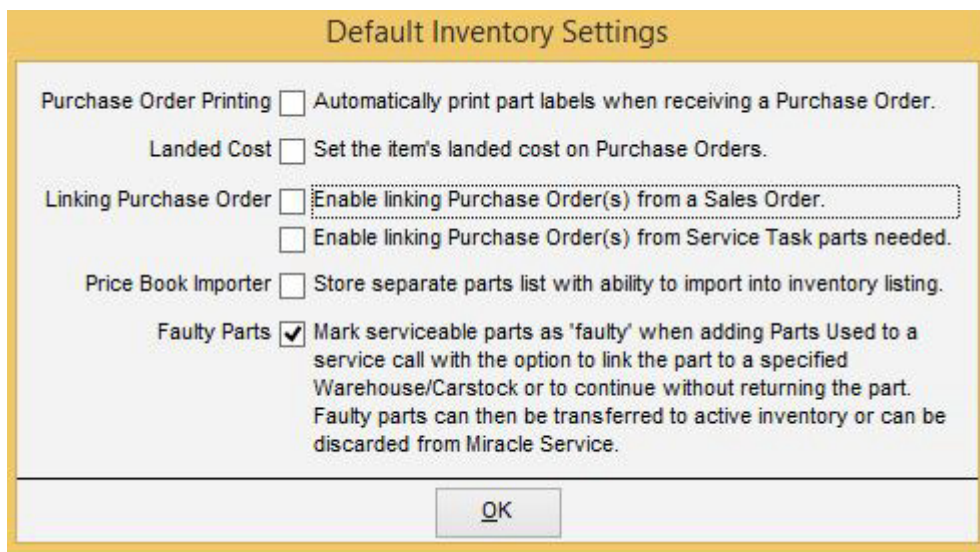
Faulty Parts Tracking

The Faulty Parts Management system in Miracle Service allows users to mark serviceable parts as faulty as the part is used on a service task. This feature is standard; however, you must enable the feature with a setting in the administration application of Miracle Service.

Enable Faulty Parts Management

In order to run the Faulty Parts Management system within Miracle Service you must enable the feature.

Run the Administration application and select 'Inventory -> Default - Settings'. A form will be displayed that will allow you to enable the feature by checking the provided box (see Figure 1).



Default Inventory Settings

Purchase Order Printing ☐ Automatically print part labels when receiving a Purchase Order.

Landed Cost ☐ Set the item's landed cost on Purchase Orders.

Linking Purchase Order ☐ Enable linking Purchase Order(s) from a Sales Order.
☐ Enable linking Purchase Order(s) from Service Task parts needed.

Price Book Importer ☐ Store separate parts list with ability to import into inventory listing.

Faulty Parts ☒ Mark serviceable parts as 'faulty' when adding Parts Used to a service call with the option to link the part to a specified Warehouse/Carstock or to continue without returning the part. Faulty parts can then be transferred to active inventory or can be discarded from Miracle Service.

OK

Figure 1

Mark Parts as Faulty

Parts are marked as being faulty as they are added to a service call. After selecting parts from the appropriate warehouse a confirmation will be displayed prompting the user to either mark the part as faulty or to continue without returning parts. Figure 2 illustrates the form for non-serialized parts, whereas Figure 3 illustrates the form for serialized parts.

The quantity that is used on the task is the same quantity that will be marked as faulty. If the part is serialized you will be required to enter the serial number of each part that is marked as faulty.

Faulty parts are linked to the Warehouse/Carstock in which the parts used are pulled from. Therefore, if one part is used from the MAIN warehouse and one part is used from JP Carstock, then one faulty part will be linked to the MAIN warehouse and one faulty part will be linked to JP Carstock. As serialized parts are identified by Serial Numbers, users will be able to indicate the Warehouse/Carstock in which to link them to. However, they will be limited to the Warehouse/Carstock in which the parts used were pulled from.

Faulty Parts Management

As part of the Faulty Part Management system you have the ability to mark parts as faulty. Faulty parts will be linked to the Warehouse or Carstock in which they are pulled from.

Do you want to mark the part(s) as faulty?

Figure 2 - Prompt displayed for non-serialized parts

Faulty Parts Management

As part of the Faulty Part Management system you have the ability to mark parts as faulty. Faulty parts will be linked to the Warehouse or Carstock that is specified.

To continue without marking parts as faulty click the 'OK' button.

Serial Number	Warehouse
▶ QXF4376B	MAIN
*	

Figure 3 - Prompt displayed for serialized parts

View a Part's Faulty Quantity Level

As faulty parts are only "linked" to a Warehouse/Carstock they are not physically added to inventory and therefore do not affect the quantity in stock levels. To view the total number of faulty parts for a specific part you can view the quantity in the Warehouse Summary section on the Inventory Maintenance screen.

Warehouse Summary	
Total Qty in Stock	3
Average Cost Per Unit	\$500.00
Average Retail Per Unit	\$750.00
Total Ins. Valuation	\$1,500.00
Total Sales Valuation	\$2,250.00
Total Reserved Parts	0
Total Faulty Parts	0

Figure 4

Return Faulty Parts to Inventory or Discard Parts

The 'Faulty Parts Return' screen identifies all of the parts that have been marked as faulty. It includes details such as the Task that it was added from, the quantity of faulty parts for that Task and the Warehouse/Carstock that the parts are linked to.

Faulty Part Returns

Move To: **Main** WarehouseID: MAIN
Main Warehouse
ATTN: Lou Bradford
119 West 23rd St
Back Entrance
New York NY 10011

Action: **Transfer To Warehouse**

Select	Item Number	Serial Number	Item Description	Task ID	Warehouse	QIS	Qty
☐	A369852		Toner	67-1	MAIN	1	0

OK Cancel Exit

Figure 5

Users are able to transfer a faulty part from one Warehouse/Carstock to another. Simply select the destination warehouse in the 'Move To' drop down box, select the item record to transfer and click the 'Transfer' button. Note that all faulty items associated to the item and task will be transferred.

Once a part has been repaired and tested, users have the option of returning the part to a specific Warehouse/Carstock by selecting the location from the 'Move To' drop down box. The user is also able to specify the quantity to return to that location by changing the value in the 'Qty' column. Once the changes have been made select Tested: Return to Inventory. The selected parts will be updated accordingly and transferred to available inventory.

Move To: **Main** WarehouseID: MAIN
Main Warehouse
ATTN: Lou Bradford
119 West 23rd St
Back Entrance
New York NY 10011

Action: **Transfer To Warehouse**
Transfer To Warehouse
Tested: Return To Inventory
Discard: Remove From Inventory

If a part is deemed irreparable, users are able to discard the faulty part from the Miracle Service database. To discard a part, change the value in the 'Qty' column accordingly and select the 'Discard: Remove From Inventory' from the drop down list and then click the 'OK' button at the bottom of the screen.

Run 'Inventory Transfer Log' report

A trace record is logged each time a part is marked as faulty and when a faulty part is discarded or returned to active inventory. Users can view the trace information by running the 'Inventory Transfer Log' report.

Inventory Transfer Log

Date	Transfer By	From Warehouse	To Warehouse	Item Number	Description	Serial Number	Qty
Transfer From Warehouse:		MAIN					
04/27/08	Millennium	MAIN	Dave/Pacific	46223 45	Connection Cables		1
04/27/08	Millennium	MAIN	Discarded	12390 9-0998	Toner		1
04/27/08	Millennium	MAIN	Steve/Pacific	46223 45	Connection Cables		1
Transfer From Warehouse:		Returned from Task					
04/27/08	Millennium	Returned from Task	MAIN	98715 41	Connectors		3
04/27/08	Millennium	Returned from Task	MAIN	46223 45	Connection Cables		2
04/27/08	Millennium	Returned from Task	Dave/Pacific	32541 1	Paper		1

Figure 6

Chapter 26

Price Book Importer

The Inventory Price Book Importer offers users the ability to store a separate, off-line directory of parts available (a catalogue). It is a 'holding tank' for inventory items that might not be used often, but are available from the supplier. Items may be imported into a storage table, and can be imported into the Miracle Service inventory module as required.

Using this method to store parts information reduces the amount of ineffective information in the database which improves the time to search for parts and supplies. It also help improve performance by not needed to search through parts that are not used. For example the inventory module must calculate much more data when creating PO's, closing service calls with parts, and creating invoices. This unique 'off-line' inventory speeds the process. The information is still stored in the application, but on a second level.

The Price Book feature is located on the Inventory Control menu.

Price Book Lists

If the supplier's part lists are available electronically this feature will be especially useful. The list of parts must be in ASCII format and listed in ten (10) columns divided by a semi-colon as follows:

Item Number; Description; Model Class; Model Number; Category; Cost; Retail; Supplier ID; Warehouse ID;QIS;BIN

The data file is in ASCII format.

Note: Do not include the “\$” in your dollar amounts as this will cause an error in the import process. Remove the “\$” symbol from your ASCII format data field before continuing.

The parts data cannot contain special characters such as semi-colons (;), apostrophes ('), quotes (""), asterisks (*), dollar symbols (\$) etc...

You can omit data columns, except the 'Item Number' and 'Description' columns. However the semi-colons must remain in place as placeholders. Default values will be used for data values that are not provided.

Data values that exceed the specified maximum size of a field will be truncated.

For more information regarding importing inventory data visit the Technical Support section of the Miracle Service website.

Always create a back up before using this routine.

Importing a File into your Price Book Importer

Select the 'Price Books' button on the 'Inventory Control Menu' screen to enter the 'Price Book Importer' screen. A warning message appears to alert the user to ensure the data is in the correct format. Click 'OK' to proceed.

Select 'Import From File' and select the file to import.

Price Book Importer

Total number of parts: 0 Parts selected to import/update: 0

Select default values for records with null or invalid data values:

Warehouse ID: MAIN
 Model Class: N/A
 Model Number: N/A
 Category: Parts
 Supplier ID: ABC

Select default values for all imported items:

Tax Category: NON

☐ Update description
☐ Update cost and retail
☐ Update quantity in stock
☐ Update bin location

Item Number	Description	Code	Class	Model No	Category	Cost	Retail	Supplier ID	Warehouse ID	QIS
-------------	-------------	------	-------	----------	----------	------	--------	-------------	--------------	-----

Item Number: [] From: [] To: [] Select
 Like: [] Cancel All Select All

Clear Parts List Import From File Import to Database Exit

Form View

During importation, if the file is in the proper format, the status bar the items as they're being imported.

Moving Parts from the Price Book Importer to your Inventory

When the 'Import from File' button is selected, the entire file will be accessible through the screen. Items will appear in the columns as described above. This indicates that the items described are in the importer. There is an extra column at the end labeled 'Import'. Select the red 'NO' and turn it to a 'YES' if the item is to be imported. Items selected as 'Yes' may be changed back to 'No'. Items identified as 'No' will not be imported into the primary inventory.

When all the items are properly identified, select the 'Import to Database' and the marked items will be listed in your MAIN warehouse. Miracle Service will automatically create an 'Inventory Entry' screen for each imported item.

If a quantity is entered into the 'Quantity in Stock' window at the bottom right corner of the 'Price Book Importer' screen, that quantity will appear in the records as quantity in stock for that item.

Items can also be searched using the search feature. A drop down box will help define the search parameters.

As stated earlier, items listed in your off-line parts file can be missing certain information since only the item number and description fields are mandatory. In order to be imported, Miracle Service needs much of this information gap filled. Do this with settings chosen from the top of the 'Price Book Importer' screen. Editing may be done later from the 'Inventory Maintenance' screen.

Note: Miracle Service will not import items that are missing information. If the information is not provided in the file, it will use the defaults set at the top. If a Supplier ID is provided in the file, a matching 'Supplier ID' must be added before the parts importer will work. The new data will overwrite an existing item. Therefore, if suppliers periodically send electronic parts catalogues with new prices, Miracle Service will update those prices, however the other information, (such as QIS) will remain the same unless a specific Quantity in Stock (QIS) value is entered in the file.

The 'Price Book Importer' can hold thousands of items. Periodically replace it with the supplier's new catalogue. The secondary parts list may also be deleted with the 'Clear Parts List' button, and import a new list.

Chapter 27

Reserved Parts Management

The Reserve Parts Management system in Miracle Service allows users to reserve parts when a Project Order is converted to a Service Request. This feature is standard and available to use when working with Project Sales Orders.

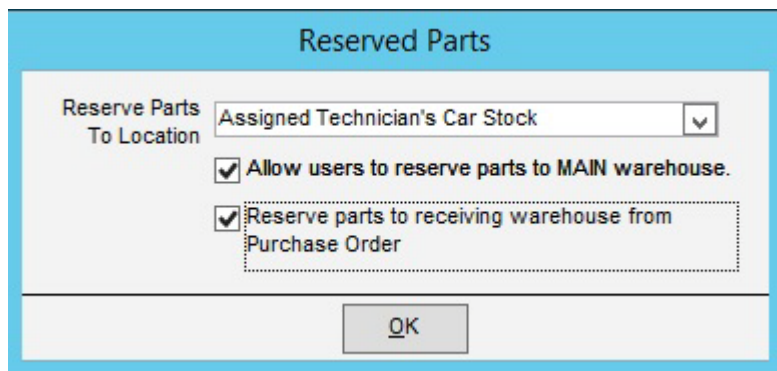
Parts that are listed on a Project Order are reserved to a specific warehouse, for a specific task as the order is converted to a Service Request. This will ensure that the right parts are available to the assigned technician when the task begins.

This feature will also keep track of the parts that are not immediately available in order to allow a user to generate a report on all parts needed so that a Purchase Order can be generated. When a Purchase Order is received, the user will have the ability to allocate parts to any task waiting for that specific part.

Configure Reserved Parts Management

Before you begin using the Reserve Parts Management system within Miracle Service it is recommended that you first configure this feature.

Run the Administration application and select 'Inventory -> Reserved Parts - Details'. A form will be displayed that will allow you to specify the reserve warehouse location (see Figure Reserved Parts).



Reserved Parts

Reserve Parts To Location: Assigned Technician's Car Stock

☒ Allow users to reserve parts to MAIN warehouse.

☒ Reserve parts to receiving warehouse from Purchase Order

OK

Reserved Parts

Specify Location to Reserve Parts To

There are 3 warehouse options available for reserving parts:

- **MAIN warehouse** – reserves parts to the MAIN warehouse, even when a technician is specified on the Project Order.
- **Assigned Technician's Home Warehouse** – reserves parts to the assigned Technician's Home Warehouse (requires Multiple Warehouse module)
- **Assigned Technician's Car Stock** – reserves parts to the assigned Technician's Car Stock (requires Multiple Warehouse module)

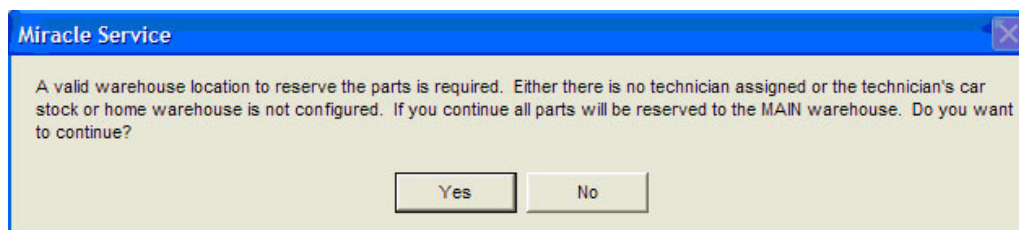
To specify the location, open Miracle Service Administration and select 'Reserved Parts' from the Inventory Administration menu. Select the option '*Allow users to reserve parts to MAIN warehouse*' if you want to allow users to allocate parts to the MAIN warehouse as they are received from a Purchase Order for a specific task. The default preference will also be available for allocating parts.

If this option is not selected, the user will only be able to allocate parts to the default location.

To allow the Purchase order to override the reserved location defaults select the option '*Reserve parts to receiving warehouse from Purchase Order.*' This setting is most useful when drop shipping the parts directly to the customer. In this case the parts will be reserved to the drop ship location. This is intended to help clarify where parts are being held for service technicians.

Reserve Parts for a Service Task

Parts are reserved for a task as a Project Order is converted to a Service Request. During this process, Miracle Service identifies the warehouse location to store the reserved parts. If the application is configured to store parts in the Assigned Technician's Home Warehouse or the Assigned Technician's Car Stock a technician must be specified on the Project Order. If no technician is selected, you will be presented with the following warning. You will have the option to store the parts to the MAIN warehouse or terminate the conversion process in order to specify a technician.



The user will then be prompted to pull the parts from inventory using the following screen. If the parts ordered exceed the amount available in inventory, a notification is presented to the user indicating that the remaining parts will be added as parts needed on the Service Request.

Sales Order Convert to Invoice Warehouse Selection

Item Number: CPU Qty Ordered: 1 Price: \$450.00

Selected	Warehouse ID	Qty In Stock	Qty Selected	Cost	Sugg. Retail	Price/Unit
☐	MAIN	0	0	\$0.00	\$0.00	\$0.00

Miracle Service

? The quantity selected is less than the Quantity Ordered. The remaining parts will be added as parts needed on the Request. Do you want to continue?

Yes No

OK

To bypass this screen, you can specify to automatically pull inventory from the MAIN warehouse. When there is insufficient inventory in MAIN to cover the request, the user will be presented with the above screen. To set this preference, open Miracle Service Administration and select 'Sales Orders – Inventory' from the Inventory Administration menu.

Sales Order Inventory

Check this option if you want to automatically pull inventory from the MAIN warehouse when converting sales orders. If there is not enough inventory to cover the entire sales order, only the amount in stock (which may be zero) will be included on the invoice. Note that this option does not apply to serialized inventory parts.

If you do not check this option then you will be asked to select a warehouse for every item on every sales order.

☒ Automatically pull inventory from MAIN warehouse:

OK

View Reserved Parts

A screen is available that lists all of the reserved parts detailing the task number, the quantity for the specific task and the warehouse location of the parts. Parts for a specific task can be transferred to another warehouse. This flexibility is available in the case where technicians are reassigned or the MAIN warehouse is used for initially storing reserved parts.

Move To

Main

WarehouseID: MAIN

Main Warehouse

ATTN: Lou Bradford

119 West 23rd St

Back Entrance

New York NY 10011

Action

Transfer To Warehouse

Select	Item Number	Serial Number	Item Description	Task ID	Warehouse	QIS	Qty
☐	A147258		Toner	68-1	MAIN	2	0
☐	A147258		Toner	67-1	MAIN	3	0
☐	A32014856	A652148574	Copier	68-1	MAIN	1	0
☐	A369841		Connectors	67-1	MAIN	2	0

Item Number

OK

Cancel

Exit

Use Reserved Parts on a Task

When adding parts used on a task, the item quantity that is reserved will be displayed so the user can visually see where the parts are reserved. As the indicated parts are reserved for the task, users will be required to select the reserved parts before they can select additional parts that were used.

Edit Warehouse Selection

View ☒ All Warehouses ☐ Only Carstocks for Scheduled Technicians ☐ Home Warehouse for Scheduled Technicians

Selected	Warehouse ID	Qty In Stock	Qty Reserved	Qty Selected	Cost	Sugg. Retail	Price/Unit
☐	BEN	2	0	0	\$9.68	\$11.39	\$0.00
☐	MAIN	114	2	0	\$9.68	\$11.39	\$0.00

Ok Cancel

Screen Shot for Non-Serialized Reserved Parts

Parts Used - Serialized

View ☒ All Warehouses ☐ Only Carstocks for Scheduled Technicians ☐ Home Warehouse for Scheduled Technicians

Selected	Warehouse ID	Serial Number	Status	Cost	Sugg. Retail	Price/Unit
☐	MAIN	A963258741	In Stock	\$500.00	\$588.24	\$0.00
☐	MAIN	A654998712	In Stock	\$500.00	\$588.24	\$0.00
☐	MAIN	A652148574	Reserved	\$500.00	\$0.00	\$0.00

Ok Cancel

Screen Shot for Serialized Reserved Parts

Generate a Listing of Tasks Needing Parts

To view a list of tasks that require parts, run the ‘Service Request Parts Needed’ report found in the ‘Inventory’ section. This report details the item number; quantity needed, task number and indicates whether or not the task is open. The Service Request number groups this report. With this information, users can generate Purchase Orders and allocate the parts received to specific tasks.

Service Request Parts Needed

Task ID	Open	Item Number	Description	Unit	Quantity
Request ID 28					
28-1	Yes	3654118	Roller SGMT4 Comp	Each	1
Request ID 29					
29-1	Yes	3654118	Roller SGMT4 Comp	Each	1
Request ID 30					
30-1	Yes	3654118	Roller SGMT4 Comp	Each	1
Request ID 31					
31-1	Yes	3654118	Roller SGMT4 Comp	Each	9
Request ID 32					
32-1	Yes	9874541	I/O Board	Each	3
Request ID 33					
33-1	Yes	5451517	Drums SGMT2 Comp	Each	1
33-1	Yes	3654118	Roller SGMT4 Comp	Each	2

Allocate Received Parts from a Purchase Order to a Task

As you receive a Purchase Order, a check is made to see if there are open tasks waiting for any of the items that are on the Purchase Order. When the system finds a link the following screen is presented to the user (Figure 9 or Figure 10).

Each task is displayed with the corresponding quantity that is needed. The ‘Reserve To Warehouse’ drop down will list the warehouses according to your default reserve location. If you receive more items than what is specified, the remaining parts will be added to inventory.

Once the Purchase Order has been received, the allocated parts will now be available to be used on the selected tasks.

Reserve Parts for Task

Item Number: Qty Received:

Task ID	Sales Order Number	Reserve To Warehouse	Qty Needed	Qty To Reserve
68-1	101224-0001	MAIN	1	0
MAIN				

Non-serialized Parts Screen

Reserve Parts for Task

Item Number: Qty Received:

Selected	Serial Number	Task ID	Reserve To Warehouse
☒	JJ4588390	69-1	MAIN
☐	JJ4588391		
☐	JJ4588392		

Serialized Parts Screen.

Return Unused Reserved Parts to Inventory

When closing a Service Request, any unused reserved parts that are linked to the corresponding tasks will be returned to actual inventory, to the warehouse that it is currently reserved to.

Chapter 28

Equipment

Equipment refers to serialized hardware that requires service. This equipment may have a manufacturers warranty on it, and may have one or more Service Contracts covering the parts or labor used to repair the equipment. This menu is where equipment is added or viewed.

You can add new 'Service Equipment' from the 'Equipment' menu.



Clicking the Equipment menu button will display the equipment screen.

Equip ID	Customer ID	Company Name	Serial Number	Unit ID	Location	Model Class	Model Number	Requester	Equip Email	Metered	Description
26	CVC001	Credit Woodland Cancer Centre	X142536987			Segment 1	X100258			Yes	Copier
91	INTER001	International Computer Sales	X141856854	X1369527454		Segment 5	X123456987		intcomp@rbwis.com	Yes	High Volume M
90	INTER001	International Computer Sales	X524545	X1859652		Segment 4	X3652148		intcomp@rbwis.com	Yes	High Volume
89	INTER001	International Computer Sales	AS2418966	A201545685		Segment 3	A19573512		intcomp@rbwis.com	Yes	Standard
88	INTER001	International Computer Sales	A4852962474	A6321526954		Segment 2	AS21489		intcomp@rbwis.com	Yes	Desk Top-Black
87	FLE001	Fleet Painting & Supplies	X852241994	X1496854525		Segment 5	X123456987		fleet@alskdj.com	Yes	High Volume M
86	FLE001	Fleet Painting & Supplies	X625974	X154898554		Segment 3	X214569		fleet@alskdj.com	Yes	Standard
85	FLE001	Fleet Painting & Supplies	A6985217	A48589957		Segment 4	A42068953		fleet@alskdj.com	Yes	High Volume
84	FLE001	Fleet Painting & Supplies	AS2148956	AS3598415		Segment 5	AS21069		fleet@alskdj.com	Yes	Multi Function I
83	AIR001	Airforce Base	X644328552	X21654531		Segment 5	X123456987		rsombach@nextent.co	Yes	High Volume M
82	AIR001	Airforce Base	A9641531556	A894132156		Segment 3	A19573512		rsombach@nextent.co	Yes	Standard
81	BKS001	BK's Law Office	X5214896	X3968562858		Segment 4	X3652148		bkaw@pouuyt.com	Yes	High Volume
80	BKS001	BK's Law Office	AS3419632	A5165558		Segment 5	AS21069		bkaw@pouuyt.com	Yes	Multi Function I
79	CAMP001	Camp Processing	X324153855	X324153855		Segment 4	X3652148		camp@asdfg.com	Yes	High Volume
78	CAMP001	Camp Processing	X485321	X26487954		Segment 4	X3652148		camp@asdfg.com	Yes	High Volume
77	CAMP001	Camp Processing	A65217489	A3258155		Segment 5	AS21069		camp@asdfg.com	Yes	Multi Function I
76	KING001	Kingway Trucking	A654288	A69852174		Segment 3	A19573512		kingway@gyhano.cc	Yes	Standard
75	KING001	Kingway Trucking	A3652478	A5215495		Segment 5	AS21069		kingway@gyhano.cc	Yes	Multi Function I
74	KING001	Kingway Trucking	X9852148	X472529689		Segment 4	X3652148		kingway@gyhano.cc	Yes	High Volume
73	TAS001	The After School Place	X47218556	A135689		Segment 1	A225596314		taspp@alemtg.com	Yes	Desktop-Black
72	MSP001	Mike Smith Pontiac	X3215988	X5874866		Segment 3	X3059862		mspontiac@akdnhiak	Yes	Standard
71	LAND001	Land and Sea Tours	X98571299	X2548585		Segment 2	AS21489		landandsea@ghoemv	Yes	Desk Top-Black
69	KIS001	Kissinger Furniture	A36985274	A1597596		Segment 2	AS21489		kissfurniture@agbnt	Yes	Desk Top-Black
68	KING002	King Dentistry	A454829	A238954		Segment 3	A19573512		kingdentistry@ghwanj	Yes	Standard
67	KING001	Kingway Trucking	X5212369	X1258469		Segment 5	X123456987		kingway@gyhano.cc	Yes	High Volume M
66	KFD001	K's Foods	X625477	X1235488		Segment 2	X5554896321		kfoods@bnh4dad.com	Yes	Desk Top-Black
65	KEL003	Keller Wilson Realty	X141822	X2685441		Segment 3	X214569		kellerwilsonrealty@par	Yes	Standard
64	INTER001	Interx Canada Corp.	A874595	A3268741		Segment 1	A225596314		intexcc@berlugh.com	Yes	Desktop
63	INT01	International Jewelers	X987452	X32561		Segment 5	X123456987		intjewel@ghyhufrfm	Yes	Large Volume I
62	INS001	Insurance Source	A987452	A62548795		Segment 4	A42068953		instaprint@ghgfjdcf	Yes	High Volume
61	INNO01	Innovative Solutions	X789524	X3215874	Reception	Segment 2	X5554896321		innovative@zmoncnv	Yes	Desk Top-Black
60	FLE001	Fleet Painting & Supplies	X14857	X6214		Segment 5	X123456987		fleet@alskdj.com	Yes	Large Volume I
59	FEL001	Fallon Real Estate	AS3214827	A2418556		Segment 3	A19573512		fallonrealestate@rbhg	Yes	Black and Colo
58	FCC001	Forward St. Church	X52148	X3265887		Segment 2	X5554896321		forward@booksmu.com	Yes	Desk Top-Black

Flags		Active	Metered	Has Contract(s)	S.E. ID 103
Serial Number	478829098				
Unit ID					
Customer	Credit Woodland Cancer Centre				
	Credit Woodland Cancer Centre				
	1 Professional Park Dr, Johnson City, TN, 37604, 5559260063				
Model Class	Segment 3				
Model No	X214589				
Description	Standard				
Unit Location					
Local Phone					
Install Date	29/08/2011				
IP Address					
Category					
Bill-To ID	CVC001				
	Credit Woodland Cancer Centre				
	1 Professional Park Dr, Johnson City, TN, 37604, 5559260063				
Requester	Susan Williams				
Email					
Equipment Configuration	Status	☒ Main ☐ Accessory	Configuration		
			Movement History		

Labor Charges | Travel Charges | Meter Info | Purchase Info | PM Info | Service History | Profitability | User Screens | Documents

Adding Service Equipment

When a customer service request is entered, there's an option in the task to select the equipment that requires service. One or more Service Contracts can apply to this equipment.

Add new 'Service Equipment' from the 'AddNew' Service Equipment button on the 'Service Equipment List' screen.

Service calls can only be created on active service equipment. Equipment can also be covered under one or more service contracts.

If the equipment was sold to a customer from the Miracle Service Invoice screen, then the program offered to add the equipment to the service equipment database. This is only true if the inventory item category option is marked as 'Serviceable?' on. (See the 'Inventory Administration' menu of the 'Administration' program.) When this occurs, the option of creating a service contract is offered. (See the Section on Equipment Contracts). This automatic process speeds up data entry and ensures that the equipment is related to the customer properly within Miracle Service.

Note: Equipment can be added on the fly in both the Quick Call screen and the Task screen. This is important if you are a service center that receives calls from new customers that are not already in the database. From one screen, you can add this new customer, the equipment and the complete call information

Fields with the Service Equipment Screen

Service Equipment ID (Serial Number): This field is mandatory. Duplicate numbers are permitted in this field, but a warning will appear.

Note: One very important aspect of Miracle Service is it maintains referential integrity. For example, if you were to change this number at a later date, say you realized the serial number was incorrect; you can change it simply by typing in the new value over top of the present one. No service history or billing history will be lost as the information is actually tagged to a computer generated ID number that is shown in the top right corner (S.E. ID #).

Unit ID: We suggest that a unique equipment or Unit ID be assigned to each piece of equipment rather than rely on the serial number. The Unit ID may be printed on a sticker and placed on the equipment for easy identification. This may also be referred to as an Asset number. When a service call is requested on equipment, use this Unit ID number to quickly locate the company and equipment information.

Customer ID: Begin typing the customer number, or use the 'Zoom [+]' button to enter the customer screen where a new customer may be entered on the fly, or locate the customer using the search buttons.

Model Class/Model Number: The best way to define Model Class is as follows: The automotive industry offers various model classes such as Sport Cars, Luxury Cars and SUVs. Dozens of manufactures offer vehicles within each Model Class, for example Ford offers the Mustang and GM offers the Corvette.

The best way to define Model Number is as follows: An automotive manufacturer may offer various performance and price packages for the same product, for example Ford offers an entry level Mustang called the LX, a medium performance Mustang called the GT and a high performance Mustang called the SVT. They all belong to the same model class (Sports Car), but they're different product offerings or product numbers (LX, GT).

Enter Model Classes in the 'Administration Set Up' program of Miracle Service, or add a new one on the fly by clicking the 'Zoom' [+] button. If the equipment being added has a meter or meters, (for example imaging equipment), and the meter clicks need to be tracked, select a model class that includes meters.

If the Model Class is not relevant to the equipment you are adding, select N/A (not applicable).

All model numbers associated with the Model Class appear. Select the appropriate one. If the Model Number is not relevant to the equipment you are adding, select N/A (not applicable).

Note: Model Class information is important for accurate service bulletin information, correct default PM frequency data, and most importantly good reporting. The model class is used to determine the type of service calls by the model class and model number combination. You'll be able to see what types of service calls are appearing daily, the response times of your staff, and the repair schedule of service equipment. This will also allow you to see which technicians are best suited for the repair of specific model numbers and which technicians may require additional training.

Description: Add a description of the equipment. The Model Class description is the default description, however this defaulting information may be changed.

Unit Location: This field was included for the convenience of anyone wanting to find this piece of equipment on premises.

Hint: If you enter 'sales department' in this field, this information will display next to the equipment serial number and description when taking the service call. This will allow you to ask the caller if “this is the machine in the sales department?”

Local Phone: Another field included for convenience. For metered equipment, this number appears on the meter call sheet/screen/report. This will assist the meter billing users to contact meter readers close to the piece of equipment.

Install Date: Is used to capture the date the equipment was installed at the customer location.

IP Address: Is used to record the Network IP Address of the equipment installed on the customers network. This is useful when remotely troubleshooting or to help when on-site to identify the network connectivity of the device.

Category: Is used to flag different categories of equipment and is user defined.

Requester: Selecting the Requester is only needed if the Meter Reading E-mail feature is being used with either the Customer Web Portal or the Meter Center service. When the Requester is selected it will use the Requesters e-mail when sending the meter due e-mail notification.

Email: Is the actual e-mail address being used for the meter reading due e-mail notifications. If a requester is not selected user can enter any valid e-mail address.

If a Requester or e-mail address are not entered and a meter due notification is created, the system will check for the main e-mail address of the Shipto / Billto record for the equipment and use that e-mail address as the default.

Note: when the same e-mail address is used for equipment on the same contract, only one e-mail is sent with multiple equipment records listed. The following is a sample of an e-mail sent to one Requester with multiple equipment records and meters

Subject: Meter Due Notification

Miracle Service has reported that a meter reading is due with the following details.

Contract ID: 80

Meter Reading Due Date: 5/3/2013

<http://miracleservice/customerlogin.asp?start=multimeter>

Equipment ID: 50

Serial Number: X5126698

Unit ID: X23596

Location:

Description: Desk Top-Black\Color 555-279-0788

Meters that are due for X5126698:

Meter Name: ColorMeter Location: Control PanelLast Billed Meter

Reading: 365 on 4/4/2013

Meter Name: BlackMeter Location: Control PanelLast Billed Meter

Reading: 2548 on 4/4/2013

Equipment ID: 83

Serial Number: X644328552

Unit ID: X21654531

Location:

Description: High Volume Multi Function 555-279-0788

Meters that are due for X644328552:

Meter Name: BlackMeter Location: Control PanelLast Billed Meter

Reading: 1200 on 4/4/2013

Meter Name: ColorMeter Location: Control PanelLast Billed Meter

Reading: 600 on 4/4/2013

New Meter Readings (enter reading beside the meter when you reply):

Serial Number: X5126698Meter Name: ColorNew Reading: <Enter New Reading Here>

Serial Number: X5126698Meter Name: BlackNew Reading: <Enter New Reading Here>

Serial Number: X644328552Meter Name: BlackNew Reading: <Enter New Reading Here>

Serial Number: X644328552 Meter Name: ColorNew Reading: <Enter

New Reading Here>

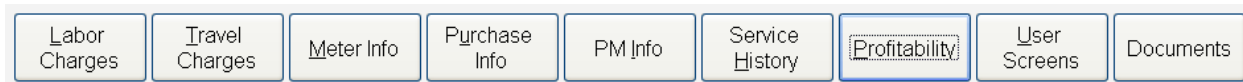
Please contact the administrator with any questions.

Save & Activate Button: Select the 'Save & Activate' button when completed.

If the 'Save,' button is selected, the equipment is not active and service calls cannot be created on this equipment.

Special Info Buttons

Special Info Buttons can be used to fine-tune the description of Service Equipment or information regarding it.



The 'Service History', 'Profitability', and 'User Screens' buttons do not appear while adding the equipment, as they are not relevant at that time. They are seen only while in 'View' or 'Edit' mode of existing equipment.

Note: To make equipment 'Not Active' from View/Edit mode, click on the [+] button (looks like a zoom button) to the right of the word Active on the Flags bar on the Service Equipment screen. You can now edit this information.

Labor Charges

For a complete explanation of this box, please review the 'Contract Templates' setup in the Administration portion of this guide.

The information that appears here is defaulted from the customer selected above, which in turn was defaulted from how the Miracle Service Administration program was set-up.

View Service Equipment Labor Charges

Labor Charges

Are Labor Hours Included ? Not Included ☒ All Included ☐

Any Additional Charges for Labor No Surcharge ☒ Flat Charge ☐ Flat Surcharge by Zone ☐

Flat Charge if Applicable

Labor Rate

The Labor Charges defaults may be edited for this piece of equipment. Select the labor rate applicable for this equipment.

Travel Charges

The screenshot shows a dialog box titled "View Service Equipment Travel Charges". Inside, there is a section labeled "Travel Charges". The first question is "Are Travel Hours Included?", with two radio button options: "Not Included" (which is selected) and "All Included". Below this, another question is "Any Additional Charges for Travel?", with three radio button options: "No Surcharge" (selected), "Flat Charge", and "Flat Surcharge by Zone". To the right of the "Flat Charge" option is a text field labeled "Flat Charge if Applicable" containing the value "\$0.00". Below the radio buttons, there is a "Labor Rate" dropdown menu currently set to "STANDARD". At the bottom of the form is a text field labeled "Charge per Mile (KM)" containing the value "\$0.50". An "Ok" button is located at the bottom center of the dialog box.

Travel Charges work the same as the Labor Charges identified above. (See Labor Charges above.) The additional field to the Labor Charge set-up is the Charge per Mile (KM). This mileage charge will be multiplied by the number of miles entered in the Service Task Ticket to add a revenue line item to the completed Service Task. A Mileage revenue line is also added to the Service Invoice.

The Mileage charge will be used only if it is selected to be on the actual service task. This field is only used when the mileage is added to the Service Task Ticket and the box is checked to use this information to calculate mileage costs.

Note: If there is a Charge per Mile (KM) on an active contract and this equipment is part of that contract, the contract Charge per Mile (KM) will be used instead of the Equipment Charge per Mile (KM).

Meter Info

Service Equipment Meter Info

	Meter Reading	Date of Reading	Difference	Note
▶		07/27/2015		
	900	07/31/2016	900	
*				

Reset Meter Lifetime

Ok Cancel

This button will only work if the model class selected is metered. If it is not, this button will do nothing. The Model Class selected will default to the correct meter name. All meter names will be displayed here. Select the meter readings button for each meter, (an unlimited number of meters for each equipment is supported), and enter the previous meter reading and meter reading date. Entering previous meter reading and meter reading date is not mandatory. If required, add a new meter in the first blank white line available.

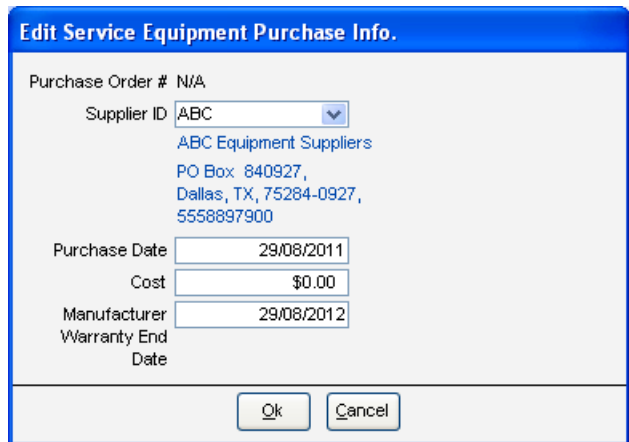
Reset Meter: Clicking the 'Reset Meter' button will remove the meter history and reset the meter to zero with the current date. While the Reset Meter button will also update the Last Billed Meter Reading (LBMR) on the contract to zero as well, we generally do not recommend resetting a meter while the equipment record is on a contract.

Lifetime: If you have Lifetime meters turned on in the Miracle Service Administration set-up, the Lifetime button will allow you to view the lifetime meters. This lets you see the total clicks on a machine even if the meter has been reset.

Difference: This will display the incremental readings from the previous reading.

Purchase Info

When adding new equipment using the 'Service Equipment Data Entry' screen, this screen will not have any data in it. However, a customer has been invoiced for this equipment from the Miracle Service Invoice module, Miracle Service automatically enters the purchase information. The Manufacturer Warranty End Date appears from the actual item in inventory for this equipment. This is an example of how Miracle Service lets information flow from the time it was received to when it was sold and to the customer's record.



Edit Service Equipment Purchase Info.

Purchase Order # N/A

Supplier ID 
 ABC Equipment Suppliers
 PO Box 840927,
 Dallas, TX, 75284-0927,
 5558897900

Purchase Date

Cost

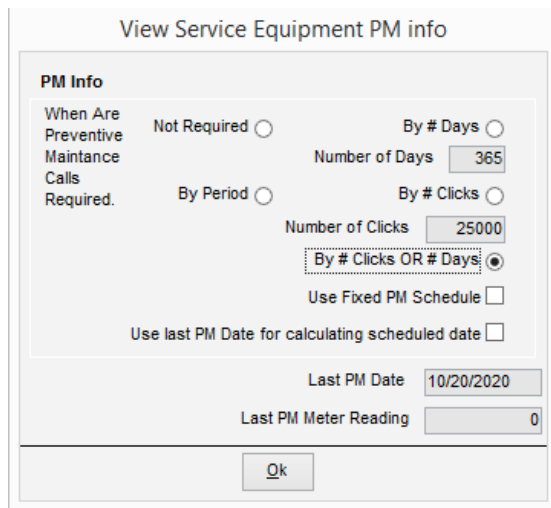
Manufacturer

Warranty End Date

If required, enter purchase information.

Preventative Maintenance Info

Except for the last 'PM' date and 'Meter Reading', preventative maintenance information defaults in from the Model Class/Model Number selected. Defaults may be edited.



View Service Equipment PM info

PM Info

When Are Preventive Maintenance Calls Required. ☐ Not Required ☐ By # Days ☐ By # Clicks

Number of Days

Number of Clicks

☐ By # Clicks OR # Days ☒

Use Fixed PM Schedule ☐

Use last PM Date for calculating scheduled date ☐

Last PM Date

Last PM Meter Reading

Last 'PM' date and last 'Meter' Reading' automatically update when 'PM's' are performed or when meter readings are taken. Meter readings are only applicable if the equipment is a metered item.

“Use Fixed PM Schedule” affects how the date is determined when scheduling the next PM. If the field is checked, it will calculate the next PM date based on the last PM date. If the field is not checked, it will calculate the next PM date based on the date the current PM is being completed. “Use Fixed PM Schedule” is usually used when PM’s are mandated by a government authority or by a specific contract terms.

“Use last PM Date for calculating scheduled date” affects how the date is determined when scheduling the next PM. if the field is checked, it will calculate the next PM date based on the last PM date plus the Period or Days. If the field is not checked, it will calculated the next PM date based on the date the PM Call was generated.

When completing the 'Model Class' screen, if 'Not Required' is selected in the 'Preventative Maintenance' field, this function will not be available to this model class of equipment.

Service History

Miracle Service records all service activity on a piece of equipment. It displays the activity as entered in the 'Service' screens of the application. It is shown in summary form when the 'Service History' button is selected.

Select View		Equipment ID		Customer ID: AIR001 Equipment ID: 99		☐ Show for A Date Range	
Req ID	Task ID	SE ID	SEC ID	Labor Amount	Travel Amount	Parts Amount	Task Information
62	62-1	99		\$75.00	\$0.00	\$3.00	Task Type: FAULT Description: test 1
Tech Info	Work	Parts Used	Invoice	Task End:	12/20/2010	CB ☐ PA ☐	

The following is an example of the display:

Reduce or expand the range of service history displayed with the 'Show for a Date Range' feature. Use the selection boxes at the top left to view history by 'Customer' or 'Equipment'. If 'Customer' is selected, history for all equipment in the Miracle Service database belonging to this customer displays. If 'Equipment' is selected, history for this piece of equipment will be displayed.

Excellent reports are also available on service history from the 'Reports' selection screen on the Main menu.

Profitability

Serial No: 544564DS54A45K	Labor Burden: \$30.00	Date Range	
Unit ID:	Labor Hours: 7.00	From: 9/20/2010	!
Description: Desktop-Black	Total: \$210.00	To: 12/21/2010	

Attached Sales Invoices

Invoice Number	Invoice Date	Parts Cost	Parts Sold	Discount
Totals:		\$0.00	\$0.00	\$0.00

Period Billing Invoices

Invoice Number	Invoice Date	Billed Amount	Contract %
Totals:		\$0.00	

Service Billing Invoices

Invoice Number	Parts/Exp Cost	Parts/Exp Price	Labor	Travel	Discount	
100920-0003	\$2.50	\$10.00	\$75.00	\$0.00	\$0.00	+
101011-0001	\$2.50	\$2.94	\$75.00	\$0.00	\$0.00	+
101012-0001	\$9.68	\$25.00	\$75.00	\$0.00	\$0.00	+
Totals:	\$19.68	\$48.44	\$450.00	\$0.00	\$0.00	

Total Revenue:	\$498.44	Total Expenses:	\$229.68	Profit/Loss:	\$268.76
-----------------------	----------	------------------------	----------	---------------------	----------

Miracle Service can assess how much it has cost to maintain equipment, and will compare it with how much revenue the equipment generated to determine if this equipment has been profitable. The factors examined are:

Date Range: The default setting for this box is from the date of the first record of activity on the contract to the current date. Alter this by selecting the 'Recalculate' button and re-entering the desired dates. (Note: Do not confuse this feature with the red exclamation 'Recalculate' button that appears in many other screens.)

