Processing Transactions for items that need to be repaired

Customer Services

Sparkstone Technology Ltd

Introduction

This document outlines the workflow for processing items that need to be repaired within the Sparkstone Retail EPOS System. These notes are designed to complement the training that you will have received on the Sparkstone Retail EPOS from a Sparkstone training consultant or system administrator. They are not intended to be a complete overview of the software but are designed to assist you at a later stage when you are away from the training session.

These notes have been compiled to reflect the configuration of the Sparkstone EPOS system at your site and as such may only contain information pertinent to the operations that you require. If additional modules are purchased at a later date, training notes will be provided as appropriate on completion of the associated training course.

Objectives

To provide an overview of the processes involved in creating sales for items to be repaired.

Conventions Used

Menu paths will be indicated throughout this training manual in bold.

For example:

Back Office | Product file | Stock Records

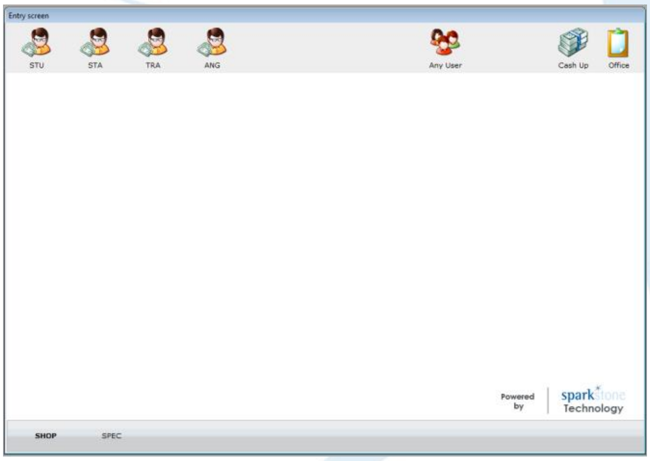
Indicates that you should access Stock Records window from the Back Office using the Product File on the drop down navigation menu.

Keying in Repair transactions

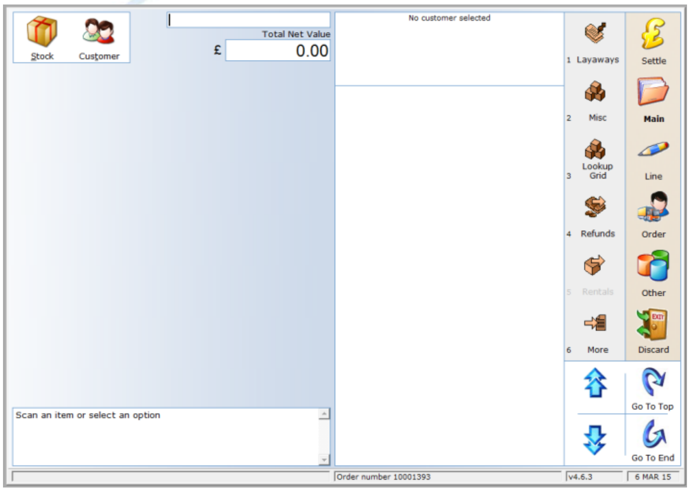
Keying in a new repair

When opening Sparkstone, you will be greeted by the splash screen:

Click the screen using a mouse or the touch screen and the following login screen will be displayed:

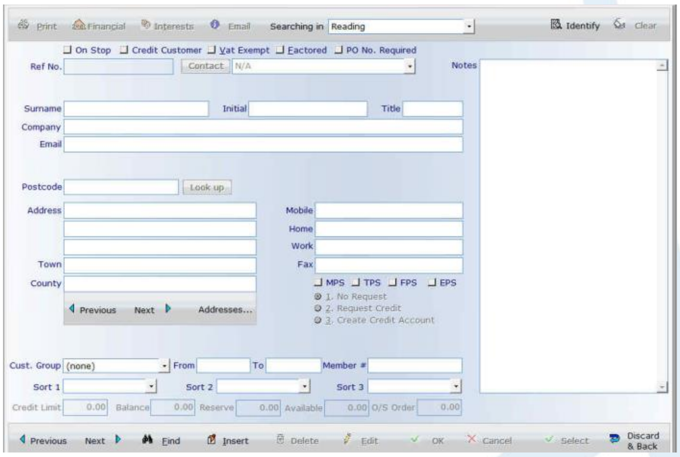


Either select the icon that corresponds to you on the top left hand side or click 'Any user' and this will list all users. Select the required user and press 'OK'. The tilling screen will then be displayed:

