Microsoft Dynamics SL

Flat Rate Pricing

Release 2015

Publication Date

September 2014

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Introduction

Flat Rate Pricing Overview

The Microsoft Dynamics® SL Flat Rate Pricing module is designed to allow organizations to efficiently manage flat rate pricing for material and services provided to customers. This comprehensive service module gives companies the ability to easily create and maintain customizable pricing catalogs that give customer service representatives and technicians the capability of quickly quoting prices on specific services provided by companies. Flat rates can be grouped into categories and subcategories that allow the *Price Book* (SP.606.00) report to be printed in an organized manner.

Flat Rate Entry (SP.000.00) allows users to enter an unlimited number of flat rates associated with the material, labor and overhead costs required for providing services to customers. The Flat Rate Pricing module streamlines the billing process because users can easily associate a flat rate identifier to a service call invoice in *Invoice Entry* (SD.202.00) instead of entering every material and labor item needed to complete a job or service call. Flat rate invoices are always billable to the customer.

Flat Rate Pricing gives organizations the ability to set up two types of flat rates. The first flat rate type is Task. A task flat rate includes all the material, labor and overhead costs required when completing a job or service call. The other type of flat rate is Extra. An extra or "add-on" flat rate is used to increase the price of an invoice for additional services performed on a job or service call without charging the customer for overhead costs multiple times on an invoice. Extra flat rates typically do not include labor and administrative overhead costs.

The Flat Rate Pricing module can also be used to create an unlimited number of pricing plans in order to give customer discounts on flat rate prices. Pricing plans are created in *Flat Rate Pricing Plan Maintenance* (SP.002.00).

Example: A Gold pricing plan can be set up to give customers a 10% discount while a Diamond pricing plan can be set up to give customers a 20% discount.

Once pricing plans are created, the prices associated with each plan for a flat rate along with a dollar profit amount and profit percentage can be viewed in *Flat Rate Entry* (SP.000.00).

Flat Rate Entry (SP.000.00) enables users to enter flat rates into the system in a simple and time saving manner. To begin the flat rate entry process, a unique flat rate ID and description is entered. Warranty information for both labor and parts included in the flat rate and the date the flat rate becomes effective can be associated with a flat rate. After attaching the material and labor inventory items needed to complete the job or work of a flat rate, users can attach the flat rate to a Problem Code for quoting purposes.

The profitability of flat rates can be easily and proactively managed. Flat Rate Pricing allows users to view the profitability by pricing plans, inventory items, and inventory classes.

Flat Rate Pricing Interaction

The figure below illustrates the interaction between the Flat Rate Pricing module and the core Microsoft Dynamics SL system.
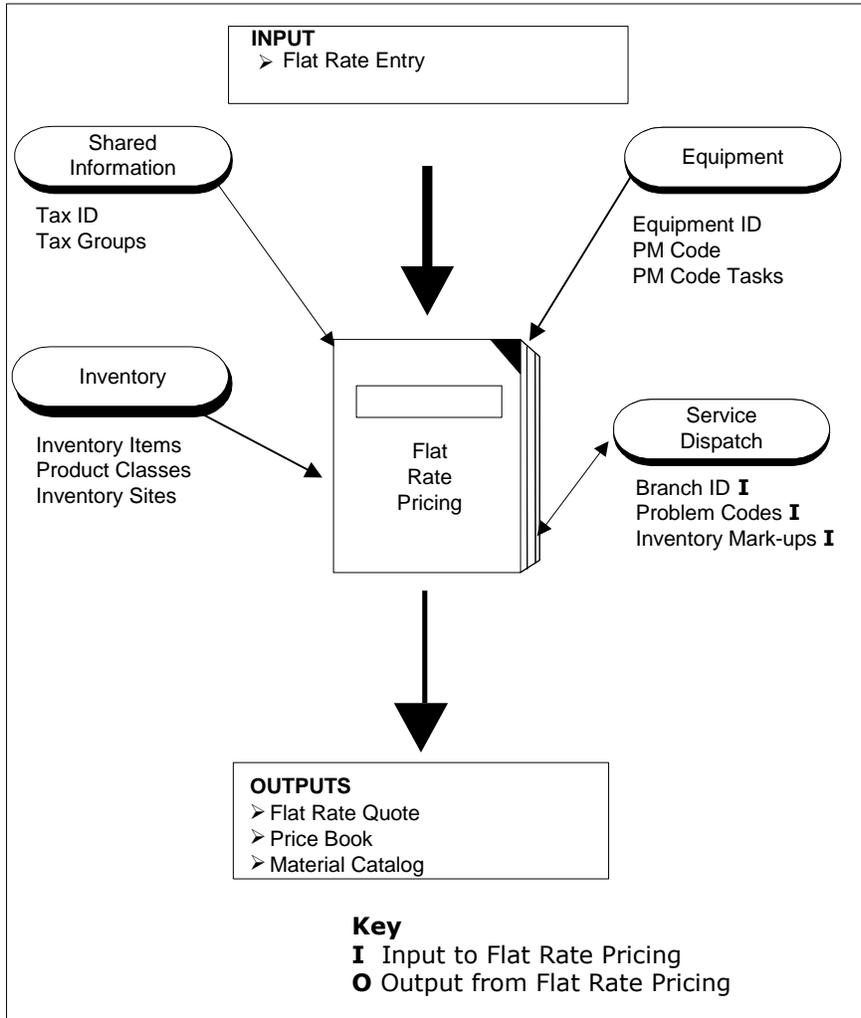
Figure 1: Flat Rate Pricing Interaction