Labor Burden: This field requires the entry of how much it costs to send a technician to a work site in terms of labor hours. This labor burden is the total cost to provide service per hour. Miracle Service will use this information with the number of hours spent maintaining equipment to calculate that portion of the cost.

Sales Invoices: This includes all charges included in any Sales Invoice attached to this equipment. Use the 'Attach' button within the Sales Invoice and have attached the invoice to this equipment or the Sales Invoice will not be linked to this Equipment. Click the [+] button to zoom directly to the invoice for further analysis.

Period Billings: This includes all contract billings and/or meter billings. Period billings are automatically linked to the equipment and contract. Click the [+] button to zoom directly to the invoice for further analysis.

Service Billing: This includes all of the charges arising out of any service call. Miracle Service will calculate all parts, labor, and other expenses. Service billing invoices are automatically linked to the equipment and contract. Click the [+] button to zoom directly to the invoice for further analysis.

When the information is compiled, it is possible to determine the profit or loss of a piece of equipment. By comparing the cost of maintaining a piece of equipment, there's evidence on how supplies are used and how service calls are made, compared to other equipment.

User Screen

See the 'User Screen' paragraphs under 'Application Conventions'.

Documents (Optional)

Documents can be attached and viewed in the documents screen. Selecting the documents button will open the Document Management screen. The Document Manager is integrated throughout the application. It is possible to attach documents to customers, contracts, equipment, sales orders, and service tasks. From the Documents button in the Customer Maintenance screen, users can find all the documents relating to the customer.

Special Equipment Fields for Weights and Measures Edition

To support the Weights and Measures edition of Miracle Service, the equipment record has a series of specific fields required to assist Weights and Measures users.

Service Equipment		Flags	Active	Metered	Has Contract(s)
Serial Number	A9641531556	Bill-To ID	AIR001		
Unit ID	A894132156	Airlines International 10368 Wallace Alley Street, Kingsport, TN, 37663, 5552790788			
Customer	Airlines International 10368 Wallace Alley Street, Kingsport, TN, 37663, 5552790788	Requester		Email	users@nexent.com
Model Class	Bench Scale	Service Charge	\$0.00	Equipment Configuration	Status: ☒ Main ☐ Accessory Configuration Movement History
Model No	A19573512	Capacity	500	Increment	0.01
Description	Standard	Uncertainty		Class	III
Unit Location		UOM	lb		
Local Phone	555-279-0788				
Install Date	07/03/2008				
IP Address					
Category					
Advanced Replacement ☐					
Labor Charges Travel Charges Meter Info Purchase Info PM Info Service History Profitability User Screens Documents					

When you are using the Weights and Measures Edition, there are 5 equipment fields that can be used to record more specific information on the equipment record. The fields are:

Capacity: This field is linked to a keyword field used on the eForms so the capacity of the Primary Equipment record can be displayed and used on an eForm document.

Increment: This field is linked to a keyword field and can be displayed/used on an eForm document.

Uncertainty: This field is linked to a keyword field and can be displayed/ used on an eForm document.

Class: This field is linked to a keyword field and can be displayed and used on an eForm document. Standard entries are expected to be I, II, III, IIII, and III L to support Handbook 44 tolerance calculations if designed in to the forms. User can enter any other value as needed; however, if it is expected to be used in a calculation in an eForm, a standardized and consistent use of values is critical.

UOM - (Unit of measure for the device): This field is linked to a keyword field and can be displayed/ used on an eForm document.

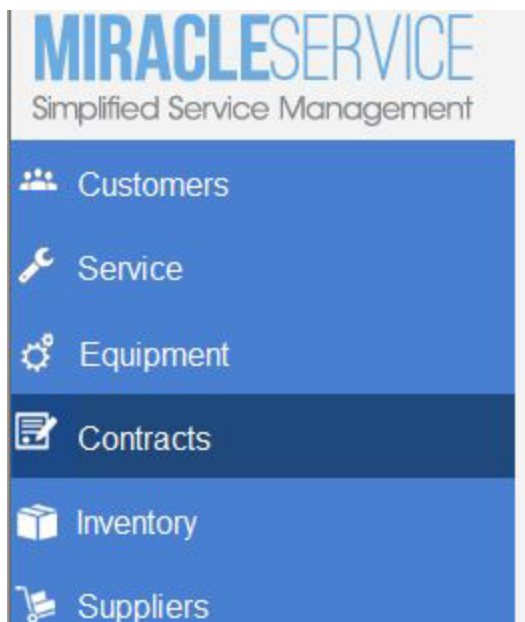
These fields are populated initially from the values set on the Model Class/Num. record. Once the record is created, it can have it's own values set specifically for the equipment record.

Chapter 29

Service Contracts

Service Contracts are the agreement, including the terms and conditions, reached between you and your customers for servicing equipment.

The 'Service Contract Data Entry Screen' is accessible through the 'Contracts' button of the 'Main' menu.



Creating Service Contracts

To enter a contract, select a previously defined contract template. The values set in contract templates are 'defaults'. Redefine terms and conditions, as the individual circumstances require. The redefined contract is the agreement between your business and the customer.

Flags Active ☐ Not Cancelled ☐ Metered ☐ Not Billed Contract ID: 42

Customer: BK'S001 ☐ Bill-To: BK'S001

Customer Address: BK's Law Office
634 Middle Creek Rd,
Sevierville, TN, 37862,
(555) 248-7532

Customer Address: BK's Law Office
634 Middle Creek Rd
Sevierville, TN 37862

☐ Estimate Usage ☐ Auto Price Adjustments
☐ Ignore Yield Alerts ☐ Zone Charge
☐ Copy Block
☐ Per Bill. in Arrears
☐ Email Motor Notices

Properties Equipment Meters

Contract Template: All Inclusive ☐ Base + Overage & Supplies Included

Contract Start Date: 07/25/2008 **Cust P.C. Number:**

Contract Term: 10 Years **Default Priority:** Standard

Contract End Date: 07/24/2018 **Default Technician:**

Period Billing Interval: Monthly **Period Billing**

Meter Billing Interval: Monthly **Meter Billing**

Base (Period) \$: \$0.00
Additional (Period) \$: \$16.25
Other (Period) \$: \$0.00
Auto Zone (Period) \$: \$0.00 ☐
Total Contract \$: \$1,950.00
Period \$ To Date: \$0.00 ☐

Other Charges **Labor Charges** **Travel Charges** **Contract Text** **Renewal** **User Screens** **Notes**

Feasibility **Documents** **Update Wizard**

Steps to Create a Simple Service Contract

Click on the 'New' button in the Service Contracts group from the 'Service Equipment & Contracts Menu'. If editing or viewing an existing contract, click on 'New' from the 'Service Equipment Contracts' screen.

Select the customer from the list or add a new one on the fly. Click the [- - - -] button (near the top right) to edit the period billings Bill-To for this contract. Service invoices that are created from work completed during a service call will continue to be sent to the equipment Bill-To. Selecting other Bill-To addresses through this method creates only a temporary relationship with the Bill-To for the single Service Contract. This does not necessarily create a permanent Ship-To / Bill-To relationship. To create a permanent Ship-To / Bill-To relationship, you should establish the relationship through Customer Maintenance.

Select the Primary Equipment from the list of equipment at that customer site. If the 'Master Contracts Module' was purchased, select more than one piece of equipment to be added to this contract. Attach the meters and/or preventative maintenance information.

Select a contract template. These were defined in the Administration Program. Complete the information as prompted by Miracle Service. Modify the defaulting contract template information if required.

Enter the contract start date. Select a billing frequency for the period billings charges and meter charges if applicable.

Click the 'Save and Activate' button. Print the contract if required. If this is a metered contract, verify (edit) the start meter reading.

Billing New Service Contracts

To bill a new service contract, go to the 'Periodic Billing' screen and accept the billing charges. If this contract uses 'Period Billing in Arrears', then the contract will not be billed until the end of the first billing interval. For example, if the contract starts on January 1, 2005 and is an annual contract that is billed monthly in arrears, the first charge is due January 31, 2005. After the period billing charges are approved and the invoice is previewed, print the invoice from the 'Invoice Review' screen.

Adding Previously Billed Service Contracts to Miracle Service

Read the 'Adding Previously Billed Service Contracts to Miracle Service' section following this module.

Primary Service Equipment

With the Master Contract Module, the first piece of equipment on the list is the primary piece of equipment. Attach additional pieces of equipment covered under the service contract. If the Master Contract Module was not purchased, only one piece of equipment can be attached to the service contract.

After the customer is selected, a table appears below the Customer ID box requesting the serial number of the 'Primary Service Unit'.

Customer: BK's Law Office
BKS001
634 Middle Creek Rd,
Sevierville, TN, 37862,
(555) 248-7632

Bill-To ID: BKS001
BK's Law Office
634 Middle Creek Rd
Sevierville, TN 37862

Primary Equipment: 1728819 Unit ID: 1728819

Contract Template	1728819	Segment 3/X3059€ Standard
Contract Start Date	37678299	Segment 2/X5554€ Desk Top-Black\Color
	A15843358	Segment 1/A2255€
	A36587412	Segment 3/A1957€ Black and Color
	A59419632	Segment 5/A5210€ Multi Function High Volum
Site Record	A5165558	N/A/N/A
	X5214896	X3968552 Segment 4/X36521High Volume

Setting the Primary Service Equipment

Every contract must have at least one machine attached to it. The Master Service Contract Module allows more than one machine to be attached to a contract. The first piece of equipment in the equipment list becomes the 'Primary Service Equipment' for that contract. All other machines and equipment in the contract will be 'accessories' to this primary equipment (for the purposes of the contract).

Select the serial number from the drop down box, which contains all serial numbers of all machines assigned to the customer in question, i.e. the equipment on site. Machines may even be on the premises of a 'Ship to' customer attached to this 'Bill to'. Make the selection or select the 'Zoom [+]' button to go to the 'Service Equipment' record to search for a specific piece of service equipment.

When 'Primary Service Equipment' is selected, another table will appear to accommodate 'Other Service Equipment'.

Other Service Equipment

This is equipment other than the primary service equipment that appears on a contract. Attach additional equipment by clicking on 'I Un/Attach Equipment', which appears below the primary service equipment.

When the primary service equipment is selected from the list, a blank 'Other Service Equipment' table appears. Below this table are special info buttons.

Other Main Buttons/Options

Equipment

Equipment									
☐ Attach All		Set Charges		Reset PM Schedule		All Equipment			
Attach	Details	Serial Number	Unit ID	Description	Location	Make	Class	Model Number	Priority
☐	View	AC2140366	AC2090415	Multi Function High Volume		Segment 5		A521008	☒
☒	View	A495895217	A49589557	High Volume		Segment 4		A42368953	☐
☒	View	X14857	X6214	Large Volume Multi Function		Segment 5		X123456987	☐
☒	View	X6259/4	X14855564	Standard		Segment 3		X214569	☐
☒	View	X852241594	X1496854525	High Volume Multi Function		Segment 5		X123456987	☐
									Period Charge
									6/30/2008
									\$25
									6/30/2008
									\$6
									6/30/2008
									\$20
									6/30/2008
									\$4
									6/30/2008
									\$20

Selecting the 'Equipment' tab will enter the 'Edit Service Equipment Contract Accessories' screen. This allows additional attachment of service equipment at that customer's site.

This screen lists all equipment, and will identify the primary service unit at the site. Note: if the contract was set-up selecting the Bill-to site then all equipment at the 'Ship-to' and 'Bill-to' locations associated to that customer will be listed. On the left of each is a box 'Attach'. The default setting is unchecked. Selecting this box will select that equipment record and attach it to the current contract. Period Charges may be defined for each equipment item added to the contract. These will be added to the contract value for this contract. The sum of the additional charges will appear on the contract invoice. Leave this value field blank, and simply add the value for this other equipment onto the total contract fee. Using this field will track the profitability of each piece of equipment on the contract separately. It compares the additional charge value to the base charge of the contract to determine its percentage of the total. When the 'Profitability' button is selected, the profitability will be displayed on the 'Service Equipment' screen for equipment covered by a master service contract.

Note:

An example of why the 'Period Charge' field is important, and should be used.

If the Base Charge for the contract is \$100.00 and another piece of equipment is added on this screen for an additional amount of \$50.00, in the Period Charge field. Then the primary service unit should be weighted at 66.6% for all revenue collected, and the other piece of equipment at 33.3% (\$100.00 + \$50.00 = \$150.00 which is 2/3 and 1/3 of the total contract value respectively). Therefore, if you invoice the customer for the service contract value total of \$150.00, \$50.00 of the total amount billed should go towards the other service equipment. If you had left the Period Charge field in this screen at \$0.00 when adding this other piece of equipment to the contract and you simply made the base charge \$150.00, then the revenue collected on this contract would be the same. But when you did a profitability analysis of the other piece of equipment, it would show no period billing revenue at all since it would use 0% of the \$150.00 revenue. The entire \$150.00 revenue would show as revenue for the primary equipment only. This means that if you have any service calls on the other service equipment, then Miracle Service will think you would have lost money on the equipment contract for this other equipment item since you have a labor burden cost and possibly parts costs as part of the service call. This is an example of the powerful analysis capability within Miracle Service. It is also a perfect example of the flexibility of Miracle Service, as you can chose to use the capability or not to use it.

If 'Save & Activate' is selected, Miracle Service attaches the equipment and returns to the 'Service Equipment Contracts Data Entry' screen.

Note: If you do not use meters on equipment or contracts, skip to section 'C. 3 Un/Attach PMOS'.

PM Included. When this is selected it indicates that the PM is included in the contract and is mandatory. When the PM is completed the task will be billed as a zero dollar service task.

One-Time Charge. This field can be used at anytime during the life of the contract. It provides for the ability to charge a one-time fee associated with the equipment. These are used to charge set-up fees and equipment pro-ration if the equipment is added to the contract between billing periods.

One-Time Billed. This identifies if the one-time charge was billed. Once this charge is billed a check mark will appear in this field to confirm the one-time charge was generated.

Date Added. This is a critical field and is used to determine if the equipment is to be billed in a billing cycle. If the Date Added is after the current billing period the equipment will not be included in the current billing period.

When creating a new contract it is important to set the Date Added to the contract start date to ensure it will be included in the Period Billing from the start of the contract.

Set Charges: Enables users to set charges across a number of machines or meters. In large contracts where there are a large number of equipment records attached, users can modify all of a group of the charges. These changes can be applied to All Equipment, or certain Model Class' of equipment or by Model Number. The base (Period Charge), One-time Charge and Meter Charges can be set or modified. User can also define the Clicks Included on metered contracts if needed.

Reset PM Schedule: Enables users to reset the PM Schedules on the Equipment on a specific contract. This will update the PM Schedules for all equipment on the contract. Note: if the need is to reset the PM Schedule for a specific Model Class / Model Number this can be accomplished in the Model Class / Model Number set-up in the Administration section.

Attach All: Allows the user to quickly attach all equipment to a contract. This is helpful for customers with a large number of equipment records.

Filter Equipment List View: User can filter the list of equipment displayed on the contract by selecting the filter. The filter options are: All Equipment, Attached Equipment or Unattached Equipment.

Penalty Fee: When the Penalty Fee feature is active a new column is available to define the Penalty Fee on a per equipment basis. The Penalty Fee will automatically be charged when a Period Billing is generated if no meter readings are valid for that equipment record. The Penalty Fee will be charged for each Billing Interval where the reading is not available.

In the case where the user needs to void and re-generate then Period Billing invoice, it will check on the current reading availability and will re-calculate the penalty based on the information at the time the invoice is re-generated.

Equipment										
☐ Attach All				Set Charges		Reset PM Schedule				
	Location	Model Class	Model Number	Primary	Date Added	Period Charge	One-Time Charge	One-Time Billed	Penalty Fee	Renew Intra
▶		Segment 1	A225596314	☐	7/1/2008	\$45.00	\$0.00	☐	\$0.00	\$0.0
		Segment 1	A225596314	☒	7/1/2008	\$4.17	\$0.00	☐	\$0.00	\$0.0

Meters

If meters were set up on this equipment, the meters can now be added to the contract. Meters do not need to be added to the contract for metered equipment. Add meters to the contract: If Miracle Service is to bill the customer based on some meter readings and meter charges, or if Miracle Service is to track the meter reading on the date service was performed on the equipment.

To attach or unattach Meters, select the “Attach” box on the left side of the meter item. Enter the Start Meter Reading, CPC Charge, Clicks Included, Clicks Included Type.

Meters

☐ Attach All

Set Charges

Consolidated Meters

Call Buffer: 15

Attached Meters

	Attach	Serial Number	Unit ID	Meter Class	Model Number	Description	Meter Name	Start Reading	Last Billed Reading	CPC Charge
	☒	AQ21409G	AQ259041C	Segment 5	A521009	Multi Function High Volume	Black	2009	2365	
	☒	A52148953	A5259841E	Segment 5	A521069	Multi Function High Volume	Color	521	521	
	☒	A6955217	A48589957	Segment 4	A42368953	High Volume	Black	1256	1256	
	☒	A4355217	A43589957	Segment 4	A42368953	High Volume	Color	355	355	
	☒	X14857	X6214	Segment 5	X123456987	Large Volume Multi Function	Black	0	0	
	☒	X14057	X6214	Segment 5	X123456987	Large Volume Multi Function	Color	0	0	
	☒	X625374	X151698554	Segment 3	X214569	Standards	Black	3246	3246	
	☒	X857241994	X1496854525	Segment 5	X123456987	High Volume Multi Function	Black	2114	2114	
	☒	X852241994	X1496854525	Segment 5	X123456987	High Volume Multi Function	Color	325	325	

The meters for the equipment attached to the contract will be listed on the screen. Check the “Attach” to link the meters to the contract.

To Attach All meters click the Attach All box at the top of the list.

If there is only one piece of equipment on the contract, and this equipment has only one meter, only one meter will appear. If there are many machines with many meters, they will all appear.

Attach the appropriate meter(s) on the equipment to add to the contract. To add more than one meter, or other meters from other pieces of equipment, simply select each meter individually.

Meters													
Attach All Set Charges Consolidated Meters Call Buffer: 15 <input "="" type="checkbox" value="Show: <input checked="/> Attached Only"/>													
	Attach	Serial Number	Unit ID	Model Class	Model Number	Description	Meter Name	Start Reading	Last Billed Reading	CPC Charge	Clicks Included	Clicks Included Type	Consolidate
	☒	TestMeter		Segment 1	A225596314	Desktop-Black	Black	400	400	0.0	0.0	None	CON000001
	☒	X5126698	X23596	Segment 2	X5554896321	Desk Top-Black/Color	Black	3000	3000	0.0	0.0	None	CON000001
	☒	X5126698	X23596	Segment 2	X5554896321	Desk Top-Black/Color	Color	500	500	0.0	0.0	None	CON000001

In this example, there are three meters displayed. The first and second meters are actually consolidated into a single meter charge. Notice the 'Consolidate' field. The computer-generated number CON000001 appears in the 'Consolidate' box. See 'Consolidated Meters' later in this section.

Charge for Each Selected Meter

The meter 'CPC Charge' can be set on each meter line. This is where the 'click' schedule and customer meter billing for each meter is entered.

Each meter included in the contract has a field marked 'Charge' associated with it. Add the criteria that will be used by Miracle Service for the calculation of any meter charges.

Service Equipment Meter Info

(Optional) Clicks Included in the Entire Contract Term - Copy Block

Clicks Included Term

Periodic Meter Charges After Exceeding Clicks Included, by Interval

Charge Level Name	Level Start	Level End	Cost Per Click	Step Down To Level
	0	10000	Included	
Level1	10001	25000	\$0.015000	
Level2	25001	40000	\$0.013000	
Level3	40001	55000	\$0.010000	
Add Level	55001	Whatever	\$0.010000	

There are 3 fields critical to the Charge:

- ▶ CPC Charge - the actual cost per click to be charged to the customer.
- ▶ (Optional) Clicks Included
- ▶ (Optional) Clicks Included Type - 'In Interval' or 'In Term'

Optional Clicks Included in the Entire Contract Term – Copy Block:

What is a Copy Block and how does Miracle Service track them?

If a contract has a life of a year, often included in that term is a predetermined number of meter clicks ('In Term'). Meter clicks are not billed if the contract is a copy block contract. Call the customer to obtain a current meter reading to ensure that the number of clicks included in the base charge has not been exceeded. Miracle Service can handle this type of copy block contract several ways.

One way is to expire and renew the copy block contract from the 'Service Contract Renewals' screen. This allows the contract administrator to keep track of the actual and estimated meter readings for all metered contracts.

Another method is to have the contract run for a pre-determined period of time, e.g. one year. Only after this copy block amount of clicks has been used would the customer receive a bill. This invoice would only include charges for the extra clicks used, in accordance with the per-click fees (CPC Charge) set up for the meter.

Enter the number of 'clicks' included in this contract for this meter.

Attach	Serial Number	Unit ID	Model Class	Model Number	Description	Meter Name	Start Reading	Last Billed Reading	CPC Charge	Clicks Included	Clicks Included Type	Consolidate
☒	TestMeter		Segment 1	A225596314	Desktop-Black	Black	400	400	0.0	0	None	COND00001
☒	X5126698	X23596	Segment 2	X5554896321	Desk Top-Black/Color	Black	3000	3000	0.0	None		COND00001
☒	X5126698	X23596	Segment 2	X5554896321	Desk Top-Black/Color	Color	500	500	0.10000	10000	In Term	

In the example above, 10,000 clicks will be included in the contract for this meter.

If a number of clicks are entered and the 'Clicks Included' field is set to 'In Term', when the contract is activated, select whether or not this is a copy block contract. This will only happen if the Copy Block checkbooks on the contract screen was not selected. This was done to confirm that this contract is, or is not, a copy block contract.

The message box that is displayed states, 'You have indicated that this contract has Clicks Included. If this contract is a Copy Block contract select YES. If 'Yes' is selected, the Copy Block check box in the top right corner of the 'Service Equipment Contract' screen for this contract will check the 'Copy Block Contract' check box. This contract will now expire once the copies exceed or are estimated to exceed this copy block amount. It is up to the contract administrator to run the contract expiry reports and/or review the contract expiry screen on a regular basis. If 'No' is selected, this contract will not expire until the end of the contract period. The customer will not pay for any further copies unless additional charges in the COC Charge field been added. (Section 'B. Periodic Meter Charges after Exceeding Clicks Included by Interval').

Again, if the 'Clicks Included - In Term' field is used and you do NOT click the Copy Block check box on the 'Service Equipment Contract' screen, then charges for clicks above the clicks included term will be created from the 'CPC Charge field'. This billing feature simplifies the copy block expiry date guessing game. Now the contract will not expire until the actual term date has been reached.

In other words, a copy block contract can be set-up so that 150,000 copies are included, but once they expire, the contract starts billing on a per click basis until the end of the contract period. At this point the contract will expire or be renewed.

Periodic Meter Charges after Exceeding Clicks Included by Interval: A set number of clicks per billing period - called the 'Interval', which can be monthly, quarterly, annually, etc. - is free or is included in the period charges. There is a charge for the next set of clicks for each billing interval. This is sometimes referred to as a 'Cost-Per-Click' or 'Cost-Per-Copy' contract.

The number of clicks included in the interval is entered in the 'Clicks Included' field. Select the 'Clicks Included Type' as 'In Interval'.

Meter Level Charges

This can be activated in the Miracle Service Administration and it enables a feature to build multiple levels of charges for a meter. It is available as a standard feature when setting the charges for a Consolidated Meter.

The figure below shows an example of a Meter with Meter Level Charges. Notice that this new line indicates Level Start = 0 (clicks), Level End = 25000 (clicks), Cost Per Click = Included. If there's a Base charge for a contract, during each meter interval, these clicks will be included in that base charge.

Now click the 'Add Level' button to add a new Charge Level. After the number of clicks that represents the end of that level has been entered, the start of the next level automatically appears in the next level start box when another 'Add Level' has been added. There are an unlimited number of levels in the billing system.

If there is one rate for clicks over and above those included in the contract, go to the bottom right field to the right side of the word 'Whatever' and type in the amount to bill per click over and above these clicks.

For example:

Service Equipment Meter Info

(Optional) Clicks Included in the Entire Contract Term - Copy Block

Clicks Included Term

Periodic Meter Charges After Exceeding Clicks Included, by Interval

Charge Level Name	Level Start	Level End	Cost Per Click	Step Down To Level
	0	25000	Included	
Level1	25001	100000	\$0.021000	
Level2	100001	200000	\$0.016000	Level1
Add Level	200001	Whatever	\$0.015000	

If for example, a contract with a monthly meter-billing with 25,000 clicks included in the base contract charge. Thus, the customer will not be invoiced for the first 25,000 clicks made in the monthly interval. If the meter-billing interval were quarterly on the contract, 25,000 clicks would be included in the quarter.

For 25,001 to 100,000 clicks, the customer will pay \$0.0210 per click.

For 100,001 to 200,000 clicks, the customer will pay \$0.0160 per click. However, with this Step Down to Level field stating 'Level 1', the actual 0.0160 charges will apply to all copies made between 25,001 and 100,000, which saves the customer money.

For copies 200,001 to whatever in the interval, the charge will be \$0.0150 per click.

Note: 0.0210 is 2.1 per click. No matter what currency you use, (or which is displayed), Miracle Service uses the 0.0210 figure to multiply by one hundred to get a per (cent) charge. If you use another currency, the same holds true and your currency symbol for the dollar equivalent will display according to the international settings in Windows.

Example 1: If the total copies made in the month were 250,000 copies, the following would be the meter charges for the month:

(We will ignore the Step Down Level field for this calculation for this first pricing example. We will use the currency symbol '\$' here, but your system set-up may be different.)

Total Copies Made = 250000

0 - 25,000 = 25,000 clicks x 0.0000 = \$0.00
(included)

25,001 - 100,000 = 74,999 clicks x 0.0210 = ... \$1574.9790

100,001 - 200,000 = 99,999 clicks x 0.0180 = \$1799.9820

200,001 - 250,000 = 49,999 clicks x 0.0150 = . \$749.9850

Example 2 – Step-Downs: Every time a customer reaches a new level, they pay a lower rate for clicks within that range.

Note: Miracle Service provides a step-down feature that is the most powerful available in any click billing system. This system will allow you to provide more accurate billing options to your customer, which will help you win more contracts. Your sales people need to be made aware of this feature.

For the above example, the meter charges using the step down would be as follows:

Total Copies Made = 250000

0 - 25,000 = 25,000 clicks x 0.0000 = 0.00
(included)
25,001 - 100,000 = 74,999 clicks x 0.0180 = . \$1349.9820
100,001 - 200,000 = 99,999 clicks x 0.0180 = \$1799.9820
200,001 - 250,000 = 49,999 clicks x 0.0150 = . \$749.9850

In our calculation and in the example screen above, the 'Step Down to Level' will charge the customer the same cost for every click between Level 1 (25,001) and Level 2 (200,000) once they have exceeded 100,000 clicks.

Note: Notice that clicks 200,001 to 250,000 are charged at a lower cost. This is because those clicks fall in the 200,001 to 'Whatever' case, which is not, considered a level in our equation.

To have all 250,000 clicks charged at the lowest rate, create a third level that will have a level end high enough to include the highest number of clicks a customer could make in the period. The highest number that the field will accept is 2,000,000,000. Once this level has been created, give it a Step Down to Level 1. This will ensure that all clicks will be charged at the lowest rate.

Click OK to return to the 'Service Equipment Contracts' screen.

Set Charges

Provides the ability to set or modify the charges on all or a group of machines or meters at the same time. This avoids the need to set the charges on the individual machines and is very helpful with large meter contracts. These changes can be applied to All Equipment, or certain Model Class' of equipment or by Model Number or by Meter Name. The base (Period Charge), One-time Charge and Meter Charges can be set or modified. User can also define the Clicks Included on metered contracts if needed.

Consolidated Meters

On occasion, a machine will have more than one meter. An example might be a color copier that could separately bill black toner at one rate, and any of the three different colored toners at a consolidated higher rate per click. Many contracts might include a number of similar purpose machines each with a meter. It might be advantageous to combine the readings of several meters from different machines, or to combine the readings of two meters on one machine into one contract. Such a meter is called a Consolidated Meter and it offers one billing rate for all the attached meters. This allows the contract administrator to attach a number of 'clicks included' on several machines or meters, so that all the clicks made in a period or interval are added up together during billing.

In the 'Service Equipment Contracts' - 'Meters' tab, select the Consolidated Meter button. Note: you will need to be in Edit mode to create new Consolidated Meters.

Consolidated Meter Name	Start Meter Reading	Last Billed Meter Reading	Charges
CON000001	0	0	☐

New Consolidated Meter

Ok

To add a consolidated meter to the contract, click the New Consolidated Meter button. A box marked CON000001 will appear in the table. Every time the 'New Consolidated Meter' button is clicked, a new consolidated meter is created. Create as many consolidated meters as necessary (CON000001, CON000002, etc.). To delete a consolidated meter, click the small gray box to the left of the any meter, and press the delete button.

In the Meters tab, attach a meter to a consolidated meter by selecting the appropriate consolidated meter from the drop down box to the left side of the Clicks Included Type field for that meter. When a specific consolidated meter is selected, the associate equipment and the equipment's meters are attached to the consolidated meter. The 'Consolidated Meter' reading is the total of all the readings of all the meters attached to it. The charges for Consolidated Meters are set up in the same manner as the charges for individual meters.

Estimating Usage for Meters (Top Right of Contract screen)

Select the 'Service Equipment Contracts' and notice the item called Estimated Usage in the top right corner of the screen. If this is checked it will estimate the meter charges for periodic billing.

When activated, the feature is enabled through defaults set-up through the 'Administration Set Up' menu, where the 'Service' and 'Period' defaults were entered. In the absence of a current meter reading, Miracle Service will estimate a reading based on previous meter information. If the customer does not want to be estimated, manually turn off this feature for this contract. Other contracts may still use the estimate feature.

Miracle Service will estimate the meter reading for a billing period. If you select "Estimate Usage", Miracle Service will estimate the meter reading for the billing date based on the meter history of the equipment over the life of the contract.

To estimate the meter readings, Miracle Service will take the last known actual meter reads and establish a Copies per Day (CPD) calculation which is used for estimating meter readings. It will use the last known CPD value and based on the numbers of days from the last Period billing, it will calculate (estimate) the number of copies used based on the established CPD number.

Actual Date	Meter Reading	Days	Total Days	CPD	Billed Meter Reading
May 1	0	0	0	0	0
May 31	100	30	30	3.333	100
June 30	700	30	60	11.667	700
July 29	1200	29	89	13.48	N/A
July 31	Estimated	31	91	13.48	1227

In this simple example, the meter reading is estimated based on the fact that there were 1200 copies produced in 89 days. This gives us 13.48 (1200/89) Copies per Day (CPD). Since the billing date is actually the end of the month in this example, that adds two more days at 13.48 CDP. This adds 26.96 (rounded to 27) copies to the actual meter reading of 1200. The final estimated billed meter reading is therefore 1227.

PM Included (Preventative Maintenance)

Properties Equipment Meters									
Reset PM Schedule									
Attach	Details	Serial Number	Unit ID	Description	Location	Model Class	Model Number	Primary	PM Included
☒	View	34559223		Color Machine	Room 302, 3rd Segment 4	A42068953		☒	☐
☒	View	5109268290		Model Description		PRINTER	HC PRINTER	☐	☐
☒	View	A6325987	A21587	Multi Function High Volume	Second Floor R Segment 5	A521069		☐	☒

This is a powerful feature that allows the addition of PM's on equipment under a service contract. While PM's are actually determined by the particulars of each piece of equipment, attaching these PM's to the contract allows the printing of PM reports and the viewing of PM's that are due, by two-different ways.

In the Preventative Maintenance Review screen, all equipment that is covered by a PM on a contract is displayed. Furthermore, when a service call is created, all equipment with a PM due displays a 'warning light' in the top right of the task screen.

In the same Preventative Maintenance Review screen, all equipment that requires a PM, regardless of whether a PM is included in a contract or not, can be viewed. Furthermore, a 'warning light' can be displayed while taking a service call to alert the call taker, that a cleaning or a regular checkup should be performed to ensure proper maintenance.

Note: The above example is a powerful way to increase service contract sales or PM jobs. The service manager can print a report at the beginning of the month and then call the customers that are not under a service contract to see if they would like to purchase a PM contract, or if they would like to purchase a cleaning and checkup service call.

If the PM for the equipment should be included in this contract, just click the box associated with each equipment record to confirm the PM is included in the contract.

Further Contract Details

Contract Template

Select the contract template from the drop-down list. Zoom to the template to review the details by clicking the [+] button. Based on which template selected, information will be defaulted into several fields and screens for the balance of the contract. The white fields may be edited. The name of the contract selected should appear. The field to the right of the contract template name can be changed. The name that appears to the right of the contract template will be the name that appears on the printed service contract.

Contract Start Date

After the start date of the contract is entered, Miracle Service displays a series of fields and requests additional information.

Contract Template	Base + Overage & Supplies included	Base (Period) \$
AI inclusive		\$0.00
Contract Start Date	Cust P.O. Number	Additional (Period) \$
7/25/2008		\$13.25
Contract Term	Default Priority	Other (Period) \$
10 Years	Standard	\$0.00
Contract End Date	Default Technician	Auth / one (1-Period) \$
7/24/2018		\$1111
Period Billing Interval	Period Billing	Total Contract \$
Monthly		\$1,850.00
Meter Billing Interval	Meter Billing	Period \$ To Date
Monthly		\$0.00
Accumulate Clicks		
☒		

Contract Term

This is the default value determined in the 'Contract Template'. Select another term from the drop down box if required.

Contract End Date

Miracle Service calculates the contract end date and appears in an un-editable gray field. The exception to this is if a 'Special' contract term is selected. In that case, Miracle Service will default the contract term of one year however the end date will be a white field that can be edited.

Billing Interval (Period) and Billing Interval (Meter)

The Contract Template defaults the period and meter billing intervals, however they may be edited based on the agreement.

Accumulate Clicks

This setting defines this contract as an Accumulate Clicks contract. When there are clicks included on meters, the Accumulate Clicks feature will accumulate the clicks included on the contract and add them to the next billing period if no meter readings are obtained on a meter. In the case of a Consolidated Meter, the clicks are only accumulated if no readings is obtained on any meter. If even one meter reading is obtained on a machine included in the Consolidated Meter group, then no clicks are accumulated and carried forward to the next billing period.

Customer P.O. Number

This field is optional. It will appear on the contract itself.

See top right corner of screen for the following check boxes.

Estimate Usage

If this is selected, the meter contract is set to estimate the meter charge if a reading is not available for the billing period. Estimates can only be calculated if the two previous billings had valid actual readings. See section '**Estimating Usage for Meters**' above for more details.

Zone Charge

If this selection box is not activated, the 'Zone Charge' defined in the contract template will not be applied.

Copy Block

If this is activated, Miracle Service will assume the meter contract is a copy block contract. (See Copy Blocks above).

Per. Bill. in Arrears

Period billings are defaulted to bill in advance, however, if this box is activated the period billings are billed at the end of the month. Miracle Service is sophisticated enough to allow this function to be contract specific, rather than company wide.

Group PMs

If this feature is selected, the contract is configured to generate a Group PM service task when a service task is generated. This means, it will generate a service call for all equipment or all equipment due on the contract based on the Group PM option selected.

There are two Group PM options available: Primary Equipment or PM Schedule. If Primary Equipment is selected, it will use the PM Schedule of the contract Primary Equipment record only to drive the PM schedule for the contract. In this case a call will be queued to be generated for all equipment on the contract whenever the Primary Equipment record's PM is due.

If the 'PM Schedule' is selected, it will still group the equipment on the PM Service Task, but it will only group the equipment that are due based on the Aging Date selected in the PM Review screen. This option is considering the individual equipment and their due date when building the list or equipment to include on the PM Task when it is generated.

Email Meter Due Info Automatically

(Requires Customer Web Portal). If this is activated, this contract will be included in the Meter Due Notification routine to send an automatic e-mail to this contract customer notifying them that a meter reading is due. This feature only works if the Customer Web Portal is purchased with the system. The Customer Web Portal is an optional feature and is purchased separately. For more information on using the Email Meter Due Notification feature, see Chapter "Period Billing".

Base \$

The top box is a white field and requests the base rate of the contract. The Base charge defaults from the 'Contract Template'. See 'Contract Templates' in the 'Administration Set up'. The customer's primary unit has the contract fixed to it, and the cost of the contract is basically the charges for maintenance of that unit. The base rate may be edited.

Additional Unit \$

After the 'Primary Service Equipment', every other unit is an additional unit on the contract and the additional price information comes from the 'Other Service Equipment' screen.

Zone Charge \$

If the 'Zone' charges are activated, any applicable zone charges appear in this field.

Total Contract \$

Miracle Service brings all of the above relevant information to this corner of the 'Service Equipment Contract' screen and totals it. It displays the sum here.

Period \$to Date

The 'Period Billing To Date' field displays the total period billings created to date, not including taxes.

Recalculation Button [!]

See 'Application Conventions' on 'Recalculation Button'.

Special Info Buttons

The special info buttons allow access to more contract information. They are:

Other Charge

The Other Charge feature allows the user to define additional recurring charges to be defined and generated with the Period Charge. The Other Charge will be listed separately and will be generated on each Period Billing invoice.

Labor Charge

The Labor Charges default from the 'Contract Template'. See 'Contract Templates' in the 'Administration Set up'. You can edit it here.

Travel Charge

The Travel Charges default from the 'Contract Template'. See 'Contract Templates' in the 'Administration Set up'. You can edit it here.

Default Priority

Priorities may be set higher for mission critical customers. Miracle Service uses this information when a service call is created on equipment.

Default Technician

This information is used to assign a default technician to a service task when it is created for the contract.

Contract Text

The contract text defaults from the 'Contract Template'. See 'Contract Templates' in the 'Administration Set up'. These defaults may be edited.

Renewal

The Renewals button provides the user the ability to define an automatic price change when the contract is renewed. The price change can be an increase or decrease from the current price and can be based on a percentage or an individual price. The 'By Percentage' will apply a Base Change, Additional Change, or Meter Change based on the percentage value entered. A minus will denote a decrease should be applied. The 'By Individual Price' will set the charges with the specific attached Service Equipment or Meters are individually defined.

User Screens

User Screens can be defined on the contracts to capture and retain other information on the contracts based on the unique requirements of each user. See User Screens in the manual for more information on setting up these screens.

Notes

Contract Notes can be added to individual contracts and retained for future reference. The notes are specific to the current contract and are not carried to the renewed contract. The Notes feature will also allow users to e-mail a message from the contract and retain a copy of the message sent to the customer.

Period Billing

The contract term, start date, and billing interval information has been entered by the time this field is displayed. Therefore the billing schedule is already calculated. Click on this button and notice that the date billed, the amount billed, and the invoice number is in an editable white field along with 'Notes'. This is to accommodate special circumstances that may occur, (such as existing contracts prior to using Miracle Service).

Start of Billing Period	End of Billing Period	Date Billed	Amount of Period Charge	Invoice Number	Notes
01/05/2012	31/05/2012		\$0.00		
01/06/2012	30/06/2012		\$0.00		
01/07/2012	31/07/2012		\$0.00		
01/08/2012	31/08/2012		\$0.00		
01/09/2012	30/09/2012		\$0.00		
01/10/2012	31/10/2012		\$0.00		
01/11/2012	30/11/2012		\$0.00		
01/12/2012	31/12/2012		\$0.00		
01/01/2013	31/01/2013		\$0.00		
01/02/2013	28/02/2013		\$0.00		
01/03/2013	31/03/2013		\$0.00		
01/04/2013	30/04/2013		\$0.00		

As the contract's term progresses, the period billing module will request approval for these period charges and create invoices. After the period billings are created and approved, the date billed, amount of charge and the invoice number appear in this schedule. Enter this screen at any time to view which periods have been billed. The period billing module will manage the next period due date and the amount of the charge to approve automatically. The amounts shown on the screen display the amount billed, not including taxes. These amounts billed to date are used during service contract profitability analysis. (See Special Info Buttons below).

Note: A percentage of the amount billed to date is weighted to specific pieces of equipment on the contract and their respective values in terms of the overall contract value. If you have more than one piece of equipment on the contract you must use Additional \$ field when adding these other equipment items; you must have the Master Service Contract Module to add multiple pieces of equipment to the same service contract. This per equipment amount period charge value is calculated based on the total billed and the percentage of the contract value that the equipment represents. This is then passed to the service equipment for equipment profitability analysis, which is done in the equipment profitability screen and not the contract profitability screen. (See 'Other Service Equipment' Button 1, Un/Attach Equipment and review the 'Additional \$' field). The contract profitability screen uses the total amount billed for the profitability calculation.

If an existing service contract that already has been billed in another software program or was maintained manually, read the section entitled, 'Adding Previously Billed Service Contracts to Miracle Service' below.

Meter Billing

Date to be Billed	Date Billed	Amount of Meter Charge	Invoice Number	Notes
31/05/2012		\$0.00		
30/06/2012		\$0.00		
31/07/2012		\$0.00		
31/08/2012		\$0.00		
30/09/2012		\$0.00		
31/10/2012		\$0.00		
30/11/2012		\$0.00		
31/12/2012		\$0.00		
31/01/2013		\$0.00		
28/02/2013		\$0.00		
31/03/2013		\$0.00		
30/04/2013		\$0.00		

Similar to 'Period Billing', Miracle Service will enter the past meter reading billings. The actual meter billing process takes place in another area of the application. The editable white fields are to accommodate the editing of special circumstances that arise in meter billings.

If an existing service contract that has already been partially billed in another software program or manually, read the section entitled, 'Adding Previously Billed Service Contracts to Miracle Service' below.

Documents (Optional)

Documents can be attached and viewed in the documents screen. Selecting the documents button will open the Document Management screen. The Document Manager is integrated throughout the application. It is possible to attach documents to contracts. From the Documents button in the Customer Maintenance screen, users can find all the documents relating to the customer.

Adding Previously Billed Service Contracts to Miracle Service

There are three options if an existing contract is being added, that has been billed previous to Miracle Service being implemented:

- ▶ Option 1 - Follow the steps of the Period Billing system for the previous billed months, as though they were stepped through each period by the application. Allow Miracle Service to generate actual invoices.

- ▶ Option 2 - Add these previous invoice amounts manually by entering the date of the invoice and the invoice amount billed from the Period Billing button (button 8) on the contract.
- ▶ Option 3 - Make the start date of the contract the next due billing date. This option works well, but note that during Service Contract Renewals, Miracle Service will use the same amount of time remaining in this contract term, e.g. a few months, for the new renewed contract. If there were 3 months left on the contract, starting August 1st and ending October 31st, the contract period on the renewed contract would be 3 months. Thus the start date of the renewed contract would be November 1st and the end date would be January 31st. Be aware that the 'Contract End Date' must be manually updated to properly reflect the term or length of the contract.

Note: Option 1 is the easier way for non-metered contracts, and option 2 is easier for metered contracts. Option 3 is easier than both, but be aware of the renewal issue mentioned above.

Selecting Option 2 - Steps to Take to Manually add the Previous Billed Dates and Amounts from the Service Equipment Contract Screen (Button 8 and Button 9)

If Option 2 was selected for a particular contract, inform Miracle Service of the previous billing activities on the contract. If this is not done, Miracle Service will create an invoice for each period from the start of the contract date, unless steps outlined in Option 1 are performed. Click on buttons 8 'Period Billing' and 9 'Meter Billing', if required, from the Service Equipment Contract' screen as the contract is added, or at a later date just prior to going 'live' with Miracle Service. In these screens, view all the previous billed invoices, dates and amounts.

