

Repairs and Workshop

Customer Services

Sparkstone Technology Ltd



Introduction

This document outlines the workflow for processing sales 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 second hand items.

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.

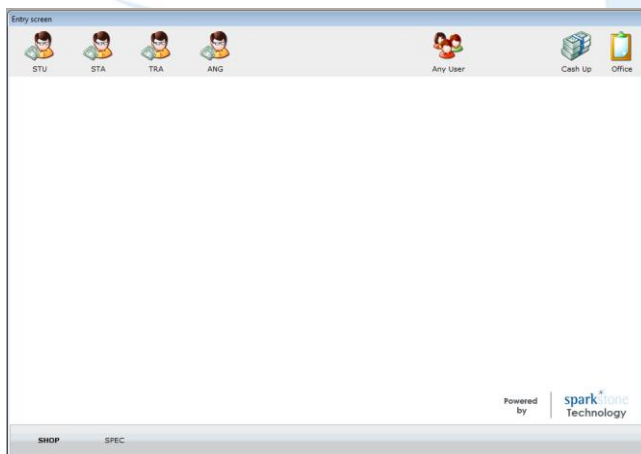
Keying in Repair transactions

Keying in a new repair

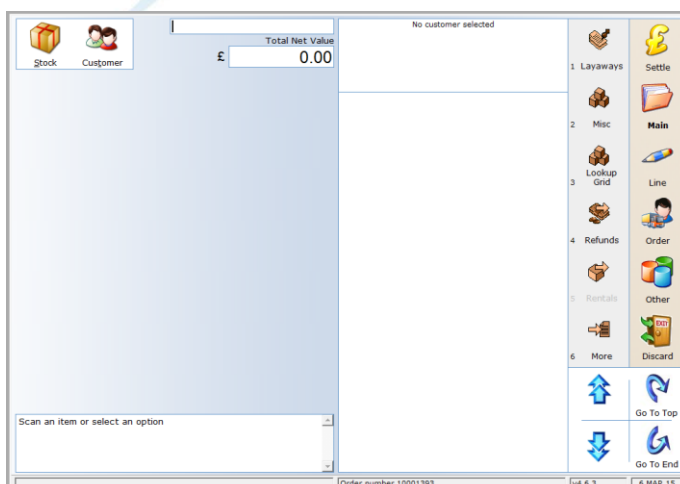
When opening Sparkstone, you will be greeted by the splash screen:



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.

The screenshot shows the Sparkstone software interface for booking a repair. At the top, there are icons for 'Stock' and 'Customer'. The 'Total Sale Value' is displayed as £ 0.00. The user's name, Mrs C Sparkstone, and address, Botley Mills, Mill Hill, Botley, are shown in the top right. The main form has several sections: 'Select repair type' with a dropdown menu showing 'repair', 'guitar restring', 'Guitar Repair', 'String Repair', 'Electronic Repair', and 'Brass/Wind Repair'; 'Job: 6'; 'Date' and 'Time Left' fields; 'Sort key 1' and 'Sort key 2' fields; 'Serial' field; 'Stock Code' field with the value 'REP-56-0004'; 'Item Description' field with the value 'Guitar restring'; 'Fault Description' field with the value 'Full guitar strings to be replaced.'; 'Under warranty' and 'Estimate Only' checkboxes; 'Date Req.' field with the value '2 APR 15'; 'Est. Cost' field with the value '15.00'; 'Est. Time' field with the value '3.00'; a 'Calendar' button; and 'OK' and 'Cancel' buttons. A 'Scanning' section is at the bottom.

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:

The screenshot shows the 'Extra workshop job information' window. It has a title bar with a question mark icon and a close button. The window contains the following information: 'Job Number 6', 'Page 1', 'Repair Extra Info', 'Sale Order Number 10000089', and a 'Case?' dropdown menu. At the bottom, there are buttons for 'Edit', 'OK', 'Cancel', and 'Back'.

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
Address Botley Mills
 Mill Hill
 Botley

Home Tel
Work Tel
Mobile

Your Ref

Account 10000022

Notes


Stock Code REP-56-0004
Description Item : Guitar restring
 Fault : Full guitar strings to be replaced.

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:




Total Sale Value
 £

Job	Name	User	Date	
6	Sparkstone, C, Mrs	MSTR	26 MAR 15 16:31	NEW REPAIR. <input type="checkbox"/>
Item : Guitar restring				

Job
 Customer

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:

The screenshot shows the 'Workshop management' window. The 'Job Sheet' tab is active, displaying details for Job 6, Type REPAIR, Branch HO, Customer name Sparkstone, and Customer reference 10000022. The job description is 'Guitar restringing' with a stock code REP-56-0004. The 'Phases' table shows one phase: 'GUITAR R: Guitar restringing' with a time of 1.00 and cost of 0.00. The 'Phase detail' table shows one entry: 'LABOUR labour' with a quantity of 1.00 and cost of 0.00. The 'History' section shows the job was created on 26 MAR 15, required by 2 APR 15, and has an estimated time of 4.00. The bottom left has buttons for 'Update Stock', 'Update Time', 'Complete Job', 'Cancel Job', and 'Send To Contractor'. The bottom right has buttons for 'Edit', 'OK', 'Cancel', and 'Back'.

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'.

This screenshot is identical to the one above, but with a red box highlighting the 'Budget' and 'Actual' buttons in the 'Phases' section. The 'Budget' button is currently selected. The 'Update Stock' and 'Update Time' buttons in the bottom left are also highlighted with a red box.

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'.

A close-up of the two buttons: 'Update Stock' and 'Update Time'.

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

Allocate stock items to job

Navigation Posting to: 2015, period 12

Job 6 Repair of REP-56-0004

Phase GUITAR RESTRING Guitar restring

Stock

Qty 0 Unit cost 0.00 Total cost 0.00 Unit sale 0.00 Total sale 0.00

Stock Code	Matrix	Job Sheet	Phase	Qty	Cost	Sale	Date	Notes	Serial Number

Add New

Load All Stock Save and Return Save and Allocate Time Back

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:

Stock Code	Matrix	Job Sheet	Phase	Qty	Cost	Sale	Date	Notes	Serial Number
M140		6	GUITAR RESTF	1	2.38	6.99	26 MAR 15		

Add New

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 select 'Allocate' or Order Stock' and a transfer document will then be printed. The allocate time window will then be presented:

Allocate time to job

Navigation

Job 6 Repair of REP-56-0004

Phase GUITAR RESTRING Guitar restring

Resource LABOUR

Process labour

Time/hrs 0.00 Unit cost 0.00 Total cost 0.00 Unit sale 0.00 Total sale 0.00

Resource	Job Sheet	Phase	Process	Cost	Sale	Date	Description
	6	GUITAR RESTF	LABOUR	1.00	0.00	26 MAR 15	labour

Add New

Save and Return Save and Allocate Stock Back

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:

The screenshot shows the Sparkstone software interface. On the left, there are icons for 'Stock' and 'Customer'. The main area displays a list of items with their descriptions and prices. The total sale value is £16.99. The settled amount is £0.00. The balance due is £16.99. The list of items includes:

Line	Description	Price
1	REPAIR guitar restring : Guitar restring	£0.00
2	LABOUR labour	£10.00
3	M140 Martin M140 Bronze Light 12-54	£6.99

On the right side, there is a sidebar with navigation buttons: Void, Settle, Quantity, Main, Line Discount, Line, FOC, Order, Extra Details, Other, More, Discard, Go To Top, and Go To End.

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