Flat Rate Pricing Features

The Flat Rate Pricing module offers users the ability to:

- Create flat rates with associated material and labor inventory items.
- Use flat rates to create invoices.
- Update inventory and flat rate prices easily.
- Create flat rate pricing plans, which allow you to discount or mark up the price of a flat rate.
- Create a customized flat rate pricing catalog.
- Modify and re-print the flat rate pricing catalog.
- Group common flat rates into categories.
- Group common flat rates into subcategories.
- Define the tax basis for a flat rate.
- View pricing history for a flat rate.
- Enter and/or view warranty information on both materials and parts.
- Relate a problem code to a flat rate to create quotes to customers while on the phone.

User Guide Overview

This user guide provides information regarding the set up and use of the Flat Rate Pricing module. Reviewing the user guide can help you make informed decisions regarding the implementation in the Flat Rate Pricing module in your business.

What is Covered in the User Guide?

The user guide consists primarily of procedures and checklists that describe how to perform the various tasks featured in the Flat Rate Pricing module. The user guide also contains topics that help you become better acquainted with the capabilities of the module. Topics are arranged in a logical order that builds on information previously presented in other Microsoft Dynamics SL user guides.

Who Should Use the User Guide?

The user guide is designed for readers who are new to Microsoft Dynamics SL. The guide provides the information necessary for making decisions regarding how to use the Flat Rate Pricing module to get the most from your system.

How to Use this Guide

Read the appropriate section of the user guide before proceeding with any system customizations. The user guide presents the procedures and steps required for completing the various customization processes. To assist you in locating information, the user guide contains:

- A "Table of Contents" of logically organized activities and tasks.
- An alphabetized "Quick Reference Task List" of commonly performed tasks.
- An alphabetized "Index" of the information provided in the user guide.

Implementation Hints and Tips

Developing Problem Codes

Problem codes are used to define the reason why a service call is generated. Unlike call types that can have a one-to-one relationship with a line of business, multiple problem codes may exist for each call type.

Example: A Heating call type can have HEAT01-Emergency No Heat and HEAT02 – Change Air Filter.

Although problem codes are optional, it is recommended that you set up at least one problem code for each call type. When attaching a call type to a service call, only the problem codes associated with the call type are displayed and can be assigned to the service call. If problem codes are not used in the system, only the call type must be entered when generating a service call.

An estimated time to complete a repair can be attached to problem codes. This time is used by the system to calculate the duration of time needed to complete a service call. This estimated time is also useful for users during the dispatching process by estimating the total amount of time needed to complete a service.

To reduce the amount of time needed to train customer service representatives (CSRs) for service call processing, questions and notes can be attached to problem codes to assist in collecting valuable information from customers. Questions for CSR to ask when entering a service call can be designed to provide technicians that perform the work with valuable information.

Example: When completing a HEATING call type and a HEAT02 – Change Air Filter problem code, specifying the location of a furnace in a house may be important. After a problem code is assigned to a service call in *Service Call Entry* (SD.200.00), the notes associated with the problem code displays. In order to activate the note feature when entering a problem code for a service call, the **Prompt Operator** check box must be selected.

If problem codes are not used, the note feature cannot be implemented.

Problem code IDs are user-defined and can be any combination of numbers and letters up to 10 characters. Typically, problem codes are alphanumeric for reporting purposes.

Problem Code ID	Description
HEAT01	Emergency No Heat
HEAT02	Change Air Filter
AIR01	Emergency No Air
AIR02	No Power
PLUMBING01	Emergency No Water
PLUMBING02	Emergency Flooding
PM	Routine Preventive Maintenance

A problem code is attached to flat rates using *Flat Rate Entry* (SP.000.00). Associating a problem code to a flat rate gives customer service representatives (CSRs) the ability to quote an amount for services needed to complete a job or service call to customers while on the phone. Currently, relating a problem code to a flat rate is for reporting purposes only.