Button 8 - Period Billing (White Fields on in Add/Edit Mode)

Start of Billing Period	End of Billing Period	Date Billed	Amount of Period Charge	Invoice Number	Notes
01/05/2012	31/05/2012		\$0.00		
01/06/2012	30/06/2012		\$0.00		
01/07/2012	31/07/2012		\$0.00		
01/08/2012	31/08/2012		\$0.00		
01/09/2012	30/09/2012		\$0.00		
01/10/2012	31/10/2012		\$0.00		
01/11/2012	30/11/2012		\$0.00		
01/12/2012	31/12/2012		\$0.00		
01/01/2013	31/01/2013		\$0.00		
01/02/2013	28/02/2013		\$0.00		
01/03/2013	31/03/2013		\$0.00		
01/04/2013	30/04/2013		\$0.00		

Button 9 - Meter Billing (White Fields on in Add/Edit Mode)

Edit Service Equipment Contract Meter Billings				
Date to be Billed	Date Billed	Amount of Meter Charge	Invoice Number	Notes
31/05/2012		\$0.00		
30/06/2012		\$0.00		
31/07/2012		\$0.00		
31/08/2012		\$0.00		
30/09/2012		\$0.00		
31/10/2012		\$0.00		
30/11/2012		\$0.00		
31/12/2012		\$0.00		
31/01/2013		\$0.00		
28/02/2013		\$0.00		
31/03/2013		\$0.00		
30/04/2013		\$0.00		

Ok Cancel

Enter all previous billing dates for this contract so that Miracle Service will know that this contract has already been billed for these periods.

Enter all previous period charge amounts in the next column. The 'Amount' column should be for the total amount of the invoice for this contract only, not including the taxes. Miracle Service will use this amount to determine how much is left to be invoiced, and will use the dates not yet billed to determine how many billing intervals are left in the contract. It will then divide the balance of funds to be billed by the number of periods to be billed. For the next billing period, Miracle Service will request that the calculated charge be approved. Change the amount to be charged during the Period Billing process if necessary. (See 'Period Billing' for more information). However, the last billed date and total amount billed to date for this contract can not be entered on one line, as Miracle Service will assume the previous dates were not billed, even though the amount reflects this total amount billed to date. The amounts entered in this field in both button 8 and button 9 will be used in calculating contract profitability.

Notes:

For previously billed metered contracts that contain a period charge amount and a meter charge amount, you need to separate the meter charge amount from the period billing amount. Miracle Service needs to know the Amount of the Period Charge for each of the previous period dates already billed, as well as the Amount of Meter Charge billed and the dates. You can make this easier by simply determining the total amount of period charge for the contract to date for both the period charges and the meter charges. Now enter the dates of all the previous periods, and in the last date billed so far, add the total amount billed to date for that type of charge. This will update Miracle Service's records to reflect that it billed the invoices correctly for all the previous dates at \$0.00, but that it caught up on the billing on the last billed period billing due date.

You do not need to enter the Meter Billed Amount in button 9 Meter Billing, as this is only used in Profitability Analysis. However, you must at least enter the date billed, or Miracle Service will think you neglected to bill for this period.

Do not put the invoice number into the Invoice Number column, as this column is linked to Miracle Service generated invoices only. No invoice number will be accepted here. Miracle Service will place invoice numbers into this column automatically when the invoice is generated from Miracle Service's Period Billing Module.

Optional Use Only: Use this column to add the invoice number from your old billing program if you like.

Flags on Equipment Contract Screen

Active

All active contracts illuminate an 'Active' warning. Deactivate contracts by clicking on the [+] button to edit.

Not Cancelled

If the contract has been cancelled, meaning it will no longer be billed in period billing, this will show as cancelled. A contract cancels 2 ways. Either by clicking the cancel button on this screen, or when the contract expires.

Not Metered

Metered contracts would show metered. For the contract to show as metered, a piece of equipment would need to be added to the contract, and a meter must have been attached to this contract. (Button 2 in this screen)

Has Not Been Billed

As soon as this contract has had revenue posted to it from the period billing screen, this will show up as 'Has been Billed'. Contracts that have not been billed can be edited, however if a contract has been billed, even partially billed such as one period charge in a one year contract billed monthly, be aware that modifying something within the contract may inadvertently create other contract billing issues. (See 'Editing an Existing Contract' for more information).

Print, Save and Activate, Save, and Cancel

Select the 'Save and Activate' button to start the contract. Activity is then permitted on the contract, i.e. this contract may be billed. 'Print' creates a hardcopy of the contract. To start again, press 'cancel'.

The first action would probably be to 'Save' the contract, however the 'Save and Activate' will activate the billings and permissions immediately. If the 'Save' button is selected, toggle the [+] button (looks like a 'Zoom [+] button) next to the red 'Activate' flag at the top middle of the screen to activate the contract.

Note: When you activate a contract that has meters, Miracle Service will prompt you to enter start meter readings.

Special Info Buttons (Edit/View Mode Only)

Profitability

This button can only be seen while editing or viewing an existing contract. Miracle Service can assess how much it has cost to maintain equipment, and will compare it with how much revenue the equipment generated to determine if this equipment has been profitable.

Service Equipment Contract Profitability						
Contract ID: 39	Labor Burden: \$25.00	Date Range				
Customer: AIR001	Lab/Trav Hrs: 33.00	From: 01/07/2008	!			
Description: Base + Overage & Supplies Included	Total: \$825.00	To: 15/03/2016				
Attached Sales Invoices						
Invoice Number	Invoice Date	Parts Cost	Parts Sold	Discount	Other Charges	
Totals: \$0.00 \$0.00 \$0.00 \$0.00						
Period Billing Invoices						
Invoice Number	Invoice Date	Period Amount	Meter Amount	Discount	Other Charges	
140108-0002	08/01/2014	\$10.42	\$39.23	\$0.00	\$0.00	
140108-0001	08/01/2014	\$10.42	\$51.68	\$0.00	\$0.00	
140619-0002	19/06/2014	\$10.42	\$313.53	\$0.00	\$0.00	
Totals: \$31.26 \$404.44 \$0.00 \$0.00						
Service Billing Invoices						
Invoice Number	Parts/Exp Cost	Parts/Exp Price	Labor	Travel	Discount	Other Charges
130722-0001	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
130724-0001	\$7.24	\$16.99	\$0.00	\$0.00	\$0.00	\$0.00
130730-0001	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Totals: \$242.35 \$279.45 \$0.00 \$0.00 \$0.00 \$0.00						
Total Revenue: \$715.15		Total Expenses: \$1,067.35		Profit/Loss: -\$352.20		

The details on this Equipment or Contract profitability screen are as follows.

Date Range

The default setting for this box is from the date of the first record of activity on the contract to the current date. Alter this by re-entering the desired dates and clicking on the 'Recalculate' [!] button to the right.

Labor Burden

There are many philosophies and methods used to calculate labor burden. Most trade associations provide seminars on the latest trends on calculating this value. In general, labor burden is calculated by adding the entire annual fixed and variable costs associated to providing service divided by the total number of man-hours over that time. Typically a period of one-year is used to calculate labor burden. A typical labor burden in the United States is somewhere in the \$45.00-\$75.00 range depending on the area. Allowing this field to be editable Miracle Service provides an unequalled profitability analysis.

Sales Invoices

This includes all of the charges included in any Sales Invoice attached to this equipment, including a contract if applicable. To view these invoices click the [+] button.

Period Billings

This includes all contract billings and/or meter billings. The percentage figure displayed on the equipment profitability screen, not seen on the contract profitability screen, refers to the weight of the equipment on the contract. To view these invoices click the [+] button.

Service Billing

This includes all of the charges arising out of service calls. Miracle Service will calculate all parts, labor, and other expenses. To view these invoices by click the [+] button.

Editing Active Service Equipment Contracts

Only users with 'siteadmin' privileges are allowed to edit existing contracts. (See 'Security' in the 'Administration Set up' program.)

Editing a Non-Metered Contract

First click the [+] button to the right of the word Active to make the contract inactive. Then click the Edit button to edit the contract.

Editing a Metered Contract

It is not recommended that a metered contract, especially if it has been billed, be edited. If the contract must be edited, manually note the contract billings before proceeding. Some revisions of the contract will clean the billing history. Click the [+] button to the right of the word Active to make the contract inactive. Click the Edit button to edit the contract.

Editing Billed Meter Contract Issues

If the contract has already been billed, and a term or condition needs to be edited, there are a few choices and decisions to make. If the changes to the metered contract will not affect any changes to any metered contract billing levels or charges, (i.e. the button 2 'Un/Attach Meters' will not be edited), simply edit the changes on the contract and click 'OK' when finished.

If the metered charges levels, or previous metered invoices must be re-billed there are some issues to consider. Clicking on button 2 to edit the charges on the meter levels will delete all the billed meter periods under this contract that can be viewed in button 9 'Meter Billing'. If there are no billed meter charges, then proceed. Edit the contract and click 'OK' when complete. If there were meter invoices created, be aware that the previous metered invoices will be deleted if 'button 2' to edit these meter charges are edited. This is because the contract is now prepared to once again start the meter portion of the contract just like it was at the start of the contract. Furthermore, if there are new consolidated meters, or new meters to the contract, the contract starts fresh. In order to guarantee that the meter billings will be accurate from this point forward, previous meter invoices that might now be incorrect are deleted from the button 9 lists. It might be wiser to simply void the previous period billing invoices before editing the contract, or enter in the meter reading invoice date manually once you have edited the meters.

If button 2 is clicked while editing a metered contract, Miracle Service will ask request a start meter reading when reactivating the contract. The application will re-compute the meter billings schedule.

All previously billed period billing invoices created for this contract are not affected. The period billing invoices may be viewed by clicking the button 8. If button 9 Meter Billing is clicked after the button 2 Attach Meters is clicked, note that the meter invoice number and amount have been deleted. Once again, for this reason, decide if it would be better to cancel the contract and create a new contract. Thus re-creating the previous period billing invoices using either the Period Billing screen, or manually entering them from button 8 and 9 while creating the contract.

To Void Period Billing Invoices

Locate the Period Billing Invoices for this contract. Click on button 8 and view the period billing invoice number. Write this/these down and enter the Period button on the 'Sales Orders and Invoices Menu'. Locate this invoice number by using the search VCR buttons at the top of the screen. Click on the 'Void' button. If all the period billing invoices are voided for an active contract, notice that the flag for the contract states 'Not Billed' and all the invoices shown previously from buttons 8 and 9 are no longer displayed.

Select 'Exit' to return to the 'Service Equipment & Contracts' menu.

Swapping Accessory Units From Main System Unit

There are three methods to modifying the configuration of a main system unit.

1. Service Equipment maintenance screen

Users are able to easily modify a system configuration by modifying the accessory status on individual units. This is for systems that are not on a Service Contract.

2. Service Contract maintenance screen

In order to modify the system configuration when it is used on a Service Contract you can perform a swap on the Service Contract itself by selecting the 'Swap' button (see below). This action will initiate the Swap Wizard to help guide you through the process. You will need to have edit permissions on Service Contracts to perform this task.

3. Service Task maintenance screen

Another possibility for system units on a Service Contract is to perform a swap on a Service Task by selecting the 'Swap' button next to the Service Equipment drop-down box. This action will initiate the Swap Wizard to help guide you through the process. You will need to have edit permissions on Service Contracts to perform this task

The screenshot shows the 'Service Contract maintenance' screen with tabs for Properties, Equipment, and Meters. The 'Equipment' tab is active. The screen displays various configuration options for a service contract, including Contract Template, Start Date, Term, End Date, Billing Intervals, and a summary table of costs.

Contract Template	Base + Overage & Supplies Included	Base (Period) \$	Additional (Period) \$	Other (Period) \$	Auto Zone (Period) \$	Total Contract \$	Period \$ To Date
All Inclusive		\$0.00	\$16.25	\$0.00	\$0.00	\$1,950.00	\$0.00

Buttons at the bottom include: Other Charges, Labor Charges, Travel Charges, Contract Text, Renewal, User Screens, Notes, Profitability, Documents, and Update Wizard (highlighted with a red box).

Update Wizard

The Update Wizard was designed to allow users to easily remove or replace accessory units from a system unit without billing implications on active Service Contracts. Changes made to a system configuration for non-metered contracts will occur at the next period billing whereas changes on metered contracts will occur at the next meter billing period. A flag titled 'Updates (x)' will be displayed on the Service Contract until the swap has occurred.

Service Equipment Contracts				
Flags	Active	+	Not Cancelled	Metered
				Updates(1)

Add, Change or Remove Equipment from an Active Contract

Update Wizard Step 1

Select the 'Action' to take on the contract. There are four (4) options for the Action.

Remove Service Equipment from Configuration

This option allows users to remove selected units from the system configuration without replacing the unit.

Add Service Equipment to Configuration

The option allow users to add new equipment to the contract when a contract is active and billed.

Swap Service Equipment in Configuration

This option allows users to remove selected units from the system configuration while replacing the unit with another unit belonging to the same customer.

Manage Pending Updates

This option allows the user to cancel all pending swaps for this Service Contract. By selecting either the option to remove service equipment from the configuration or to cancel next billing swaps a 'Finish' button will appear to process the action.

If you selected to swap service equipment you will see a grid that lists all of the individual accessory units that are linked to the main unit. Select the unit to swap and click the 'Next' button to proceed with the wizard.

Update Wizard Step 1

Action

☐ Remove Service Equipment from Configuration

☐ Add Service Equipment to Configuration

☒ Swap Service Equipment in Configuration

☐ Manage Pending Updates

Select the Service Equipment to Swap:

Serial Number	Unit ID	Model Class / Number	Status	Swap Pending	Select
A9641531556	A894132156	Segment 3 / A19573512	Main	No	
X5126698	X23596	Segment 2 / X5554896321	Main	No	
X644328552	X21654531	Segment 5 / X123456987	Main	No	

Next Cancel

Update Wizard Step 2

The next step involves selecting the Service Equipment or serialized inventory item to swap into the system configuration. The available Service Equipment includes all units that are not currently linked to an active Service Contract and belong to the same customer.

If you are swapping in a serialized inventory item, Miracle Service will automatically convert the item into a Service Equipment as an accessory to the main system unit.

When a unit is being swapped out it is returned to inventory as a *faulty* item. If the item was not previously in active inventory, then you must specify which inventory item to return the serial number to.

Otherwise the original inventory item for the serial number will be reused and you will not be required to select the item number. As the item is marked as faulty, you will need to process the item before it can be resold. See Managing Faulty Parts below.

If the Service Contract is non-metered, select the 'Finish' button to complete the wizard. If the Service Contract is metered, select 'Next' to continue with the wizard.

Update Wizard Step 2

Select from the following list the item to swap in. The list includes all serviceable serialized inventory and all existing Service Equipment that is not currently linked to an active Service Contract for the same customer.

Serial Number to Swap In: ☐ Hide Serialized Inventory ☐ Hide Metered Inventory and Equipment

Unit ID or Item Number: A32014856
 Model Class/Model Number: Segment
 3/A19573512
 Description: Copier
 Metered: True

Item Number for Faulty Equipment:

Update Wizard Step 3

The next step is to define the period change and attach the meters from the new Service Equipment unit to the Service Contract. Click the 'Next' button once you have set the desired Period charge and selected the applicable meters.

Update Wizard Step 3

Set the additional period charges for the swapped in Service Equipment. If applicable, select the meters to attach to the Service Contract.

Additional Charges	Serial Number	Model	Period Charge
	A654998712	Segment 3/A19573512	\$0.00

Attach Meters	Under Contract	Serial Number	Meter Name	Yield Warning Percentage	Low Yield Alert Days
	☐	No	A654998712	Black	150.00%
☐	No	A654998712	Color	150.00%	10

Update Wizard Step 4

The final step in the Swap Wizard for metered Service Contracts is to configure the meter charges for the newly attached meters. The current meter charges for the Service Contract can be reviewed for guidance. Users are also able to create consolidated meters or link the new equipment to an existing Consolidated Meter.

Once the charges have been configured, click the ‘Finish’ button to complete the wizard. A message will display notifying you that the swap changes will be made after the next billing period.

Update Wizard Step 4

Meter charges for all current Serial Numbers on the Service Contract.

Serial Number	Meter Name	Call Buffer	Consolidate	Charges
A9641531556	Black	15	CON000001	Charges
A9641531556	Color	15	CON000001	Charges
X5126698	Black	15	CON000001	Charges
X5126698	Color	15	CON000001	Charges
X644328552	Black	15	CON000001	Charges
X644328552	Color	15	CON000001	Charges

Configure new meter charges for selected updates.

Serial Number	Meter Name	Meter Reading	Call Buffer	Start Meter Reading	Consolidate	Charges
A654998712	Black	0	15	0	▼	Charges
A654998712	Color	0	15	0	▼	Charges

Pending Consolidated Meters

Consolidated Meter Name	Start Meter Reading	Call Buffer

Managing Faulty Parts

Units that are swapped out of a system configuration are marked as faulty and are not returned to active inventory. To manage faulty parts open the ‘Faulty Parts Return’ screen from the ‘Inventory Control’ menu.

You will notice that the unit that was swapped out appears in the grid in Figure 5. There are three actions that are available to process faulty parts.

Action: *Transfer to Warehouse*

This option will simply transfer the faulty part to another warehouse location.

Tested: *Return to Inventory*

This option will return the inventory item to active inventory where the item can be resold.

Discard: *Remove from Inventory*

This option will remove the inventory item completely from Miracle Service.

For more information on Faulty Parts see Faulty Parts Management in this manual.

Hours Included Contracts

Miracle Service supports a basic Hours Included type contract. These contracts are used to sell a block of service time to customers. When calls are placed against these contracts, the time will consume the hours included. Once the hours included are consumed, the additional hours will be billed at the labor rate defined in the contract.

Selling Additional Block Time

When Block Time contracts are used, many companies will prefer to purchase additional block time typically at reduced rates from the standard labor rates. Miracle Service accommodates this capability using the standard Invoice Module.

To sell additional Block Time, create an invoice and attach it to the affected contract. It is expected that an inventory item has been defined to facilitate selling Block Time. Once this is completed users can edit the current contract and update the hours included to add the additional hours sold.

To modify the contract first de-activate the contract by clicking the [+] Active button. When you de-activate the contract you will receive a warning message that you are deactivating an active/billed contract. Only a 'siteadmin' user can perform this function. Click 'Yes' to proceed. As a precaution you should note the Period Billing invoice history in case it is necessary to re-build these links.

Now click Edit to put the contract in to Edit mode.

Click the Labor Charges or Travel Charges button to view the current Hours Included.

View Service Equipment Contract Labor Charges

Labor Charges

Are Labor Hours Included ? Not Included ☐ Incl. per Term ☒ All Included ☐

Hours Included if applicable 20

Hours Remaining if applicable 13

Any Additional Charges for Labor No Surcharge ☒ Flat Charge ☐ Flat Surcharge by Zone ☐

Flat Charge if Applicable \$0.00

Labor Rate IT Labor Rate

Ok Cancel

Update the 'Hours Included if applicable' value to include the additional block of hours sold. For example if the original block was 20 hours and an additional block of 10 was sold, the 'Hours Included if applicable' should be updated to read 30.

View Service Equipment Contract Labor Charges

Labor Charges

Are Labor Hours Included ? Not Included ☐ Incl. per Term ☒

Hours Included if applicable 30

Hours Remaining if applicable 13

Any Additional Charges for Labor No Surcharge ☒ Flat Charge ☐

Flat Surcharge by Zone ☐

Flat Charge if Applicable \$0.00

Labor Rate IT Labor Rate

Ok Cancel

It is also possible to adjust the Hours Remaining by entering the correct 'Hours Remaining if applicable' value in the field shown. This may be required if multiple changes to task times are made as the contract is updated only once to avoid double counting used hours.

Contract Auto-Price Adjustments (Top Right of Contract screen)

The auto-price adjustment feature in Miracle Service allows users to automatically adjust period charges and meter CPC charges on a specific Service Contract. You can apply updates on a defined schedule or you can apply the updates immediately.

In order to configure or run the auto-price adjustments you will need to add the 'Run Contracts Auto-Adjustments' user permission. The permission should only be granted to a user(s) that has full knowledge and understanding of your company's Service Contracts as adjustments directly affect customer billing.

You must enable the 'Auto Price Adjustments' setting on each Service Contract in order to configure and apply automatic adjustments.

There are 3 options for applying Service Contract price adjustments:

- By Percentage
- By Individual Price
- By Meter Name

Applying Adjustments by Percentage

With this method users are able to either schedule the adjustments or apply them immediately.

Increase Interval indicates when the automatic adjustments are made. The available intervals are dependent on the Service Contract term.

Last Increase Date specifies when the last adjustment was made.

Next Increase Date specifies when the next adjustment will be made. This date is calculated using the last increase date and the increase interval.

Base Change indicates the percentage to increase or decrease the Service Contract's base charge by.

Additional Change indicates the percentage to increase or decrease the Service Contract's accessory charges by.

Meter Change indicates the percentage to increase or decrease the Service Contract's meter charges by.

Contract Price Adjustments

Adjustment Method ☒ By Percentage
☐ By Individual Price
☐ By Meter Name

Increase Interval Annual ▼

Last Increase Date 10/14/2011

Next Increase Date 10/13/2012

Base Change 3.00% % Increase/Decrease

Additional Change 3.00% % Increase/Decrease

Meter Change 1.00% % Increase/Decrease

* enter a negative amount ("-") for decreases

Apply Now

Ok Cancel

(Figure 1)

Applying Adjustments by Individual Price

Contract Price Adjustments

Adjustment Method ☐ By Percentage
☒ By Individual Price
☐ By Meter Name

Increase Interval Annual ▼

Last Increase Date 10/14/2011

Next Increase Date 10/13/2012

Individual increases are set with the attached Service Equipment and Meters.

Apply Now

Ok Cancel

(Figure 2)

With this method users are able to either schedule the adjustments or apply them immediately.

Increase Interval indicates when the automatic adjustments are made. The available intervals are dependent on the Service Contract tem.

Last Increase Date specifies when the last adjustment was made.

Next Increase Date specifies when the next adjustment will be made. This date is calculated using the last increase date and the increase interval.

The price adjustments are defined on the 'Equipment' and 'Meters' tabs on the individual records.

The equipment adjustment field is applied using the Renewal Increase field.

The meter adjustment field is applied using the Auto Adjust Increase field. This field is hidden until the setting for 'By Individual Price' is enabled.

Applying Adjustments by Meter Name

With this method users must apply the updates immediately. Note that this method does not apply to consolidated meters or for Service Contracts that use CPC charge levels.

A listing of all of the attached meters will be available for price adjustments and for updating the clicks included. You must select the meter for updates by checking the box next to the meter name.

Contract Price Adjustments

Adjustment Method ☐ By Percentage
☐ By Individual Price
☒ By Meter Name

Charges Clicks Included

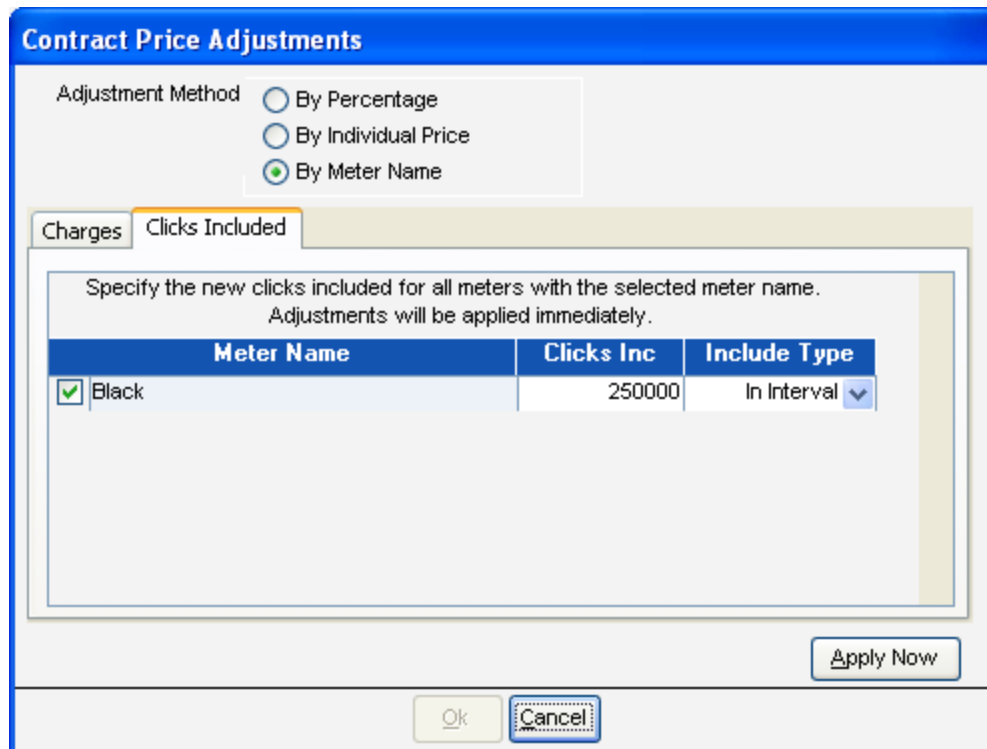
Specify the new meter charge for all meters with the selected meter name.
 Adjustments will be applied immediately.

Meter Name	Charge
☒ Black	0.01

Apply Now

Ok Cancel

(Figure 3a)



Contract Price Adjustments

Adjustment Method ☐ By Percentage
☐ By Individual Price
☒ By Meter Name

Charges Clicks Included

Specify the new clicks included for all meters with the selected meter name.
 Adjustments will be applied immediately.

Meter Name	Clicks Inc	Include Type
☒ Black	250000	In Interval ▼

Apply Now

Ok Cancel

(Figure 3b)

Running Scheduled Adjustments

When a user with the 'Run Contracts Auto-Adjustments' permission logs into Miracle Service, a check is made against all Service Contracts that have auto-price adjustments enabled. All updates due based on the next increase date will be applied at this time and the next update date is reset.

Chapter 30

Contract Print Approval

The 'Contract Print Approval' screen is a table listing all active contracts in order of 'Contract ID' that have yet to be printed. This table permits contracts to be printed.

Select the 'Print' button in the 'Contracts Menu' to enter the 'Contract Print Approval' screen.



Every active contract for the date range selected is listed here.

Note: You are also able to print a service equipment contract from the actual equipment contract screen while you create the contract, or when viewing the contract itself. This screen simply allows you to print these contracts in batch.

Contract ID

This is the unique ID Miracle Service assigned to the contract when it was created.

Serial Number

This is the alphanumeric code that identifies the primary equipment on the contract. The manufacturer usually assigns serial numbers.

Equipment Description

This is the description entered for the equipment in the 'Service Equipment Data Entry' for the primary equipment.

Customer ID

This is the unique code assigned to the customer.

Contract

This is the contract type descriptor.

Contract Term

This is the term or length of the contract.

Start Date

This is the date the contract was activated.

End Date

This is the date the contract will expire. It is calculated by adding the contract term to the start date.

Print

Select this white box to select the contract for printing. A red 'Print' will appear.

Note: If your site contains many thousands of customers, contracts, equipment and/or service calls in the database, you may want to start this processing after hours.

Chapter 31

Contract Renewals

There are two methods to renewing existing contracts: the 'Contract Renewals' screen and the 'Renewal' button on the 'Service Equipment Contracts' screen.

The 'Contract Renewals' screen displays a table containing all the service contracts that are due for renewal in the date range selected, or by clicks (estimated or actual) if that is the renewal criterion.



Select the 'Renewals' button from the Contracts Menu. This will open the Contract Renewals screen.

Show Contract: Expirations by:

☒ Date
☐ Actual Meter
☐ Estimated Meter

Group By: Customer ID

Aging Date: 11/06/2013

Customer ID	Contract ID	Customer ID	Contract term	Start Date	End Date	Date	Expired By Actual	Expired By Estimate	Renew	Activate New
AIR001	96	AIR001	+ Annual	01/11/2011	31/10/2012	Yes	N/A	N/A		
			Contract Type: Includes IT Services Onsite - 20					Meter		
AIR001	90	AIR001	+ Annual	01/11/2011	31/10/2012	Yes	N/A	N/A		
			Contract Type: Rental Contract					Meter		
DAI002	07	DAI002	+ Annual	01/08/2011	31/07/2012	Yes	N/A	N/A		
			Contract Type: Base + Overage & Supplies					Meter		
BAI002	83	BAI002	+ Annual	01/07/2011	30/06/2012	Yes	N/A	N/A		
			Contract Type: Simple/Analog Meter Billing &					Meter		
BKS001	91	BKS001	+ Annual	01/08/2011	31/07/2012	Yes	N/A	N/A		
			Contract Type: Base + Overage & Supplies					Meter		
BKE001	88	BKS001	+ Annual	01/08/2011	31/07/2012	Yes	N/A	N/A		
			Contract Type: Base + Overage & Supplies					Meter		

Renew All Renew & Activate All Clear All

Every contract due for renewal in the date range selected is listed here. In the upper left corner there are three boxes that allow the contract administrator to select contracts that expire by 'Date', 'Actual Meter Readings' or 'Estimated Meter Readings'. If more than one criterion is selected, only those contracts that satisfy both filters will be displayed.

Note: You cannot select all three criteria, because it is impossible for a contract to have been expired by all three at the same time. Once a contract expires by the actual meter, it will never get an opportunity to expire through the date, and vice versa.

Copy Block Contract Expiry Considerations

For copy block contracts, allow Miracle Service to estimate the reading based on previous meter readings. Miracle Service will review the copy block field within the metered portion of the contract to see how many copies are included on the contract. An estimate of the number of copies that would have been made up to the Aging Date will then determine whether or not the contract is likely to expire. After the estimate has been calculated, call the customers to confirm their estimates, and manually renew their contracts.

Contract ID

This is the unique ID number Miracle Service assigned to the contract.

Serial Number

This is the alphanumeric code that identifies the equipment. The manufacturer usually assigns the serial number.

Equipment Description

This is the description entered for the equipment in the 'Service Equipment Data Entry' screen.

Customer ID

This is the unique code assigned to the customer.

Contract

This is the contract type descriptor.

Contract Term

This is the term or length of the contract.

Start Date

This is the start date the contract was activated.

End Date

This is the date the contract will expire. It is calculated by adding the contract term to the start date.

Expire By

This column shows how the contract has expired. The meter button is inoperative until one of the boxes in the upper left is selected that call for a meter reading.

Renew

Select this white box to renew the contract. A red 'Renew' will appear. When a contract is renewed, a new contract is created with the same information. The new contract has a new Contract ID number and a new start date. After the contract-billing schedule is complete, the final billing is sent and payment received, the contract may be renewed. The contract administrator must decide just when the most appropriate time to renew the contract is.

Activate New Contract

Select this box to immediately activate the new contract. If this box is not selected, contracts will have to be activated from the 'Contract Maintenance' screen individually. When the new contract is activated, the old contract is automatically cancelled and cannot be billed.

Click 'OK' to renew and/or activate all marked entries.

Click 'Exit' to return to the 'Service Equipment and Contracts Menu'.

Steps to Renew a Contract (Non-Metered Equipment)

As soon as possible after the last period billing, renew the service contract(s). This can be done from the 'Contract Renewals' screen, or from the 'Service Equipment Contracts' screen. Both of these screens are accessible from the Service Equipment and Contracts Menu. We will deal with the renewal screen in this example.

After completing the invoice approvals for a period billing, enter the 'Service Equipment Contracts' screen and select a future date range. Note; select a future date range a few weeks ahead for the 'Period Billing' screen so that invoices are mailed before they are due. Therefore payments will be received on or just prior to the due date. Verify that the dates range are not ahead of the date range used for your last period billing period invoices, i.e. do not do billing for March 15th and then renew invoices up to March 31st. The previous contract will not generate the final billing.

Print the 'Print Approval Report'. To print, click the Edit/Options at the top of the screen and select the 'Print Preview Mode' to be 'on'.

Very Important: Before contracts are renewed, review the contract profitability and adjust accordingly.

Use the report that was just printed and enter the 'Service Equipment Contracts' screen in Edit Mode. Locate each current contract by looking at the far left column of the Contract Renewal Report and type this Contract ID number into the Search buttons at the top of the Service Equipment Contracts screen.

Contact ID can be found by searching on the 'Primary Service Unit Serial No' or 'Customer ID'. The report displays the serial number.

Search Button Help on Service Equipment Contract screen: Move the mouse into the field to the left of the search buttons at the top of the screen. Add the contract ID number and then press the Enter key twice. This will move the focus to the proper button and execute the search function. Now check the Contract ID number that was located to be sure it found the correct Contract ID. The current Contract ID will be in Yellow directly below the search buttons. The search criterion is always treated as a string. For example, if searching for Contract ID 4 and the find first button is used, pressing 'Enter' twice. The first occurrence of a record that has a Contract ID with a '4' in it is found - starting from the most recent record added. Therefore, if there are 974 contracts in the system, 499 are displayed. It would not be wise to use the Blue

Arrows at the bottom of the screen; the application will display 498, then 497. Clicking the third button would be the same. What we suggest is to click on the Find Last button, the forth button. It will locate the last occurrence of '4', which is actually Contract ID 4. Also search using other fields by clicking the down arrow next to the first field in the buttons.

Make sure this contract is fully billed by seeing if the 'Period \$To Date' field (how much has been billed on this contract in Period Billing) is equal to the 'Total Contract \$' field. If it is, then this contract is fully billed.

Click the profitability button to analyze the contract's revenues and costs. This screen allows the administrator to investigate who serviced the equipment, what work was performed, and review the reasons why certain parts were replaced, or why too many supplies were ordered that were included in the service contract.

Document any changes required to renew the contract in the space provided on this report (below current Contract ID #).

Select the 'Renew' button on the contract at the bottom of the screen. The application requests whether to renew the contract. Select 'Yes'. The application then asked to cancel the existing contract. There are two choices. Selecting 'Yes' would activate the new contract and cancel the old contract, which should be fully billed. If it is not, do not select 'Yes'.

If 'Yes' is selected, realize that Miracle Service will not bill for any remaining periods under that earlier contract, since it has been cancelled. Hence the reason the 'Period \$To Date' field equaled the 'Total Contract \$' fields were verified.

If 'No' is selected, the current contract is brought in front up, notice the Contract ID number has changed to the new Contract ID number, but the old contract is still active. This will allow the completion of any billings that have yet to be completed. Just remember to Activate this contract after the other contract is fully billed.

All contracts that have been activated are ready to be invoiced in Period Billing when the time comes.

Another Way to Renew Simple Contracts

Enter the 'Service Equipment Contracts' screen, and click the 'Renew' button. It is that simple. Keep in mind all the other renewal details described above.

It should be noted that the administrator can simply click 'Renew and Activate' on the Contract Renewals screen. However, by doing this, the administrator does not have the opportunity to investigate the contract profitability and the newly generated contract is not easily editable. If the pricing and billing frequency are the same on the newly generated contract, this method can be used.

Renewing Metered Contracts

Use the same steps as Renew a Contract (Non-Metered Equipment), but when the contract is activated, enter the start meter reading(s). If renewing a contract before the actual start date of the contract, the start meter reading is not known, be aware that the start meter reading(s) must be added later for the contract when it is time to be activated. When the 'Activate' button is clicked, the system will display the last billed meter reading to confirm. Enter a new start meter reading if necessary.

Cancelling Active Contracts

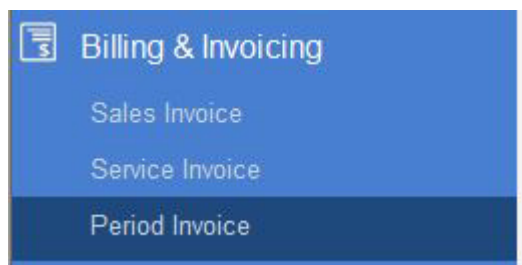
To cancel an active contract select the contract and then click the 'Cancel Contract' button. If there are unbilled items attached to the contract the system will not allow you to cancel the contract until these items are resolved. Clicking OK to this message will generate a report listing the unbilled tasks that must be resolved before cancelling the contracts.

Chapter 32

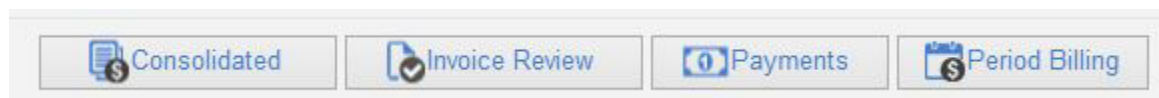
Period Billing

Period Billing is the price charged for a contract distributed in uniform amounts over the life of the contract. For example, a one-year contract for \$1,200.00 may have twelve period billings of \$100.00 each over the length of the contract. This is subject to agreement between you and your customer. Monthly billings are the most common, but Miracle Service allows many other billing frequencies.

From the main menu, select 'Period Invoice'.



On the Period Billing screen, click the Period Billing button.



This will launch the Period Billing process.

Generating Period Billing

After you click the 'Period Billing' button a calendar displaying the current date will appear requesting an 'Aging Date' to be selected.

Service Contract Period Billing

Filter Contract: * blank includes all

39	Airforce Base	7/1/2008	6/30/2018
40	Bail & Well Business Solutions	7/1/2008	6/30/2018
43	Bank of Marion	8/1/2008	7/31/2018
45	Camp Processing	7/30/2008	7/29/2018
46	Cave Office Products	8/15/2008	8/14/2018
47	Credit Woodland Cancer Centre	6/5/2008	6/4/2018
48	Dr. Mable Anderson	6/25/2008	6/24/2018
49	Dept Of Motor Vehicles	7/2/2008	7/1/2018

Use the Calendar to Select the Aging Date

2014

Ok Cancel

Notes:

This is the date that you want Miracle Service to use for determining who to find in your contract system that [will] require an invoice. You can move this ahead a few weeks and approve all the charges, allowing you to get your invoices out early.

If you are using Copy Block contracts, you should also print the Copy Block renewals report to have the system determine those contracts where the meter readings will be, or will be estimated to be expired by the selected aging date. This will allow you to call the customer to confirm the reading and renew the copy block for another period or term.

If your site contains many thousands of customers, contracts, equipment and/or service calls within the database, you may want to start this processing after hours and let Miracle Service process it for you.

Filter Contract: It is possible to select a specific contract using the Filter Contract drop down. Selecting a single contract will run faster than leaving it blank to run on all contracts. This is helpful if multiple users are managing the Period Billing process and user would like to just work on specific contracts.

Calendar and the Aging Date Field

There are two places to select an Aging Date. When the Period Billing 'Billing' button is clicked from the menu, a calendar will appear forcing an aging date to be selected. Furthermore, the aging date near the top right of the 'Period Billing Review' screen may be edited. Miracle Service will display information as of that date. To view contracts that will require a billing as of the new aging date, edit the date.

Miracle Service will display billings that are due to be invoiced by any aging date. Activity that takes place after this aging date is billed at the selected aging date. When the aging date is changed, Miracle Service determines the number of contracts requiring approval. This may take a few minutes. Prior to re-selecting another aging date, click the 'Save' button if any billings have been approved.

Sort By	Customer ID						Aging Date		6/16/2016		Change			
Customer ID		Contract ID	Next Period Charge	Period Charge	Other Charges	Next Meter Charge Due	Meter Charge	Meter Reading	Adjust Type	Hold	Approve Period	Approve Meter	Email Notice	
▶ A New Customer		81	3/27/2016	\$250.00	\$0.00	4/26/2016	\$0.00	Call		No	No	No	No	
Bail & Well Business Solutions		40	10/1/2008	\$3.75	\$0.00	8/31/2008	\$42.56	Call		No	No	No	No	
Bank of Marion		43	8/1/2008	\$0.00	\$0.00	8/31/2008	\$0.00	Call		No	No	No	No	
BK's Law Office		42	7/25/2008	\$16.25	\$0.00	8/24/2008	\$0.00	Call		No	No	No	No	
Camp Processing		45	1/30/2008	\$54.96	\$0.00	8/29/2008	\$0.00	Call		No	No	No	No	
Cave Office Products		46	8/15/2008	\$21.25	\$0.00	11/14/2008	\$0.00	Call		No	No	No	No	
Credit Woodland Cancer Center		47	8/5/2008	\$4.17	\$50.00	9/4/2008	\$0.00	Call		No	No	No	No	
David Perdue, CPA		50	9/1/2008	\$2.08	\$0.00	9/30/2008	\$0.00	Call		No	No	No	No	
Dept Of Motor Vehicles		49	7/2/2008	\$20.83	\$0.00	8/1/2008	\$0.00	Call		No	No	No	No	
District IV Police Dept		54	7/3/2008	\$10.00	\$0.00	8/2/2008	\$0.00	Call		No	No	No	No	
Dr. Mable Anderson		48	6/25/2008	\$1.25	\$0.00	7/24/2008	\$0.00	Call		No	No	No	No	
Felton Real Estate		53	7/22/2008	\$5.42	\$0.00	8/21/2008	\$0.00	Call		No	No	No	No	
Fleet Painting & Supplies		64	6/30/2008	\$87.50	\$0.00	7/29/2008	\$0.00	Call		No	No	No	No	
Forward St. Church		52	10/15/2008	\$2.92	\$0.00	11/14/2008	\$0.00	Call		No	No	No	No	
Innovative Solutions		58	8/1/2008	\$12.50	\$0.00	8/31/2008	\$0.00	Call		No	No	No	No	

The 'Period Billing Review' screen displays any contract due for billing as of the billing date selected.

Sort By

The list can be sorted using the Sort By drop down. This will sort the list by Customer ID, Contract ID, Next Period Charge, Period Charge, Other Charges, Next Meter Charge Due, Meter Charge and Adjust Type.

Metered Contracts Please Note

Any contract that requires a telephone call or fax for Meter Billings for the selected Aging Date will show a check mark next to the 'Call' button. If there is no check mark, then a meter reading is not due. The Call Button does not need to be clicked in this case.

Period Billing Review Fields

Pay particular attention to the fields and their meanings on this screen. An understanding of the capabilities of this screen will ensure how contract billings occur, and how to deal with the cancellation or modification of contract charges during a billing period.

Customer ID

This is the unique alphanumeric code assigned to the customer on the Customer Data Entry screen.

Contract ID

Miracle Service assigns a number to every contract when the 'New Contract' screen is completed. The 'Zoom [+]' button enters the contract for viewing. The 'Contract ID' appears in the top right of the 'Equipment Contract' screen.

Next Period Charge [Date]

Miracle Service will determine this date by reviewing the last billed period charge date. This date should be the current billing period, however if previous period billings are missed for this contract, it will appear here instead of the date that the next period billing was due. If the contract is billed monthly, or annually, the next billing date displays here. When the contract terms for the contract are set-up, (for example the

contract length is one year and the billing frequency is monthly), Miracle Service creates the billing schedule, tracks the historical billings and will generate the next billing based on the date. To view the last billed interval on a contract, click the button 8 and/or 9 from the 'Service Equipment Contract' screen. If monthly intervals were not generated by mistake, Miracle Service would actually display the next due interval date in this field. Note: missed intervals must be approved. The three separate line items for each missed interval will not be displayed. Approve the one, and then approve subsequent intervals after approval for those intervals that were missed.

Period Charge

Miracle Service calculates the value of the next period charge based on the sum of the individual period charges. If an annual contract with the period billing interval set to monthly, the monthly period charge displayed is based on the sum of the period charges on all linked equipment records on the contract.

Note: you can modify the Period Charge to adjust a customers billing if desired. This will not affect future period billings as each billing is calculated from the sum of the equipment period charges on the contract.

Next Meter Charge Due

As with the next 'Period Charge' due date, the current meter billing period is displayed here.

Meter Charge

What is the value of the next meter charge? This will have an amount greater than \$0.00 if a reading has been received, and the number of clicks has created the need to bill for these clicks.