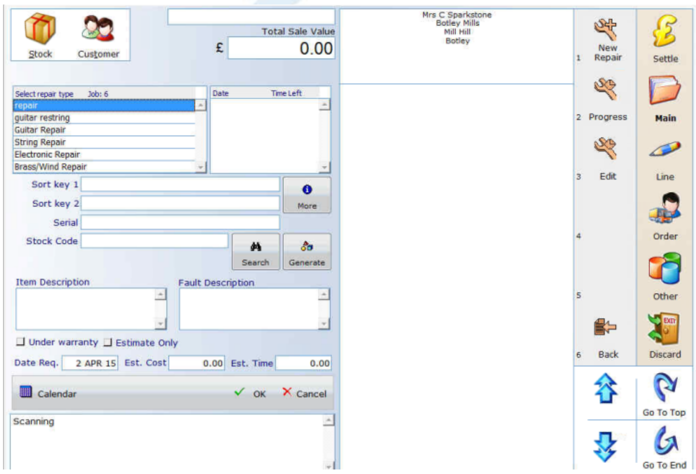


First of all, select ‘Repairs’ and the following menu options will be displayed:

Select ‘New Repair’, then you will be prompted to attach a customer to the sale:

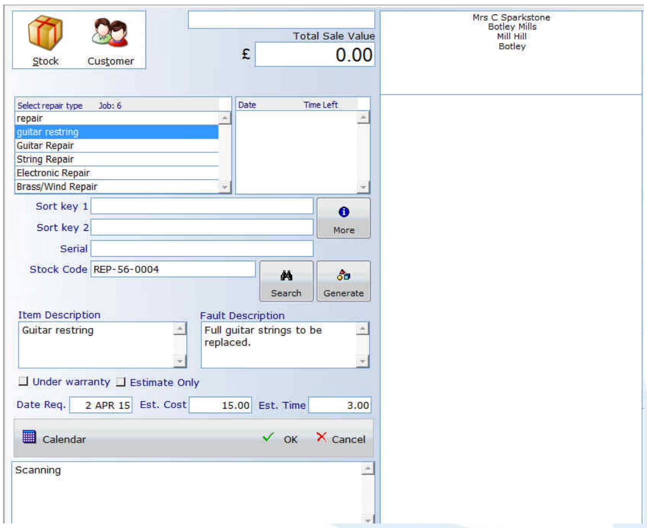


If they are a new customer, go to ‘Insert’ and fill in the relevant information. If the customer has previously purchased from you, go to ‘Find’ and type in the customer’s name or postcode and press ‘OK’. Press ‘Select’ when you have chosen the correct customer record. The below window will be displayed:

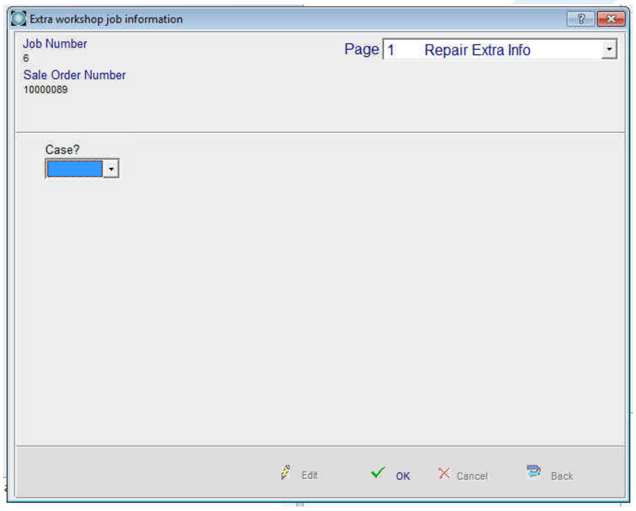


Select a repair type from the left hand side, tab through the fields to get to 'Stock code' and select 'Generate' if a new item is being booked in. A stock item will be created with the prefix 'REP' for a repair item.