Time and Material Invoicing Versus Flat Rate Price Invoicing

After a service call has been dispatched and a technician has performed the work, the service call needs to be invoiced. *Invoice Entry* (SD.202.00) in the Service Dispatch module allows CSRs to enter the material and labor needed to complete the service call. Service Dispatch provides two **Service Type** options for invoicing customers.

The first option for invoicing customers is **Time & Material**. **Time & Material** allows CSRs to enter an unlimited number of detail lines for labor and parts needed to complete the service call. The second option for invoicing customers is **Flat Rate Pricing**. **Flat Rate Pricing** is a separate service management module in Field Service Management that allows CSRs to create an unlimited number of user-defined flat rates that include all material, labor, and overhead costs to complete a job or service call. Flat rate pricing streamlines the processing tasks needed for billing customers because all material, labor and overhead costs do not have to be entered during *Invoice Entry* (SD.202.00). Only the flat rate ID associated with the costs to complete a job or service call is required.

Since the Service Dispatch and the Flat Rate Pricing modules require inventory for invoicing customers, material and labor must be set up as inventory items in *Inventory Items* (10.250.00) of the Inventory module. It is recommended that you enter all hourly labor rates as non-stock inventory items.

Developing Flat Rates

Flat Rate Entry (SP.000.00) allows CSRs to enter an unlimited number of flat rates for invoicing customers for service work. *Flat Rate Entry* (SP.000.00) gives CSRs the ability to associate material and labor inventory items to flat rates. Flat rates streamline processing tasks for invoicing customers. A Flat Rate ID can be attached to a service call invoice in *Invoice – Flat Rate Order* (SP.200.00) after specifying a service type of Flat Rate in *Invoice Entry* (SD.202.00).

Example: A heating and air conditioning contractor may want a flat rate for each type of service. A flat rate can be created for the installation of a central air and heating system. Therefore, when invoicing a customer, only the flat rate ID for the installation needs to be entered, not all the material and labor used.

Figure 2: Flat Rate Entry (SP.000.00)

Developing Flat Rate Pricing Plans

Flat Rate Pricing Plan Maintenance (SP.002.00) allows customer service representatives (CSRs) to create an unlimited number of pricing plans to discount or mark up a flat rate. Flat rate prices can be increased or decreased only by a percentage entered in **Default Percentage**. Discounts are entered as negative numbers; markups are entered as positive numbers.

Example: A Gold pricing plan can be set up to give customers a 10% discount while a Diamond pricing plan can be set up to give customers a 15% discount.

Figure 3: Flat Rate Pricing Plan Maintenance (SP.002.00)

Once pricing plans are created, the prices associated with each plan for a flat rate along with a dollar profit amount and profit percentage can be viewed in *Flat Rate Entry* (SP.000.00).

Figure 4: Flat Rate Entry (SP.000.00)

Implementation Check List

The checklist below may be used as a guide when completing a Flat Rate Pricing implementation.

Description	Assigned To	Date Required	Date Completed	Comments
General Ledger:				
Ledger Maintenance (01.310.00) • Set up at least one ledger for posting actual account data				
Chart of Accounts Maintenance (01.260.00)				
GL Setup (01.950.00) • Complete General Ledger Setup screen				
Shared Information:				
Flexkey Definition (21.320.00) • Define subaccount segment structure				
Flexkey Table (21.330.00) (Optional) • Define valid values for the segments where **Valid** is enabled in *Flexkey Definition* (21.320.00)				
General Ledger:				
Subaccount Maintenance (01.270.00) • Establish subaccount for each line of business, location, or line of business and location				
Shared Information:				
Tax Maintenance (21.280.00) • Associate to customer by entering tax ID in **Tax ID 1** in *Customer Maintenance* (08.260.00) • Associate to customer site by entering tax ID in **Tax ID** in *Site Maintenance* (SD.025.00)				
Tax Group Maintenance (21.340.00) (Optional) • Establish tax rate groups				
Terms Maintenance (21.270.00) • Associate to customer in *Customer Maintenance* (08.260.00)				
Accounts Receivable:				
Statement Cycle (08.280.00) • Establish at least one statement cycle for aging categories and customer statement printing				
Customer Class (08.290.00) • Establish at least one customer class to group customer for reporting purposes				
AR Setup (08.950.00) • Complete Accounts Receivable Setup screen				