Meter Reading (And 'Call' Button)

This is an optional module used to track meter readings/clicks on equipment. Meters are tracking devices used to determine the number of times a piece of equipment or a function of the equipment has been used.

Adjust Type

This column will display post processing billing adjustment actions that will run when generating the invoice. There are three Adjust Type Actions:

- Acc. CPC - displayed when the contract is using the Accumulate CPC method.
- Base+ - displayed with the contract is a Combined Base Charge method.
- Mixed - displayed if both of the above methods are being employed.

When there is an Adjust Type displayed in the column, the meter values displayed are the screen are the straight CPC calculations. When the charges are approved and the invoice is generated additional billing calculations will run based on the contract template settings.

Held

If there is a reason to withhold period billing for this piece of service equipment, do so here by selecting the red 'No'. It will become a blue 'Yes' after the information is entered as prompted in the pop-up that appears.

Approve Period

If the period billing amount displayed is satisfactory, approve it by selecting the red 'No', which turns to a blue 'Yes'.

Approve Meter

If the meter billing information displayed in the 'Meter Charge' field is correct, approve the meter billing portion for this contract by clicking on the red 'No' which turns it to a blue 'Yes'.

E-mail Notice

If a meter reading is due, a check mark will display in the box beside the 'Call' button. For these items you can request that an E-mail Notice be generated for this Meter reading. This feature will be an optional feature bundled with the Miracle Service Customer Web Portal software. When this is selected, an e-mail is generated to advise your customer that a meter reading is due. The e-mail includes an internet hyperlink back to the Customer Web Portal where the user can enter the current meter reading and date. For more details on this feature, please see the Customer Web Portal Set-up and installation guide or contact your Miracle Service sales representative.

Call Screen Button (See Below)

Located in the bottom left of the screen. The button enters a screen similar to the 'Call' button located to the left side of the check mark column. Selecting the 'Call Screen' button displays information on all customers rather than just the machines at that customer's site. See 'Meter Readings' below for more information on the meter reading processes available within Miracle Service.

Approve All

When the 'Approve All' button is selected all period and billing charges on this screen will be approved.

Approve All Not Held

When the 'Approve All Not Held' button is selected, all billings not on 'Hold' are approved.

Hold All Not Approved

After contracts have been approved, select the remainder to identify them as on 'Hold'.

Save

As soon as any period billing charge is 'Approved', a 'Save' button will appear in the bottom center of the screen. When the 'Save' button is selected, the period billing invoice is created and sent to the 'Invoice Review' screen for printing.

Cancel and Edit

These self-explanatory buttons are at the bottom of the screen to the right of the 'Save' button.

To Approve Period Billing Charges for Non-Metered Contracts

Confirm the amount to be billed in the 'Period Charge' column for the contract. Review the description of this field above. Confirm the date in the 'Next Period Charge' column. Review the description of this field above.

In the 'Approve Period' column, click the word 'No'. It will turn to a 'Yes'.

Continue approving all the other period charges, (or simply select the 'Approval All' button, and then click the 'Save' button. All the invoices are created and will be sent to the Invoice Review screen for printing.

To Print the Approved Period Billing Invoices

Go to the 'Invoice Review' screen and approve all the un-printed invoices.

Meter Readings (Requires Metered Contracts Module)

The application will determine which customers require a telephone call to obtain their latest reading for their metered contracts. There are two methods:

- ▶ Click the 'Call Screen' button on the bottom left of the Period Billing Review Screen

- Click the 'Call' button for each contract that has a check mark next to the call button.

Call Screen Button



Clicking on the 'Call Screen' button at the bottom of the 'Period Billing Review' screen brings up a screen that lists every customer in order. The order can be changed using the Sort By drop down. Tab through the screen, (three tabs per record), notice the Customer ID's, the contract information and the phone numbers change above. Customers that require a telephone call are clearly listed as 'Req'd, (Required)' in the 'Call Req'd' column.

While there are other ways of calling a customer and entering the meter reading, what follows is the best way to determine which machines in the entire equipment base requires a call to obtain the latest readings.

Select View: Default View

Field 1: SE ID

Field 2: SEC ID

Field 3: Meter Name

Field 4: Next Bill Date

Field 5: Reading Type

Ship To: BKS001

Address: BK's Law Office
634 Middle Creek Rd
Sevierville, TN 37862
Phone: (555) 248-7632
Email: bklaw@pcluyt.com

Sort By: SE ID

Acing Date: 8/16/2016

Print By Contract ID: ☐

Calls Required Only: ☐

	SE ID	SEC ID	Meter Name	Next Bill Date	Reading Type	Call Req'd	Meter Reading	Reading Date	Note	
Details	46	42	Color	8/24/2008	Actual	No				History
Details	46	42	Black	8/24/2008	Actual	No				History
Details	47	47	Black	9/4/2008	Actual	No				History
Details	47	47	Color	9/4/2008	Actual	No				History
Details	48	48	Black	7/24/2008	Actual	No				History
Details	50	39	Color	2/28/2009	Actual	No				History
Details	50	39	Black	2/28/2009	Actual	No				History
Details	51	40	Black	8/31/2008	Actual	No				History
Details	52	43	Black	8/31/2008	Actual	No				History
Details	52	43	Color	8/31/2008	Actual	No				History
Details	53	45	Black	8/29/2008	Actual	No				History
Details	53	45	Color	8/29/2008	Actual	No				History
Details	54	46	Color	11/14/2008	Actual	No				History
Details	54	46	Black	11/14/2008	Actual	No				History
Details	55	49	Black	8/1/2008	Actual	No				History

The cursor is already located on the first 'Details' button. To the top of this screen are the customer's name and their phone number.

If a PC available the entire time while calling for the meter readings, use the following process. If a PC is not available during the entire process, click the print button at the bottom of the screen. The information contained in the table is printed on a report.

Notice the 'Call Req'd' column (Call Required). For each line, it will state Yes or No. If the customer needs to be contacted to obtain the latest reading, the Call Req'd message will be 'Yes'.

Reading Type	Call Req'd	Meter Reading	Reading Date	Note	
Actual	Yes				History
Actual	Yes				History
Actual	No				History
Actual	No				History

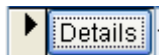
Calls Required Only: To shorten the list, users can check the 'Calls Required Only' at the top of the screen. This will filter the list to only display the items where a call is required.

Notes: Users can enter notes on the meter reading to identify any special information they need to include on the reading.

There are two options when calling a customer for meter readings. If the customer has multiple pieces of equipment at that site, call the customer's general telephone number to obtain the meters. If the customer only has one piece of equipment or equipment is spread out in a large area, the application offers the caller to call the telephone number associated to the equipment. A specific telephone number, closest to the equipment may have been entered when the equipment information was entered.

The history button will display the main meter reading history for each piece of equipment. It will list the readings from within the last 16 months of the aging date.

Use the following steps to enter the latest reading. Use their mouse to click the 'Detail' button on a record that requires a call. (Miracle Service allows more than one meter per equipment, so there is a 'Detail' button for each meter on the equipment).



Using a Keyboard instead of a mouse, tab to the appropriate line, for example tab 3 times until the triangle appears to the left of the Detail button.

Click the 'Detail' button to view the 'Meter Details' screen.

Meter Details

Equipment Info

Serial Number: A365874125
Unit ID: A62358
Model Class/No: Segment 3/A19573512
Description: Black and Color 555-248-7632
Local Phone: 555-248-7632

Meter Info

Meter Name: Black
Meter Location: Control Panel

Meter Readings

	Meter Reading	Reading Date
Last Billed:	2485	25/07/2008
Current:	2485	15/02/2008
	From Reading	To Reading
Copy Block:	N/A	N/A

Note the 'Local Phone' display. The local phone number is to call a person, for the meter reading, that is physically close to the piece of equipment.

Obtain the reading, and make sure the reading is greater than the 'Last Billed' reading for the one last collected. (Just in case the customer made an error it has been provided within the 'Meter Details' screen above).

If a meter reading is obtained, return to the previous screen by clicking 'OK', and then press Tab. Your cursor is located in the meter-reading field.

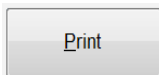
Enter the reading and press the tab button. Today's date will appear in the column to the right. To accept this date, press tab, and the cursor will enter the next record. Notice the Details button for the next machine on the contracts is highlighted. Start the process over again, or tab three times to go to the next record. Another option is to use your mouse to click on the Details button for the next customer that requires a call.

Another way to enter the meter reading is by clicking on the 'Call Button', which appears next to the checkmark box for each contract. This only brings up the specific machine at the customer's site, whereas the 'Call Screen' button in the bottom left of the screen finds all the machines at the customer's location that requires a reading.

We will discuss the method and explain the differences below.

Print Button on the Period Billing Meter Calls Screen

To see this button, click the 'Call Screen' button from the main 'Period Billing Review Screen'. Doing so will open the Period Billing Meter Call screen. The button is at the bottom of this screen.



All of the contracts at each customer site that has been calculated in the 'Period Billing Meter Calls' screen are listed on this report.

This report can be print previewed as well.

Period Billing Meter Call Sheet

SE ID	Meter Name	Meter Location	Billing Interval	Current Reading	Reading Date	Last Billed Reading	Last Bill Date	Reading Type	Call Req'd	Actual Reading	Reading Date
Customer: AIR001 International Airlines, 10368 Wallace Alley Street, Kingsport, TN 37663 USA, Phone: 5552790788, Contact: BETH											
Equipment ID: 50	Serial No: X5126698	Unit ID: X23596	Model Class/No: Segment 2/X5554896321			Desc: Desk Top-Black/Color			555-279-0788		
50	Back	Control Panel	Monthly	7500	1/31/2009	7500	1/31/2009	Actual	No		
50	Color	Control Panel	Monthly	4521	1/31/2009	4521	1/31/2009	Actual	No		
Equipment ID: 82	Serial No: A9641531556	Unit ID: A894132156	Model Class/No: Segment 3/A19573512			Desc: Standard			555-279-0788	Loc: Bill's Office	
82	Back	Control Panel	Monthly	7500	1/31/2009	7500	1/31/2009	Actual	No		
82	Color	Control Panel	Monthly	4500	1/31/2009	4500	1/31/2009	Actual	No		
Equipment ID: 83	Serial No: X644328552	Unit ID: X21654531	Model Class/No: Segment 5/X123456987			Desc: High Volume Multi Function			555-279-0788		
83	Back	Control Panel	Monthly	4800	1/31/2009	4800	1/31/2009	Actual	No		
83	Color	Control Panel	Monthly	3589	1/31/2009	3589	1/31/2009	Actual	No		
Customer: BAIL002 Bail & Well Business Solutions, 4001 Steelburgh Highway, Cedar Bluff, VA 24609, Phone: 5559637336, Fax: (555) 963-7337, Contact: Richard Wade											
Equipment ID: 51	Serial No: A5156874	Unit ID: A23684	Model Class/No: Segment 1/A225596314			Desc: Desktop			Loc: Sue's Office		
51	Back	Control Panel	Monthly	7452	8/31/2008	6122	7/31/2008	Actual	No		

This report can be printed and given to a 'meter call person'. This report is laid out in a similar fashion as the Call screen. From this report, the meter call person has access to equipment specific information, to the phone number of the person to call to obtain a reading, as well as a place to enter the meter reading. The

report lists all the machines at the customer's site, as well as those that require a reading. (Note the Call Required [Req'd] column.) For easy retrieval of meter readings, the report is sorted by customer and then by equipment.

When printing this report, you can also select to have this report printed in Contract ID order by checking the "Print by ContractID" before selecting Print.

Once the latest reading for the equipment is received, enter the information by selecting the 'Details' button to the far left of each column on the 'Period Billing Meter Calls Screen'.

Meter Reading 'Call' Button within the Period Billing Review Screen

This is another way of entering the readings. Within the first screen displayed after the calendar appeared for the aging date, each record has a small 'Call' button within the row.

Meter Reading	
Call	☒
Call	☒
Call	☒
Call	☒
Call	☐

Obtain the latest reading, if there is a checkmark next to the Meter Reading 'Call' button. Look to the top of the screen on the record selected, the currently selected record has a triangle to the left of the 'Detail' button, and call the customer. If the local phone number for the person closest to this equipment was entered, it can be displayed by selecting the 'Detail' button.

Notice that below the 'Aging Date' field is a box labeled 'Show'. To view all the meters for all equipment at this site, select the option for 'All Meters for Customer', and they will all be displayed. To print a meter reading report that can be faxed to the customer, select 'Print'.

Period Billing Meter Calls										# Calls Req'd	5	# Called	2
Select view	Default View			Ship To: AIR001			Aging Date: 07/31/2008						
Field 1	SE ID			Address: Airforce Base			Print By Contract ID			☐			
Field 2	SEC ID			10368 Wallace Alley Street			Calls Required Only			☐			
Field 3	Meter Name			Kingsport, TN 37663			Show						
Field 4	Next Bill Date			Phone: 5552790788 Other: 5552790788			All Meters On Contract			☐			
Field 5	Reading Type			Att: BETH			All Meters For Customer			☐			
	Road ng Type			Email: rsomach@nexent.com									
	SE ID	SEC ID	Meter Name	Next Bill Date	Reading Type	Call Req'd	Meter Reading	Reading Date	Note				
	50	39	Black	07/31/2008	Actual	Called		07/31/2008	Reading was	History			
	50	39	Color	07/31/2008	Actual	Called		07/31/2008	Equipment off	History			
	82	39	Black	07/31/2008	Actual	Yes				History			
	82	39	Color	07/31/2008	Actual	No				History			
	83	39	Black	07/31/2008	Actual	Yes				History			
	83	39	Color	07/31/2008	Actual	Yes				History			

Details

Select 'Details' to see a summary of the service equipment meter and the service equipment it is attached to. (See the previous description of this button, and the screen).

SE ID

This is the Service Equipment ID number. The number given by Miracle Service for each piece of Service Equipment added. It is located in the top left of every piece of equipment within the 'Service Equipment' screen.

SEC ID

This is the Service Equipment Contract ID number. See the top left of the contract for this number on the 'Service Equipment Contracts' screen.

Meter Name

This is the name of the meter, e.g. Black, Main, etc. This meter name was defaulted to the equipment from the Model Class/Model Number set-up. It can be changed at the equipment level at any time.

Unit Location

This option field indicates the location of the Service Equipment at the customer's place of business. It is useful when calling for a reading.

Next Bill Date

This is the date that Miracle Service has determined as the next meter billing due date.

Reading Type

This is the type of meter reading, (for example, actual, estimate or last), that was contractually agreed upon.

Call Req'd

If a meter reading for the current billing period has been entered already, a blue 'called' replaces the green 'Call Req'd'. Only customers for equipment that is listed as 'Call Req'd' need to be contacted. Read the section 'Estimating Meter Usage' above.

Reading Date

During the process of entering meter readings, the current date is defaulted in the field to the right of the reading. This field may be edited.

History

When the 'History' button is selected, a screen displays all previously meter readings.

Other features include:**Print**

The above information and more is available in hardcopy by selecting 'Print'.

Save, Cancel and Exit

These self-explanatory buttons are located on the bottom of the screen with the 'Print' button.

Aging Date

The information displayed on this screen is effective on this editable date.

Show

To view all meters on a specific piece of equipment or all meters on a specify contract, select either 'All Meters On Contract' or 'All Meters For Customer' button.

Flags

Call req'd displays the number of pieces of service equipment displayed where calls are required. This changes only with the addition of service equipment to the contract or customer.

Called

This number indicates how many of the above pieces of service equipment had their meter readings entered so far this billing period.

E-Mail Meter Notifications (Requires Customer Self-Service Portal)

You can send your meter reading requests to your customers using e-mail. You can send these e-mail notifications manually or automatically.

Customer ID	Contract ID	Next Period Charge	Period Charge	Other Charges	Next Meter Charge Due	Meter Charge	Meter Reading	Adjust Type	Held	Approve Period	Approve Meter	Email Notice
K's Law Office	42	7/25/2008	\$16.25	\$0.00	8/24/2008	\$0.00	Call ☒		No	No	No	Yes
amp Processing	45	7/30/2008	\$54.96	\$0.00	8/29/2008	\$0.00	Call ☒		No	No	No	Yes
ave Office Products	46	8/15/2008	\$21.25	\$0.00	11/14/2008	\$0.00	Call ☐		No	No	N/A	N/A
redit Woodland	47	8/5/2008	\$4.17	\$50.00	9/4/2008	\$0.00	Call ☐		No	No	N/A	N/A
ept Of Motor	49	7/2/2008	\$20.83	\$0.00	8/1/2008	\$0.00	Call ☐		No	No	No	No
istrict IV Police	54	7/3/2008	\$10.00	\$0.00	8/2/2008	\$0.00	Call ☐		No	No	No	No
r. Mable Anderson	48	6/25/2008	\$1.25	\$0.00	7/24/2008	\$0.00	Call ☐		No	No	No	No
lton Real Estate	53	7/22/2008	\$5.42	\$0.00	8/21/2008	\$0.00	Call ☒		No	No	No	Yes
et Painting & Police	64	6/30/2008	\$87.50	\$0.00	7/29/2008	\$0.00	Call ☐		No	No	No	No
ovative Solutions	58	8/1/2008	\$12.50	\$0.00	8/31/2008	\$0.00	Call ☐		No	No	N/A	N/A
ernational Computer Sales	67	8/5/2008	\$13.75	\$0.00	8/4/2008	\$0.00	Call ☐		No	No	No	No
ernational Jewelers	61	7/9/2008	\$20.83	\$0.00	8/8/2008	\$0.00	Call ☐		No	No	No	No
ex Canada Corp.	68	7/23/2008	\$2.08	\$0.00	8/22/2008	\$82.34	Call ☒		No	No	No	Yes
eller Wilson Realty	69	7/25/2008	\$4.17	\$0.00	8/24/2008	\$0.00	Call ☒		No	No	No	Yes
ngsway Trucking	71	7/1/2008	\$45.83	\$0.00	7/31/2008	\$0.00	Call ☐		No	No	No	No

You can send the e-mail notification manually right from the Period Billing main screen. Simply mark which Period Billing Notice's you would like to send via e-mail by selecting 'Yes' under the 'E-mail Notice' column. As you check each Period Bill record, the counter on the bottom of the screen will show how many e-mails have been marked for sending.

ount: \$415.63 Email Meter Due: ☐ Select All # email(s): 0

Once you have selected all of your records you can hit the "Send email(s)" button to send all of the e-mails. To send the e-mail automatically, you will need to set-up the Automatic E-mail Notification Scheduler.

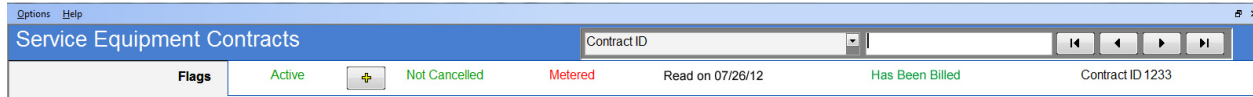
Automatic E-mail Notification Scheduler

The Automatic E-mail Notification Scheduler set-up is covered in the Administrative Set-up area of this manual. Since this is automatic, once the routine is set-up there is very minimal need to do anything with this process except to monitor its progress.

To monitor the progress of the Automatic E-mail Notification, there are a few areas to view the activity.

1) Viewing Contracts

When you view a contract where automated e-mail notification has been activated, the status bar at the top of the contract will identify if the e-mail notification has been sent.



The Flags line will identify the status and activity with a contract. In the middle of the screen, you will notice the “Read on xx/xx/xx”. This indicated the date the meter was read. This status field will also show the following status information:

a) E-mail Sent on mm/dd/yy

b) Error xx - description - is displayed if there was a problem sending the e-mail. If any error codes are encountered and the description is not self explanatory, you should contact Miracle Service Technical Support for more details.

This status information only displays when the meter reading call window is active. If the call window is not active for this contract, the Status information in the Flags field is not displayed.

2) Viewing the Log File

Another way to view the overall automatic e-mail notification activity is to review the log file generated by the scheduler on a regular basis. The frequency of this review is based on the number of contracts that are set-up on automatic e-mail notification, and the frequency of the e-mail reading are required. The following is a sample of the output of the typical log file.

```
21:01:56_228_D10: Entering emailMeterDueNotice function with emailing type: 0
21:01:56_275_D10: Got URL from DB http://66.96.21.164/customerportal/customerportal/
21:01:57_868_D10: created PB temp tables.
21:01:57_868_D10: Total selected contract which meter is due is: 9
21:01:57_868_D10: Contract ID: 2
21:01:57_868_D10: Next Meter Due Date: 7/11/2004
21:01:57_900_D10: The contract has 1 meter(s) attached.
21:01:57_915_D10: The equipment info: Equipment ID: 5 Serial Number: 56875DFSABDG54 Unit ID: EWC001-01 Location: Room 112 Description: H/O 555-984
21:01:57_915_D10: The meter info: Meter Name: Main Meter Location: Top Right
21:01:57_915_D10: Checking if contract has one equipment only.
21:01:57_915_D10: URL for single meter contract: http://66.96.21.164/customerportal/customerportal/login.asp?start=meter&seid=5&snum=56875DFSABDG54
21:01:57_915_D10: It is not the call buffer window start date.
21:02:01_993_D10: The send email function returns:
21:02:02_087_D10: Set Email Status with: Emailed on 6/5/2006
21:02:02_118_D10: Contract ID: 51
21:02:02_118_D10: Next Meter Due Date: 5/31/2006
21:02:02_134_D10: The email for customer: test@nexent.com
21:02:02_134_D10: The customer (CPL001) is not WebActive.
21:02:02_150_D10: The contract has 6 meter(s) attached.
21:02:02_150_D10: The equipment info: Equipment ID: 20 Serial Number: CP_SE001 Unit ID: Location: Description:
21:02:02_150_D10: The meter info: Meter Name: Main Meter Location: Top Right
21:02:02_150_D10: Checking if contract has one equipment only.
21:02:02_196_D10: It is not the call buffer window start date.
21:02:02_196_D10: URL for multiple meter contract: Use the following link to enter the corresponding meter reading(s):
http://66.96.21.164/customerportal/customerportal/login.asp?start=multimeter
21:02:02_196_D10: The customer is not WebActive. No web link in email.
21:02:04_040_D10: The send email function returns:
21:02:04_040_D10: Set Email Status with: Emailed on 6/5/2006
21:02:04_040_D10: Contract ID: 6
21:02:04_040_D10: Next Meter Due Date: 7/10/2004
21:02:04_040_D10: The contract has expired on 4/10/2005, no need to send e-mail, skip this contract.
21:02:04_040_D10: Total 2 email(s) have been sent successfully.
21:02:04_040_D10: Exiting emailMeterDueNotice.
```

The level of detail presented in the log file is related directly to the trace level set-up in the Log file configuration.

Chapter 33

Service Call Management

From the 'Main Menu', select 'Service' to go to the 'Service List' screen. All service call related activities are controlled from this menu.

Task ID	Company Name	Requester	Requester Phone	Task Type	Task Description	Worked Performed	Task Status	Tech Status
0000042-1	Airforce Base	Billy Watson	393-382-2092	SOFT	Equipment not working.			
0000041-1	BK's Law Office	May Smith	555-248-7632	ERROR	Copies are blank		Open	Unassigned
0000040-1	Kingsway Trucking	Tom Larson	(555) 652-4765	QACH	Copies are faint	Replaced Black Toner	Completed	
0000039-1	Airforce Base	Joe Malone	(555) 279-0788	SOFT	What is the Equipment ID: 388292			
0000038-1	Airforce Base	Allan Rock	393-121-9229	SOFT	Test			
0000037-1	Bank of Marion	Sam Walters	(555) 783-3116	QACH	Generator Inspection		Open	Assigned
0000036-1	Airforce Base	Joe Malone	(555) 279-0788	FAULT	Fire Panel fault.		Open	Assigned
0000035-1	Airforce Base	Joe Malone	(555) 279-0788	ERROR	No transmit.	Call Complete - additional work performed information	Completed	
0000034-1	Airforce Base	Joe Malone	(555) 279-0788	FAULT	Update Calibration	Call Complete	Completed	
0000033-1	Bail & Well Business Solutions	Mike Abel	555-936-7336	PMC	Calibration Report Needed		Open	Unassigned
0000032-1	Cave Office Products	Mary Jones	555-393-2967	JAM	Jamming in the feeder.	Call Complete - add more work performed details as	Completed	
0000031-2	Airforce Base	Joe Malone	(555) 279-0788	SOFT	Install new sensor	Reset Machine	Completed	
0000011-1	Airforce Base	Joe Malone	(555) 279-0788	SOFT	Install new sensor	Call Complete	Completed	

The application has the ability to create a Request (Work Orders), and multiple Tasks per Request. Each Task can be assigned to several different technicians; all of which can have several travel times and work times on that Task.

Opening and Closing Calls

There are two methods to open a service call within Miracle Service. One is by clicking on the 'New' button on the Service Request, and the other is the 'Quick Call' button. The most commonly used method is the Quick Call.

Several steps throughout the call process, which allows the service personnel to enter or change times, add call comments, view service call information and assign technicians to a task. Use the method that best suits your needs; there are multiple procedural possibilities.

Requests (Work Orders)

A 'Request' is the first level of a service call. This is the information about the customer that called, or required in-house service, and the subject details of the call.

Tasks

A 'Task' is the second level of a call. Multiple tasks for a single service request may be entered. Each task will be assigned and scheduled separately. The Tasks may or may not be associated to equipment. For better tracking and reporting, we suggest entering the detailed information about the work to be performed on a task rather than the request.

Service Calls - Creating them the Best Way

Although Miracle Service provides two methods for creating service calls, the easiest and quickest method is to use the 'Quick Call' screen. It actually creates a Request and a Task in one screen.

How to Create a Service Call

There are two methods to create a service call.

Create a Request (Work Order) by selecting the 'AddNew' button on the Service Menu.

Complete the screen by entering the data as requested. Then add a Task by clicking the 'Tasks' button on the Request screen. Using this option, more than one Task may be entered for a single service Request.

Use the Quick Call button on the Service Menu to create a Request and Task all in one step.

The advantage with this method is that both the Request and Task are all done on one screen. However, more than one task can not be entered to the service call (request) using the Quick Call screen.

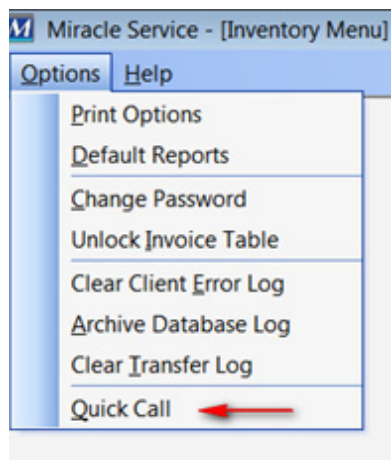
For example: Say you were creating a Request to install a LAN at a customer site. One task might be an 'Inspection' Call Type to survey the site for the cable; the second task might be an 'Install' Call Type to install the cable; and the third task might be another 'Inspection' Call Type to inspect the job. You could have just used a single task for these jobs. However, if you want to get reports on the types of calls you do by their Call Type, only one Call Type is allowed per Task, so you would need to create 3 tasks. Each Task can be scheduled to more than one technician, so if you chose to do all three calls in one Task, it would still work for you. If you need to create another Task for this service call, (and you used the 'Quick Call' screen to create the task), this can be done by locating the Task ID from the 'Requests' screen and adding a new task to the request number. When looking at a Task ID number, the request number is the number before the '-'. You can add another task later using the 'Edit' button from the 'Service Menu'.

Chapter 34

Quick Call

The 'Quick Call' screen is designed to speed up the call entry process for service calls requiring only one Task. Add additional Tasks later if required from the 'Requests Edit' screen. When using the 'Quick Call' screen, both the Request information and much of the Task information are entered on the same screen, and the process is streamlined. Calls created here may be edited from the 'Requests' screens just like the process explained above.

The Quick Call can be quickly accessed through the Top Option menu bar. You can access the Quick Call screen at any time at any point from anywhere in the Miracle Service Client application.



Simply click Options and then select Quick Call. Once you complete your Quick Call entry, you are returned to the point in the application where you were previously.

Alternatively, click the Quick Call button at the top of the screen.



Eight Simple Steps to Creating a 'Quick Call'

Creating, Dispatching, Closing a 'Quick Call' & Creating the Invoice

Click the Quick Call button from the 'Service Menu'.

1) . Enter or select the Customer using the Search Button (binoculars), or press CTRL-F (find). There are multiple search options available. To add a customer on the fly, the 'customer' field must be void of alphanumeric characters and click the 'zoom' [+] button. Click the 'New' button in the customer screen to add the new customer's information.

After the customer is entered or selected in the 'Customer' field, press Tab.

2) . Select the Requester from the list. To add a new requester on the fly, enter their name and other information and press Tab.

3) . Enter a description of the customer's concern or the work to be performed and press Tab.

4) . Select a Request Type from the list that appears.

5) . Select the piece of equipment from the drop down list or enter a new piece of equipment on the fly using the plus key. If this is an existing piece of equipment under an active contract, the contract name will appear.

6) . Select the technician from the drop down list if possible. If there's a technician assigned to the customer, equipment or contract, the technician's name will default into the field. If this is an In-Shop repair, identify the task with a check. The default for tasks is 'field service'.

7) . Enter a scheduled date and time, if different from the defaulted date. If possible, enter the 'estimated time to complete the service'.

8) . When the task information is complete, click 'Save and Print' to print a Task Ticket, or click 'Save' to save this call without printing a task ticket.

To review all outstanding Tasks, use the Outstanding 'Tasks' button. On the Outstanding Tasks screen, select the call, click on the Schedule button, and assign a technician, (if a technician hasn't been assigned). Enter the On the Outstanding Tasks screen, select the call, click on the Activity button, and add all the details about the service call (if a details haven't been entered).

To close the Task, the parts used, work performed and travel & labor times need to be entered. These steps will be discussed later.

Quick Call Screen Details

Select the 'Quick Call' button on the Service Menu to go to the 'Quick Call Task Entry' screen. There you will find a field requesting the 'Customer'.*

**Note: If your company prefers to identify customers by CustomerID instead of by name, you can set this preference in Miracle Service Administration. Go to button '6. Customers & Suppliers' > Defaults > and set you default lists and search parameters to 'CustomerID'. The first field in the Quick Call will now be CustomerID.*

Customer

It is important you understand the capabilities of selecting the customer, so read this part thoroughly.

Select from the drop down box, or use the search button (see 'Search Button' in 'Requests') to locate the customer.

Click on the down arrow on this customer field, or start typing the customer name.

The 'zoom' [+] button will enter the 'Customer Maintenance' screen, to search for customers, view customer information, or add a customer on the fly. Another option is to click the binoculars button, or press CTRL-F to pull up the search screen.

Search Screen Issues and Hints

Use the binoculars button next to the Customer field, (accessible by pressing CTRL-F as well). This screen performs searches with partial requester, company, serial number, Unit ID or customer name information.

The image shows two windows from a software application. The top window, titled 'Search Criteria', has a 'Search Parameter' dropdown set to 'Company Phone' and a 'Search Value' text box containing '*555*'. Below the text box is a note: 'Use the asterisk (*) wildcard to filter your search'. At the bottom are 'Ok' and 'Cancel' buttons. The bottom window, titled 'Search Results', displays a list of search results in a table format. The first row is highlighted. The table has two columns: 'Phone' and 'Company Name'. Below the table are 'Ok' and 'Cancel' buttons.

Phone	Company Name
(555) 248-7632	BK's Law Office
(555) 393-2967	Cave Office Products
(555) 397-7555	Felton Real Estate
(555) 428-2301	Insurance Source
(555) 452-8723	Fleet Painting & Supplies
(555) 523-8119	Dept Of Motor Vehicles
(555) 542-8639	Innovative Solutions
(555) 576-6280	Land and Sea Tours
(555) 626-3323	The After School Place
(555) 628-7341	Kissinger Furniture

For example, if only a partial part of the search parameter is known, for example a partial part of a telephone number. Select the search option and enter the information that is known. If there were only one customer matching the information entered, the customer record would be selected. If there were multiple records matching the search parameter, a screen will open displaying the records. Select the customer from the list. Note: Do not insert '*' asterisk in the field as it is not required for the search.

If Unit ID, (unique identifiers assigned by your company and advertised on the piece of equipment), are used, and the customer offers partial or entire Unit ID information, after the Unit ID is entered, the customer information, equipment information and service equipment information automatically defaults into the Quick Call. Enter the requester, the description of the service, and assign a technician to save the Quick Call.

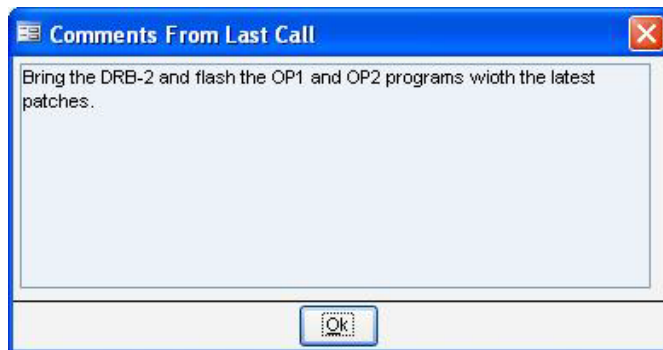
Warning Lights

After the customer is selected, three warning lights may appear: 'Account on Hold', 'VIP' and 'Last Call Comments.' Any applicable warnings will light up.



If the customer account has been placed on hold, the 'Account on Hold' will illuminate. Customer's accounts are placed on hold through the customer screen.

If comments were added to the 'Comments Next Call' field the last time service was performed for this customer, the 'Last Call Comments' icon will illuminate. To view the information, click the 'zoom' [+] next to the activated warning light. Service history and comments can be viewed for this customer.



Requester

Next, choose the person requesting the service from the drop down box, or add a new requester on the fly. The drop-down box will list all the requesters (previous callers) at this site. The 'zoom' [+] button will open the requester screen.

Description of Request

This is a description of the overall problem or problems that must be resolved. It may later be divided into more than one task. This field is unlimited in length, so be sure to enter all the information available.

Request Type

Select the appropriate request type from the drop down box. The 'Request Types' were set up in 'Administration Set up'.

After the Request Type is selected, several more fields appear.

Add Equipment to Task

Adding equipment to the Task is optional. If the service will be performed on or is related to a specific piece of equipment, add it to the Task. By selecting the equipment, service history by equipment can be saved, equipment specific reports can be generated and equipment benchmarks can be produced.

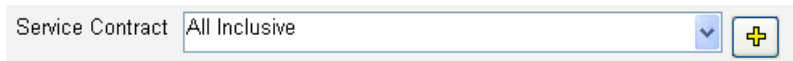
Service Equipment ▼ +

Model: Segment 3/A19573512
 Description: Standard
 Location:
 Local Phone: 555-279-0788
 Unit ID: A894132156

When the 'Add Equipment' button is selected, a drop down box listing all equipment appears. Note; only active equipment appears. Choose from the list, or add a piece of equipment on the fly by clicking on the 'zoom' [+] button. The serial number field must be blank when entering new equipment information.

The table that is displayed for the equipment contains the Serial Number, the Unit ID number, the Equipment Description, the Model Class and Model Number, and the Location. It also appears in blue directly below the equipment selected.

Service Contract



If the equipment selected is covered by an active service contract, the service contract descriptor appears. If the equipment is covered by more than one active contract, a list opens to select the applicable contract.

Warning Lights

When equipment is added to the service call, additional warning lights appear.



The possible warning lights are as follows:

PM Due

A PM Due warning light indicates that, according to the PM schedule created for the equipment in the 'Service Equipment' or 'Service Equipment Contracts' screens, a preventative maintenance service should be performed.

Call Back & Problem Alert

The Call Back and Problem Alert warning lights activate when previous service calls with the same 'Task Type' on this equipment meet the Call Back and Problem Alert criteria. These criteria were set up in Administration. When the lights activate, the 'zoom' [+] buttons appear. A person with proper authority, see 'Security' in 'Administration Set up', may turn off the lights by pressing the button if this task is not related to the previous service call(s). This way, the report for the technician will not be negatively affected.

Last Task Comments

The 'zoom' [+] button next to the Last Task Comments opens the most-previous task's comments on this specific piece of equipment.

Service Bulletin

If a service bulletin has been created for the model class/model number for this piece of equipment, the warning light will activate. Click the 'zoom' [+] button next to the warning light to read the service bulletin.

Under Warranty

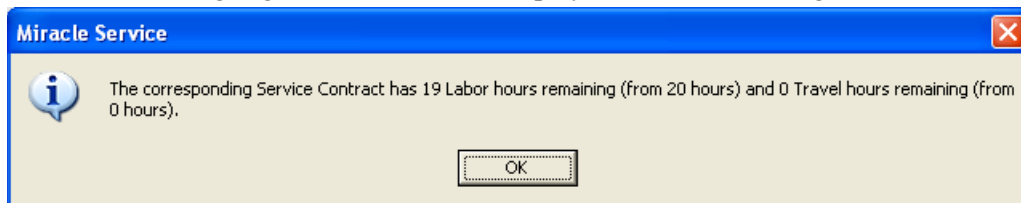
Equipment with a manufacturer warranty remaining will illuminate this warning light. The manufacturer information appears in the equipment purchase information button. Purchase and manufacturer information were added to the inventory item when the serialized item was received from the supplier.

Yield Alert

If the optional yield alert module was purchased, this warning light will illuminate to signify that the supply yield has been exceeded and if additional supplies are included in the service task, they will be charged for those supplies. See Yield Tracker section later in the manual for more details on this feature.

Hours Included

The Hours Included warning light will illuminate if the contract is an Hours Included type of contract. When the Warning Light is clicked it will display the hours remaining in the sold block time.



In the situation where users would desire to sell more time, the user should create an invoice for the additional time and attach it to the contract. An Inventory Item should be created to add to the invoice. The invoice should be attached to the contract to ensure the revenue is included in the contract Profitability analysis. Once the invoice is attached users will need to manually adjust the contract for the additional hours sold. For example if the original hours included was 20 hours and an additional block of 10 hours is sold, you will enter 30 in the hours included field on the contract.

Task Priority



The Task Priority will default from one of 3 places. If no equipment has been selected for this task, the customer's task priority will default from the 'Administration Set up'. If equipment has been selected for this task, the priority will default from the service contract, if active, or from the equipment itself, if it is not under a service contract.

This field can be edited, to change, simply select another priority.

The Task Priority selected is associated with Target Hours, (set up in 'Administration Set up'), therefore the 'Scheduled Time' field (also known as 'Time to Target') will display the time the technician should arrive. This figure is calculated by taking the time when the call was created, and adding the number of hours associated with each priority. 2 hours may have been set-up for a high priority, and 8 hours for a low priority. The scheduled time considers weekends, holidays, and business hours.

Task Status

The Task Status will let users configure a list of status' they would let to use. These are set manually by the

Task Status

user as the job progresses to completion. Users will select the different Task Status' defined by their internal company guidelines.

NOTE: When the Task Status is set to 'Completed' this will also automatically set all technician status's to completed as well. This is an automated feature.

Customer PO

Customer P.O.

This is an optional field. Enter the Customer PO (Purchase Order) number provided by the customer if you would like to track this with the service task.

Technician

Technician

This is an optional field. Leave it blank if this call is unassigned. Only one-technician may be selected from the drop-down box. Multiple-technicians may be assigned to the task through the Outstanding Task screen's Activity button.

In-Shop Task

In-Shop Task ☐

The 'In-Shop Task' selection box should be marked if the Task will be performed internally, rather than a field service. Marking an 'In-Shop Task' allow separately sorting in the Outstanding Task screen.

Estimate

Estimate ☐

The 'Estimate' selection box is used to activate the Quick Estimate feature. Checking the Estimate selection box allows users to create an Service Estimate sheet instead of a task ticket. This Service Estimate will use the prices of the parts needed and the Estimate hours to calculate the estimate. The hourly rate will be the default hourly rate for the customer.

Task Times

This displays the times associated with the task, and the estimated time to repair.

Task Times			
Created	11/06/2012	5:29:40 PM	
Scheduled	12/06/2012	4:00:00 PM	
Est. Repair	2.5	Hours	

Created

This is the time the Task was first entered into the system. The workstation's system clock will date and time stamp the Created Time as soon as a Task Type is selected, this time may be edited if the Tasks are entered after the fact.

Scheduled

This is the time the technician should begin working on the Task. Miracle Service will calculate the scheduled time based on the Priority of the Task. If it is 9:00 am now, and the priority is 'High', (which may have a 2-hour response time), the scheduled time would be 11:00 am. Miracle Service will enter the Scheduled Time when a technician is assigned to the Task. If a Service Contract was selected for the Task, and a default technician was entered on the contract, the technician will automatically be assigned to this Task, and the scheduled time will be entered. The scheduled time can be edited.

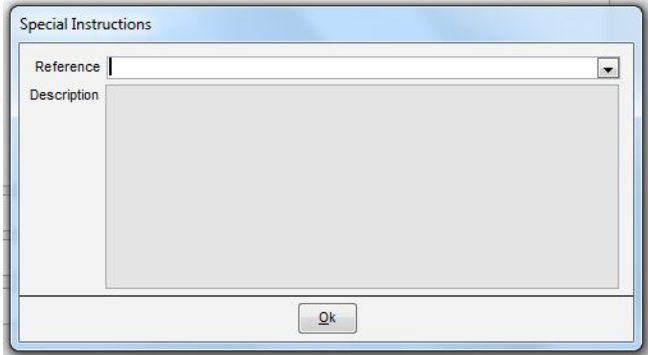
Est. Repair (Also known as ETTR)

The 'estimated time to repair' is an optional but very useful field. The dispatcher can estimate the time, and use the estimate as a reference when scheduling other calls for the technician(s). This will help to determine when a technician will be available.

Schedule	Instructions	User Fields	Expenses	Parts Needed	Notes	History
----------	--------------	-------------	----------	--------------	-------	---------

Instructions

Click the Instructions button to add specific Instructions for the Service Task Ticket.



The dialog box titled "Special Instructions" contains a "Reference" dropdown menu and a large "Description" text area. An "Ok" button is located at the bottom center.

These instructions are kept in the system but can be copied and pasted into the Description field if needed.

User Fields

User Fields are custom fields to add specific data items to the Service Task Ticket. These fields can be defined to also print on the Service Task Ticket in the administrative set-up.

User Label	Value
Contact1	
Contact2	
PM Checklist	

When creating the QuickCall you can select any or all of the different User Fields to add information to the Service Task Ticket. Select the label and enter the data to present in the Value column. When the Service Task Ticket is printed, the label with the information will be printed on the Service Task Ticket.

Expenses

You can define expenses to be included in the Service Task charges or just capture certain expense costs. These expense items are set-up in the Miracle Service Administration set-up. When these items are added to the Service Task Ticket and there is a charge for the item, the charge is added to the Miracle Service Invoice. (**NOTE: these expense items are not included in most of the Accounting Exporters.** If you are exporting invoices to your accounting application these items will not be included. Please contact our Technical Support Team for further information on this meter).

Expenses are included in the Profitability Analysis for the Equipment or Contract. They are added to the profitability similar to parts. The Expense Cost and Revenue will be considered in the overall Profitability Analysis.

Parts Needed

Dispatchers can select a list of parts that will be needed for the task. This will list the parts on the task so the technician knows these are needed on the task.

Add Inventory Kit

This is an optional field. Select an Inventory Kit so the parts in the kit will be listed as parts required on the service task ticket. Inventory Kits can be used to add multiple parts and quantities to a task by selecting a single Kit item.

Notes

Dispatchers can enter notes when taking the call. These can be useful if preliminary troubleshooting steps were taken so they can be recorded along with the results.

History

Quick access to the service history for the equipment or customer is available by selecting the History button.

'Save' and 'Save and Print'

Select 'Save' or 'Save and Print'. Both buttons save the task information, however, the later will also produce a hard-copy task-ticket, (or work order), to complete in the field. In either case, the Task still remains editable. When a new call is saved, Miracle Service begins a new 'Quick Call' screen. 'Exit' returns to the 'Service Menu'.