Type in the item description and fault description, then specify the time (if required). If you require further information to be listed, press the 'More' button and further information can be added under the 'Notes' box.



Press 'OK' and another display will open up, where the item can be added to a category. Fill in the required field and press 'OK' and the following window will open:



This is a compulsory field- the case needs to be selected from the drop down. Select the item from the list and press 'OK'. At this point the repair can be settled- usually by taking a deposit or selecting 'No money taken'.

To do this, go to 'Settle' and select the option from the list. At this point a workshop order confirmation will print out which can be given to the customer as a record of the repair.

Screen report

Workshop Order Confirmation

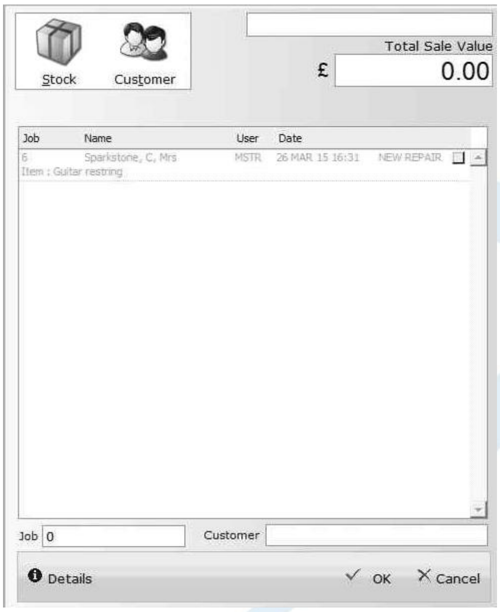
Hickies Music

Job No. 6
Date 26/03/15
Sales Order No. 10000089

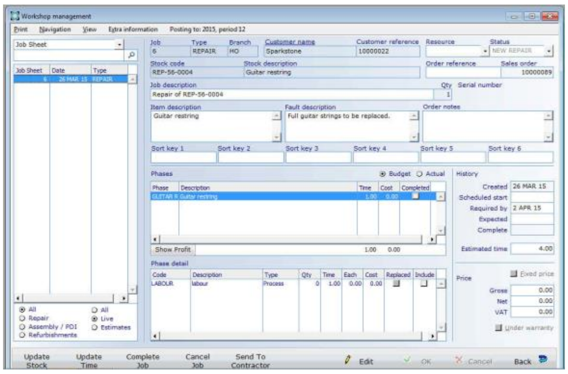
Name	Mrs C Sparkstone	Home Tel	
Address	Botley Mills Mill Hill Botley	Work Tel	
		Mobile	
		Your Ref	
		Account	10000022
Stock Code	REP-56-0004		
Description	Item : Guitar restring Fault : Full guitar strings to be replaced.	Notes	
Serial Number			
Date Req	02/04/2015	On Warranty	NO

Code	Description	Qty
LABOUR	labour	1

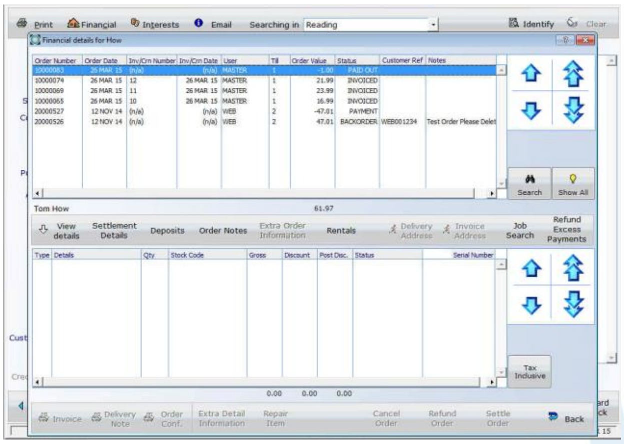
To view the progress of a job, click on 'Repairs' and 'Progress' and the jobs will be listed as follows:



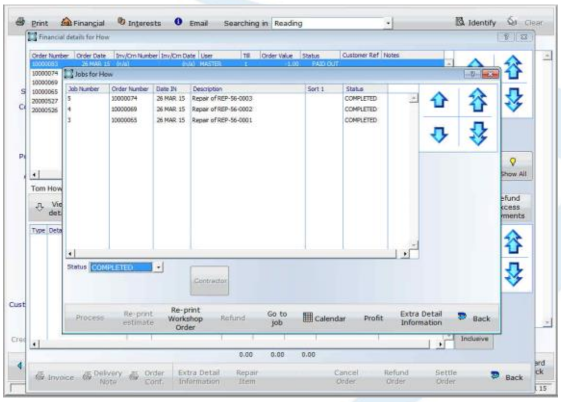
When the technician who is working on the job has received the repair, they need to view it by going to the **Back Office| Workshop | Job Sheet** and the following window will be displayed:



Please Note: *This window can also be accessed from the front end of the tilling screen by going to Customer | Find | Type in the name/postcode for the customer, then go to Financial, which will bring up the sales transactional history for the customer:*



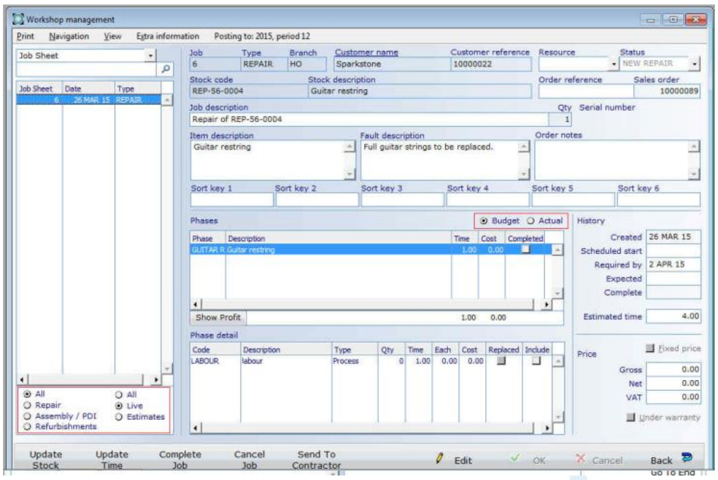
Then select 'Job Search' and the Jobs for the customer will be displayed (the status can be changed in the drop down to display active jobs):



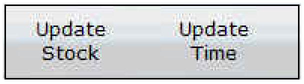
Select a job so that the line is highlighted, the click 'Go to Job' and the Job Sheet window will be displayed:

The buttons in the bottom left hand side can be toggled to view all live jobs by going to 'Live' or all jobs (including those which have been completed by going to 'All').

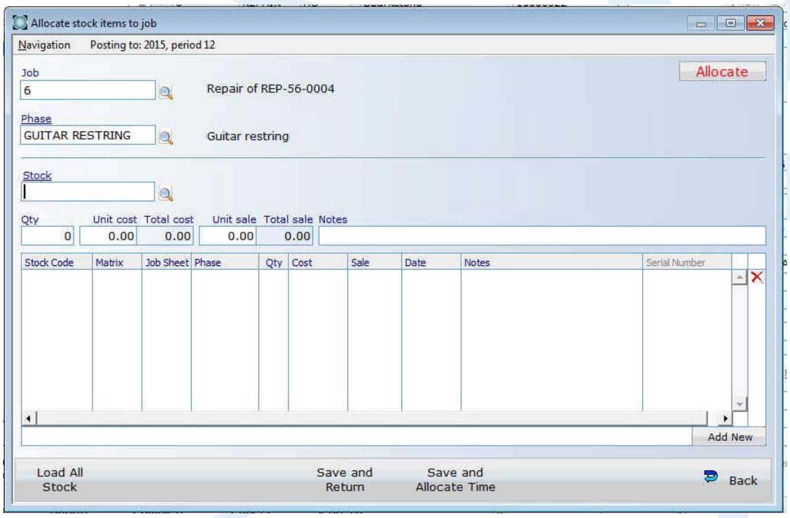
Also, the buttons can be toggled to switch between 'Budget' and 'Actual'.