Description	Assigned To	Date Required	Date Completed	Comments
Salesperson Maintenance (08.310.00) • Define at least one salesperson such as "House"				
Customer Maintenance (08.260.00) • Define one customer for each billing address				
Inventory:				
IN Setup (10.950.00) • Complete IN Setup screen • Set **COGS Subaccount Source** to Sales Transaction				
Product Classes (10.280.00) • Define at least one product class for setting default values on new inventory items and reporting purposes • Can view profit for each product class associated with a flat rate				
Unit Conversions (10.650.00) • Define all stocking units of measure for inventory items with purchase or sales units differing from their stocking unit				
Sites (10.250.00) • Define locations or warehouses where inventory items are stocked				
Warehouse Bin Locations (10.340.00) • Define all locations within a warehouse where inventory items are stored				
Inventory Items (10.250.00) • Define material and labor items • Define all labor items as non-stock inventory items • Associate material and labor items to flat rate price				
Service Dispatch:				
Call Status Maintenance (SD.002.00) • Define at least one call status for dispatching and reporting purposes				
Service Series Setup Maintenance (SD.000.00) • Complete Service Series Setup Maintenance screen				
Zip Code Maintenance (SD.021.00) (Optional) • Define postal codes where services are performed				
Geographic Zone Maintenance (SD.009.00) • Define work zones or regions where services are performed • Associate postal codes defined in *Zip Code*				

Description	Assigned To	Date Required	Date Completed	Comments
Maintenance (SD.0021.00) to each work zone or region				
Branch Maintenance (SD.001.00) • Define at least one branch for dispatching and reporting purposes • Associate geographic zones defined in *Geographic Zone Maintenance (SD.009.00)* with each branch • Associate a branch with a flat rate price				
Call Type Maintenance (SD.003.00) • Define at least one call type for dispatching, call monitoring, and reporting purposes				
Employee Class Maintenance (SD.006.00) • Define groups of employees with similar characteristics for reporting purposes				
Employee Maintenance (SD.007.00) • Define an employee for each technician, volunteer, and subcontractor				
Problem Code Maintenance (SD.008.00) • Define the reason service calls are generated • Associate flat rate prices that apply to each problem code				
Media Group Maintenance (SD.013.00) (Optional) • Define groups of marketing resources for reporting purposes				
Media Buy Maintenance (SD.012.00) (Optional) • Define marketing sources to track effective sources of advertising				
Dwelling Maintenance (SD.005.00) (Optional) • Define the different type of building where services are performed • Associate a dwelling to each customer site				
Inventory Mark-Up Maintenance (SD.026.00) (Optional) • Associate an inventory markup to each customer site				
Site Maintenance (SD.025.00) • Set up one site for each customer location where work is performed				
Flat Rate Pricing:				
Flat Rate Category Maintenance (SP.001.00) • Group similar flat rates into categories and subcategories for reporting purposes • *Price Book* (SP.606.00) report can be organized and sorted by categories and subcategories				

Description	Assigned To	Date Required	Date Completed	Comments
Flat Rate Pricing Plan Maintenance (SP.002.00) • Create pricing plans to discount or mark up flat rates				
Service Dispatch:				
Inventory Mark-Up Maintenance (SD.026.00) (Optional) • *Price Update Process* (SP.203.00) can be generated for an inventory markup				

Flat Rate Pricing Concepts

Flat Rate Pricing Reference and ID Codes

Flat Rate ID

Flat Rate Entry (SP.000.00) allows users to enter an unlimited number of flat rates for invoicing customers for service work performed by organizations. *Flat Rate Entry* (SP.000.00) gives users the ability to associate material and labor inventory items with flat rates. Flat rates streamline the processing tasks needed for invoicing customers because a flat rate ID can be attached to a service call invoice in *Invoice – Flat Rate Order* (SP.200.00). Therefore, users are not required to enter all the material and labor detail line items when invoicing.

Flat Rate ID is a user-defined field that can be any combination of numbers and letters up to 10 characters.

Flat Rate Pricing Plan ID

Flat Rate Pricing Plan Maintenance (SP.002.00) allows users to create an unlimited number of pricing plans in order to discount or mark up a flat rate. Flat rate pricing plans are associated with a flat rate using *Flat Rate Entry* (SP.000.00).

Flat Rate Pricing Plan ID is a user-defined field that can be any combination of numbers and letters up to10 characters.

Inventory Mark-Up ID

Inventory markup tables are used to increase the price of inventory items that are associated with a flat rate price. When running *Price Update Process* (SP.203.00) in the Flat Rate Pricing module, the system increases the price of individual inventory items associated with a flat rate by a cost multiplier based on the cost of the item.

Inventory markup IDs are user-defined and can be any combination of numbers and letters up to 10 characters. Inventory markup IDs are set up in *Inventory Mark-Up Maintenance* (SD.026.00) in the Service Dispatch module.

Inventory ID

Inventory ID is a unique 10-character identifier assigned to each inventory item in an organization. Material and labor items are set up in *Items* (10.250.00) in the Inventory module.