Chapter 35

Service Requests / Work Orders (The Alternative to Quick Call)

The 'Quick Call' screen is a quicker method when creating a service request with a single task. However, if multiple tasks are associated with a single request, the Service Request / Work Orders button must be used. This section reviews how to create a Service Request / Work Order. Much of the information is similar, and therefore is not repeated in as great of detail as in the 'Quick Call' screen.

Service requests allow multiple tasks per requests. Click the AddNew button on the Service List screen to open the 'Work Order Entry' screen.

The screenshot shows the 'Work Order Entry' screen. At the top, there are tabs: 'Flags' (selected), 'Open', 'Total Tasks U', 'Open Tasks U', 'Unbilled Tasks U', and 'Request ID: 150'. The 'Customer' field is set to 'Mike Smith Pontiac' with a dropdown arrow and a search icon. Below it, the customer's address and phone number are displayed: 'MSP001, 1201 Tusculum Boulevard, Greeneville, TN 37745, (555) 639-5151'. The 'Requester' field is set to 'Dane Johnson' with a dropdown arrow and a search icon. The 'Description' field contains the text: 'Periodically the function that is collected isn't necessarily what the equipment performs. Determine whether the equipment isn't functioning properly due to a faulty card or a flash program.' The 'Request Type' is set to 'OACH' with a dropdown arrow. Below it, there is a 'Quality Check' section with a checkbox labeled 'Follow Up Required'. The 'Start Time' is set to '11/05/2012 5:04:15 PM' with a calendar icon. The 'Comp. Time' field is empty with a calendar icon. A 'Tasks' button is located at the bottom left. On the right side, there is a 'Warning Lights' section with a blue header and three icons (a light, a speech bubble, and a gear). Below it, the 'Notes' field contains the text: 'Have the technician bring a new card with him. R&R the card and test. If the same problem occurs we may have to perform a flash program.' The 'Next Call Comments' field contains the text: 'Bring the DRB-2 and flash the DP and GF2 programs with the latest patches.'

Customer

After the 'Work Orders Entry' screen is opened, enter or select a 'Customer ID' or 'Company Name'. Typing the customer number in this field if known. Miracle Service will find it and display the information. Choose the customer from the drop-down box, or enter a new customer using the 'zoom' [+] button. To help find a customer there is a search button, (the binoculars beside the zoom key).

Search Button

Clicking on this button or CTRL-F enables the search feature.



Read about this functionality as described within the 'Quick Call' screen.

Changing the 'Bill-To' Customer

The correct Bill-to appears automatically for the selected customer. However, users with 'siteadmin' privileges may select a different 'Bill To' customer by clicking on the button in the top right that has several dashes in it.



When this button is clicked, a small screen appears that allows a different customer to bill for the service performed.

If the account has been placed on hold, the warning light will illuminate. Customers are placed on Credit Hold from the Customers Screen.



If comments were added to the 'Comments Next Call' field the last time service was performed for this customer, view the comments by clicking the 'zoom [+]' next to the activated yellow warning light. If the light is not on, there were no last call comments.

Requester

Select the person or requester that is requesting the service from the drop down box. A new requested may be added on the fly.

Description of Request

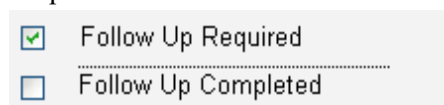
Add a description of the Request.

Request Type

Select the appropriate request type from the drop down box. After the Request Type is selected, several additional fields appear.

Follow Up Required

If the Follow-Up Required selection box is selected, another box will appear for Follow Up Completed. Use these features to contact customers prior to completing a Request, or prior to billing a Task under this Request.



Miracle Service will not allow the closing of a Request until the Follow Up Completed box is checked.

Start Time

The Start Time is the time the call was received. It will be used to calculate the response time for reports. The current date and time are the default entry, and are entered as soon as the Request Type is entered. The start time may be edited. Clicking the date/time stamp button to the right will refresh the entry with the workstation's current date and time.

Tip: Entering times without having to enter the date

Move your cursor into the hours/minute field. Enter '6:00p' and today's date will appear automatically. The time will show 6:00:00 PM. '6:00' will default to 6:00:00 AM.

Comp. Time

This is the date and time the service call was completed. After a request has been completed it can be closed.

Note: This field is for internal use and reference only. It will not be printed on any reports or invoices.

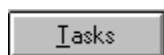
Next Call Comments

This field allows comments or requirements to be entered now and appear the next time a service is requested from this customer's location. If Next Call Comments are entered, the next time a service request is created for this customer the Next Call Comments Warning Light will illuminate. These comments are available by selected the 'zoom' [+] button. A place for Next Equipment Call comments is also available from the Task screen.

'Save' and 'Task' buttons

When the Request information is complete, click the 'Save' button, or add a 'Task'. To add a Task, click the 'Task' button on the bottom of the screen. Tasks may be added later.

Task Button on the Request Screen



Select the task button to go to the 'Task Maintenance' screen. Here one or more Tasks can be assigned to the Request. To create two or more Tasks for a Request, simply click the 'New' button on the 'Tasks' screen. The top right corner of the Task displays both the Request ID number, with a Task ID number.

Task ID 150-1

In this example, if the Task ID is 150-2 it means that this is Request ID 150, and there are two Tasks for this Request. If there were only one Task under this Request ID 150, the Task ID number would be 150-1.

Technicians are assigned to Tasks, not Requests. In order to dispatch a technician to the Request, there must be at least one Task created. If normally, one Task were created per Request, it would be easier to create the service call using the Quick Call screen.

The rest of the 'Tasks' screen works exactly like the 'Quick Call' screen described earlier in the manual. Please refer to it for a complete explanation.

Chapter 36

Open Work Orders / Outstanding Requests

Note: You will rarely use this screen, as it is only used to review and close Requests (Work Orders). Requests themselves are related to Tasks, and therefore can also be closed when you close the Task. As this screen does not allow you to schedule a technician, or add what was done at a customer's site, or on a piece of equipment, it may be more appropriate for you to review the 'Outstanding Tasks' screen.

To dispatch technicians and close a service call, use the 'Outstanding Tasks' screen and not this screen. This is a table containing all of the outstanding 'Requests' contained in Miracle Service displayed in the sort order selected from the choices at the top of the screen. It allows Requests and information pertaining to them to be viewed.

Reviewing Outstanding Requests / Work Orders

Select the 'Work Orders' button from the 'Service Menu' to go to the 'Work Orders' table.

Work Orders											
Quick Search		Clear All		Views		Show Open					
Request ID	Request Type	Company Name	Requester	Follow Up	Request Start Time	Request Complete Time	Open Task	Request Notes	Next Call Comment	Customer ID	
0000042	SOFT	Airforce Base	Billy Watson	No	2/11/2015 3:54:16 PM		1			AIR001	
0000041	ELEC	BK's Law Office	May Smith	No	9/24/2013 4:06:17 PM		1			BKS001	
0000039	SOFT	Airforce Base	Joe Malone	No	8/28/2013 4:39:00 PM		1			AIR001	
0000038	SOFT	Airforce Base	Allan Rock	No	8/28/2013 4:34:00 PM		1			AIR001	
0000037	QACH	Bank of Marion	Sam Walters	No	8/26/2013 4:43:57 PM		1			BOM001	
0000036	MECH	Airforce Base	Joe Malone	No	8/19/2013 8:32:37 AM		1			AIR001	
0000033	PMC	Bail & Well Business Solutions	Mike Abel	No	7/30/2013 2:56:39 PM		1			BAIL002	
0000029	PMC	Fleet Painting & Supplies		No	7/22/2013 4:47:25 PM		1			FLE001	
0000024	PJT	Fleet Painting & Supplies	Greg Clifford	No	7/3/2008 1:36:15 PM		1			FLE001	
0000018	ELEC	David Perdue, CPA	Angela Miller	No	7/3/2008 12:43:09 PM		1			DPC001	
0000017	JAM	Intex Canada Corp.	Scott Sunworth	No	7/3/2008 12:42:34 PM		1			INTEX001	

Select the order to display the calls by clicking the column header at the top of the screen. To narrow the range of requests displayed you can select to show only Open, Closed or All Work Orders. Further filtering is available using the data sheet filtering features.

Double Click any record to open the Work Order Maintenance screen.

Close Work Order Button

Select the 'Close Work Order' button when all Tasks have been completed to close the request. If Tasks are still open for this Request, the request cannot be closed.

Chapter 37

Open Tasks

This is a table with all of the 'Open Tasks' contained in Miracle Service, displayed in the sort order selected in the Preferences set-up.

Select the 'Open Tasks' button from the 'Service Menu' to go to the 'Open Tasks' table. Double click any task to view the details on an individual task. The following features are available.

Open Tasks													
Quick Search Clear All My View Quick Call Select View Status My Views Show All													
Close	Task ID	Company Name	Serial Number	Model Class	Model Number	Priority	SLA	Tech Name (All)	Time To Target	Problem #	Region	Region N	
☐	0000066-1	BK's Law Office	A59419632	Segment 5	A521069	Standard	7 hrs, 59 mi		-1196 hrs, 26 min	No	HICKM	Hickman	
☐	0000038-4	International Airlines	A9641531556	Segment 3	A19573512	Standard	111 hrs, 41	Kevin Norton	-3164 hrs, 19 min	No	DVD	Davidson	
☐	0000061-1	Camp Processing	A65217489	Segment 5	A521069	Emergency	316 hrs, -1		-3191 hrs, 38 min	No	FRANK	Franklin t	
☐	0000060-1	BK's Law Office	A365874125	Segment 3	A19573512	Emergency	292 hrs, 58	Ben Wilson	-3192 hrs, 34 min	No	HICKM	Hickman	
☐	0000059-1	International Airlines	A9641531556	Segment 3	A19573512	Standard	2492 hrs, 3		-3169 hrs, 17 min	No	DVD	Davidson	
☐	0000058-5	Bail & Well Business Solutions				Standard	2513 hrs, 1		-3141 hrs, 51 min	No	HICKM	Hickman	
☐	0000058-4	Bail & Well Business Solutions				Standard	2513 hrs, 1		-3165 hrs, 51 min	No	HICKM	Hickman	
☐	0000058-3	Bail & Well Business Solutions				Standard	2513 hrs, 1	Ben Wilson , Kevin N	-3142 hrs, 21 min	No	HICKM	Hickman	
☐	0000056-1	International Airlines	X5126698	Segment 2	X5564896321	PM Call	5307 hrs, 3	Ben Wilson	-3123 hrs, 45 min	No	DVD	Davidson	
☐	0000053-1	BK's Law Office	A365874125	Segment 3	A19573512	Standard	6734 hrs, 4	Scott Davis	-3139 hrs, 45 min	No	HICKM	Hickman	
☐	0000052-1	Fleet Painting & Supplies	X14857	Segment 5	X123456987	PM Call	5833 hrs, 0	Josh Gordon	-3123 hrs, 45 min	No	DVD	Davidson	
☐	0000051-1	Credit Woodland Cancer Centre	A365214894	Segment 5	A521069	PM Call	5833 hrs, 0	Ben Wilson	-3123 hrs, 45 min	No	DVD	Davidson	
☐	0000050-1	International Airlines	A9641531556	Segment 3	A19573512	Emergency	7053 hrs, 3	Scott Davis	-3122 hrs, 11 min	No	DVD	Davidson	
☐	0000046-1	District IV Police Dept.	X52156647	Segment 5	X123456987	Standard	3270 hrs, 4		-3163 hrs, 45 min	No	LEWIS	Lewis Co	
☐	0000042-1	International Airlines	A9641531556	Segment 3	A19573512	Standard	12088 hrs	Tyler Roberts	-3140 hrs, 51 min	No	DVD	Davidson	
☐	0000041-1	BK's Law Office	A365874125	Segment 3	A19573512	Standard	24208 hrs	Scott Davis	-3122 hrs, -3 min	No	HICKM	Hickman	
☐	0000039-1	International Airlines	X5126698	Segment 2	X5564896321	Standard	24855 hrs	Tyler Roberts	-3116 hrs, -6 min	No	DVD	Davidson	
☐	0000033-1	Bail & Well Business Solutions	A5156874	Segment 1	A225596314	Contract	25557 hrs	Josh Gordon	-29209 hrs, 49 min	No	HICKM	Hickman	

Select View Options

All open Tasks are displayed in the order previously defined. The order was created in 'My Views' set up in the 'Open Tasks' screen. To select a different view using the 'Select View' drop down box, edit the fields viewed using the drop down boxes, or select the 'zoom' [+/-] button to add a new view on the fly.

Users can define to display up to 20 fields in a specific view. Fields can be seen by scrolling to the right using the scroll bar at the bottom of the table.

Tech Status Field: displays the current active status of the Primary Technician for the Open Service Task. This field is automatically updated as the technician updates the times on the task or as the ticket is processed in the system. The Status values are: UNASSIGNED, ASSIGNED, ON-ROUTE, ON-SITE, STARTED and COMPLETED.

- UNASSIGNED means no technician has been added to this task.
- ASSIGNED means the technician has been added to this task; however, no activity has been recorded in the Tech Activity.
- ON-ROUTE means the Travel Started time has been entered.
- ON-SITE means the Travel End time has been entered; however the Work Started time is blank.
- STARTED means the Work Started time has been entered.
- COMPLETED means the Work Finished time has been entered.

Task Status: displays the current active status of the task for the Outstanding Service Task. This field is manually updated by either the dispatcher or the technician from their field device if that option was purchased. The two standard status values are: Open and Completed. User can define any other status values in the Administration set-up in the Call Lookups setup in the Service Preferences Administration Menu.

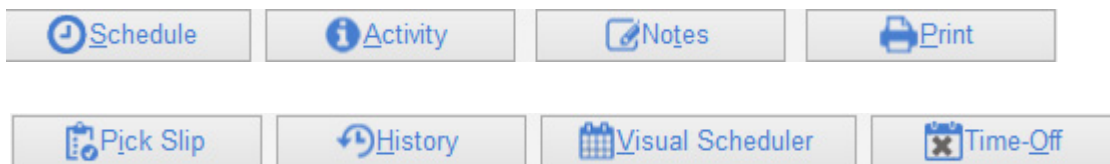
Show Options

To narrow the range of Tasks displayed, select from the following three: 'Assigned', 'Unassigned', or 'All'. Select one option.

My Views

Users can define views by selecting the My Views zoom [+] button.

Now click one the eight buttons at the bottom of the screen. These buttons are as follows.



Each button, and the options and procedures within the button's screen(s) are described in detail in the following sections.

Schedule Button



Select the 'Schedule' button and enter the 'Schedule Task' screen. Here technicians can be assigned to the Task, modify the Task Description and/or Task Type, schedule the call, and enter the 'Estimated Time To Repair'.

The screenshot shows a window titled "Technician Activity" with a close button in the top right corner. Below the title bar, it says "Task Number 80-1". The main area contains a table with the following data:

Tech ID	Tech Name	Open Tasks	Est. Hours	In Zone?	Assign?	
BW	Ben Wilson	1	2 Hrs 0 Mins	No	Yes	Detail
JG	Josh Gordon	5	8 Hrs 15 Mins	No	No	Detail
KN	Kevin Norton	5	8 Hrs 0 Mins	No	No	Detail
SD	Scott Davis	7	8 Hrs 30 Mins	No	No	Detail
TR	Tyler Roberts	6	7 Hrs 0 Mins	Yes	No	Detail

Below the table, there is a "Task Description" field with the text "Machine is noisy". Underneath that is a "Task Type" dropdown menu currently set to "FAULT" with "Mechanical" listed next to it. Below the dropdown are two time fields: "Task Created Time" (03/11/2011 10:26:14 AM) and "Scheduled Time" (03/05/2012 9:30:00 AM). Below these is an "ETTR" field set to "1" with "hours" next to it. At the bottom are "Ok" and "Cancel" buttons.

This screen assists in determining which technician may be available to take a service call based on their current schedule. The Technician ID and his or her name are displayed, along with the number of outstanding calls that have already been assigned to him/her.

Est. Hours: The total 'Estimated Time to Repair' totaled for all the Tasks currently assigned to each technician. The 'Estimated Time to Repair' was entered on the 'Task Entry' screen. The ETR informs the dispatcher as to the estimated amount of work the technician has been assigned.

Assign? Click the 'No' with your mouse and it turns to a 'Yes' to assign a technician. Any technicians already assigned to this Task are indicated by a 'Yes'; technicians not assigned to a task show a 'No'. After times have been entered for a technician, the technician cannot be unassigned by changing the 'Yes' to a 'No'.

Notes Button: Select the Notes button to enter date stamped notes to a Service Task. These are usually internal notes to track the progress on a task or to add details on the progress of the call. Notes provide insight in to what has transpired on a task if it is being reviewed or handed off to someone else.

Print Button



Prints a copy of the Task Ticket for this Task. This button is also available from the 'Tasks' screen, and prints the same Task Ticket as the 'Save' and 'Print' on the Quick Call screen.

Pick Slip Button



 Your Company Logo		Picking Slip Sales Order #: N/A Task ID: 00000384 <i>Page 1 of 1</i>	
Nexent Sales Company SQL Business Solutions Made Easy! Demo Company 119 West 23rd St. New York, NY 10011 Phone: (555) 396-5914		Ship To: BETH International Airlines 10368 Wallace Alley Street Kingsport, TN, 37663	
S.O DATE	CUST. ORDER #	PAYMENT TERMS	SALESPERSON
11/29/2016	N/A	N/A	N/A
Sale Order Line Items			
Item Number	Description	Qty Ordered	Unit of Measure
A147258	Toner	0	Each
A234567	Drum	1	Each
Comments			

History Button



The 'History' button allows the user to view the complete Equipment History, Caller History, and Company History for every service call.

Select View
Equipment D

Customer ID: AIRC01
Requester: Bob Watson
Equipment ID: 108

☒ Show for A Date Range
Start Date: 1/06/2011
End Date: 1/06/2012

Req ID	Task ID	SE ID	SEC ID	Labor Amount	Travel Amount	Parts Amount	Task Information
140	140	103	9E	\$0.00	\$125.00	\$50.00	Task Type: FAULT Description: Lifting unevenly.
Tech Info	Work	Parts Used	Invoice	Task End:	03/05/2012	CB ☐ PA ☒	
138	138	103	9E	\$0.00	\$125.00	\$0.59	Task Type: FAULT Description: Filters are dirty.
Tech Info	Work	Parts Used	Invoice	Task End:	13/04/2012	CB ☐ PA ☒	
137	137	103	9E	\$0.00	\$0.00	\$49.09	Task Type: JAM Description: Copies jamming.
Tech Info	Work	Parts Used	Invoice	Task End:	09/04/2012	CB ☐ PA ☐	
130	130	103	9E	\$0.00	\$125.00	\$0.00	Task Type: FAULT Description: Empty Shredder Bins
Tech Info	Work	Parts Used	Invoice	Task End:	12/03/2012	CB ☒ PA ☐	

To view history for the contract, or for all calls placed at the company, change the 'Select View' in the top left of the screen.

Req ID	Task ID	SE ID	SEC ID
140	140	103	9E
Tech Info	Work	Parts Used	Invoice

Click on each button above to see the details of each task. Click on the 'Tech Info' button for Technician Information, Work Performed details, Parts Used information, and the Actual Invoice created for the previous work. CB and PA show if this previous service call was a Callback or a Problem Alert. See 'warning lights'. Amounts show figures not including taxes, if applicable.

Click on the [+] buttons to zoom directly to the details of the field within the line item you have selected.

Updating a Task

Users can update a Task using the Task Maintenance Window or the Service Task Activity window.

Activity Button

The easiest way to update a task in the Outstanding Task screen is to select the task by clicking the column to the left of the zoom [+] button and then click the 'Activity' button.



We have saved this one for last, as it opens a screen with a number of other buttons. All of the buttons and activities on this small screen can also be completed from the 'Tasks' screen as well. This capability has been duplicated here so that dispatchers can stay in the Outstanding Task screen and have access to everything they need while assigning technicians to calls or closing the call with all the service information.

Description: Update and modify the task description by editing the Description field.

Est. Repair: Update and modify the Estimated Repair Time.

Task Status: Choose the appropriate status for the task from the drop-down list. The Task Status codes were set up in the 'Administration Set up'. The Task Status should be set so users can quickly identify the current status of the job.

Resolution Code: Choose the appropriate resolution code from the drop-down list. The resolution codes were set up in 'Administration Set up'. They should indicate the type of work performed. Many industries have specific Task Types and Resolution Codes suggested by the manufacturer.

PM Performed: If preventative maintenance was performed on the equipment, check the box to indicate that the PM was performed. Miracle Service will use this to calculate when the next PM is due and will update the equipment's 'Last PM' date in the equipment information.

Work Performed: Enter a detailed description of the work performed. The description may be as detailed as need be, this is an unlimited field. The work-performed descriptor will be printed on the invoice sent to the customer.

Next Task Comments: If a piece of equipment was added to the Task, the Next Task Comments field will appear. Enter any suggestions or requirements for the next task performed on this piece of equipment. The next time the equipment is selected; the Next Task Comments warning light will illuminate.

'Billing Info' are defaults that affect the invoice, including comments, taxes, customer purchase order, or notes regarding the invoice.

Equipment: Displays the serial number of the equipment record attached to the service task ticket.

Beside the Equipment field are four action buttons. The first is the More button so users can add other equipment to the task. This lets the task show multiple equipment records on one task.

The second is the Swap Wizard button. This is used to manage equipment on a contract. Using the Swap Wizard it is possible to swap the current serial number with a replacement unit if it was necessary to swap out the entire unit and replace the existing unit.

The third is the Return Order button. This is active if you have the optional Returns Management Module.

The fourth is the Weight Kit button (only available on the Weights and Measures edition). This provides the ability to link specific weight kits to the equipment record being calibrated.

Service Charge: Will set the flat charge for servicing the Primary Equipment on the Service Task. If there are additional equipment records linked to the task, each of those will have their own equipment charge value.

Service Charge	\$0.00	☐ Include charge as expense on invoice
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If the equipment has a set charge it will populate the charge and the user can check the 'Include charge as expense on invoice' to have the charge calculated on the Service Billing Invoice.

Tax Group, Labor Rate, and Travel Rate: The tax group and labor and travel rates will default in, but can be edited by selecting from the drop down list.

Customer P.O.: If the customer requires their Purchase Order Number to appear on invoices sent to them, enter the PO number in this field. The PO number will be printed on the invoice for the customer to reference.

Service Billing Invoice Comments: This field allows comments to be entered, which will be printed at the bottom of the invoice. It may be a clarification of charges, or a simple "Thank You" for their business.

Flag Task in Service Billing Review: By marking the 'Flag Task' check box, the user is actually creating a warning for this task during the 'Service Billing Review' process. A Comments field opens where notes can be entered for the person who will be approving this task. These comments will be visible in the Service Billing Review screen by clicking the Billing Info zoom button next to the warning. This could be used for something like, "Do not bill this task as the sales department is quoting them on new equipment. Hold until the first week of next month".

Comments: When the 'Flag Task in Service Billing' is checked, the comments entered in this field will be visible by the user in the Service Billing Review screen. Adding comments here will assist this user in understanding any specific issue they may need to be aware of to process the invoice for this service task.

Suppress Event Notifications: By clicking the Suppress Event Notifications, users can choose to ignore selected notifications event so they will not be generated for this task. This feature is only available if the optional Event Notification module was purchased.

Suppress Notifications	
☐ Parts Needed	Parts Needed
☐ Request Job Cancel	Task Cancelled
☐ Request for New Job	Create New Task
☐ New Job Confirmation	Create New Task
☐ Task is Overdue	Overdue Task
☐ Disable event notifications for this task	
OK	

Disable event notifications for this task: By marking the Disable event notifications for this task, all task events will not be generated for this task. This feature is only available if the optional Event Notification module was purchased.

Task Activity Buttons

Tech Info	Parts Used	Expenses	Tech Messaging	Meter	Documents	Notes	eForms
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These task activity buttons are available to update all of the details on a task. The following is a description of function of each button.

Tech Info Button

If a technician is already selected (or more than one technician) by clicking the 'Schedule' Button on the 'Outstanding Task' screen, this screen will display the first technician's name in the selection box at the top of the screen.

Multiple technicians can be assigned to the task by clicking the 'New' button on this screen. If this call has not been assigned, but the service has been performed, click the 'New' button and choose the technician from the drop down box.

Task Technician Maintenance

Task ID: 80-1

Technician: Ben Wilson

Assigned Time: 26/04/2012 4:24:00 PM

Assigned Technicians

Ben Wilson

Total Techs Assigned: 1

Travel Times

Start	End	Hours	Total	Bill
		N/A		0.00

Labor Times

Start	End	Hours	Total	Bill
		N/A		0.00

Mileage

Total miles (kms): 0

☐ Include the technician's mileage when calculating expense costs.

Tech Messaging Travel Times Labor Times

New Delete Tech Activity

← → Exit

After the technician has been selected, the application will date and time stamp the assigned time. The assigned time may be edited by typing over the existing date and time or by selecting the Date/Time stamp.

To assign an additional technician to the same task, click the 'New' button again. Use the blue arrows to scroll through the technicians and add or click the technician's name in the blue 'Assigned Technicians' box on the right of the screen.

Travel and Labor Start and End Times: Dispatchers add travel and labor times, from the work order, which the technicians return with after their jobs have been completed.

To track the total amount of travel time a technician or service department uses for travel, enter both the start travel time and end travel time for each task. The end travel time is, (or should be), the same as the start labor time. Click on the date/time icon, the icon to the left of each time field, to enter the date and time or enter the date and time manually. The end times cannot be greater than the start times.

Time/Date Field Hint: To enter a date quickly, if the call was done today, tab past the date field and enter 1:30p for 1:30 p.m. You could have also entered 13:30 and 1:30 p.m. would appear. If the beginning travel or work date is 6/12/05, then this date is defaulted into the date field when you enter the time only in the End time field. For the date field, enter 6/12 for June 12th. The current year is added for you automatically. If your country uses month day, or day month, Miracle Service will use the date setting that Microsoft Windows International Settings is set at.

Travel Times

	Start	End		Hours	
				Total	Bill
	11/06/2012	1:30:00 PM			
	11/06/2012	1:50:00 PM		0.33	0.33

Labor Times

	Start	End		Hours	
				Total	Bill
	11/06/2012	2:00:00 PM			
	11/06/2012	3:00:00 PM		1.00	1.00

Mileage

Total miles (kms)

☐ Include the technician's mileage when calculating expense costs.

'Labor Times' and 'Travel Times' Buttons: If a technician performs other services and returns to the task several times, the multiple times in and times out may be tracked. Miracle Service sums all the times for the task to track the total time. Click the 'Labor Times' or 'Travel Times' button if multiple times for either activities have occurred. After an end time has been entered, an additional row appears to enter another start and end time. Miracle Service will calculate the total time the technician was performing a service on the Task. Click 'OK' to return.

Labor Times

	START		COMPLETED		OVERTIME HOURS
	11/06/2012	2:00:00 PM	11/06/2012	3:00:00 PM	0
	11/06/2012	3:15:00 PM	11/06/2012	4:15:00 PM	0
*					0

If several times in and times out have been entered, use the scroll bar to scroll down to view those times.

Note: Overtime Hours will be displayed if work was performed after the 'Working Hours', which were set-up in the Administration Program. If Overtime Hours are reached on this task, this will also create a 'Billing Info' warning at the 'Service Billing Review' screen.

Mileage: Mileage can be captured for each job and tracked. It is also possible to use the mileage to add a mileage cost or a mileage revenue to a service task.

Enter the mileage in the field provided. If you do not wish to use this information to add a cost or revenue information to the service task leave the check box marked “Include the technician’s mileage when calculating expense costs” blank. To included these costs and revenues in the jobs profitability and revenue calculations, check the box marked “Include the technician’s mileage when calculating expense costs”.

Mileage

Total miles (kms)

☐ Include the technician's mileage when calculating expense costs.

The technician’s mileage, the cost per mile (km), is set-up uniquely for each technician in the Miracle Service Administration module. The cost will be calculated based on the technicians cost per mile times the number of miles listed in the Total miles (kms) field.

(Alternative) Labor & Travel Rates By Technician

When the administrative setting is set to have the Labor and Travel defined by the Technician, it will display the rates to be used for each technician. A drop down selection is displayed beside the Travel and Labor times showing the rate that will be used. The OT (Overtime) rate is also displayed. Click the drop down and select the appropriate rates to be used for each technician and situation.

Task Technician Entry

Total Techs Assigned: 1 Assigned Technicians

Technician:

Assigned Time:

Travel Time

Start: End:

Hours Total: Bill:

Travel Rate: OT Rate:

Labor Time

Start: End:

Hours Total: Bill:

Labor Rate: OT Rate:

Mileage

Total mileage:

☒ Include the technician's mileage when calculating expense costs.

Tech Messaging Travel Times Labor Times

OK Cancel Exit

Parts Used Button

The Parts Used button allows the selection of parts used at the service call. This is a very simple process.

Service Call Parts Used									
Item Number	Quantity	Unit	Average Cost Per Unit	Quoted Price Per Unit	Average Price Per Unit	Total Price	Included in Contract ?		
A147258	0	Each	\$0.00	N/A	\$0.00	\$0.00	☒		
A147258	Toner		132	0					
A234567	Drum		18	0					
A32014856	Copier		2	0			\$0.00	☐	
A369841	Connectors		45	0					
A369852	Toner		42	0					
A521485	toner		37	0					
A5221478	Toner		20	0					
A654874	Toner		74	0					

Item Number: Start typing the entire or partial part number until the correct part appears in the list. If the down arrow is selected, a drop down box displays the inventory parts list. They are in alphanumeric order. It shows the 'Item Number', a brief description of the item, and the 'Quantity in Stock' for all the warehouses combined. Select the proper part and the part information will attach to the work order.

If the 'Zoom' [+] button is selected, Miracle Service will enter the 'Inventory Maintenance' screen where items can be searched or added on the fly. Adding a new item may be required if your technician stopped at a store to buy a new part on the way to the service call, or while repairing the item. When 'Exiting' from 'Inventory Maintenance' screen to the 'Service Call Parts Used' screen note the details of the inventory item were entered.

Miracle Service will check to see if the item is included in the contract. If it is included, it will be marked as such in the far right column with a check in the 'Included in Contract' field.

Description: The 'Inventory Data' screen fills 'Description' by default when the 'Item Number' is selected. The item description may be edited.

Warehouse Button: Unless Miracle Service was set-up to draw the item from the Main Warehouse, select a warehouse by clicking on the 'Warehouse' button.

Serial Items - A screen will be displayed that lists each item. The correct serial numbered item must be selected.

Non-Serialized Items - The Edit Warehouse Selection screen opens.

For non-serialized items, the warehouse button opens a list of warehouses where the item is stocked, with the quantity in stock, the cost, and the suggested retail information. Select to view all warehouses, or only the car stocks of those technicians attending the call using the selection boxes at the top of the screen. Choose the correct warehouse by clicking on the 'Selected' box. The quantity selected is the number of items that were used or sold at the service call. The quantity defaults to 1. The quantity and the default price may be modified.

Edit Warehouse Selection									
View ☒ All Warehouses ☐ Only Carstocks for Scheduled Technicians ☐ Home Warehouse for Scheduled Technicians									
Selected	Warehouse ID	Qty In Stock	Qty Reserved	Qty Selected	Warranty	Cost	Sugg. Retail	Price/Unit	
☐	BEN	2	0	0	☐	\$9.68	\$15.99	\$0.00	
☐	MAIN	130	0	0	☐	\$9.68	\$15.99	\$0.00	

Calculating the Item Price: The price will be calculated based on the pricing schedule set-up for the customer in the Customer Maintenance screen, as well as the Inventory Item screen. If the item is included in the contract, the price will be \$0.00. Persons with the proper authority can override the \$0.00 price or modify any defaulted price. For example, if the customer damaged the item and the contract does not cover damaged or abused items, the item may be overridden to be billed to the customer instead of the contract.

If the item is serialized, select the item from the list of serial numbers.

After the item has been selected from the warehouse, click 'OK' to return to the Parts Used screen. Now the Quantity, Average Cost per Unit, Average Price per Unit, and Total Price (not including tax), will be displayed.

Warranty: If the item is planned to be replaced as a warranty repair and the part will be supplied by the OEM or Vendor at no cost to your company, you can check the Warranty box. This will identify the part is being supplied by the OEM or Vendor under a warranty agreement and that no cost of this part will be included in the profitability reporting.

Expenses Button

The Expense button opens a dialogue from that allow you to capture various expense items relating to the specific service task. The user can modify the description, enter the cost, the price and the Payment Type. This information is added to your service invoice and considered in the Profitability analysis for the job.

Expense Type	Description	Payment Type	Cost	Price	Included in Contract ?
► Parking&Tolls ▼	Parking and Toll Expenses	Cash ▼	\$5.00	\$12.00	☒
* ▼		Cash Check Debit Card Amex MasterCard VISA	0	\$0.00	☐

The expense are defined in the Miracle Service Administration. The tax treatment is also set-up under the tax set-up in Miracle Service Administration.

(NOTE: these expense items are not included in most of the Accounting Exporters.

If you exporting invoices to your accounting application these items will not be included. Please contact our Technical Support Team for further information on this matter).

Tech Messaging Button

The Short Message Service (SMS) function allows the dispatcher to send a text or e-mail message to technicians' mobile devices.

A standard subject text, Customer ID, Task Number, Customer Name, None or a combination has already been defaulted in the administration module. This information will appear in the Subject line on the e-mail. We suggest that only one method be used (text or e-mail), thus allowing technicians to easily sort, search and select specific tasks on their device.

Select the 'Choose All' button to send all fields of information pertaining to the task to the technician(s). Select the 'Clear All' button and check the individual fields of information to be sent to the technician(s).

The dispatcher can send the task information to a 'Selected Tech' or 'All Assigned Techs'. If 'Selected Tech' is selected, select the technician from the drop down list.

The 'Preview' button displays the selected message, in the manner, which most Short Message Services will display on the mobile device.

Technician Short Message Service

Subject Text
Text: Your latest work order.

Subject Data
☐ Customer ID ☐ Task Number
☐ Customer Name ☒ None

Message Data

☐ Customer ID	☐ Unit ID
☒ Customer Name	☒ Unit Location
☒ Address and Phone Number	☐ Last Meter Reading/Date
☒ Problem Description	☒ Last Call Comments
☒ Requester	☒ Target Time
☒ Requester Phone	☒ Call Type
☐ Customer PO	☒ Task Number
☒ Serial Number	☐ Contract Type
☒ Model Number	☒ PM Due
☐ Contract ID	☐ Task Priority
☐ Contract End Date	

Choose All Clear All

Send To
☒ All Assigned Technicians
☐ Selected Technician
 Technician: Ben Wilson

Preview Send Exit

Preview Message Text

Message Text

Bank of Marion | 199 W Main St
 Marion, VA 24354
 Phone: 5557833116 | Machine is noisy | Serial No: A6325987 | Model No: Segment
 5/A521069 | Location: Second Floor Reception | Requester: Sam Walters | Requester
 Phone: (555) 783-3116 ext. 10 | Target Date: 03/05/2012 9:30:00 AM | Call Type:
 Mechanical | Task No: 80-1 | PM Due: True |

OK

If satisfied with the information selected, click the 'Send' button to send the text message. If the number of characters of selected information exceeds the maximum number of characters that can be received by your technician's device, Miracle Service will send another message with the remaining information.

Select 'Exit' to return to the 'Task Activity' screen.

Meter Button

The Meter button provides the ability to enter a meter reading taken on the call. When the Meter button is clicked a dialog box is displayed where the user can enter their meter readings, the reading date and any short notes on the reading.

	Serial No	Model Class/No	Unit ID	Meter Name	Meter Reading	Reading Date	Note
History	A9641531556	Segment 3/A1957351	A894132156	Black			Live Time
History	A9641531556	Segment 3/A1957351	A894132156	Color			Live Time

Documents Button

The Documents feature enables users to view documents attached to the task or to attach new documents to the task. This works with the Technician Web Portal and is very useful for sharing documents between the office and field staff. Documents are any electronic file such as pictures, reports, or calibration results. Any electronic file can be attached to the service task ticket and will be retained with the task ticket.

Notes Button

The Notes button allows the user to enter a note relating to the specific task. If the Notes is illuminated in Green, this indicates that a note exists on that task. When the user clicks the Notes button a Notes dialog box opens to display the existing notes and also to allow the user to add new notes. The dialog box also includes features to search within the Subject, Note and User Name field to locate notes if a long list of notes exist.

Notes
System Notes

Subject:

Show: Customer ID: **AIR001** **International Airlines** ☐ Show for A Date Range

Results: 1

Subject	Note	Date Created	Added By User	Note Type	Record ID	Last Updated
Discussed issue with customer	We reviewed the cause of this issue with the	5/13/2013	BW	Task	40-1	5/23/2013 9:56:17 AM

Users can click the [+] zoom button to open the specific note. Once the note is open the user can update the note, Save the note, and Delete the note.

Details are updated on the note so users can see who created the original note, the date it was created and the Last Modified date. When notes are added in the Technician Web Portal it will also display the Technician UserID as the user creating the note.

Notes Maintenance

Subject: **Discussed issue with customer**

Note: We reviewed the cause of this issue with the customer and received approval to fix the issue as a billable fix.

Created Date: 5/13/2013 By User: BW

Last Modified: 5/23/2013 9:56:17 AM

The user is also able to ‘Save & Send’ the note which will save a copy of the note and send the note as an e-mail.

Email Account and Document Listing

Subject: Discussed issue with customer# 1.#

Account List

Type	Name	Email Account	Select?
Bill To Customer	International Airlines	airforce@rgsfvnskigijh.com	☐
MS User	website	info@nexent.com	☐
Technician	Ben Wilson	rsombach@nexent.com	☐

Document List

Title / Summary	File	Select?
-----------------	------	---------

OK Cancel

When sending a note users are provided with a list of available e-mail addresses to select. If there are documents attached to the task they will display in the ‘Document List’ and can also be selected to be attached to the e-mail message when it is sent. Multiple recipients can be chosen from the available list.

eForms Button (Optional)

The eForms feature enables users to link PDF Forms to tasks. These forms can be designed with customer specific site information so when the form is completed on a device in the field it can be automatically submitted and attached to the task. See the eForms section in the manual for more information.

Task Maintenance

The Task Maintenance window is launched by double clicking the task you would like to modify.

Task Maintenance

Customer: AIR001
 Airlines International
 10368 Wallace Alley Street
 Kingsport, TN 37663
 USA
 Phone: 5552790788

Flags: Open Not Billed Open Tasks 1/1 Task ID:0000091-1

Requester: Allan Rock
 393-121-9229
 allan@company.com
 Bill to: AIR001

Task Description Scale Needs Calibration

Task Type: SOFT Software

Service Equipment: A8641531556
 Model: Bench Scale/A19573512
 Description: Standard
 Unit Location:
 Local Phone: 555-279-0788
 UnitID: A894132156

Service Charge: \$0.00 Include charge as expense on invoice

Service Contract: Annual PM

Warning Lights

Customer P.O.: 23412341
 Task Priority: Standard
 Task Status: Open
 Estimated Repair: 1.4 Hours
 In-Shop Task: ☐ Estimate: ☐
 Suppress Event Notifications: ☐

Task Times

Created	Created By	Scheduled	Start	Completed
11/01/2016	Customer	11/24/2016		
1:37:35 PM		12:36:00 PM		

Buttons: Billing Info, Tech Info, History, Work Performed, Parts Used, Expenses, Addn'l Info, Documents, Notes, eForms, P.O., Map

The Task Maintenance window provides full control to modify and update a task as well as complete a task from the Outstanding Task screen.

Details of the buttons and functions are similar to the details covered in the Activity Button explained above however, there are a few additional features available in the Task Maintenance window.

Task Type More: It is possible to define more than one task type to a task using the Task Type 'More' button. When additional tasks are selected the 'More' button will change to green.

Task Type: FAULT
 Mechanical
 More

Note: many of the reports in Miracle Service are designed expecting a single Task Type on a task. Using this feature may skew the reports and make the data unreliable. Users using this feature should consider customizing reports based on the use of this feature.

Service Equipment More: It is possible to link more than one equipment record to one task. While this feature was added, we generally recommend using the multiple task feature and create a task for each equipment record. When this Service Equipment More feature is used, only the primary equipment will record the service activity and costs. The Service History and Equipment Profitability reports for the secondary equipment will not include the time or parts usage information as it is recorded against the primary equipment record.

The primary equipment record on a multiple equipment task is the equipment record shown on the main Task Maintenance screen.

When additional equipment records are selected the 'More' button will display in green.

Service Equipment: A8325987
 More

Note: many of the reports in Miracle Service are designed expecting a single Equipment Record per task. Using this feature may skew the reports and make the data unreliable. Users using this feature should consider customizing reports based on the use of this feature.

Billing Info Button

Billing Info	Tech Info	History	Work Performed	Parts Used	Expenses	Add'l Info	Documents	Notes	eForms	P.O.	Map
--------------	-----------	---------	----------------	------------	----------	------------	-----------	-------	--------	------	-----

The Billing Info for the task can be viewed and modified. This allows users to set different Labor or Travel rates for the Task.

Tech Info Button

Billing Info	Tech Info	History	Work Performed	Parts Used	Expenses	Add'l Info	Documents	Notes	eForms	P.O.	Map
--------------	-----------	---------	----------------	------------	----------	------------	-----------	-------	--------	------	-----

If a technician is already selected (or more than one technician) by clicking the 'Schedule' Button on the 'Outstanding Task' screen, this screen will display the first technician's name in the selection box at the top of the screen.

Multiple technicians can be assigned to the task by clicking the 'New' button on this screen. If this call has not been assigned, but the service has been performed, click the 'New' button and choose the technician from the drop down box.

After the technician has been selected, the application will date and time stamp the assigned time. The assigned time may be edited by typing over the existing date and time or by selecting the Date/Time stamp.

To assign an additional technician to the same task, click the 'New' button again. Use the blue arrows to scroll through the technicians and add or click the technician's name in the blue 'Assigned Technicians' box on the right of the screen.

Travel and Labor Start and End Times: Dispatchers add travel and labor times, from the work order, which the technicians return with after their jobs have been completed.

To track the total amount of travel time a technician or service department uses for travel, enter both the start travel time and end travel time for each task. The end travel time is, (or should be), the same as the start labor time. Click on the date/time icon, the icon to the left of each time field, to enter the date and time or enter the date and time manually. The end times cannot be greater than the start times.

Time/Date Field Hint: To enter a date quickly, if the call was done today, tab past the date field and enter 1:30p for 1:30 p.m. You could have also entered 13:30 and 1:30 p.m. would appear. If the beginning travel or work date is 6/12/05, then this date is defaulted into the date field when you enter the time only in the End time field. For the date field, enter 6/12 for June 12th. The current year is added for you automatically. If your country uses month day, or day month, Miracle Service will use the date setting that Microsoft Windows International Settings is set at.

The screenshot shows two sections: 'Travel Times' and 'Labor Times'. Each section has 'Start' and 'End' fields with date and time pickers. To the right of each 'End' field are 'Hours Total' and 'Bill' fields. Below these is a 'Mileage' section with a 'Total miles (kms)' field and a checkbox to 'Include the technician's mileage when calculating expense costs.' At the bottom are three buttons: 'Tech Messaging', 'Travel Times', and 'Labor Times'.

Travel Times		Hours	
Start	End	Total	Bill
11/06/2012 1:30:00 PM	11/06/2012 1:50:00 PM	0.33	0.33

Labor Times		Hours	
Start	End	Total	Bill
11/06/2012 2:00:00 PM	11/06/2012 3:00:00 PM	1.00	1.00

Total miles (kms): 0

☐ Include the technician's mileage when calculating expense costs.

Tech Messaging | Travel Times | Labor Times

'Labor Times' and 'Travel Times' Buttons: If a technician performs other services and returns to the task several times, the multiple times in and times out may be tracked. Miracle Service sums all the times for the task to track the total time. Click the 'Labor Times' or 'Travel Times' button if multiple times for either activities have occurred. After an end time has been entered, an additional row appears to enter another start and end time. Miracle Service will calculate the total time the technician was performing a service on the Task. Click 'OK' to return.