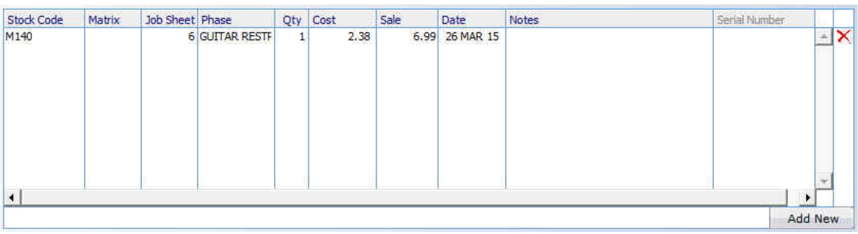
The stock used to complete the job and the time taken to do the job can both be updated by going to 'Update Stock' or 'Update Time'.



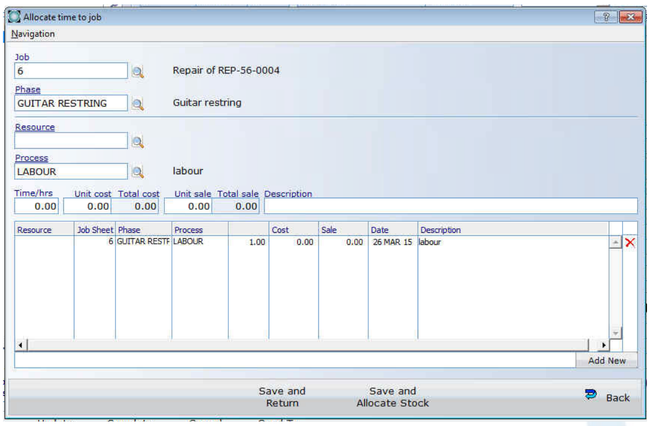
For example, selecting 'Update stock' will show as follows:



Either type in the stock record, or select the magnifying glass on the right of the box 'stock', press 'tab' and select the stock code from the list. Then press tab and enter the quantity, tab through the rest of the lines so that the line shows at the bottom:



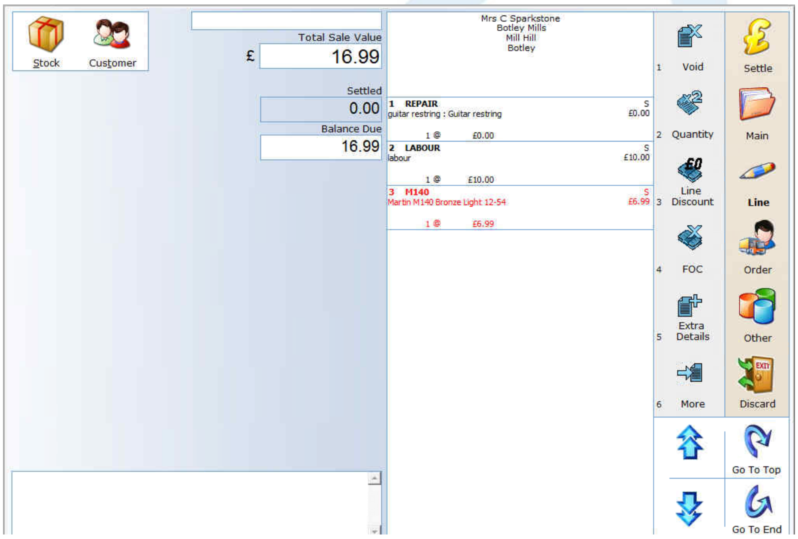
Then the time can be allocated by going 'Save and allocate time' and press 'YES' to allocate the stock to the job. It might need the stock to be allocated to the job, or to be ordered. Either selec 'Allocate' or Order Stock' and a transfer document will then be printed. The allocate time window will then be presented:



Select a resource who will complete the work and press tab, then tab through to enter the time spent on it, the cost to the business and the sale for the customer to pay. Tab through until the line is located at the bottom and press 'Save and Return'. Then press 'YES' to allocate the time and resources.

When the work is complete, the technician can select 'Complete Job' and the status at the top right hand corner will change.

For the sales assistant to retrieve and process the job- go to the front end of the till, select 'Repairs' and 'Progress' and select the job from the list, then press 'OK' and the lines will be shown on the tilling screen:



Enter any more items that the customer might be purchasing, then settle the order by going to 'Settle' then select the settlement type from the list.