Task Guidelines

This section serves as a guide to help you answer common Flat Rate Pricing questions.

How do I...

Flat Rate Entry
- Create a flat rate price? See page 29
- Associate a branch to a flat rate price? See page 30
- Associate inventory to a flat rate price? See page 32
- Associate a category/subcategory to a flat rate? See page 31
- Create a task flat rate price? See page 31
- Create an extra flat rate price? See page 31
- Enter the quantity of inventory needed for a flat rate price? See page 32
- Associate labor to a flat rate price? See page 31
- Enter a length of time material is covered under warranty for a flat rate price? See page 31
- Enter the length of time labor is covered under warranty for a flat rate price? See page 31
- Enter the amount of time needed to complete the flat rate task? See page 31
- Enter a date a flat rate becomes effective? See page 31
- Increase the amount of a flat rate by a percentage? See page 36
- Attach a tax ID to a flat rate line item? See page 32
- Make a specific line item tax exempt on a taxable flat rate? See page 33
- Enter a markup on inventory used in a flat rate? See page 32
- Change the unit price of an inventory item of a flat rate? See page 32
- View pricing plans associated with a flat rate? See page 33
- Associate problem codes to a flat rate price? See page 34

Pricing Plans
- Create a pricing plan? See page 27
- Enter a discount pricing plan? See page 27
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Inquiries
- View pricing history of a flat rate? See page 46
- View the date a flat rate price became effective? See page 31
- View the date a flat rate price book was last printed? See page 46
- View the date a flat rate price book was last updated? See page 31
- View the problem codes associated with a flat rate price? See page 35
- View the total amount of a flat rate price? See page 36
- View the unit price of inventory items associated with a flat rate price? See page 32
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- View the unit cost of inventory items associated with a flat rate price? See page 33
- View the tax amount of inventory items associated with a flat rate price? See page 33
- View the profit of a line item associated with a flat rate price? See page 34
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- Update the stock base price of inventory items based on inventory cost changes? See page 38
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- Update the stock base price of inventory items for a specific inventory item? See page 38
- Update the stock base price of inventory items for a range of inventory items? See page 38
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- An inventory markup ID? See page 13
- An inventory ID? See page 13

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- A task flat rate and an extra flat rate? See page 1
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- A time & material and flat rate invoices? See page 5

Flat Rate Pricing Setup

Implementation Overview

The following is a general overview of the activities you should perform when implementing the Flat Rate Pricing module.

Define the Requirements

Create a prioritized list that addresses the issues to be faced when implementing the Flat Rate Pricing module, and what the module is expected to resolve. Include both the issues you are facing with your current system, as well as procedural issues within your organization.

Review or Establish Procedures

When a new system is being implemented, it is essential to review existing organizational procedures. Often, existing procedures need to be modified to take advantage of new functionality in the system. If these procedures do not exist, create them and define who is responsible for completing them.

Identify Required Customizations

Customizations include changes to the standard reports, which are accomplished using one of the report writers. Simple screen changes are made using the Customization Manager.

Setup and Maintenance

Setting up Flat Rate Pricing involves three areas:

- Setting up Other Modules that integrate with Microsoft Dynamics SL
- Setting Up Service Dispatch — Overview
- Setting Up Flat Rate Pricing — Overview

Setting up Other Modules

The first steps in setting up the Flat Rate Pricing module are to perform the setup tasks for the other modules that interface with Field Service Management.

- Shared Information
- General Ledger
- System Manager
- Accounts Receivable
- Inventory
- Customization Manager
- Crystal Reports

Shared Information Module

You must set up information in the following Shared Information screens before you can implement the Field Service Management modules.

- *Tax Maintenance* (21.280.00)

  Any tax IDs used in *Invoice Entry* (SD.202.00) of the Service Dispatch module must have a **Calculation Type** of document.

- *Tax Group Maintenance* (21.340.00)

  Using tax group IDs is not recommended.

- *Terms Maintenance* (21.270.00)

  Associate with customers in *Customer Maintenance* (08.260.00).

Note: Sales tax is critical for invoice entry (invoicing) in Field Service Management and is required when creating a new site.

General Ledger Module

General Ledger processing options, accounts, and subaccounts must be set up using the following screens before you can implement the Field Service Management modules.

- *Chart of Accounts Maintenance* (01.260.00) — Required
- *General Ledger Setup* (01.950.00) — Required
- *Subaccount Maintenance* (01.270.00) — Required

The Flat Rate Pricing module does **not** directly update the General Ledger module. However, General Ledger processing options, accounts, and subaccounts must be set up using the following screens before you can implement Field Service Management modules.