The screenshot shows a 'Labor Times' dialog box with a table of entries. Each entry has a 'START' column with date and time, and a 'COMPLETED' column with date and time. To the right of the 'COMPLETED' column is an 'OVERTIME HOURS' column. There are three entries in the table, with the third one having an asterisk in the first column. An 'Ok' button is at the bottom.

START	COMPLETED	OVERTIME HOURS
11/06/2012 2:00:00 PM	11/06/2012 3:00:00 PM	0
11/06/2012 3:15:00 PM	11/06/2012 4:15:00 PM	0
*		0

Ok

If several times in and times out have been entered, use the scroll bar to scroll down to view those times.

Note: Overtime Hours will be displayed if work was performed after the 'Working Hours', which were set-up in the Administration Program. If Overtime Hours are reached on this task, this will also create a 'Billing Info' warning at the 'Service Billing Review' screen.

Mileage: Mileage can be captured for each job and tracked. It is also possible to use the mileage to add a mileage cost or a mileage revenue to a service task.

Enter the mileage in the field provided. If you do not wish to use this information to add a cost or revenue information to the service task leave the check box marked “Include the technician’s mileage when calculating expense costs” blank. To included these costs and revenues in the jobs profitability and revenue calculations, check the box marked “Include the technician’s mileage when calculating expense costs”.

Mileage

Total miles (kms)

☐ Include the technician's mileage when calculating expense costs.

The technician’s mileage, the cost per mile (km), is set-up uniquely for each technician in the Miracle Service Administration module. The cost will be calculated based on the technicians cost per mile times the number of miles listed in the Total miles (kms) field.

History Button

The History button provides the user access to past service task information. Clicking the History button will generate a screen with the history initially for the equipment.

Service History

Select View:

Customer ID: AIR001
Requester: Allan Rock
393-121-9229
Equipment ID: 82
ContractID: 82

☐ Show for A Date Range
Start Date:
End Date:

Req ID	Task ID	SE ID	SEC ID	Labor Amount	Travel Amount	Parts Amount	Task Information
0000099	0000099-1	82	82	\$0.00	\$0.00	\$0.00	Task Type: CAL Description: Calibrate scale
Tech Info	Work	Parts Used	Invoice	Task End:	01/26/2017 CB	PA	
0000098	0000098-1	82	82	\$0.00	\$0.00	\$0.00	Task Type: CAL Description: Calibrate Scale
Tech Info	Work	Parts Used	Invoice	Task End:	01/26/2017 CB	PA	
0000097	0000097-1	82	82	\$0.00	\$0.00	\$0.00	Task Type: CAL Description: Scale need calibration
Tech Info	Work	Parts Used	Invoice	Task End:	01/26/2017 CB	PA	
0000095	0000095-1	82	82	\$300.00	\$100.00	\$36.99	Task Type: FAULT Description: Scale device is not weighing the same as the main truck scale. Two different weight readings.
Tech Info	Work	Parts Used	Invoice	Task End:	11/22/2016 CB	PA	
0000093	0000093-1	82	82	\$200.00	\$100.00	\$42.99	Task Type: FAULT Description: Scale is not weighing properly.
Tech Info	Work	Parts Used	Invoice	Task End:	11/16/2016 CB	PA	
0000092	0000092-1	82	82	\$200.00	\$100.00	\$18.99	Task Type: FAULT Description: Display is not reading.
Tech Info	Work	Parts Used	Invoice	Task End:	11/03/2016 CB	PA	
0000091	0000091-1	82	82	\$0.00	\$0.00	\$0.00	Task Type: SOFT Description: Scale Needs Calibration
Tech Info	Work	Parts Used	Invoice	Task End:	CB	PA	

Select View: The user can choose to change the view and display the Service History based on Customer ID, Requester ID, Equipment ID or Contract ID. This selection can help the user better visualize the service history for the customer, equipment, requester or contract depending on the situation.

Show for a Date Range: The user can filter the history to a specific date range based on the task end date. Select the check box and enter a Start Date and a desired End Date.

Work Performed Button

The Work Performed is entered by clicking this button.

When completing the work performed, the user will select the Resolution Code.

PM Performed: This is a critical check box for managing Preventative Maintenance. When this box is checked and the task is closed, the system will update the Last PM date on the Primary Equipment Record on this task. This will set the equipment record so it will show the PM completed and scheduled for the next PM date.

Work Performed: The user entered the details to describe the work that was performed. Users should enter all pertinent details on the Work Performed to ensure future users will fully understand the work that was completed on this task.

Next Task Comments: Entering these comments will help the next technician servicing the primary equipment. These comments will be available when a new call is entered for the primary service equipment record after the current Task with the comments has been closed.

Meter Button: The Meter button provides the same functionality as described above in the Task Activity section.

Parts Used Button

Billing Info	Tech Info	History	<u>Work Performed</u>	Parts Used	Expenses	Add'l Info	Documents	Notes	eForms	P.O.	Map
--------------	-----------	---------	-----------------------	------------	----------	------------	-----------	-------	--------	------	-----

The Parts Used button allows the selection of parts used at the service call. This is a very simple process.

Service Call Parts Used									
Item Number	Quantity	Unit	Average Cost Per Unit	Quoted Price Per Unit	Average Price Per Unit	Total Price	Included in Contract ?		
A147258	0	Each	\$0.00	N/A	\$0.00	\$0.00	☒		
A147258	Toner		132	0					
A234567	Drum		18	0					
A32014856	Copier		2	0		\$0.00	☐		
A369841	Connectors		45	0					
A369852	Toner		42	0					
A521485	toner		37	0					
A5221478	Toner		20	0					
A654874	Toner		74	0					

Item Number: Start typing the entire or partial part number until the correct part appears in the list. If the down arrow is selected, a drop down box displays the inventory parts list. They are in alphanumeric order. It shows the 'Item Number', a brief description of the item, and the 'Quantity in Stock' for all the warehouses combined. Select the proper part and the part information will attach to the work order.

If the 'Zoom' [+] button is selected, Miracle Service will enter the 'Inventory Maintenance' screen where items can be searched or added on the fly. Adding a new item may be required if your technician stopped at a store to buy a new part on the way to the service call, or while repairing the item. When 'Exiting' from 'Inventory Maintenance' screen to the 'Service Call Parts Used' screen note the details of the inventory item were entered.

Miracle Service will check to see if the item is included in the contract. If it is included, it will be marked as such in the far right column with a check in the 'Included in Contract' field.

Description: The 'Inventory Data' screen fills 'Description' by default when the 'Item Number' is selected. The item description may be edited.

Warehouse Button: Unless Miracle Service was set-up to draw the item from the Main Warehouse, select a warehouse by clicking on the 'Warehouse' button.

Serial Items - A screen will be displayed that lists each item. The correct serial numbered item must be selected.

Non-Serialized Items - The Edit Warehouse Selection screen opens.

For non-serialized items, the warehouse button opens a list of warehouses where the item is stocked, with the quantity in stock, the cost, and the suggested retail information. Select to view all warehouses, or only the car stocks of those technicians attending the call using the selection boxes at the top of the screen. Choose the correct warehouse by clicking on the 'Selected' box. The quantity selected is the number of items that were used or sold at the service call. The quantity defaults to 1. The quantity and the default price may be modified.

Edit Warehouse Selection									
View ☒ All Warehouses ☐ Only Carstocks for Scheduled Technicians ☐ Home Warehouse for Scheduled Technicians									
Selected	Warehouse ID	Qty In Stock	Qty Reserved	Qty Selected	Warranty	Cost	Sugg. Retail	Price/Unit	
☐	BEN	2	0	0	☐	\$9.68	\$15.99	\$0.00	
☐	MAIN	130	0	0	☐	\$9.68	\$15.99	\$0.00	

Calculating the Item Price: The price will be calculated based on the pricing schedule set-up for the customer in the Customer Maintenance screen, as well as the Inventory Item screen. If the item is included in the contract, the price will be \$0.00. Persons with the proper authority can override the \$0.00 price or modify any defaulted price. For example, if the customer damaged the item and the contract does not cover damaged or abused items, the item may be overridden to be billed to the customer instead of the contract.

If the item is serialized, select the item from the list of serial numbers.

After the item has been selected from the warehouse, click 'OK' to return to the Parts Used screen. Now the Quantity, Average Cost per Unit, Average Price per Unit, and Total Price (not including tax), will be displayed.

Warranty: If the item is planned to be replaced as a warranty repair and the part will be supplied by the OEM or Vendor at no cost to your company, you can check the Warranty box. This will identify the part is being supplied by the OEM or Vendor under a warranty agreement and that no cost of this part will be included in the profitability reporting.

Expense Button

Billing Info	Tech Info	History	Work Performed	Parts Used	Expenses	Addn'l Info	Documents	Notes	eForms	P.O.	Map
--------------	-----------	---------	----------------	------------	----------	-------------	-----------	-------	--------	------	-----

The Expense button opens a dialogue from that allow you to capture various expense items relating to the specific service task. The user can modify the description, enter the cost, the price and the Payment Type. This information is added to your service invoice and considered in the Profitability analysis for the job.

Expense Type	Description	Payment Type	Cost	Price	Included in Contract ?
Parking&Tolls	Parking and Toll Expenses	Cash	\$5.00	\$12.00	☒
*		Cash	00	\$0.00	☐

Check
Debit Card
Amex
MasterCard
VISA

Ok

The expense are defined in the Miracle Service Administration. The tax treatment is also set-up under the tax set-up in Miracle Service Administration.

(NOTE: these expense items are not included in most of the Accounting Exporters.

If you exporting invoices to your accounting application these items will not be included. Please contact our Technical Support Team for further information on this matter).

Addn'l Info Button

The Additional Info button will give the user access to select and change additional information on the task.

Billing Info	Tech Info	History	Work Performed	Parts Used	Expenses	Addn'l Info	Documents	Notes	eForms	P.O.	Map
--------------	-----------	---------	----------------	------------	----------	-------------	-----------	-------	--------	------	-----

The additional information includes Inventory Kit selection, Special Instructions and User Fields.

Service Task Additional Information

Inventory Kit: [Dropdown]

Special Instructions:

Reference: [Dropdown]

Description: [Text Area]

User Fields:

User Label	Value
[Dropdown]	

Ok

Documents Button (Optional):

The Documents feature enables users to view documents attached to the task or to attach new documents to the task. This works with the Technician Web Portal and is very useful for sharing documents between the office and field staff. Documents are any electronic file such as pictures, reports, or calibration results. Any electronic file can be attached to the service task ticket and will be retained with the task ticket.

Notes Button:

Billing Info	Tech Info	History	Work Performed	Parts Used	Expenses	Add'l Info	Documents	Notes	eForms	P.O.	Map
--------------	-----------	---------	----------------	------------	----------	------------	-----------	-------	--------	------	-----

The Notes button allows the user to enter a note relating to the specific task. If the Notes is illuminated in Green, this indicates that a note exists on that task. When the user clicks the Notes button a Notes dialog box opens to display the existing notes and also to allow the user to add new notes. The dialog box also includes features to search within the Subject, Note and User Name field to locate notes is a long list of notes exist.

Notes
System Notes

Subject: [Search] [Navigation Icons]

Show: Task Notes Customer ID: AIR001 International Airlines
Results: 1

Subject	Note	Date Created	Added By User	Note Type	Record ID	Last Updated
[+] Discussed issue with cu	We reviewed the cause of this issue with the	5/13/2013	BW	Task	40-1	5/23/2013 9:56:17 AM

[Add Note] [OK]

Users can click the [+] zoom button to open the specific note. Once the note is open the user can update the note, Save the note, and Delete the note.

Details are updated on the note so users can see who created the original note, the date it was created and the Last Modified date. When notes are added in the Technician Web Portal it will also display the Technician UserID as the user creating the note.

Notes Maintenance

Subject: Discussed issue with customer

Note: We reviewed the cause of this issue with the customer and received approval to fix the issue as a billable fix.

Created Date: 5/13/2013 By User: BW

Last Modified: 5/23/2013 9:56:17 AM

[Delete] [Save & Send] [Save] [Cancel]

The user is also able to 'Save & Send' the note which will save a copy of the note and send the note as an e-mail.

Email Account and Document Listing

Subject: Discussed issue with customer# 1.#

Type	Name	Email Account	Select?
Bill To Customer	International Airlines	airforce@rgsfvnskkgijh.com	☐
MS User	website	info@nexent.com	☐
Technician	Ben Wilson	rsombach@nexent.com	☐

Document List

Title / Summary	File	Select?
-----------------	------	---------

OK Cancel

When sending a note users are provided with a list of available e-mail addresses to select. If there are documents attached to the task they will display in the 'Document List' and can also be selected to be attached to the e-mail message when it is sent. Multiple recipients can be chosen from the available list.

eForms Button (Optional):

Billing Info	Tech Info	History	Work Performed	Parts Used	Expenses	Add'l Info	Documents	Notes	eForms	P.O.	Map
--------------	-----------	---------	----------------	------------	----------	------------	-----------	-------	--------	------	-----

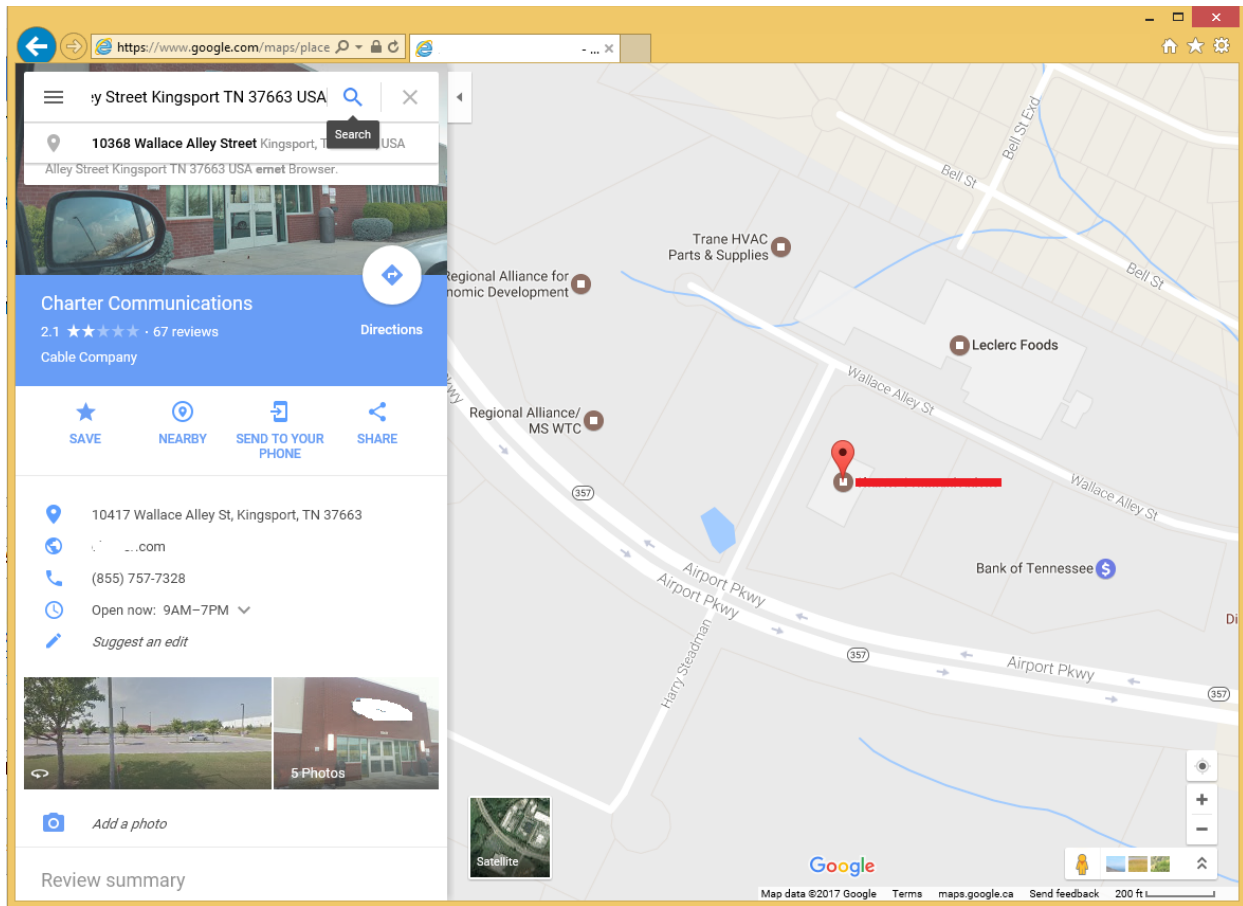
The eForms feature enables users to link PDF Forms to tasks. These forms can be designed with customer specific site information so when the form is completed on a device in the field it can be automatically submitted and attached to the task. See the eForms section in the manual for more information.

P.O. Button:

The P.O. button will only be visible if this is configured in Miracle Service Administration. When parts are needed on a task, the P.O. button will allow the user to generate a Purchase Order and link the Purchase Order to the task with the Parts Needed. When the parts are received, the system will ask the user if these should be reserved for this task. This ensures the parts do not enter regular inventory so they cannot be sold. See the Purchase Order module information for more details on this process.

Map Button

The Map button will generate a map of the service location based on the address specified on the task. When the Map button is pressed, it will open an Internet Browser window with Google Maps and display the location of the customer based on the address on the task.



From the web browser, users can get directions or just print the map.

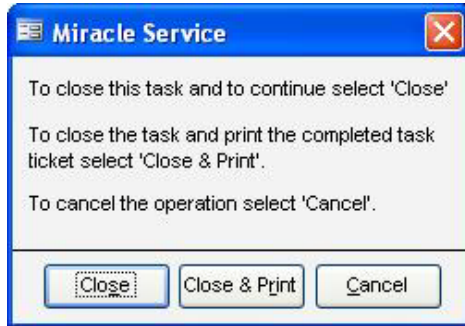
Close (Complete) a Task

From the Outstanding Call Screen, select a Task and click the Activity button at the bottom of the screen. The 'Task Activity' screen appears. Click the 'Close' button to complete the task and send it to 'Service Billing Review' for approval. If the 'Close' button doesn't appear, there are fields, (for example, time stamps or codes), which still require completion or information.



The 'Reschedule' and 'Close' buttons are not available to use until labor times, work performed and parts used information has been added to the Task. This ensures proper closure of the task and service data.

Close the Task from the Task screen, or from the Task Activity Screen. When closing a task, the user can also choose to print the completed Service Task Ticket.



Select Close to close the task without printing a completed Service Task Ticket, or 'Close & Print' to close the task and print a completed service task ticket. The completed service task ticket does not include any charges as the job costing occurs after the Service Task Ticket is closed.

Note: once the task is closed, it is not possible to print a blank version of the task ticket.

After a Task has been closed, it can still be edited up to the point that it has been billed. If the Service Billing Invoice is found to be in error and the Task needs to be edited, you will need to first void the Service Billing Invoice before locating and editing the Task in question.

Reschedule a Task

 A screenshot of the "Service Task Activity" web application interface. The top header bar is yellow and contains the title "Service Task Activity" and a "Flags" section with "Incomplete Times" (red), "PM Not Due" (green), and "Task ID 0000091-1". The main content area is divided into two columns. The left column, titled "Task Details", contains fields for "Description" (Scale Needs Calibration), "Est. Repair" (1.4 Hours), "Task Status" (Open), "Resolution Code", "PM Performed" (checkbox), "Work Performed", "Next Task Comments", and "Equipment" (A9641531556). The right column, titled "Billing Information", contains fields for "Tax Group" (Ship To), "Labor Rate" (STANDARD), "Travel Rate" (STANDARD), "Customer P.O." (23412341), "Service Billing Invoice Comments", "Flag Task in Service Billing" (checkbox), and "Comments". At the bottom of the left column, there is a "Service Charge" field set to "\$0.00" and a checkbox for "Include charge as expense on invoice". A bottom navigation bar contains buttons for "Tech Info", "Parts Used", "Expenses", "Tech Messaging", "Meter", "Documents", "Notes", and "eForms".

From the Outstanding Call Screen, select a Task and click the Activity button at the bottom of the screen. The 'Task Activity' screen appears. If the Task cannot be completed because of a parts shortage, or a need to research the problem etc. reschedule the Task for a later date. Click the Reschedule Button.



Note: All labor and travel [end] times must be entered for each of the selected technicians on the Task before you can reschedule the Task. If times are not added, or information is missing, the Reschedule and Close button will not be accessible. These times will be used for reporting Service/Equipment Call Activity and reasons for incomplete service calls later. When you have entered the time, select the OK button on the Task and a new button appears below the Task Special Info Buttons line. This button is marked 'Reschedule'.

Select the 'Reschedule' button to go to the 'Task Reschedule' screen.

Choose the Reschedule Type from the drop-down list of types created in the Administration. These reschedule types are used for immediate dispatch management and future Service/Equipment Call Activity reporting.

Comments entered in the Notes field will be appended to the description of the new Task, which will be created automatically. This rescheduled task will be given a '-2' after the request ID, which signifies that this is the second task for this service request.

Note: Tasks are billed separately! If only one invoice will be sent to the customer, do not reschedule the task, simply add the multiple times-in and times-out to the technician activity. Miracle Service allows for more than one technician on each task, over multiple days to facilitate this need for only one invoice.

Parts Needed for Rescheduled Task

If parts are required for the rescheduled task, click on the Parts Needed button and select the items from the list of inventory items, or add the new items on the fly.

Click 'OK' on the 'Task Reschedule' screen, and a 'Reschedule Task Details' screen appears.

Reschedule Task Details Task ID 63-2

Customer ID **BOM001** Bank of Marion
102 W Main St
Marion, VA 24354
USA
Phone: 5557833116
Fax: (555) 783-3117

Task Description: Copies Jamming
Rescheduled from task # 63-1
After performing the 26 point check list and replacing the cartridge the customer informed me that the operator panel doesn't light up. They were closing for the day and nobody

Task Type: JAM Jamming

Task Priority: Standard

Technician: Ben Wilson

Created Time: 6/30/2014 3:53:15 PM

Scheduled Time: 7/1/2014 3:53:00 PM

ETTR: 0 hours

Ok Cancel

This screen allows the Task Description, Task Type, Technician or Scheduled Time to be edited. The estimated-time-to-repair (ETTR) field is optional. It is helpful in determining the scheduling of staff.

Purchase Order linked to Parts Needed

When parts are marked as needed on a task, a purchase order can be raised from the Quick Call and linked back to the task. This helps ensure the parts are ordered and will be reserved for the task once they are received.

On the Task Maintenance screen the user can click the P.O. button to create or view the PO for parts needed on a Task. When the P.O. button is clicked, the Purchase Order Details are displayed. This will show the user the status of the P.O. for the Parts Needed on this task.

Purchase Order Details

View Purchase Orders

A listing of all Purchase Orders linked to this Service Task.

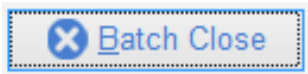
PO Number	Ordered From	Warehouse	Approved	Printed	Received	Invoiced
+ 140630-0001	ABC2	MAIN	No	No	No	No

Batch Close

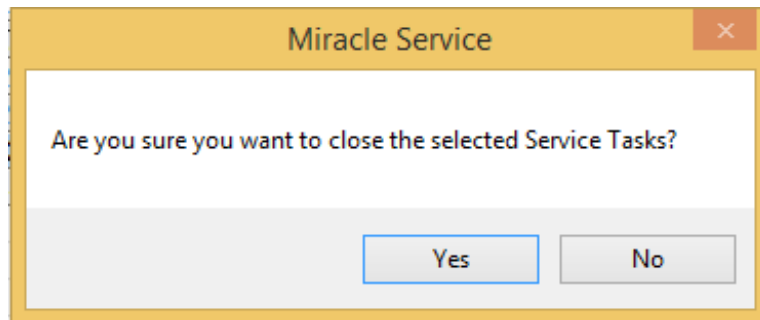
User can activate the Batch Close feature in the Miracle Service administration set-up. Once this is active, a 'Close' column will be displayed on the left side of the Open Tasks screen.

When a task is selected to close, a 'Batch Close' button will display at the bottom of the screen.

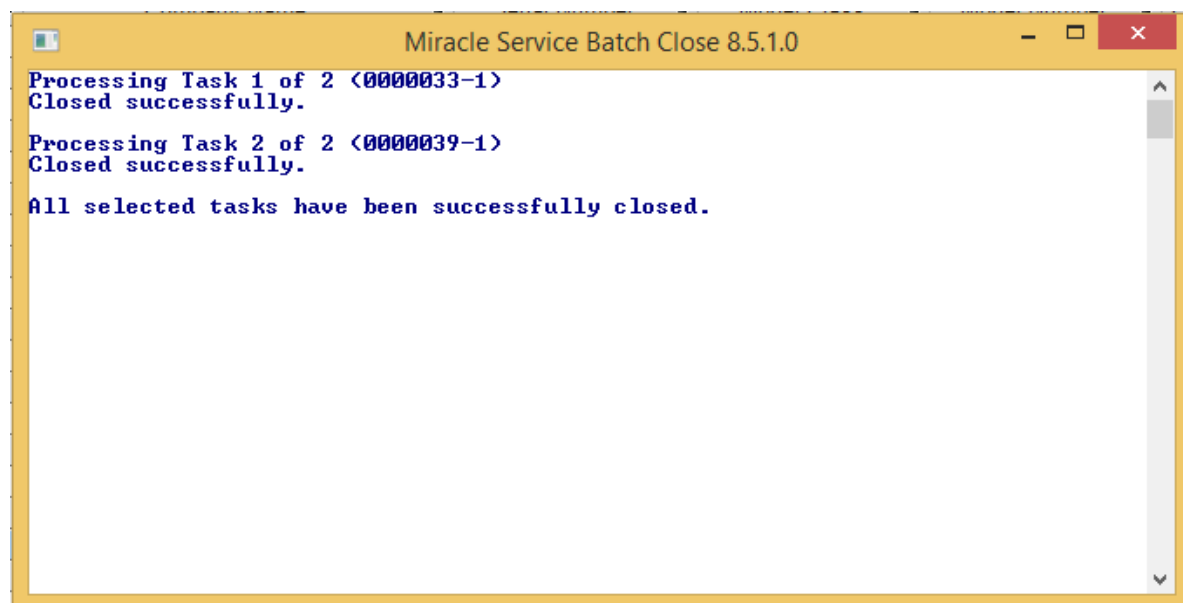
Users can select one or multiple tasks to close. Once all tasks are selected the Batch Close button can be clicked.



Once the Batch close is clicked the users are prompted to confirm they would like to close the selected calls.



Clicking yes will run the batch close routine to go through each task and update the fields based on the defaults set-up in the Administration Menu and then close the task.



The Batch Close window will show the progress of all tasks being closed. This activity is logged in the Miracle Service logs folder. Users can review the log for any issues encountered during the batch close process.

It is possible some tasks will not be closed after this process runs depending on the settings in the Administration Menu. The log file will provide details on all tasks and the reason for a task not closing during this process so users can update the task so it can be closed.

Chapter 38

Using the Visual Scheduler

The Miracle Service Visual Schedule is a tool for you to browse and manage the Open Tasks created in Miracle Service. This Visual Schedule is designed to provide a powerful interactive calendar view of your Open Tasks. It allows you to view the jobs and easily assign, re-assign or reschedule jobs directly in the Visual Scheduler. It is designed as a separate companion application to Miracle Service and can be opened while Miracle Service is open, or on its own.

How to Setup the Visual Scheduler

Launch the Visual Scheduler by clicking the Visual Scheduler button found at the bottom of the Open Tasks screen in Miracle Service.

The first time you launch the Visual Scheduler should open the Settings configure your company's preferences. **IMPORTANT:** These are global settings for All Users of your Visual Scheduler.

The screenshot shows the 'Setup Miracle Service Scheduler' window with the title bar 'Setup Miracle Service Scheduler' and a close button. The main content area is titled 'Settings - All Users'. It contains several sections:

- Default Calendar View:** Radio buttons for Day (selected), Work Week, Week, Month, and Timeline.
- Auto Refresh Interval:** Radio buttons for None (selected), 1 min, 5 min, and 10 min.
- Time Zone:** A dropdown menu showing '(UTC-09:00) Alaska'.
- Technician Zones:** A checkbox for 'Select All' and a checked checkbox for 'Daylight Saving'. Below is a list box with 'Default Zone' and 'NX' checked.
- Task Preview Form:** A section with a 'Subject' field containing '[CUSTOMER NAME], TASK ID: [TASK ID] - [PRIORITY]' and a blue link 'Right click in text box to add additional fields'. Below are 'Location' and 'Additional Information' fields, both containing '[CUSTOMER ADDRESS] [CUSTOMER CITY]' and '[TASK DESCRIPTION]' respectively.
- Technician Status and Task Type color selection:** Two tables on the right side.

At the bottom center is an 'OK' button.

Technician Status	Bar Color
Unassigned	Select Color
Assigned	Select Color
On-Route	Select Color
On-Site	Select Color
Started	Select Color
Finished	Select Color
Completed	Select Color

Task Type	Background Color
Installation	Select Color
Pick up equipment	Select Color
Drop off equipment	Select Color
Training	Select Color
Repair	Select Color
Removal	Select Color
Quality Check	Select Color
Miscellaneous	Select Color
PM Call	Select Color

Basic Settings

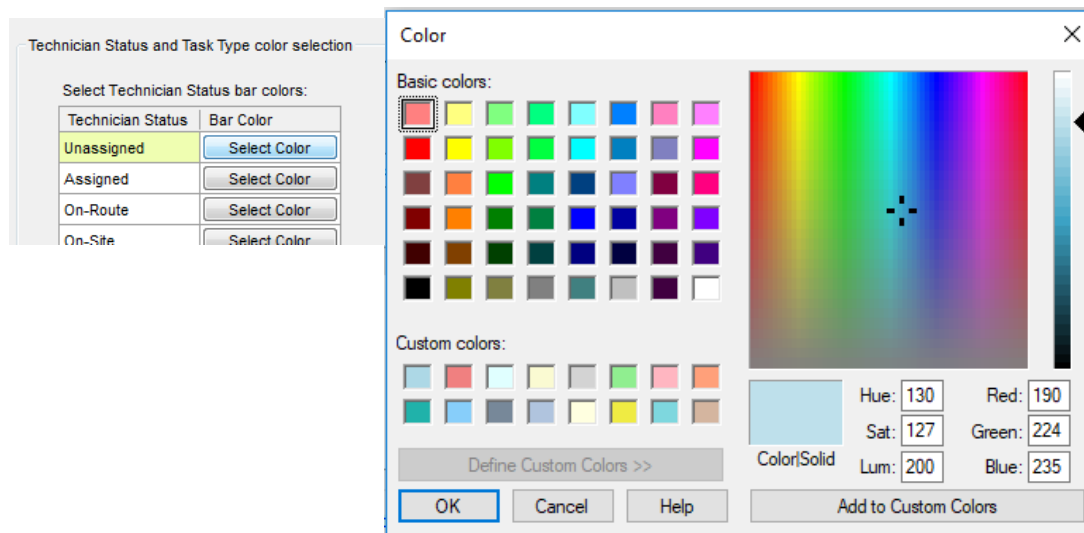
- **Default Calendar View** (optional) - this defines the opening view of the Visual Scheduler - Users can select the default view they prefer to use.
- **Auto Refresh Interval** (optional) - Because the Visual Scheduler retrieves the data from the database to display, changes other users make are not immediately available. You can choose to use the manual 'Refresh' button to obtain the most recent data or set the Auto Refresh Interval.
- **Technician Zones** - set the zones to view by default when the Visual Scheduler first opens. It is possible to add and remove zones in the Visual Scheduler once it is open so the setting is intended to set the preference for the initial screen when it is first opened.

Task Preview Form Settings

Using a combination of text and database fields, configure the Subject, Location and Additional Information to appear on the Task Ticket. Right-clicking on a text box will present a list of available fields to choose from. For example, [CUSTOMER NAME] will present the Customer's Name.

Defining the Colors for Technician Status and Task Type

Clicking on the 'Select Color' button will launch a Color Picker to select a basic, custom or personalized color for each individual Technician Status and Task Type.



Technician Status Bar Color: Sets the color of the status bar on the left side of the Task.

Task Type Background Color: Sets the background color of the Tasks on the calendar.

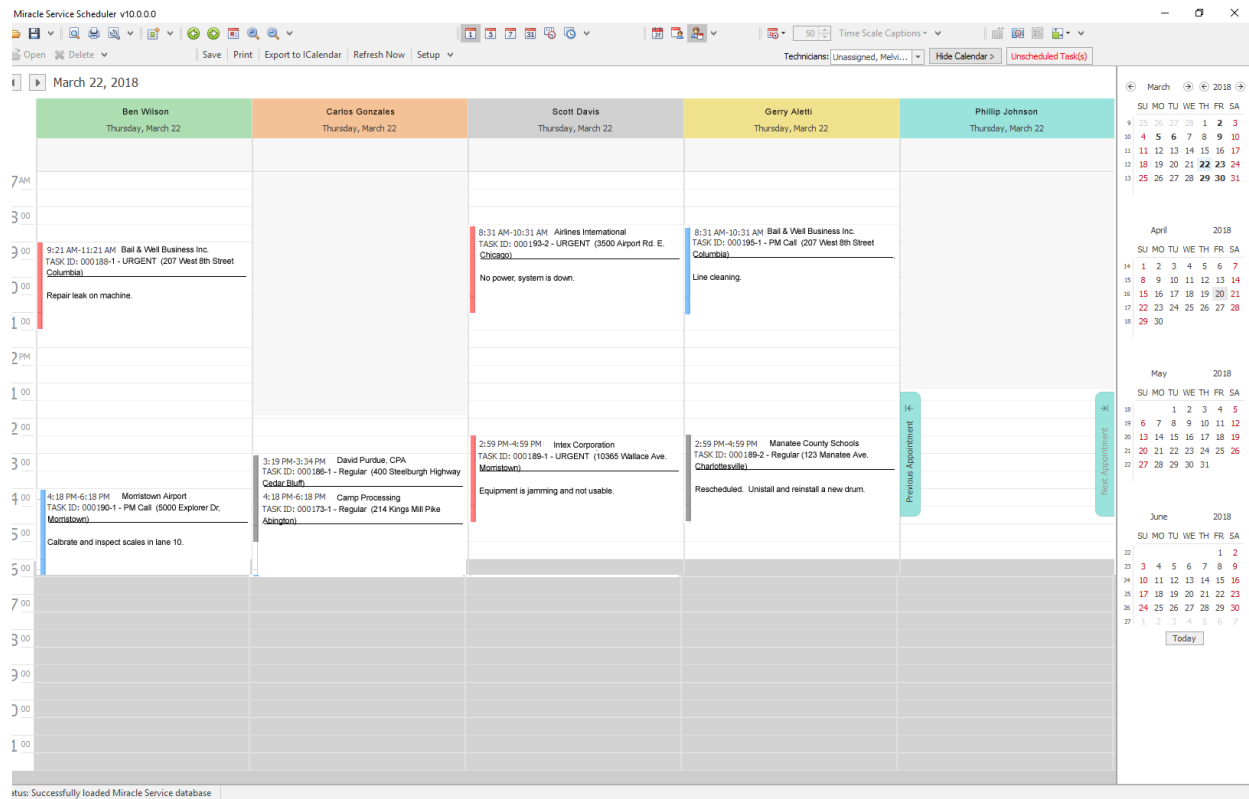
8:30 AM - 10:30 AM Bail & Well Business Inc.
TASK ID: 0001369-1 - PM Call (207 West 8th Street
Columbia)

Line cleaning.

Visual Scheduler Overview

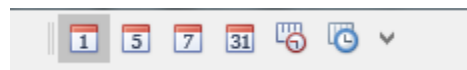
When the Visual Scheduler is open there are two main areas of the application. The main viewing area and the monthly calendar overview on the right side of the screen.

The monthly calendar side bar is a quick way to see a high level overview of your schedule and which days have calls assigned. Days where a call is assigned shows the date number in **bold**. If the date number is not bold, then no calls are scheduled for that date.

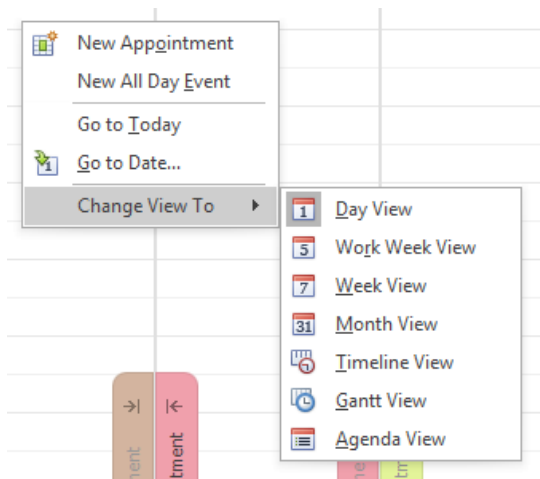


Changing Visual Scheduler Views

To change the Visual Scheduler view user can select the buttons across the top of the screen. Then you can select 'Day', 'Work Week', 'Week', 'Month', 'Timeline', or 'Gantt View'.



Alternatively, users can right click their mouse and select the view from this pop-up menu.



This pop-up menu also allows the user to select the day they are interested in viewing. They can select 'Go to Today' or 'Go to Date'. Users can also click on the monthly calendar on the right side of the screen to select any day quickly.

Scheduling Tasks in the Visual Scheduler

Drag and Drop - Scheduling tasks in the Visual Scheduler is very easy as it is a 'drag and drop' application. Users can select a task that is being displayed and then click and hold their left mouse button to grab the task. They can then drag the job to a new time or technician while holding down their left mouse button. The user can also drag and drop the task into the Monthly Calendar on the right side to schedule or reschedule the task for a new date. This makes it easy for the dispatcher to schedule the job days or even months ahead.

Task Ticket - Users can also schedule the task by opening the task ticket. Open any task by double-clicking the task.

With the task ticket open, the user can modify a number of fields:

Start Time: Use the pull down or enter a new date and / or time.

End Time: Use the control button of the right of the field is change the hours, minutes, seconds or AM/ PM. Select the area you wish to modify and then click with up or down arrow to increase or decrease the values.

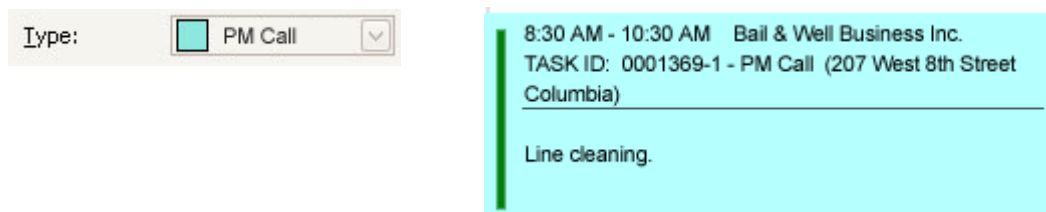
Technician(s) - Click the pull down arrow beside the technician to assign the task to one or more technicians. Click the box beside the technician to assign then to the task.

Work Description area - Users can update and edit the Work Description be typing in the text box.

Visual Scheduler Task Information

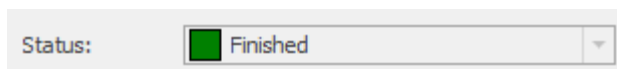
The following information is available in the Visual Scheduler:

Task Type: The task type is represented by the color of the task in the scheduler. In the task window, you can view the task color and the task type definition if it is not know.



The screenshot shows a task window with a light blue background. On the left, there is a 'Type:' label next to a small blue square icon and a dropdown menu showing 'PM Call'. To the right, a larger blue box contains the following text: '8:30 AM - 10:30 AM Bail & Well Business Inc.', 'TASK ID: 0001369-1 - PM Call (207 West 8th Street Columbia)', and 'Line cleaning.'

Task Status: The status of the task is represented by the color bar on the left side of the task. In the task window you can view the status color and the definition if it is not known.



The screenshot shows a task window with a light gray background. On the left, there is a 'Status:' label next to a small green square icon and a dropdown menu showing 'Finished'.



The screenshot shows a task window with a light gray background. It contains two main fields: 'Company:' with the value 'Airforce Base, TASK ID: 19-1 - Standard' and 'Address:' with the value '10368 Wallace Alley Street, Kingsport'. To the right of the address field is a 'Type:' label next to a small blue square icon and a dropdown menu showing 'PM Call'.

Task Company: The Company field includes the Company Name, Task ID and Task Priority.

Task Number (ID): The Task ID is displayed in the Company Field. The Task ID in the above example is '19-1'.

Task Priority: The Task Priority in the above example is 'Standard'.

Task Location (Address): The address of the service task is displayed in the Address Field. This includes the Address and City/Town of the service task location.

Unscheduled Task(s)

When tasks do not have a Scheduled Date assigned they cannot be displayed in the Calendar so a Button is activated on the menu bar to indicate there are Unscheduled Tasks.



Click the 'Unscheduled Task(s)' button to open the Unscheduled Task Window.

 A screenshot of a window titled 'Unscheduled Tasks'. At the top, there is a red text box with an important notice. Below this is a header area with a prompt to drag column headers for grouping. The main area contains a table with four columns: 'Service Task Number', 'Service Task Scheduled Date', 'Time', and 'Add To Schedule'. One task is listed in the table. At the bottom of the window is a 'Save' button.

Service Task Number	Service Task Scheduled Date	Time	Add To Schedule
26-1	13/07/2012	09:00:00	☐

This screen is a list of all unscheduled tasks. By default the planned scheduled date and time is set to the start of the current business day. Click on the drop down arrow beside the date to select the date. Click on the time field to enter a preferred time to schedule the call. Check the 'Add To Schedule' box and then click save to schedule the selected call(s). Multiple calls can be managed in this screen at the same time.

Unscheduled Tasks

Important: All unscheduled tasks have been defaulted to today's date. Click in the Scheduled Date and Time fields to modify if necessary before selecting 'Add to Schedule'.

Drag a column header here to group by that column

Service Task Number	Service Task Scheduled Date	Time	Add To Schedule
28-1	13/07/2012	09:00:00	☐

< July > < 2012 >

S	M	T	W	T	F	S
24	25	26	27	28	29	30
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Today Clear

Save

Chapter 39

Service Billing Review

The 'Service Billing Review' screen is where services performed are approved for invoicing. After tasks are closed, the service task activities are sent to the Service Billing Review screen for approval. This step helps to ensure that customers are not billed in error, or that the proper parts, codes and work descriptors were used. Service Invoices are not printed from the Review screen. After Tasks are approved the service billing is sent to the Invoice Review screen for actual printing.

Managing Service Billings

Select the 'Service Billing' button on the Service Invoice Menu to enter the 'Service Billing Review' screen. All the closed service tasks are ready for approval. The following information is available for each task.

		Aging Date		11/06/2012		Change	
	Task No:	Labor:	Hours	Charge	Surcharge	Total Charge	Approve
Details	OC-1		2.00	\$0.00	\$0.00	\$0.00	
	Customer D:	Travel:	0.33	\$0.00	\$0.00	\$0.00	
	Warnings:	Parts:	N/A	\$0.00	N/A	\$0.00	
	Food Status:	Expenses:	N/A	\$0.00	N/A	\$0.00	
Details	IC7-1		1.50	\$0.00	\$0.00	\$0.00	
	Customer D:	Travel:	1.00	\$0.00	\$0.00	\$0.00	
	Warnings:	Parts:	N/A	\$0.00	N/A	\$0.00	
	Food Status:	Expenses:	N/A	\$0.00	N/A	\$0.00	

Details Button

Select the 'Details' button to zoom to the Task. Once of the Task the user can edit the details in the task and quickly return to the Service Billing Review screen to view the changes.

Task Number

This is the number assigned by Miracle Service to the Task. It consists of the Request ID number, followed by a dash and then the Task number.

Customer ID

This is the unique customer identifier.

'No Warnings' or 'Billing Info'

Task No: OC-1	
Details	Customer D: BOMUL1
	Warnings: Billing Info +
	Food Status: Held +

A warning will appear next to the 'Details' button for each task. The warning will appear if any overtime hours were spent working on the equipment, or if a user while adding information about the task created a 'Billing Info' comment.