System Manager Module

- *Users* (95.260.00) and *Groups* (95.280.00) — Optional

Define all users in *Users* (95.260.00) and groups in *Groups* (95.280.00) along with passwords for all users of the Flat Rate Pricing module.

- *Access Rights* (95.270.00) — Optional

  1. Set the appropriate access rights for all Flat Rate Pricing users and groups in *Access Rights* (95.270.00) for the Flat Rate Pricing module.

  2. Click **Preload** to open *Preload Screens* (95.270.01) and select Flat Rate Pricing from the list to view the screens for the Flat Rate Pricing module.

  3. Specify the appropriate level of rights for each screen for each Flat Rate Pricing user or group.

Accounts Receivable Module (Required)

Accounts Receivable is a required module for use with Field Service Management. Along with customers and sites (**Ship To Addresses**), class IDs are important for many of the Field Service Management analysis reports. Therefore, create a class ID coding scheme ahead of time to avoid creating unnecessary class IDs.

You must set up information in the following Accounts Receivable screens before you can implement the Field Service Management modules.

- *AR Setup* (08.950.00)

  Enable **Auto Reference Numbering** to have the system generate sequential invoice numbers during *Invoice Entry* (SD.202.00) in Service Dispatch.

- *Customer Maintenance* (08.260.00)

- *Statement Cycle* (08.280.00)

- *Customer Class* (08.290.00)

- *Salesperson Maintenance* (08.310.00)

  Define at least one salesperson, such as "House."

Inventory Module (Required)

The Inventory module plays an integral part in how revenue and costing is posted during the service invoice process. Using inventory items when entering information through *Invoice Entry* (SD.202.00) allows you to control the posting of revenue and costs to specific accounts, control commissions through the product class ID, and associate special pricing and discounts by labor or materials. Define product class IDs in a way that corresponds easily with your flat rate pricing scheme. When inventory items are entered on transactions, the quantities are allocated in the Inventory module. Allocation provides control over the inventory by preventing the over-use of items by other transactions across all modules.

You must set up information in the following Inventory screens before implementing the Field Service Management modules.

- *IN Setup* (10.950.00)

  The **COGS Subaccount Source** drop-down list **must** be set to the Sales Transaction Subaccount option.

- *Product Classes* (10.280.00)

  Define product class IDs to correspond with your flat rate pricing scheme.

- *Warehouse Bin Locations* (10.340.00)

- *Unit Conversions* (10.650.00)

- *Sites* (10.310.00)

  Enter all trucks-in-service as Inventory sites.

- *Inventory Items* (10.250.00)

Customization Manager Module

Customization Manager gives users the ability to modify Flat Rate Pricing screens to meet the accounting requirements of an organization. For example, new fields and controls can be added, data fields and objects can be hidden, and defaults values for data fields can be set. To make data entry more efficient, objects can be moved to other positions on a screen and the tab order of data fields can be modified.

Although there are no setup procedures required for the customization manager, the module must be purchased and installed separately in order to make modifications to Flat Rate Pricing screens.

Crystal Reports

Crystal Reports gives users the ability to modify Flat Rate Pricing reports to meet the accounting requirements of an organization. For example, new labels and fields can be added while data fields and objects can be removed.

Although there are no setup procedures required for Flat Rate Pricing, the module must be installed in order to make modifications to Service Dispatch reports.

Setting Up Service Dispatch

This section provides an overview and detailed procedures explaining how to adapt the Service Dispatch module to your business needs and practices. Use the following general procedures to set up the Service Dispatch module. More detailed directions are provided for the following steps.

1. Define call statuses using *Call Status Maintenance* (SD.002.00).

    Call Status Maintenance (SD.002.00) is used to enter an unlimited number of call statuses and descriptions that define the life cycle of a service call.

2. Set up general service information using *Service Series Setup Maintenance* (SD.000.00).

    Service Series Setup Maintenance (SD.000.00) is used to set up regular business hours as well as determine the sequencing of key identifier codes, such as Customer ID, Service Call ID, Service Contract ID, and Equipment ID.

3. Set up licenses using *License Maintenance* (SD.010.00) — Optional.

    License Maintenance (SD.010.00) allows users to set up an unlimited number of licenses in the system that can be linked to technicians, problem codes, and zip codes.

4. Set up postal codes using *Zip Code Maintenance* (SD.021.00) — Optional.

    Zip Code Maintenance (SD.021.00) is used to set up an unlimited number of Postal Zip Codes to help dispatching departments be efficient when assigning service technicians to a service call in the dispatching screens.

5. Attach licenses to zip codes using *License - ZIP Code Maintenance* (SD.011.00) — Optional.

    License - ZIP Code Maintenance (SD.011.00) is used to associate licenses to zip codes in order to have the system display warning messages when a company no longer has a valid or active license to perform work in the zip code.

6. Set up geographic zones using *Geographic Zone Maintenance* (SD.009.00).

    Geographic Zone Maintenance (SD.009.00) is used to create an unlimited number of work zones or regions where a company performs jobs or services. These predetermined areas are designed to help dispatching departments be more efficient when assigning service technicians to a service call.

7. Set up branches using *Branch Maintenance* (SD.001.00).

    Branch Maintenance (SD.001.00) is used to set up an unlimited number of branches in the system. Branches are used to represent the different divisions or locations in an organization. For example, an organization that has locations in Columbus, Cincinnati, and Cleveland may create a branch for each city.

8. Define call types using *Call Type Maintenance* (SD.003.00).

    Call Type Maintenance (SD.003.00) is used to set up an unlimited number of call types that give users the ability to separate service calls or jobs for each division or line of business in an organization.

9. Create pager templates using *Pager Template* (SD.031.00) — Optional.

    Pager Template (SD.031.00) is used to define an unlimited number of paging templates used to extract data from a service call to send to technicians in the field from *Dispatch Board* (SD.201.00).

10. Define vehicles using *Vehicle Maintenance* (SD.020.00) — Optional.

    Vehicle Maintenance (SD.020.00) is used to create an unlimited number of vehicles in the system for tracking valuable information such as make, model, year, date purchased, and odometer readings.

11. Define skills using *Skills Maintenance* (SD.017.00) — Optional.

    Skills Maintenance (SD.017.00) is used to create an unlimited number of skills that are designed to track the expertise required by technicians to perform the work needed to complete a service call.

12. Define tools using *Tool Maintenance* (SD.018.00) — Optional.

    Tool Maintenance (SD.018.00) is used to set up and maintain an inventory of company-owned tools and equipment that technicians have on hand for completing service calls.

13. Define tool usage using *Tool Usage Maintenance* (SD.019.00) — Optional.

    Tool Usage Maintenance (SD.019.00) is used to set up an unlimited number of usages of tools to give dispatching departments the ability to confirm that technicians have the appropriate tools to perform the work of problem codes during *Service Call Entry* (SD.200.00).

14. Define employee classes using *Employee Class Maintenance* (SD.006.00).

    Employee Class Maintenance (SD.006.00) is designed to identify and set up groups of employees with similar characteristics for reporting purposes.

15. Define employees using *Employee Maintenance* (SD.007.00).

    Employee Maintenance (SD.007.00) is used to set up and maintain all employees, volunteers, and subcontractors who perform work on service calls.

16. Define dispatch view templates using *Dispatch - View Maintenance* (SD.004.00).

    Dispatch - View Maintenance (SD.004.00) is used to set up an unlimited number of call view templates in order to display service calls in *Dispatch – View Maintenance* (SD.004.00).

17. Set up templates and queues for users with *User Configuration* (SD.000.01) — Optional.

    User Configuration (SD.000.01) is used to define default dispatching view templates or service call queues for each user.

18. Define problem codes using *Problem Code Maintenance* (SD.008.00) — Optional.

    Problem Code Maintenance (SD.008.00) is used to set up an unlimited number of problem codes that define the reasons service calls are generated.

19. Define cause codes using *Cause Code Maintenance* (SD.014.00) — Optional.

    Cause Code Maintenance (SD.014.00) is used to set up an unlimited number of cause codes that define why a problem code may occur or why a piece of equipment is not working.

20. Define resolution codes using *Resolution Code Maintenance* (SD.015.00) — Optional.

    Resolution Code Maintenance (SD.015.00) is used to create an unlimited number of resolution codes that define what a technician does to solve a problem or cause code.

21. Define media groups using *Media Group Maintenance* (SD.013.00 — Optional.

    Media Group Maintenance (SD.013.00) is used to group similar marketing resources for reporting purposes to track the most effective means of advertising.

22. Define media sources using *Media Buy Maintenance* (SD.012.00) — Optional.

    Media Buy Maintenance (SD.012.00) is used to set up an unlimited number of marketing sources in order to track the most effective source of advertising.

23. Define advertising partners using *Coop Advertising Information* (SD.012.01).

    Coop Advertising Information (SD.012.01) is used to set up cooperative advertising partners and the percentage share amounts that the cooperative partners contribute to the marketing resources.

24. Define product classes using *Product Class Maintenance* (SD.016.00).

    Product Class Maintenance (SD.016.00) allows users to add Field Service Management-related information to the product classes created in the Inventory module.

25. Define dwellings using *Dwelling Maintenance* (SD.005.00) — Optional.

    Dwelling Maintenance (SD.005.00) is used to create an unlimited number of dwelling types or building characteristics types in the system for reporting purposes. Dwellings are used to represent the different type of buildings where organizations perform work.