Users are warned of overtime spent or billing information entered about this task by a red 'Billing Info' displayed in this field, replacing the black 'No Warnings'. Click the 'zoom' [+] button to view details.

If the Task was flagged in the 'Billing Info' button, and comments were entered, the comments may be read here. See the 'Billing Info' special info button in 'Tasks'.

If the Task was performed after standard business hours, as set up in 'Administration Set up', the overtime details are displayed.

Labor, Travel, and Parts

The amounts that will be billed for Labor and Travel Hours charges and surcharges are displayed here in white, editable fields, along with the un-editable charge for Parts Used. 'Zoom' [+] buttons enters a screen detailing the source of the amounts.

Charge and Surcharge

The Charge and Surcharge fields are editable if the Labor & Travel Rates are set 'By Task/Job'. However, if the Labor & Travel Rates are set 'By Technician', these are not editable since they cannot be linked back a specific technician.

Hold Status

Occasionally, the customer may not be billed. Perhaps a special promotion, a public relations gesture, or some confusion about the service on the part of the customer will prompt this. Select the 'zoom' [+] button to view or enter the 'On Hold Until' date and comments.



The default for comments is 'Held by' followed by the user login name. The display changes from 'OK' to 'On Hold' with the date the billing will be held until.

Approve

Select the white box at the right of the row to approve this billing and create an invoice. A blue 'OK' appears.

Approve All

This button allows all the entries as a group to be approved.

Approve All not Held

This button allows entries where the 'Hold Billing' button is not enabled to be approved.

Hold All not Approved

This activates the 'Hold Billing' button on all unapproved entries.

Hold All

This activates the 'Hold Billing' button on all entries.

Click 'Save' to create invoices for all approved entries.

Click 'Exit' to return to the 'Service Menu'.

Note: If you have many thousands of customers, contracts, equipment and/or service calls in your database, you may want to start this processing after hours and let Miracle Service process it for you.

Edit Closed Tasks

A closed Task can be edited up to the point that it has been billed. If the Service Billing Invoice is found to be in error and the Task needs to be edited, the user needs to first void the Service Billing Invoice before locating and editing the Task in question. To void the Service Billing Invoice, you will need security rights to be able to void invoices.

To Edit a closed task, Select Edit button under Service Request. You can then search for the Request ID.

Once you have located the Request ID, you can click the Task button to the navigate to the associated task. At this point you can select Edit and modify the Service Task information as required.

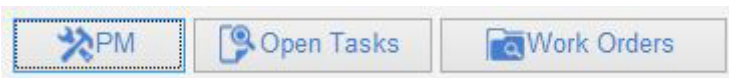
Chapter 40

Preventative Maintenance Module

The PM Review is a table listing all equipment requiring preventative maintenance displayed in order by 'Customer ID'. By approving entries here, service 'Work Orders' and 'Tasks' will be automatically generated for the PM's. These automatically created PM Tasks will be given the default PM call type selected in the Administration set-up of Miracle Service.



Preventative Maintenance can be found under the 'Service' area from the main menu.



Select the Preventative Maintenance 'PM' button to enter the 'PM Call Generation' screen.

PM Call Generation														
Quick Search		x3 Clear All		Show All Equipment				Number of PMs to Generate: 0		8/6/2021				
								Number of PMs Due: 58						
Generate	Region ID	Customer ID	Company Name	Serial Number	Unit ID	Model Class/No	Last PM Date	Status	Contract	Contract Template	Group PM Type	Equip ID	City	State
☐		FLE001	Fleet Painting & Supplies	A6985217	A4638957	Floor Scale/A42068953	5/24/2018	OK				85	Columbia	TN
☐		JON001	John's Hardware	17282899		Floor Scale/A42068953	5/26/2020	OK				143	Bloomington	AR
☐	DVD	CVC001	Credit Woodland Cancer Centre	X142538887		Indicator/X100258	5/24/2018	OK				92	Johnson City	TN
☐	DVD	CVC001	Credit Woodland Cancer Centre	X365214894	A6358742	Truck Scale/A521069	12/22/2020	OK				47	Johnson City	TN
☐	DVD	INTER001	International Computer Sales	A695262474	A63215265485	Bench Scale/A521489	5/24/2018	OK				88	Morristown	TN
☐	DVD	INTER001	International Computer Sales	A52418966	A32154568	Bench Scale/A19573512	5/24/2018	OK				90	Morristown	TN
☐	DVD	INTER001	International Computer Sales	X524545	X1859552	Bench Scale/X3652148	8/7/2018	OK				90	Morristown	TN
☐	DVD	INTER001	International Computer Sales	X41856854	X1369527454	Truck Scale/X123456987	5/24/2018	OK				91	Morristown	TN
☐	DVD	INTER001	Interx Canada Corp.	A874596	A3258741	Bench Scale/A225596314	8/7/2018	OK				64	Mississauga	ON
☐	FRANK	CAMP001	Camp Processing	X6325987	X2158774	Floor Scale/X365982	8/7/2018	OK				53	Bristol	VA
☐	FRANK	CAMP001	Camp Processing	X62448556	X324152855	B-TEK/B-TEK Floor Unknown	9/13/2018	OK				79	Bristol	VA
☐	FRANK	CAMP001	Camp Processing	X4859231	X26487954	Bench Scale/X3652148	5/25/2018	OK				78	Bristol	VA
☐	FRANK	CAMP001	Camp Processing	X78839902	X2356	Bench Scale/A19573512	5/24/2018	OK				97	Bristol	VA
☐	FRANK	DRM001	Dr. Mable Anderson	X3652185	X2521485	Floor Scale/X214569	8/7/2018	OK				48	Bluefield	WV
☐	FRANK	DFC001	David Perdue, CPA	A6326547	A41259	Bench Scale/A521489	8/7/2018	OK				56	Manion	VA
☐	FRANK	FEL001	Felton Real Estate	A6321487	A2418556	Bench Scale/A19573512	8/7/2018	OK				59	Dandridge	TN
☐	FRANK	TAS001	The After School Place	Test1	Test1	B-TEK/B-TEK Floor Unknown	4/5/2019	OK				138	New Tazewell	TN
☐	FRANK	TAS001	The After School Place	A74218556	A135689	Bench Scale/A225596314	8/7/2018	OK				72	New Tazewell	TN
☐	GILES	AIR001	Airlines International	Details	Details			On Hold	1092	Basic Monthly	PM Schedule	136	Kingsport	TN
☐	GILES	AIR001	Airlines International	83929201	334431	Floor Scale/A42068953	7/12/2019	On Hold				107	Kingsport	TN
☐	GILES	AIR001	Airlines International	X987123753		Indicator/X5554896321	10/1/2018	On Hold				135	Kingsport	TN
☐	GILES	AIR001	Airlines International	A456345		Floor Scale/A42068953	9/2/2020	On Hold				145	Kingsport	TN
☐	GILES	FCO001	Forward St. Church	X52148	X3265897	Indicator/X5554896321	8/7/2018	OK				58	Pound	VA
☐	GILES	FIT001	Fit for Life Gym	J5029920		Bench Scale/A521489	8/10/2018	OK				132	Lewisburg	TN
☐	GILES	FIT001	Fit for Life Gym	J5029921		Bench Scale/A521489	8/10/2018	OK				133	Lewisburg	TN
☐	GILES	INN001	Innovative Solutions	X785624	X3215874	Indicator/X5554896321	8/7/2018	OK				61	Knoxville	TN
☐	GILES	KING001	Kingsway Trucking	X9852146	X42752689	Bench Scale/A225596314	8/7/2018	OK				74	Bristol	TN
☐	GILES	KING001	Kingsway Trucking	A654288	A68852174	Bench Scale/A19573512	8/7/2018	OK				76	Bristol	TN
☐	GILES	KING001	Kingsway Trucking	X5212369	X1258469	Truck Scale/X123456987	8/7/2018	OK				67	Bristol	TN
☐	GILES	KING001	Kingsway Trucking	A5652478	A5215496	Truck Scale/A521069	8/7/2018	OK				75	Bristol	TN
☐	HOKM	BAL002	Bail & Well Business Solutions	A5158874	A324884	Bench Scale/A225596314	9/25/2019	OK				51	Cedar Bluff	VA
☐	HOKM	BKS001	BK's Law Office	A59419632	A5165558	Truck Scale/A521069	5/24/2018	OK				80	Sevensville	TN

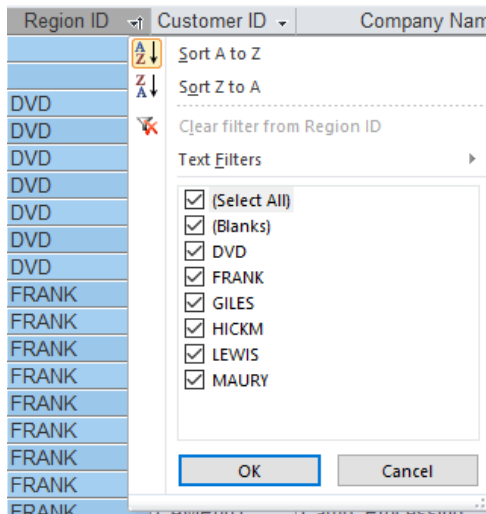
Use the 'Show' options to display all equipment that is under a service contract, or contracts whereby PM's are included. This is a very useful filter as the service manager or sales people can then call customers that do not have PM's in their contracts, or do not have contracts at all. They can then alert the customer that their equipment is due for a PM cleaning or checkup. This feature can also determine who to sell service contracts to. Miracle Service tracks all the equipment service calls were performed on. Since the Equipment record knows when a PM is due and the last time a PM was completed on the equipment, it is able to determine when the next PM is due.

This is how it works:

The list of equipment is filtered based on the following conditions as well as the selectable 'Show' filters.

- First it checks to see if the Service Equipment is active, Customer is active and PM frequency is not set to 'not required'
- Next it will exclude Service Equipment that have open PM tasks where the scheduled date is $\geq$ (PM frequency days – Aging Date) (this filter does not apply to PM with # of clicks). Note: this is designed to only hide the PM for the current scheduled period. However if you set the Aging Date further out, it will pick-up the PM since it is required in the next PM period.
- Next it excludes Service Equipment where PM Last Date is greater than Aging Date. In this case the PM is not yet required.
- Finally it will include Service Equipment with a PM that is due based on Last PM Date.

Group, Filtering and Sorting Information



Group PM's by the column header to set the sort order or to filter the list by selected specific items to display. Users can choose to sort by or group by any column.

'Quick Search' at the top of the screen can be used to quickly find a specific record such as a serial number. Clicking the 'Clear All' will reset the list to the original listing.

Details... link displayed in Serial Number Field.

Generate	Region ID	Customer ID	Company Name	Serial Number	Unit ID
☐	GILES	AIR001	Airlines International	Details...	Details...
☐	GILES	KING001	Kingsway Trucking	X9852146	X427529689

The 'Details...' link is displayed when a PM includes a list of equipment and is not a single equipment record. This is part of the Master PM contract feature that allows users to generate calls that include a complete list of equipment based on the contract. When the 'Details...' link is selected, a dialogue box opens to show the list of equipment that will be included when the call is generated.

Print button

The Print will generate an Approval Report of all PM's due grouped by the CustomerID.

Customer ID

This is the unique customer identifier.

Equipment ID

This is the unique equipment identifier.

Serial Number

This is the unique equipment identifier assigned by the manufacturer.

Unit ID

This is an optional unique equipment identifier.

Model Class/Model Number

The model class and model number of the equipment is shown here.

Last PM Date

The last time a preventative maintenance service was performed on the equipment.

Generate

Select this white check box at the beginning of the row mark it to create a PM call for this equipment.

Show

Choose one (only) of the options displayed by selecting the item in the Drop Down list.

Aging Date

Miracle Service displays information as of the date entered in this field.

Flags

- ▶ Number of PMs Due
- ▶ This is the total number of rows in the table.
- ▶ Number of PM Calls to Generate
- ▶ The number of calls marked (checked) to create the PM calls.

Select All

To mark all equipment listed in the table for a PM call, click 'Select All'.

Select All Not Held

To mark only equipment not 'On Hold' listed in the table, click 'Select All Not Held'.

Clear All

To deselect all marked entries, click 'Clear All'. The 'Generate' column will display a red 'No' for all equipment.

Print

If the 'Print' button is selected, a hardcopy of the entire list of PM's due is printed. This 'work sheet' allows approval without working from the screen.

Cancel

This allows the user to exit without saving any changes entered.

OK

Click 'OK' to create the selected PM calls.

Click 'Exit' to return to the 'Service Menu'.

Chapter 41

Reports

Access this feature from the 'Reports' button on the 'Main' menu. Periodically, screens throughout the application direct the user to specific reports in the 'Reports Selection' screen.

Report Selection

Options

Printer Selection ☐ Print ☒ Print Preview

Report Categories: Customers

Report Range: OFF

Report Description

A listing of customers that are on credit hold, sorted by Customer ID.

Customers

- All Customers on Credit Hold
- Customer Envelope *Non-editable
- Customer Envelope 2 *Non-editable
- Customer Listing By Company Name
- Customer Listing by Customer ID
- Customer Listing By Payment Terms
- Customer Listing By Type
- Customer Listing by Zipcode
- Customer Listing for Mail Merge
- Customer Listing with Email
- Customer Mailing Labels
- Customer Mailing Labels (4"x2")
- Customer Mailing Labels (Continuous)
- Customer Price Groups *Non-editable
- Customer Type with Email
- Requester Email List

*Non-editable denotes reports that have been depreciated and cannot be edited with the Report Editor

Running Reports

From the 'Main' menu select the 'Reports' button to enter the 'Report Selection' screen. The reports are separated into categories with similar subjects.

The report categories are listed in the drop down list. The individual reports for each category are displayed in the box to the right, with the selected report highlighted. A description of the highlighted report displays to the left.

Report Editor

The Report Editor (optional) module is used to modify the Standard Reports in Miracle Service. All reports can be modified unless they are marked as *Non-editable in the Reports menu. Please see the "Report Editor Installation & Quick Start Guide" for instructions on using this module

Select Range Button (Viewable and Accessible on Several Reports)

Several of the reports offer the opportunity to select parameters or ranges. For example, some reports can be generated by, start date and end date, some reports can be generated by model class or model number, some reports can be generated by customer groups, zones or regions. Most reports can be generated by

user defined parameters and ranges to optimize the report functionality. Notice the 'Select Range' button, under the list of reports, is defaulted to 'Report Range is Off'. Select the 'Select Range' button and enter the report specific ranges.

Selection Screens

This screen displays a list of items eligible for this report. There is one row per entry. Each row contains information about the entry relevant to the type of report requested.

Tech ID	Technician Name	Phone Number	Active	Zone	Include
BW	Ben Wilson		Yes	East Territory	No
DEF	Default Tech		No	Default Zone	Yes
JG	Josh Gordon		Yes	North Territory	Yes
KN	Kevin Norton		Yes	Local	No
SD	Scott Davis		Yes	South Territory	No
TR	Tyler Roberts		Yes	West Territory	No

Technician ID From To

Include

This field is on the far right column. The No/Yes toggle indicates whether to include this item in the report. The 'Clear Entries' button deselects all entries.

Field Selection

Select one of the fields from this table to narrow the parameters.

From...To...

The 'From / To' fields allow reports to be generated on sub-sets of information. For example, select 'Customer ID' from 0001 to 1000 or 'State' from 'Alabama to Michigan'. The 'From / To' will generate results in the first example in an numeric range and in the second example an alphanumeric range.

Like

In the 'Like' box, include a word, such as 'Copier', a city name or state name.

Select Button

After the criteria have been selected and the correct numbers of records were generated, click on the 'Select' button with your mouse. Every entry that falls into the parameters selected will show a blue 'YES' under the 'Include' column. Deselect an entry by clicking the word 'Yes', which will turn it to a red 'No'.

Print Selection

This feature offers the opportunity to print the document or preview the report. If 'Print Preview' is selected, the document will be displayed in a 'Print Preview' format. Selecting 'File', 'Print' from the pull down, may print the report.

Print

This creates the report to be 'Previewed' or 'Printed' based on the defaulted Print Selection in the Administration.

Select the 'Exit' button, to return to the 'Main' menu.

Chapter 42

Document Management

The Document Management feature in Miracle Service allows users to attach electronic files to a Customer, Equipment, Contracts, Service Task, or Sales Order record. Users are also able to include these files in e-mails sent for Service Tasks and Sales Orders.

Title / Summary	Date	Category	File	
Invoice Report for Customer	12/22/2010	Letters	Customer Invoice.pdf	Details

Define the Default Document Path

Before running the Document Management within Miracle Service, it is best to first define the default document path. This is the default location where you will store shared documents. Note: you can link a document from any location on your PC or network; however, only files that are stored in a location that is shareable to all Miracle Service users will allow all users to view the linked documents.

The default path should be a central shareable file folder on your server.

Run the Miracle Service Administration application and select 'Company Information -> Document Management'. A window will be displayed that will allow you to set the default document path. (see Figure 1).

When setting the Default Path, please ensure you use a UNC path. Do not specify a Mapped Network Drive Path. A path such as: \\mainserver\MiracleDB\Documents (where 'mainserver' is your server computer name) will work correctly.

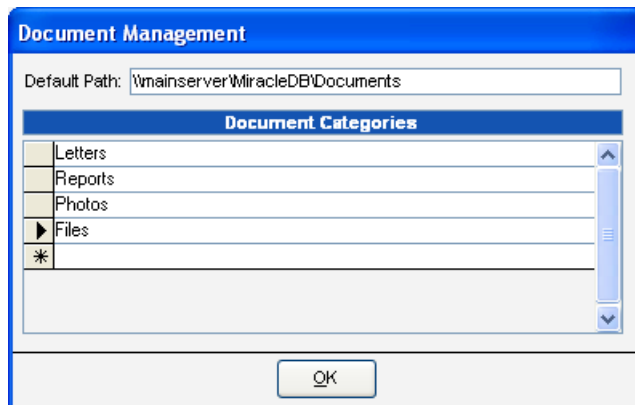


Figure 1

Define the Document Categories

To help organize documents for easy access, you can assign the document to a defined Document Category. These categories can be defined by you and you can set-up as many categories as necessary for your company.

Run the Miracle Service Administration application and select 'Company Information -> Document Management'. A form will be displayed that will allow you to enter your Document Categories. The defaults of Letters and Reports are preset. You can modify or delete these categories if desired (see Figure 1). Please note that you require at least one category for the Document Management to work correctly.

Attaching Documents

Documents can be attached to Customers, Contracts, Equipment, Sales Orders and Tasks. When you are viewing a Customer, Contract, Equipment, Sales Order or a Task, locate the 'Documents' button. When you select the 'Documents' button, the main documents window will open (see Figure 2). This window will list all of the documents currently attached.

You can add a new document by selecting the 'Add Document' button in the bottom left corner.

Document Management

Show: Customer Documents

Filter By:

☐ Show for A Date Range

Customer ID: AIR001 Number of Documents: 0

Title / Summary	Date	Category	File
-----------------	------	----------	------

Add Document
Egit

Figure 2

Clicking the 'Add Document' button will open a new window (see Figure 3).

Document Maintenance

File Path

Category

Title / Summary

☐ Customer Viewable in the Customer Portal

Figure 3

First click the browse button to select your document. This will open a typical file browser and allow you to select the file to link. This will select the default directory for your documents. The document must first be saved to this directory.

Browse to the file you wish to link to this record and click Select (See Figure 4).

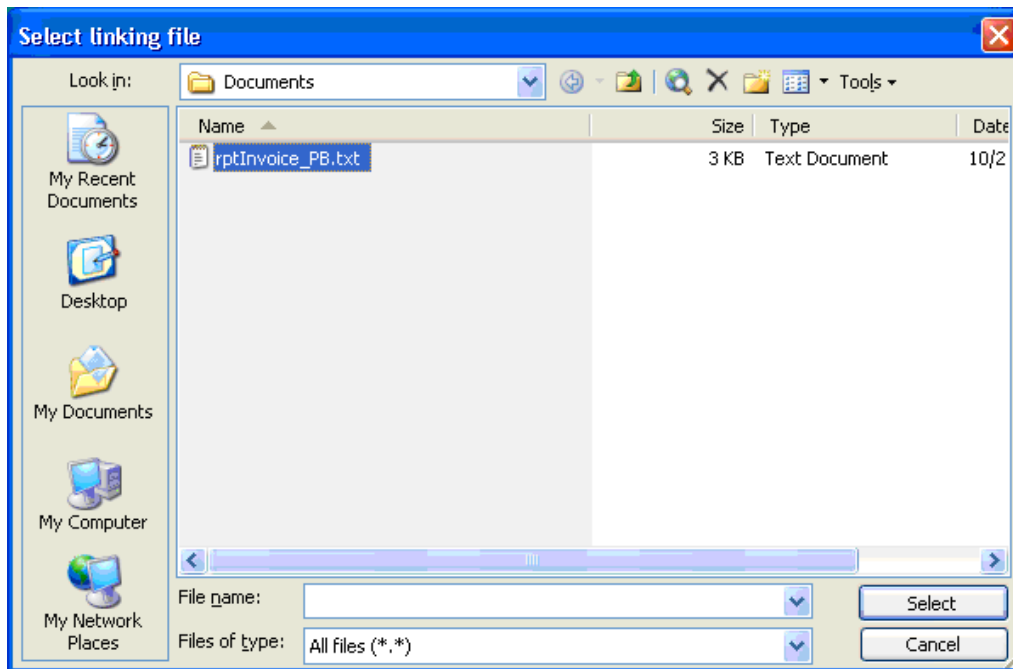


Figure 4

This will attach the document to the record. You can now select the 'Category' from the pull down list. Finally enter a description and summary of the document in the Title / Summary box. This is a searchable field. Entering a good description of the document will make finding this document later easier.

If you are using the eForms module and would like the document displayed in the eForms of the Customer Web Portal, you can check the Viewable in Customer Portal field. Note: this is only used by the eForms module today.

Click OK and the document link it saved.

Because Miracle Service is just saving a link to the file, the file size does not impact the database storage. You can easily link very large files to Miracle Service without being too concerned about the file size. However, if you are attaching files with the intention of including them in an e-mail in the future, you should consider the limitations on e-mail attachments.

Viewing Documents

Documents attached to Customers, Contracts, Equipment, Sales Orders and Tasks can be viewed directly from the record to which they are attached. When you are viewing a Customer, Contract, Equipment, Sales Order or a Task, locate the 'Documents' button. When you select the 'Documents' button, the main documents window will open (See Figure 2). This window will list all of the documents currently attached.

To view the document, click the document link in the 'File' column. (See Figure 5)

Document Management

Title / Summary

Show: Customer Documents Filter By: Show for A Date Range

Customer ID: AIR001 Number of Documents: 1

Title / Summary	Date	Category	File
Invoice Report for Customer	12/22/2010	Letters	Customer Invoice.pdf

Add Document Exit

Figure 5

When opening a document in Miracle Service you must have a valid viewer application on your PC. If you are trying to open a .PDF file, you will need a valid .PDF viewer such as Adobe Acrobat Reader.

E-mailing Documents

When working with Sales Orders or Service Task Ticket, you can attach documents linked to the record to an e-mail. To attach documents to the e-mail, first select to print the document. (You must be set to 'Print Preview' mode for this to work.) When the document is being displayed on the screen select File | E-mail from the top left menu. This will display the Email Account and Document Listing window (See Figure 6)

Email Account and Document Listing

Email Account List

Email Account Description	Email Account	Select?
Ship To customer e-mail	airinfo@rgstvnsskkgjh.com	☐
Bill To customer e-mail	airinfo@rgstvnsskkgjh.com	☒

Document List

Title / Summary	File	Select?
Service Task Ticket Details.	ServiceTaskSample.pdf	☒

OK

Figure 6

Check the e-mail address and then select the files to attach to the e-mail by checking the box under the 'Select?' column. You can select multiple documents to attach as desired.

Select OK and the documents will be included in the e-mail as an attachment.

See Email Report Settings in Administration Setup Section for information on configuring the e-mail feature in Miracle Service.

Searching for Documents

The Document Manage includes a search utility to find documents once a large number of documents are linked to the records. You can search for document in the local record. Or, you can search for all document attached to a customer using the Document Maintenance window from the Customer record or by selecting 'Customer Documents' from the 'Show' drop-down list. The customer record will allow you to view all documents that are attached to any record for that customer.

When you search for documents for the Customer record you will have more control over the filtering. In the customer record you can filter the documents by selecting the drop-down beside 'Show'. This will filter the list to only show documents in the record area specified. If you leave the selection on 'Customer Documents' it will show a complete list of all documents for this customer. Selecting any of the other 'Show' options will filter the list of documents to only that area.

Additional filter is also available by Category and / or Date Range. Select a specific Category and / or Date Range to further filter this list. This will create a smaller list of document to view.

You also have the options to search the 'Title / Summary' field at any time to look for a specific word or string of words. You can also use the 'wildcard' search in this field by adding an asterisk (*) to the beginning and / or end of the search.

For example you can enter *invoice* to search for the word 'invoice' anywhere in the Title / Summary field. Alternatively, you can enter invoice* to find the Title / Summary field that start with the word 'invoice'.

You can combine all or any combination of these filter and search techniques to quickly and easily locate the document you wish to find.

Yield Tracker

Yield tracking involves capturing the units of parts used and sold and comparing the values to the Service Contract's defined yield levels. Tracking alerts are generated when user-defined levels and criteria have been met. Yield tracking is available for active and non-cancelled Service Contracts. Usage levels are calculated based on the items from Sales Invoices and Parts Used on a Service Task.

Miracle Service supports two distinct methods of tracking yields.

1. Yield Tracking by Parts Category

This method allows users to define yield limits on the categories that are included on Service Contracts. A single alert type is generated when this method is used.

a. Exceed Alert: this occurs when the included categories usage level exceeds the predefined yield limit on the Service Contract.

How Alerts are calculated*:

$\text{Exceed Alert} = (\text{Total Category Qty}) > (\text{Category Usage})$

*When using a part on a Service Task, Invoice or Sales Order, the current quantity value is added to the purchased/used quantity levels.

2. Yield Tracking by Meter Clicks

This method allows users to define yield limits on inventory items that are linked to a Service Contract's model class and model number. The total yield limits and the meter clicks on the Service Contract are evaluated to generate two types of alerts.

a. Exceed Alert: this occurs when the parts usage level exceeds the predefined warning level for the number of meter clicks on the Service Contract

b. Low Alert: this occurs when the parts usage level is running low for the number of meter clicks on the Service Contract.

How Alerts are calculated:

Exceeded Alert*:

$\% = (((\text{Total Item Qty} * \text{Item Yield}) - (\text{Meter current reading} - \text{Meter SEC start reading})) / \text{Item Yield}) * 100$

The % is compared to the meter's warning percentage.

Note: the 'Meter current reading' is the most recent meter reading on the equipment. So if this reading is being updated multiple times during the month, it will calculate the Yield Alert based on the more current readings.

Low Alert:

$\text{ClicksPerDay} = \text{Meter Difference} / \text{Days Difference}$

$\text{DaysLeft} = (((\text{Total Item Qty} * \text{Item yield}) - \text{Meter Difference}) / \text{IngClicksPerDay})$

The DaysLeft is compare to the meter's alert days.

*When using a part on a Service Task, Invoice or Sales Order, the current quantity value is added to the purchased/used quantity levels.

Configuring Yield Tracker

The Yield Tracker module offers a great amount of flexibility in order to track usage levels that are specific to your company. In order to take full advantage of this module you will need to configure your data based for the specific method. There are two methods available: By Parts Category or Meter Clicks.

Method 1 - By Parts Category - This method allows the user to track the use of a specified quantity of parts in each inventory category on a contract. Parts in each inventory category can have a limit set and once they use more parts than the limit shown, the Yield Alert is displayed and the parts become chargeable by default.

Method 2 - By Meter Clicks - This method allows the user to track the use of a specific part or parts against a meter. This is designed to track toner usage against a meter.

It is only possible to use one or the other method, not both.

Steps:

1. Select the Yield Tracking Method
2. Setup: Yield Tracking by Parts Category (Method 1)
3. Setup: Yield Tracking by Meter Clicks (Method 2)
4. Viewing Alerts
5. Ignore Yield Alerts

Select the Yield Tracking Method

Open the Miracle Service Administration application and click the 'Equipment & Contracts' button. From this menu, select the 'Yield Tracker' Defaults button to open the 'Yield Tracker Defaults' form (see Figure 1).

Yield Tracker Type

Select the yield tracking method that applies to your company. When you select the 'Yield Tracking by Meter Clicks' you will also need to set the default Warning Percentage and Days to Alert.

Warning Percentage

The default percentage to use for generating alerts when limits have been exceeded. The warning percentage can be modified at the Service Contract level. The warning method is applicable only to the 'Yield Tracking by Meter Clicks' method.

Days to Alert

Days to Alert defines the default number of days to use for generating alerts when the parts usage level is running low for the number of meter clicks on the Service Contract. The number of days can be modified at the Service Contract level. This warning method is applicable only to the 'Yield Tracking by Meter Clicks' method.

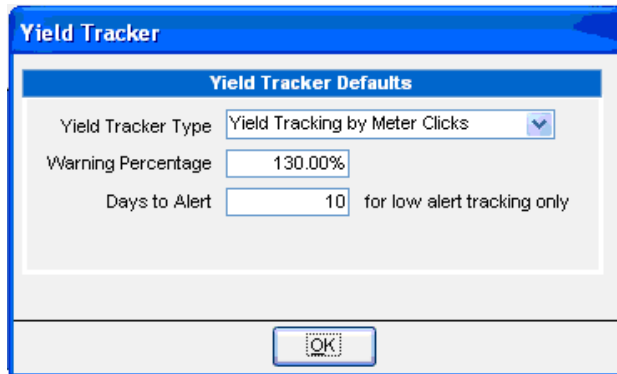


Figure 1 - Selecting Yield Tracker Type

The next step is dependent on the tracking method that you have selected to use. Please go to the setup section for your method of choice.

Setup: Yield Tracking by Parts Category (Method 1)

Service Contract templates store specific information for the wide variety of Service Contracts that you support. One of the elements that you define on a Service Contract template is the categories of parts that are included in the Service Contract. The yield tracking module includes a value to store the usage limit on each category that you have selected. It is this value that will be used for comparing against the actual usage levels for items belonging to the category.

To configure usage levels, select 'Contract Templates' from the 'Equipment & Contracts Administration' menu. Once you have created your contract template select the 'Categories Included' button (see figure 2).

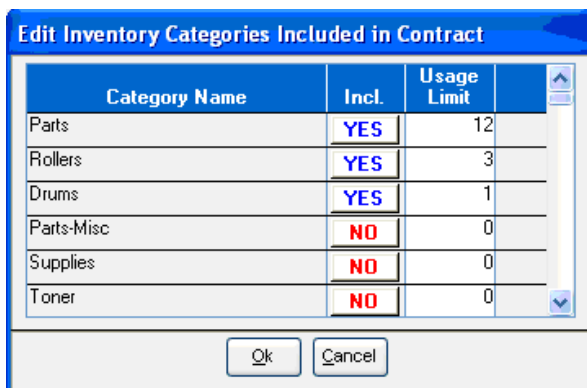


Figure 2 - Adding Usage Limits to Categories Included in Contract

Setup: Yield Tracking by Meter Clicks (Method 2)

This method involves linking applicable parts ('Linked Items') to a Model Class/Model Number meter and setting individual yield limits on each part. The part's yield limit will be used when checking for alerts. The alert screen is based on the individual part number.

To link parts to a meter on a Model Class/Model Number, select 'Inventory' from the Main menu. Click on the 'Model Class' button and select a metered Model Class. Click on the 'Meter' button to display the 'Model Meter Information' form (see figure 3).

For each meter belonging to the Model Class/Model Number you will notice a zoom ("+") button under the 'Linked Items' column. Click this button to view an entire list of your inventory. Note that you can filter parts by the Category name. Select all of the applicable parts that you would like to link to the selected meter. You are not able to link the same part to a different meter belonging to the same Model Class/Model Number.

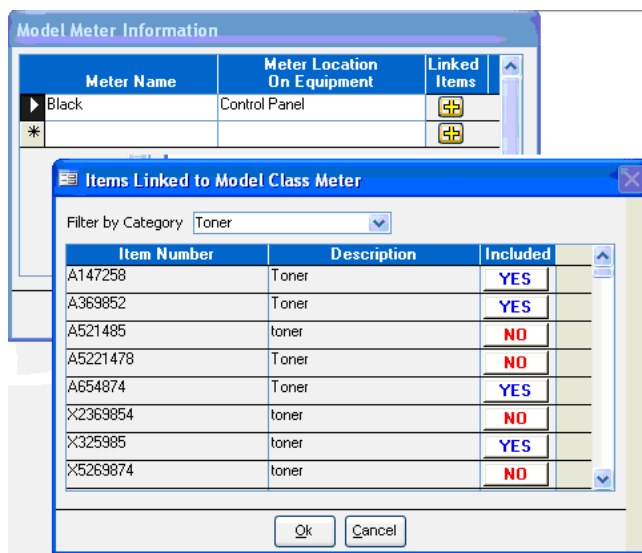


Figure 3 - Linking Parts to a Meter

You will now need to add the manufacturer's yield limit to the inventory parts that you have selected to link to the meters. For this you will need to open the Miracle Service Client application. From the 'Inventory Maintenance' form, locate the applicable item numbers and set the contract yield amounts for each (see figure 4).

Inventory Maintenance

Item Number

Inventory Item Type

Serialized

Non-Serialized

Item No.

A147258

Description

Toner

Unit of Measure

Each

Category

Toner

Tax Category

Sales Tax

Model Class

Segment 3

Model No

A19573512

Primary Supplier ID

ABC2

Primary Supplier Part No

Repairable

☐

Customer Portal Part

☒

Prefix Category

☐ (QB export setting only)

Contract Yield

10000

Comments

Warehouse Summary

Total Qty in Stock

137

Average Cost Per Unit

\$9.68

Average Retail Per Unit

\$15.99

Total Ins. Valuation

\$1,326.16

Total Sales Valuation

\$2,190.63

Total Reserved Parts

0

Total Faulty Parts

0

Main Warehouse Stock Level

QIS

137

Min

0

Max

0

Bin

Alternate Suppliers

Quantity Pricing

Warehouse Info

User Screens

Import Parts

Superseded Parts

Figure 4 - Setting Contract Yield Limits

The warning percentage and alert days that you configured previously will be defaulted in for new Service Contracts when adding new meters to an existing Service Contract. To modify or review the settings on a Service Contract select the 'Meters' tab. From this form you can modify the values for each meter attached to the Service Contract.

Yield Warning Percentage	Low Yield Alert
150.00%	10
150.00%	10
150.00%	10
150.00%	10

Figure 5 - Modifying Alert Defaults on Service Contract

Viewing Alerts

There are various methods of viewing alerts within the application. To view an entire list of alerts for all active and non-cancelled Service Contracts, select the 'Yield Tracker' button from the 'Contracts' menu.

From this form you can see the Service Contract details with the warning level. In this example, the Service Contract has exceeded the warning percentage by 105.04%.

Yield Alerts							Number of Alerts: 1
Group By: Contract ID							
Contract ID	Contract ID	Customer ID	Customer Name	Serial Number	Meter Name	Warning Level	
71	71	KING001	Kingsway Trucking	X5212369	Black	Alert: 150% Actual: 187.5%	Details

Figure 6 - Viewing Alerts for all Service Contracts

Details on the items used in the Yield Alert calculation can be viewed by clicking the 'Details' button.

Contract Yield Details					
Type	Number	Item Number	Quantity	Yield	
Invoice	200122-0005	X2369854	2	9000	
Clicks Used	1125	Total Quantity	2	Total Yield	18000
OK					

Figure 7 - Viewing Alerts Details

An alert is also generated when a part is added to a Sales Invoice, Sales Order or Service Task. When this occurs at this level the user is given the option to ignore the alert or to charge the item.

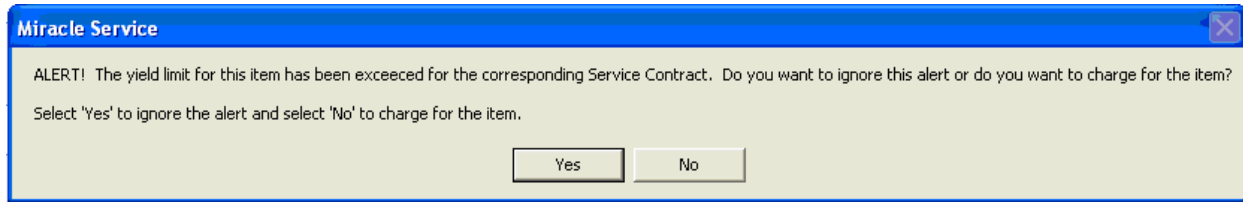


Figure 8 - Alert as a Message Prompt

There is also a 'Yield Alert' warning light on Service Tasks.

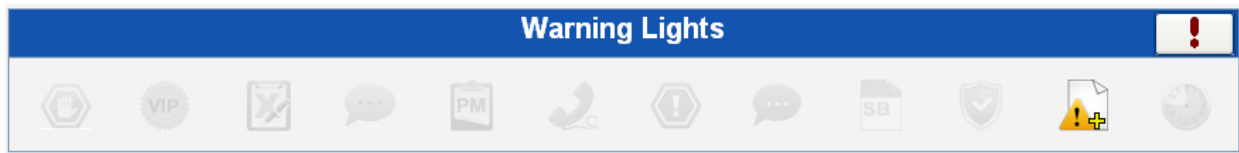


Figure 9 - Alert as a Warning Light

Ignore Yield Alerts

You can flag a contract so its Yield Alert is ignored. This can be done temporarily so the machines on a specific contract can be removed from the Yield Alert screen.

To ignore Yield Alerts, click 'Edit' on the contract and then click the box beside the "Ignore Yield Alerts". Click 'OK' and these alerts will no long be generated anywhere in Miracle Service.

The screenshot shows the 'Service Equipment Contracts' window in Miracle Service. The 'Properties' tab is active, displaying details for Contract ID 101. The 'Flags' section shows 'Active', 'Not Cancelled', 'Metered', and 'Billed'. The 'Customer ID' is BOM001, and the 'Bill-To ID' is also BOM001. The contract is for 'Bank of Marion' at 199 W Main St, Marion, VA, 24354. The 'Contract Template' is 'Simple Arrears', and the 'Contract Start Date' is 01/05/2012. The 'Contract Term' is 'Annual', and the 'Contract End Date' is 30/04/2013. The 'Period Billing Interval' and 'Meter Billing Interval' are both set to 'Monthly'. The 'Base (Period) \$' is \$450.00, 'Additional (Period) \$' is \$625.00, 'Other (Period) \$' is \$0.00, and 'Auto Zone (Period) \$' is \$0.00. The 'Total Contract \$' is \$12,900.00, and the 'Period \$ To Date' is \$2,150.00. The 'Ignore Yield Alerts' checkbox is checked. The 'Auto Email Meter Due Info' checkbox is unchecked. The 'Contract ID 101' is displayed in the top right corner. The 'Properties' tab is selected, and the 'Contract Template' is 'Simple Arrears'. The 'Contract Start Date' is 01/05/2012, 'Contract Term' is Annual, and 'Contract End Date' is 30/04/2013. The 'Period Billing Interval' is Monthly, and 'Meter Billing Interval' is Monthly. The 'Base (Period) \$' is \$450.00, 'Additional (Period) \$' is \$625.00, 'Other (Period) \$' is \$0.00, and 'Auto Zone (Period) \$' is \$0.00. The 'Total Contract \$' is \$12,900.00, and 'Period \$ To Date' is \$2,150.00. The 'Ignore Yield Alerts' checkbox is checked. The 'Auto Email Meter Due Info' checkbox is unchecked. The 'Contract ID 101' is displayed in the top right corner. The 'Properties' tab is selected, and the 'Contract Template' is 'Simple Arrears'. The 'Contract Start Date' is 01/05/2012, 'Contract Term' is Annual, and 'Contract End Date' is 30/04/2013. The 'Period Billing Interval' is Monthly, and 'Meter Billing Interval' is Monthly. The 'Base (Period) \$' is \$450.00, 'Additional (Period) \$' is \$625.00, 'Other (Period) \$' is \$0.00, and 'Auto Zone (Period) \$' is \$0.00. The 'Total Contract \$' is \$12,900.00, and 'Period \$ To Date' is \$2,150.00. The 'Ignore Yield Alerts' checkbox is checked. The 'Auto Email Meter Due Info' checkbox is unchecked. The 'Contract ID 101' is displayed in the top right corner.

Event Notification Manager

The Event Manager module is an optional module that supports the service management process by generating active alerts based on events occurring in the system. Events can include activity on tasks, contract renewal notifications or document additions. This section of the manual describes the set-up and capability of the Event Manager module for Miracle Service.

The Event Manager module is integrated with Service Task and Service Contracts to facilitate the active notification and management of these areas of the application. Notification are automated and can be notify customers, technicians and management of events that are of interest in the day to day operations.

Installing and Operating the Server Console

The Server Console is a Task Bar application that runs continuously on the server. It connects to the Miracle Service database and supports a number of features and services available for Miracle Service. For Notifications it is used to locate events and based on the Notification Definitions configured, it will act upon them accordingly. It is important to install this application on the server only as installing multiple version will create multiple event notifications. We only support the installation of this application on to the same server as the Miracle Service database.

Full installation instruction are provided with the CD or on the Miracle Service web site where you can download the application.

Once the application is installed you are able to configure your Event Notification Definitions.

Configure Event Notification Definitions

The Event Manager module is set-up in the Miracle Service Administration application.

Go to Tab 14 - Event Notifications.

Event Notification Definitions are used to define the different notifications you want generated and the action take when they are generated. The following events are available:

Contract Expiry. This event will track when contracts expire. The definition includes a setting for the days prior to expiry date to generated the event.

Create New Task. This event will track when a new task is created.

Document Added. This event will track when a new document is added to a task.

Modify Note. This event will track when a note is modified on a task.

Modify Task. This event will track when a note is modified by the original note user.

Modify Task by Other. This event will track when a task is modified by other users.

Note Added. This event will track when a new note is added to a task.

Overdue Task. This event will track when a task is past due. The definition includes a setting for the number of hours that the task is past due before the event is generated.

Parts Below Min. This event will be generated when a stock level of a part reaches the minimum stock level.

Parts Needed (Rescheduled). This event will track when a part is needed on a rescheduled task.

PM Due. This event will be generated when a PM is due on an equipment record.

Select Customer (Contract). This can be linked to a pop-up message to display whenever a customer is selected when creating a contract.

Select Customer (Inv). This can be linked to a pop-up message to display whenever a customer is selected when creating an Invoice.

Select Customer (SO). This can be linked to a pop-up message to display whenever a customer is selected when creating a Sale Order.

Select Customer (Task). This can be linked to a pop-up message to display whenever a customer is selected when creating a Service Task.

SLA Warning. Email or Highlight events can be set-up to identify alert users to possible issues in meeting the Service Level Agreement of a service call. When the Highlight method is selected the user can specify the number of minutes prior to the SLA time they would like the SLA field color changed in Miracle Service. The SLA Time is calculated from the task created date/time plus the Priority hours (plus Pending Minutes if this feature is active).

Note 1: SLA does not consider non-working hours so when comparing this to the 'Time to Target (TTT)' value in the open task screen, it will differ for tasks scheduled after non-working days (typically weekends and holidays).

Note 2: The SLA Highlight event has 3 levels. The first level is the one closest to the SLA target time and should be set to the shortest notification time (typically 0). The next two levels are set to the appropriate times so users will see these events highlighted as the time approaches. Users can set the foreground and background colors to suit their needs.

The screenshot shows the 'Event Notification Definition' form. The 'Description' field is set to 'SLA' and the 'Active' checkbox is checked. The 'Event' dropdown is set to 'SLA Warning'. Under 'Apply To', 'All Customers' is checked. The 'Module' section has 'Miracle Service' checked, while 'Customer Portal' and 'Mobile Field Technician Console' are unchecked. The 'Action' dropdown is set to 'Highlight'. Below this, a text box explains: 'Specify the rules and formatting options for the SLA time calculated on the Open Tasks form. You can configure up to 3 rules leaving unused rules blank. The first rule will also apply when the SLA is breached (current time is after SLA time).' Three rules are defined in a table:

Time Prior to SLA	Preview
60 mins prior to SLA time (includes SLA breach)	AaBbCcDd (Red background)
240 mins prior to SLA time	AaBbCcDd (Yellow background)
480 mins prior to SLA time	AaBbCcDd (Green background)

Task Assigned. This event tracks when a task is assigned to a technician.

Task Completed. This event tracks when a task is completed in Miracle Service.

Task Rescheduled. This event tracks when a task is reschedule.

Task Unassigned. An Email alert can be set to automatically send an email to the defined Recipients if the call remains unassigned for more than the number of minutes defined in the event. This notification will repeat on the interval until the call is placed in to an assigned status.

Task Web Closed. This event tracks when a task is closed in the web portal.

Description	Event Type	Action
Contract Expiry Notification internally	Contract Expiry	Email

Apply To. It is possible to define which customers an event notification will be applied to. If the event Apply To 'All Customers' is checked, then the event will be sent to all applicable customers when the event is triggered. However, if this is not checked, then the 'Next' button will appear at the bottom of the screen. When you click the Next a list of customers will be displayed. Users can select the specific customer that will receive the notifications when they are generated.

Action. The primary available action is E-mail. There are a few other actions that are applicable to specific Event types. These are Alert or Highlight actions. Alert actions will open a small pop-up window on the screen with a message. Highlight actions will change the color of the field.

HTML. Selecting HTML enables the use of more advanced formatting in the E-mail. When HTML is selected users can bold, underline and italicize text. Images can also be inserted. When inserting images we recommend placing the image files in the Miracle DB folder to ensure they are available when the E-mail is generated.

Creating a New Event Notification Definition

Click the 'Add Event' button to launch a new Event Notification Definition form. The form is used to enter one specific Event Notification Definition.

Description. This is a free-form text field and is used to uniquely describe the specific Event Notification Definition. Use the Description to help describe the purpose of the Event Notification Definition so other users can understand its use.

Event. Select the type of event. Only one can be selected per Event Notification Definition; however, additional Event Notification Definitions can be created for the same Event type using different sending criteria or text.

Included Documents. For some events the Included Documents field will be displayed. The allows this event to attach documents linked to the task to be automatically attached to the e-mail being sent based on the option selected. The options are None, All and Public Only. ‘All’ will attach all documents link to the task. ‘None’ will link no documents. ‘Public Only’ will only link documents that are checked as ‘Viewable in the Customer Portal’.

Apply To. This setting will set the event so it will apply to all of the related records. If this is not checked, the user will be able to select the specific records that the event will apply.

Recipients. For the E-mail Action, this is a list of the people that will receive the e-mail when the event occurs. It is possible to use a standard e-mail address such as name@company.com. However, it may be the case where the recipient changes for each event. In this case a Keyword can be entered in the Recipient field which will pull the e-mail address from the database based on the specific event being generated.

The Recipient Keyword can be typed in as shown below or the user can click the Keyword List button to select from a list of available Keywords.

The following is a list of available Recipient Keywords. Note: Not all Keywords are available for all Event types. For example the Technician ID would not be available for a Contract Renewal; however, it will show-up as a standard Keyword in the Keyword List.

Recipient's list:

	<u>Keyword Value</u>
Technician	TECHID
Rescheduled Technician ID	TECHIDRESCHEDULED

Customer (ShipTo)	SHIPTO
Customer (BillTo)	BILLTO
Requester	REQUESTER

Created user	CREATEDUSER
Model Sales Person	PRODUCTSALESPERSON
Sales Person	SALESPERSON

Main Equipment	EQUIPMENTEMAIL
All Equipment	EQUIPMENTMULTIEMAIL

Subject. The subject can be defined with standard text or with a mix of Keywords and standard text.

Email Text. The Email Text is the body of the e-mail. Like the Subject it can a mix of Keywords and standard text.

The following is a list of available Subject and Body Keywords. Note: Not all Keywords are available for all Event types. For example the Technician ID would not be available for a Contract Renewal; however, it will show-up as a standard Keyword in the Keyword List.

Subject and Body list:

	<u>Keyword Value</u>
Request Number	REQUESTID
Request Type	REQUESTTYPE

Task ID	TASKID
Task Number	TASKNUM
Task Description	TASKDESCRIPTION
Task Type	TASKTYPE
Task Created Date	TASKCREATEDATE
Task Priority	PRIORITY
Scheduled Date	SCHEDULEDATE
Technician ID	TECHID
Technician Name	TECHNAME
Rescheduled Technician ID	TECHIDRESCHEDULED
Rescheduled Technician Name	TECHNAMERESCHEDULED
Rescheduled Notes	RESCHEDULENOTES
Customer P.O.	CUSTOMERPO
Work Performed	WORKPERF

Customer ID (ShipTo)	SHIPTO
Customer ID (BillTo)	BILLTO
Customer Name (ShipTo)	SHIPTONAME
Customer Name (BillTo)	BILLTONAME
Requester Name	REQUESTER
Requester Phone	REQUESTERPHONE
Requester Email	REQUESTEREMAIL

Model Number	MODELNUMBER
Serial Number	SERIALNUMBER
Model Sales Person	PRODUCTSALESPERSON

Contract ID	[SEC]
Contract Renewal Date	[RENEWALDATE]

Created user	CREATEDUSER
Sales Person	SALESPERSON

Sales Order Number	SONO

Part Item Number	PARTNO
Part Item Description	PARTDESCRIPTION
Warehouse ID	WAREHOUSEID
Warehouse Name	WAREHOUSENAME
Minimum Stock Level	MIN
Maximum Stock Level	MAX
Quantity in Stock	QIS

Recommended Quantity to Order	QTYORDER
Note Text	NOTEBODY

If a Keyword is selected and is not valid for that Event type, it will interpret the Keyword as just standard text.

Modify Event Notification Definitions

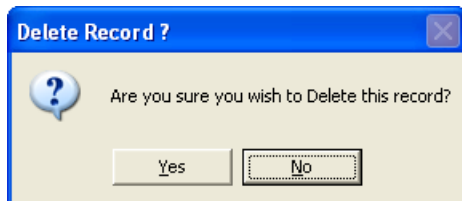
Modifying the Event Notification Definition can be done at any time. The modified version of the Event Notification Definition will be used for the next event once it is saved.

Click the zoom [+] button on the left of the Event Notification Definition description to open the Event Notification Definition edit window. Modify the information in the Event Notification Definition and click the 'Save' button.

Delete Event Notification Definitions

Deleting an Event Notification Definition can be done at any time.

Click the zoom [+] button on the left of the Event Notification Definition description to open the Event Notification Definition edit window. Click the 'Delete' button to remove the Event Notification Definition. The following window will display to confirm your delete request.



Click 'Yes' to delete the Event Notification Definition or 'No' to abort the delete request.

Note: once the Event Notification Definition is deleted it cannot be undone.

Configuring Customer Pop-ups

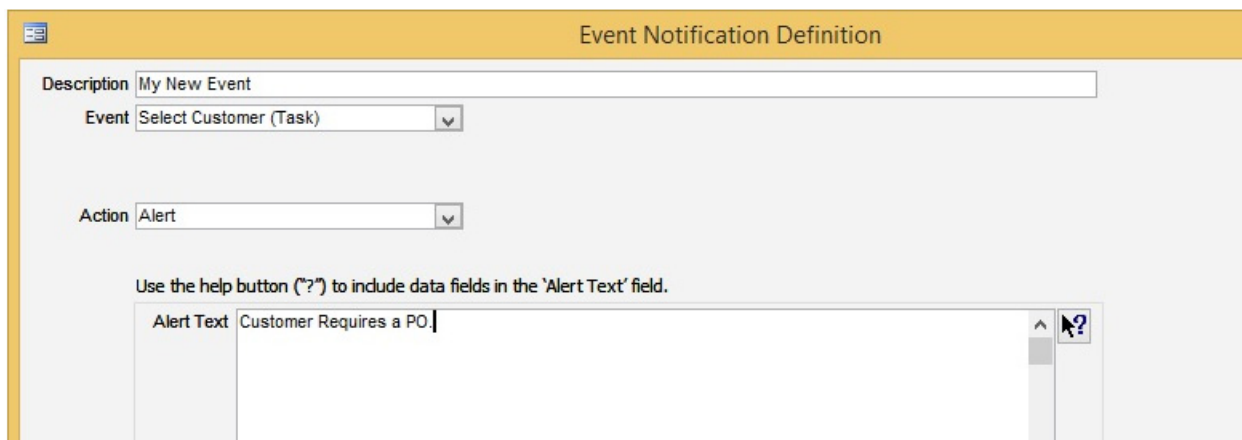
These can be set-up from the Customer Center using the 'Events' button.

The screenshot shows the 'Customer Center' window for 'ABC Manufacturing' (Customer ID: ABC001). The window has a top navigation bar with 'Options' and 'Help'. Below the navigation bar, there are tabs for 'Main', 'Requests', 'Invoices', 'Equipment', 'Service Tasks', 'Service Contracts', 'Sales Orders', 'Sites', and 'Return Orders'. The 'Main' tab is active, displaying a form with various fields for customer information. The 'Events' button is highlighted with a yellow box. The form includes fields for Company Name, Billing Attention, Address, City, State, Zipcode, Country, Long Dist, Phone, Fax, Email, Website, Region, Vertical Market, and Sales Person. There are also checkboxes for 'Active Customer' and 'VIP Customer', and a 'Comments & Location Directions' text area. At the bottom of the form, there are buttons for 'Financial Info', 'Pricing Info', 'User Screens', 'Documents', 'Notes', 'Export Templates', and 'Events'. The 'Events' button is highlighted with a yellow box.

When you open the events button the Event Notification Definition window is presented. The user can define a new event for a specific customer. The event can be specific to Contracts, Invoices, Sales Orders or Tasks.

The screenshot shows the 'Event Notification Definition' window. It has a yellow header bar with the title 'Event Notification Definition'. Below the header, there is a 'Description' field. To the left of the 'Description' field, there are two dropdown menus: 'Event' and 'Action'. The 'Event' dropdown is set to 'Parts Needed' and the 'Action' dropdown is set to 'Select Customer (Contract)'. The 'Select Customer (Contract)' option is highlighted with a yellow box. To the right of the 'Action' dropdown, there is a checkbox labeled 'HTML'. Below the 'HTML' checkbox, there is a text area for 'Recipients' with a help icon. Below the 'Recipients' text area, there is a 'Subject' field with a help icon. Below the 'Subject' field, there is an 'Email Text' field with a help icon. The 'Description' field is empty.

When you select the Event Type the Action is defaulted to Alert. You can enter the pop-up message in the Alert Text box.



The 'Event Notification Definition' window has a yellow title bar. It contains the following fields:

- Description:** A text box containing 'My New Event'.
- Event:** A dropdown menu showing 'Select Customer (Task)'.
- Action:** A dropdown menu showing 'Alert'.
- Alert Text:** A text box containing 'Customer Requires a PO.' with a help icon (?) to its right.

Below the 'Alert Text' field, there is a small instruction: 'Use the help button ("?) to include data fields in the 'Alert Text' field.'

When you click Next, you can select which customers in the customer group to which the event is applicable.



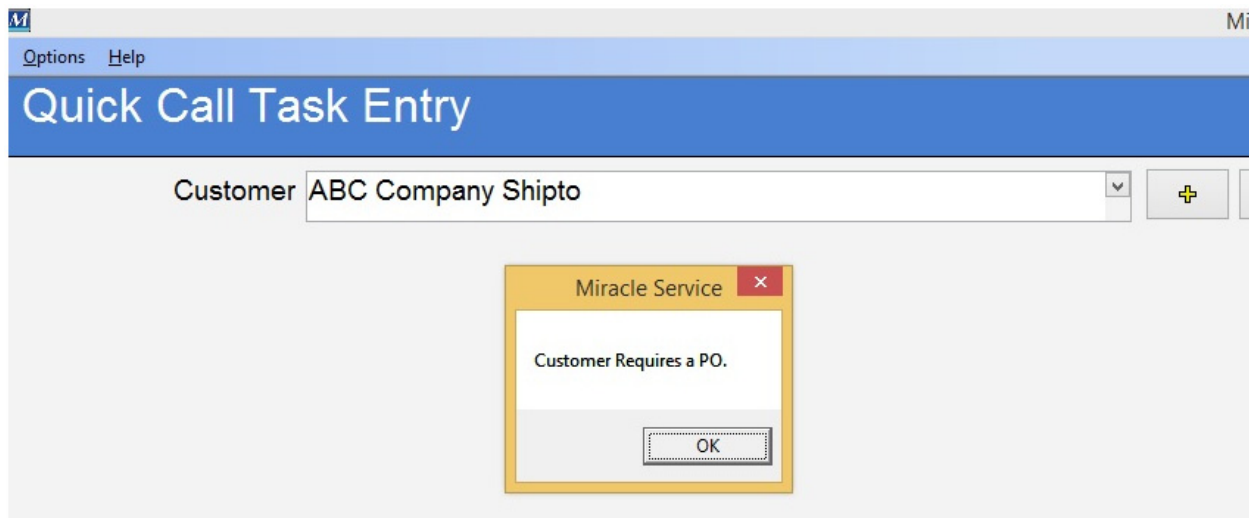
The 'Customer Listing' window has a blue title bar. It contains the following elements:

- Customer ID:** A dropdown menu.
- Apply to selected BillTo customers and their locations:** A checkbox.
- Show Attacher:** A checkbox that is checked.
- Table:** A table with columns: Attac, Customer ID, Company Name, Address, and City. It lists two customers: AIR001 (International Airlines) and BKS001 (BK's Law Office).

Attac	Customer ID	Company Name	Address	City
☒	AIR001	International Airlines	10368 Wallace Alley Street	Kingsport
☒	BKS001	BK's Law Office	634 Middle Creek Rd	Sevierville

In this case, when a user selects the customer on a Quick Call the pop-up message is displayed. When you Click OK, you can proceed with taking the call.

A user can also select 'Apply to selected BillTo customers and their locations' if the Event Notification should automatically apply to all of the related locations as well.



The 'Quick Call Task Entry' window has a blue title bar. It contains the following elements:

- Customer:** A dropdown menu showing 'ABC Company Shipto'.
- Options:** A button.
- Help:** A button.
- Pop-up:** A 'Miracle Service' dialog box with the text 'Customer Requires a PO.' and an 'OK' button.

These events are designed to give users the flexibility to add customer specific pop-ups so they can be alerted to customer information when working with a specific customer record.

Chapter 45

eForms

The eForms Module is an optional module that links Adobe™ electronic forms to service tasks automatically. These forms are published in the Technician Web Portal where they can be easily download, updated and uploaded back to the companies server so the complete form will be available and stored for future reference.

The eForms module is designed to be used with the Technician Web Portal on a Tablet style computer running Adobe Acrobat Reader version 8 or later. It is also intended to publish these forms in the Customer Web Portal to make them easily available for the customers to access at any time.

The electronic forms can be any standard Adobe™ electronic form or can be a form provided by Nexent Innovations Inc. The features and capabilities of the forms are limited to the functionality provided by Adobe and supported in the version of the Adobe Acrobat Reader being used.

Creating Adobe™ Electronic Forms

Adobe Electronic Forms are created using the Adobe Acrobat Pro application. The version currently support is Adobe Acrobat X Pro. We expect users will consult Adobe for any question on using this software application and its limitations. This information is intended to supplement your Adobe Acrobat knowledge and provide some information on how these can be designed to work more effectively with Miracle Service.

File Names for the forms files must not contain the following characters:

When creating a form please ensure the file name does not contain spaces or sensitive characters (&,% ,? ,# ,@). The file name will be embedded in to a URL path to upload back to your server and these special characters will create an unrecognizable path.

Keywords

Miracle Service will automatically populate fields in the form if those field names match one of the Keywords Miracle Service is programmed to use. The following is a list of keywords you can use in your forms to auto populate those fields.

Task Related Fields

Technician ID |TECHID|

Technician Name |TECHNAME| - for logged in technician. Useful when multiple technicians are assigned to a call.

All Assigned Technicians |TECHASSIGNED|

Rescheduled Technician ID |TECHIDRESCHEDULED|

Rescheduled Technician Name |TECHNAMERESCHEDULED|

Customer ID (ShipTo) |SHIPTO|

Customer ID (BillTo) |BILLTO|
Customer Name (ShipTo) |SHIPTONAME|
Customer Name (BillTo) |BILLTONAME|
Requester Name |REQUESTER|
Created User |CREATEDUSER|
Sales Person |SALESPERSON|
Task Number |TASKNUM|
Task ID |TASKID|
Request Number |REQUESTID|
Requester Phone |REQUESTERPHONE|
Request Type |REQUESTTYPE|
Task Type |TASKTYPE|
Task Description |TASKDESCRIPTION|
Scheduled Date |SCHEDULEDATE|
Note Text |NOTEBODY|
Customer Bill to e-mail address |CUSTOMERBILLTOEMAIL|
Customer Ship to e-mail address |CUSTOMERSHIPTOEMAIL|
Customer Bill to Fax Phone Number |CUSTOMERBILLTOFAX|
Customer Ship to Fax Phone Number |CUSTOMERSHIPTOFAX|
Shipto Address Line 1 |SHIPTOADDRESS1|
Shipto Address Line 2 |SHIPTOADDRESS2|
Shipto City |SHIPTOCITY|
Shipto State |SHIPTOSTATE|
Shipto Zip Code |SHIPTOZIP|
Billto Address Line 1 |BILLTOADDRESS1|
Billto Address Line 2 |BILLTOADDRESS2|
Billto City |BILLTOCITY|
Billto State |BILLTOSTATE|
Billto Zip Code |BILLTOZIP|

Contract Related Fields

Contract ID |SEC|
Contract Renewal Date |RENEWALDATE|
Warehouse ID |WAREHOUSEID|
Warehouse Name |WAREHOUSENAME|
Customer P.O. |CUSTOMERPO|

Work Performed |WORKPERF|

Task Created Date |TASKCREATEDATE|

Equipment Related Fields

Model Number/Model Class |MODELNUMBER|

Model Number only of the equipment |MODEL|

Serial Number |SERIALNUMBER|

Equipment Description |EquipDesc|

Model Sales Person |PRODUCTSALESPERSON|

Equipment Requester Fax Phone Number |REQUESTERFAX|

Equipment Requester E-mail Address |REQUESTEREMAIL|

Equipment Installation Date |INSTALLDATE|

Equipment Location |LOCATION|

Model Class of equipment |MODELCLASS|

Equipment Manufacturer as listed on the Model Class Model Number form |MANUFACTURER|

Last PM Date as listed on Equipment Record |LASTPMDATE|

Next PM Date is calculated from the Last PM Date plus the PM period. |NEXTPMDATE|

PM Cal Date is calculated date based on today's date plus the PM days. |PMCalDate|

Number of days between PM visits |PMDays|.

Unit ID of equipment |UNITID|

Weight Kit list all weight kits used for the equipment |MEMWEIGHTKITS|

- this is a standard listing similar to the following:

Kit	NIST	Date	Description
4001	KL8900	6/15/2015	50 lb Weight Kit
7891	KG7728	6/15/2015	25lb Weight Kit

Equipment List for Parent and Child components |EQUIPMENTLIST|

- this is a standard listing similar to the following

Make: ABC Manufacturing Model: A19573512 SN#: A9641531556 Capacity: 500 lb Graduation: 0.01 lb

Make: Rice Lake Model: 920i SN#: 78399200 Capacity: 0 Graduation: 0

Capacity from the Parent Equipment Record |CAPACITY|

Class from the Parent Equipment Record |CLASS|

Increment from the Parent Equipment Record |INCREMENT|. Some people refer to this as the graduation.

Unit of Measure from the Parent Equipment Record |UOM|.

Parts Below Minimum Fields

Part Number |PARTNO|

Part Description |PARTDESCRIPTION|

Warehouse ID |WAREHOUSEID|

|Warehouse Name WAREHOUSENAME|

Minimum Stock Quantity for warehouse |MIN|

Maximum order to level for warehouse |MAX|

Current Quantity in Stock |QIS|

Calculated quantity to order (MAX - QIS) |QTYORDER|

When entering these fields in the Adobe form, the field name include the pipe (|) character at the beginning and end of the Keyword.

Submit Button

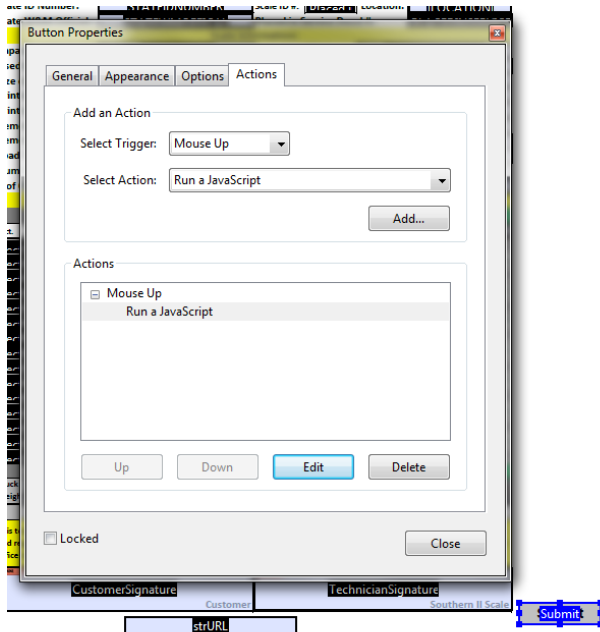
The eForm function is designed to support a 'Submit' button or action on the Adobe electronic form. This is designed to simplify the process of uploading the form to the server. Depending on the device being used the PDF Viewers support different submit capabilities.

For Adobe Reader 10.X or Later (Not Mobile Edition) - Windows Device Support

To embed a 'Submit' button on the form the user will need to add the following items to their Adobe form. This can only be added using the Adobe Acrobat X Pro. Users will need to purchase that separately from Adobe and install it on their computer. Users needing assistance with Adobe Acrobat X Pro or later application should contact Adobe for support. Any assistance provided by Nexent is on a strict fee for service basis.

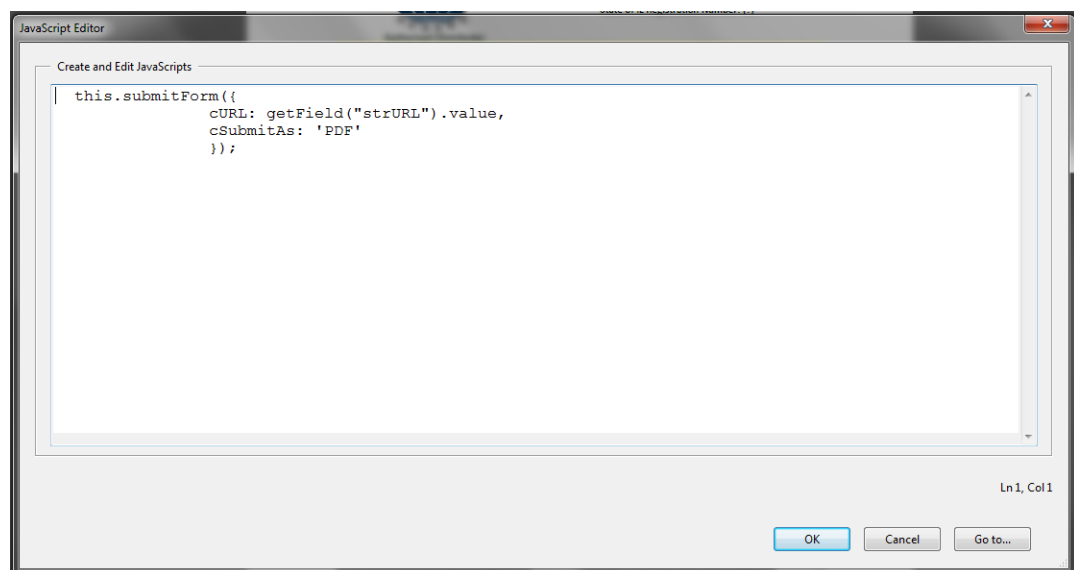
When using the Submit button the PDF form needs two items:

1. A hidden text field with name strURL
2. And a button with the following javascript code:



The Java code that must be inserted in the button is the following:

```
this.submitForm({
    cURL: getField("strURL").value,
    cSubmitAs: 'PDF'
});
```



When the Java code is entered it will look like the screen above.

The field can button can be added anywhere on the form that is convenient for the user. We recommend having it at the bottom of the form to assist the user so when they complete the form they can select the Submit button easily.

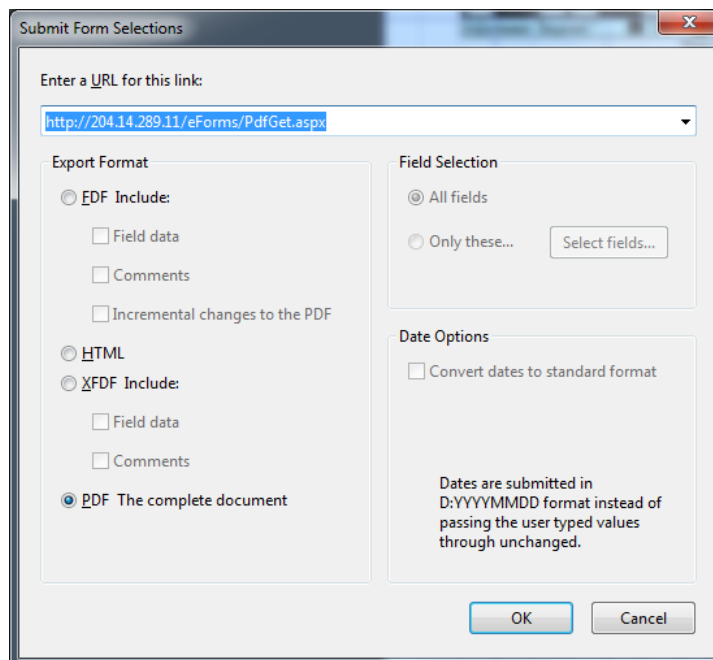
Miracle Service will store the form and link it to the Service Task automatically. The data is retained in the form and not imported into Miracle Service.

For qPDF Notes Reader - Android Device Support

To embed a 'Submit' button on the form the user will need to add the following items to their Adobe form. This can only be added using the Adobe Acrobat X Pro. Users will need to purchase that separately from Adobe and install it on their computer. Users needing assistance with Adobe Acrobat X Pro or later application should contact Adobe for support. Any assistance provided by Nexent is on a strict fee for service basis.

When using the Submit button with Android devices the PDF form needs two items:

1. Create the following hidden text fields:
 - strURL
 - iAreaID
 - sCategory
 - sCreatedUser
 - sCustomerID
 - sTransactionIFD
 - ysnCustomerView
 - strFileName
 - strDBPath
2. And a submit button with the following configuration:



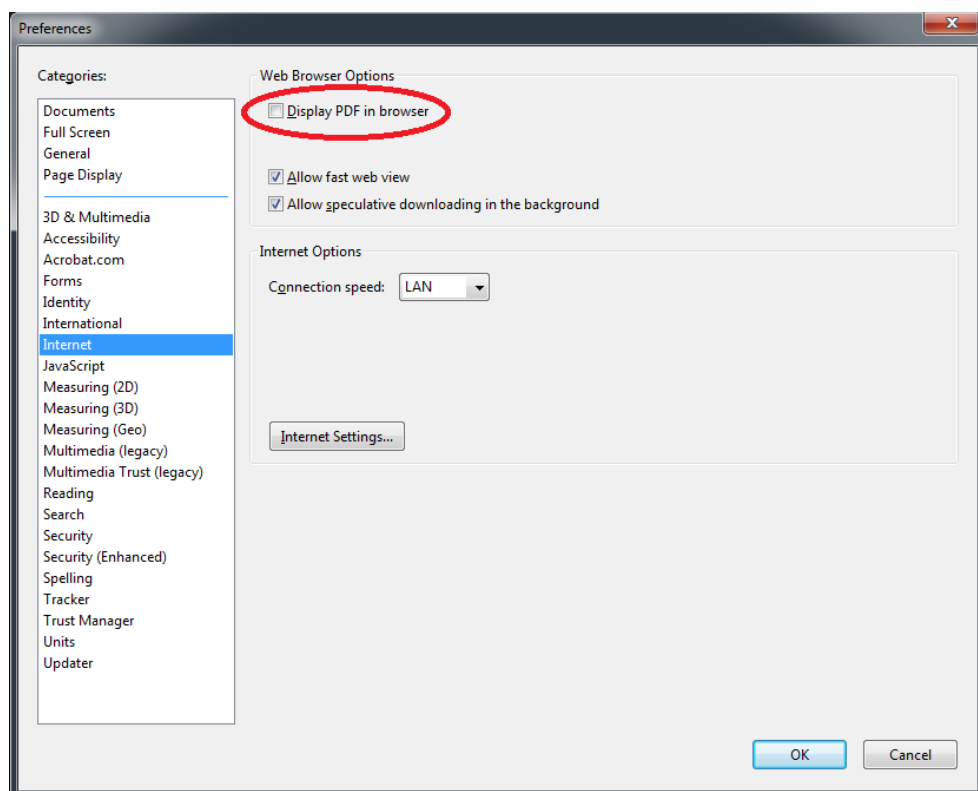
The URL is the site specific URL for the server where the eForm capability is installed. The URL format is:

`http://<Your Server IP Address or Domain Name>/eForms/PdfGet.aspx`

Note: for iOS devices use PDF Expert Professional edition. This method is also supported in Adobe Acrobat Reader 10.X or later for Windows devices.

Note: when using this method on a Windows device the PDF settings need to be configured so the PDF is not displayed in the browser. Configure your Adobe Reader as follows:

- 1) Launch the Adobe Reader
- 2) Click 'Edit' and select 'Preferences'
- 3) Click 'Internet' category in the left pane.
- 4) Uncheck the 'Display PDF in Browser'.

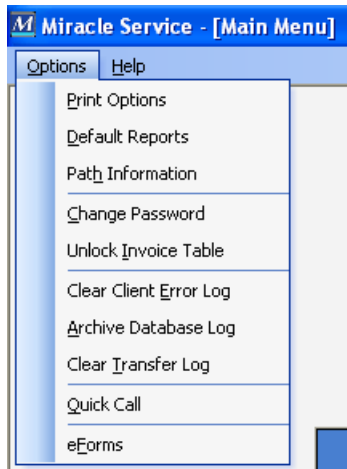


Adding Adobe Forms to Miracle Service

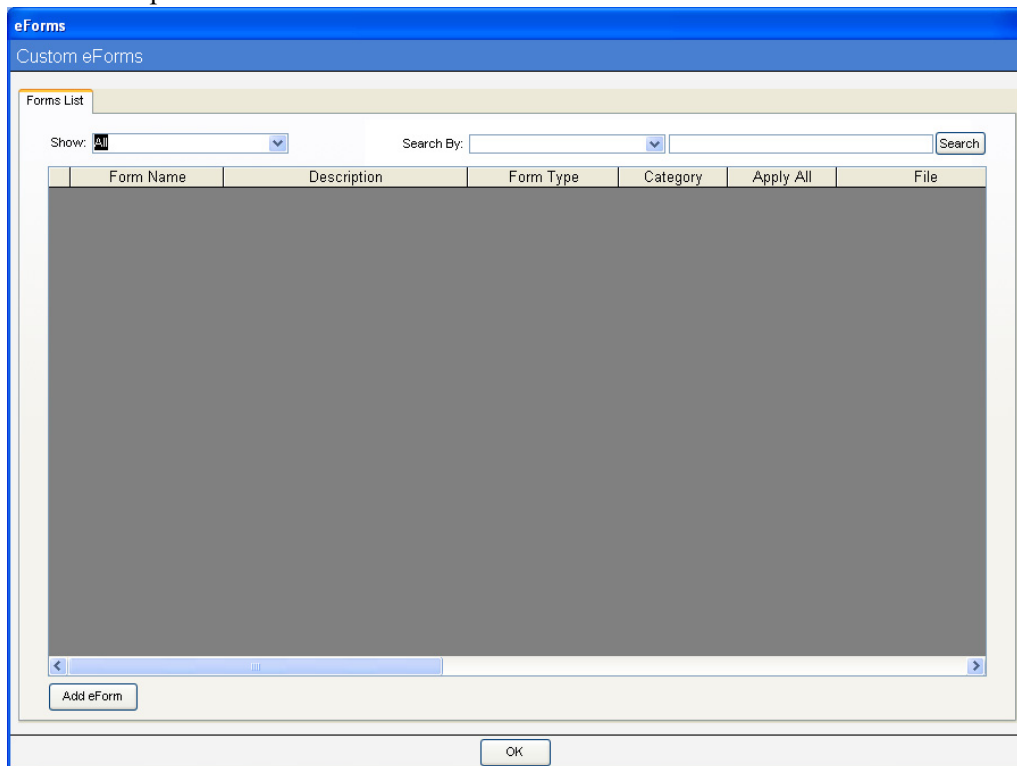
Copy the forms to the 'Forms' folder in the MiracleDB folder. Its essential that these forms are shared with the Miracle Service Database files so they are accessible to all users and to the web portals.

There is no limit to the number of forms and variations of the forms that can be retained and linked in Miracle Service.

Once the form is copied to the Forms folder, you can setup the form link in Miracle Service.



Select the Options Menu and then eForms.



Click Add Form. This will launch the Custom eForm entry screen

The following is an overview of each the fields in the Custom eForm screen.

eForm Name: When creating a form please ensure the file name does not contain spaces or sensitive characters (&,% ,? ,# ,@). The file name will be embedded in to a URL path to upload back to your server and these special characters will create an unrecognizable path.

Description: The description is free form and is used to help describe the type of form and its purpose.

eForm Type: This is a critical field as it defines when and how this form will be attached to a service task when a task is created.

Customer: will attach the form anytime the customer is selected for a task.

Equipment: will attach the form anytime the specific equipment serial number is selected for a task.

Task Type: will attach the form to a task anytime the Task Type matches the selected Task Type for the form.

Apply to All: This will automatically link the form to be use and applied to all Customers, Equipment or Task Type depending on the eForm Type defined.

Category: These are configured uniquely for each Miracle Service system and are used to help categorize the forms use. This setting is used when the form is uploaded back to the server. When the form is uploaded it will be assigned to the category defined by the form set-up. The category is used in the Document Manager to filter documents of similar type. Please consult the Document Manager information for more details on the use of the Category setting.

File: Select the Browse button to select the form template used for this form definition.

Customer Portal: When the Customer Portal field is selected, the forms will be immediately available in the customer portal once they are submitted to the Document Manager. If it is preferred to check and approve the document before it is made available to customers, we recommend leaving this field unchecked.

After entering this information click the Next button.

The screenshot shows the 'eForms' application interface. At the top, there's a blue header with 'eForms' and a sub-header 'Custom eForms'. Below this is a tab labeled 'Add eForm Details'. The main content area is titled 'Task Type Listing' and contains a checkbox labeled 'Show Attached Only'. Below the checkbox is a table with three columns: 'Attach', 'Task Type', and 'Description'. The table lists various task types with their corresponding descriptions.

Attach	Task Type	Description
☒	ERROR	Error code
☐	FAULT	Mechanical
☐	INST	Installation
☐	JAM	Jamming
☐	MISC	Miscellaneous
☐	PJT	Project
☐	PMC	PM Call
☐	QACH	Quality Check
☐	REM	Removal
☐	SOFT	Software
☐	TRAI	Training

When Next is selected a list of Customers, Equipment or Task Types will be displayed. This is only displayed if the “Apply All” is not checked. This allows users to defined the specific Customers, Equipment or Task Types the form will be used on should any of those be selected on a new task.

Note: the form is only attached when the task it created so if a form is added after a task is created, the new form will not display automatically.

Click Save to save the Custom eForm definition. This form is now available for new tasks to link when the task is created.

Chapter 46

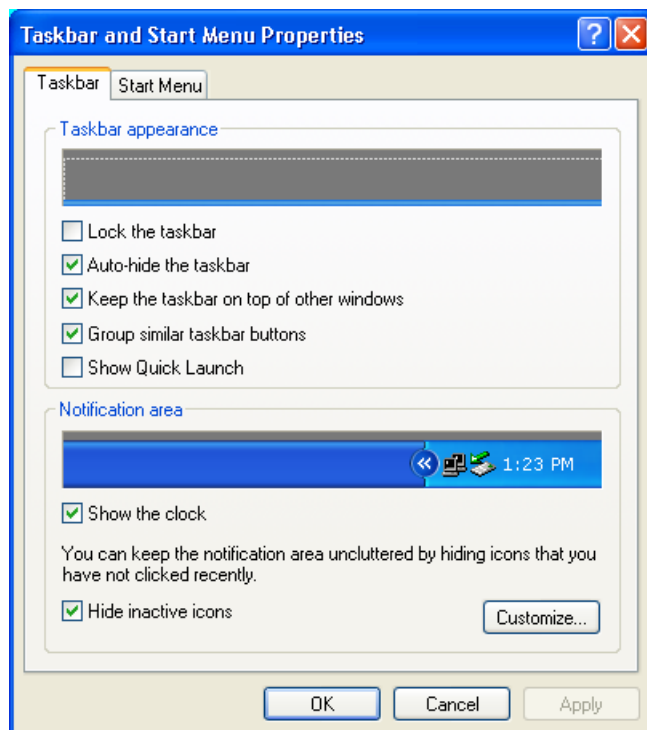
Miracle Service FAQs (Frequently Asked Questions)

For additional product information and technical support documentation visit our web site.

Q - Some menu options are not being displayed at the bottom of some screens. Why?

A - This occurs when the Windows task bar is running at the same time as Miracle Service. Miracle Service runs above the task bar, which can hide some menu options during operation of Miracle Service. This is easily solved.

1. Right click with your mouse while over top of a blank area on your task bar. The image below will appear, or something very similar.



2. Select the Properties option.

Make sure the 'Always on Top' option is unchecked, or select the 'Auto hide' if the 'Always on Top' option enabled.

Q - How do I set the International Monetary Symbols and Date Formatting for my country?

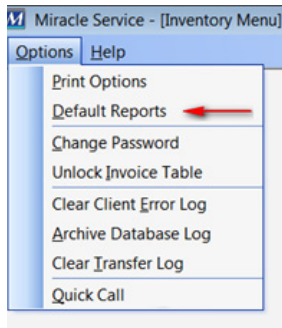
A - Miracle Service can use, display and print any currency or date format supplied by Windows XP, Windows Vista or Windows 7. If the international settings are changed after data has been entered anywhere within Miracle Service, un-repairable data issues will likely occur. Never change Windows International settings after Miracle Service has been used. Currency settings are permanent. Changes may re-align the decimal places of the data.

Q - Can I set up Custom Purchase Orders, Invoices and Work Orders?

A - Yes, using the Miracle Service Report Designer users are able to create custom versions of standard reports and add them to Miracle Service. Further information on this is available in the Report Designer Manual.

Note: Never change a standard Miracle Service report and rename it to the same name. Never create a new report and give it the same name as another report. It will be overwritten the next time there is a Miracle Service upgrade.

Select other default reports on the main tool bar under 'Edit' then 'Default Reports'.



Select the default report(s) from the drop down lists.



For additional 'Custom Created Reports' information, visit our technical support web site.

What to do if ...

Invalid Use of Null

Periodically data is entered incorrectly or lost due to external circumstances. The application has been designed to reduce these issues. However, to offer an application that is easy to use and flexible, some data related warnings might arise. 'Invalid Use of Null' errors are such errors. This warning may occur when data is missing from a field that cannot be blank. In this case, review the error log to see if the table is named. If the error log identifies the record, enter the tables and delete the record or enter the missing value. Otherwise the Miracle Service technical support staff may have to repair your database. Note: Contact our technical staff prior to entering the database tables.

Tables Locked

This message rarely occurs. Periodically, the various invoice tables may lock, whether it's because of a power outage or too many people accessing the same record at the same time. If a message appears stating that 'the invoice table is locked. Would you like to overwrite the data?' click 'No'. Click 'Security' on the menu bar and select 'Unlock Invoice Table'. This will allow the user to continue their work.

The following is another rare anomaly, however, if a network version has been purchased and identical processes on identical records are being entered or processed at the same time, the tables may lock. Read the following 'Application Runs Slowly' for an explanation of a potential table lock situation.

Periodically run the 'Compact Database' routine by selecting the icon from the 'Start' menu in your Windows program.

Application Runs Slowly

Miracle Service processes information at the client workstation, not the server. Occasionally users encounter difficulty with the speed of operations caused by numerous conditions present on either the client workstation or the server or sometimes both. If the workstation or server is not performing as expected, check the following:

Is a screen saver running on your server? Screen savers are nice but drain resources, possibly resulting in errors.

Is the icon on the client workstation pointing to the MSFE on the client (by mistake) or the server? If the icon on a client machine is pointing to the c:\miracle folder on the server, each time screens are changed; reams of data are sent a byte at a time across the LAN. Be sure the workstation icons point to c:\miracle program folders.

Is the hardware installed correctly and running optimally? For the latest system requirements visit our website.

It is strongly recommended that the server database be located on the workstation that service calls are created and closed. This will allow the database to be queried and used without the need for any tables to travel through the LAN. We recommend using Windows XP Professional for best performance.

Do some tasks before going home for the evening. This takes some understanding of what is happening during many routines within Miracle Service. Literally millions of calculations are happening during heavy processing requests. Many applications are indexed at companies during the late evening or early evening. Miracle Service has a complex data structure in fact, the database contains nearly 150 tables and hundreds more queries. Several dozen queries make up the Period Billing process alone; The Period Billing process creates many temporary tables, which are cross-referenced and analyzed. In short, this process requires time to process each record. In fact, this process may take hours for larger businesses. The period billing process actually creates all the invoices for all the contracts that require invoices. If 1000 contracts have been approved for processing and 500 more are metered invoices, it will take some time for Miracle Service to process and create these invoices, as well as update the equipment contracts tables to adjust the statuses of these contracts. For the hundred millions of updates happening for 1000 contracts, there is no choice but to perform after standard business hours. The process automatically performs its calculations, updates and printing however it may take several hours. If these processed were performed during working hours, the entire network would be negatively affected, (which may cause other concerns). Miracle Service locks many tables during these processes, which means other users would not be able to access some information while updates were in progress.

Therefore, we suggest that all heavy processing is started just prior or shortly after standard business hours. This includes Period Billings, Service Contract Billing Approvals.

If a particular workstation, with comparable system components, is running significantly slower than other machines, check for light fixtures and electrical wires near the network cables or 'crimps' in the cable.

Already mentioned in the Administrative section of this manual is the periodic purging of the database. To maintain optimal speeds, purging of the database must be performed.

There is no restriction to the number of customers, inventory items, pieces of equipment or service contracts that can be entered into Miracle Service. However, we do know that there is a relationship in the number of technicians, to the number of sales invoices, service calls, service invoices, equipment, and service contracts. We do not recommend businesses that employ more than 10-12 technicians use Miracle Service. Nexent offers a higher end SQL application called Miracle Service Accent that can manage businesses that have out grown Miracle Service.

Other Recurring Errors

Miracle Service provides utilities which can correct many known common database errors. These utilities include the Table Maintenance and Repair and Compact tools as described within this document.

Database Repair and Support

If a database issue occurs, customers with an active technical support contract can contact our technical support team for repair assistance. In extreme cases where the database issue cannot be resolved, customers with an active technical support contract can send their database to technical support for analysis and repair. Contact the technical support team for sending instructions.

Note: During the database repair stage, records with data missing in ‘linked’ tables may be deleted in order to properly repair the database. Every effort will be taken to minimize the amount of data to be deleted, however, in no way is the licensor responsible for deleted or corrupted data, nor can the licensor guarantee that the database will be completely repaired.

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