26. Define markup tables using *Inventory Mark-Up Maintenance* (SD.026.00 — Optional.

    Inventory Mark-Up Maintenance (SD.026.00) is used to set up an unlimited number of inventory markup tables that increase the price of inventory items associated with a flat rate price. When running *Price Update Process* (SP.203.00) in the Flat Rate Pricing module, the system increases the price of individual inventory items of a flat rate price by a cost multiplier based on the cost of the item.

27. Define customer sites using *Site Maintenance* (SD.025.00).

    Site Maintenance (SD.025.00) is used to set up an unlimited number of locations for customers. Service call defaults are entered into this screen so that customer service representatives can quickly enter a service call once a customer and site are selected.

28. Define special pricing parameters using Site - Special Pricing Maintenance (SD.037.00)—Optional.

    Site - Special Pricing Maintenance (SD.037.00) allows users to create special pricing for specific inventory items for customer sites.

29. Create note templates using *Notes Template* (SD.410.00) — Optional.

    Notes Template (SD.410.00) allows users to set up an unlimited number of note templates to be attached to a service call for invoicing. These templates can also be attached to equipment in the Service Contracts module.

30. Define default information using *Customer Default* (SD.033.00).

    Customer Default (SD.033.00) is used to set up default information based on customer classes defined in the Accounts Receivable module. When new customers are created, the system uses the class associated with the customer to create a site using this default information.

Setting Up Flat Rate Pricing — Overview

This section provides an overview and detailed procedures explaining how to adapt the Flat Rate Pricing module to your business needs and practices. Use the following general procedures to set up the Flat Rate Pricing module:

1. Group similar flat rates together using *Flat Rate Category Maintenance* (SP.001.00).

   Flat Rate Category Maintenance (SP.001.00) is used to group similar flat rates together for reporting purposes. An unlimited number of subcategories can also be associated with categories for additional groupings. Flat rate categories and subcategories are associated with a flat rate in *Flat Rate Entry* (SP.000.00).

2. Enter pricing changes using *Flat Rate Pricing Plan Maintenance* (SP.002.00) — Optional.

   Flat Rate Pricing Plan Maintenance (SP.002.00) is used to enter an unlimited number of pricing plans to discount or mark up a flat rate. Pricing plans are associated with a flat rate in *Flat Rate Entry* (SP.000.00).

3. Set up markup tables using *Inventory Mark-Up Maintenance* (SD.026.00) — Optional.

   Inventory Mark-Up Maintenance (SD.026.00) is used to set up an unlimited number of inventory markup tables that increase the price of inventory items associated with a flat rate price. When you run *Price Update Process* (SP.203.00), the system increases the price of individual inventory items of a flat rate price by a cost multiplier based on the cost of the item.

Step 1: Group Similar Flat Rates

Flat Rate Category Maintenance (SP.001.00) is used to group similar flat rates together for reporting purposes. An unlimited number of subcategories can also be associated together for additional groupings. Flat rate categories and subcategories are attached to flat rates in *Flat Rate Entry* (SP.000.00).

The *Price Book* (SP.606.00) report is organized and sorted by categories and subcategories.

Flat Rate Category Maintenance (SP.001.00) Required Fields

The following fields are required in *Flat Rate Category Maintenance* (SP.001.00):

- **Category ID** (Step 2)
- **Description** (Step 3)
- **Sub-Category ID** (Step 4)
- **Description** (Step 5)

To group similar categories together:

1. Choose **Module | Flat Rate Pricing | Flat Rate Category Maintenance** from the menu. *Flat Rate Category Maintenance* (SP.001.00) displays.

Figure 5: Flat Rate Category Maintenance (SP.001.00)

2. Type a unique 10-character ID for the flat rate category in **Category ID**.
3. Type a 30-character description of flat rate category in **Description**.
4. Type a unique 10-character ID for the flat rate subcategory in **Sub-Category ID**.
5. Type a 30-character description of flat rate subcategory in **Description**.
6. Click **Save** on the toolbar.
7. Click **Close** on the toolbar.

Step 2: Enter Pricing Changes

Flat Rate Pricing Plan Maintenance (SP.002.00) is used to enter an unlimited number of pricing plans to discount or mark up a flat rate. Pricing plans are attached to a flat rate in *Flat Rate Entry* (SP.000.00). Flat rate prices can only be increased or decreased by a percentage entered in **Default Percentage**. Discounts are entered as negative numbers and markups are entered as positive numbers.

Example: A Gold pricing plan can be set up to give customers a 10% discount while a Diamond pricing plan can be set up to give customers a 15% discount.

Figure 6: Flat Rate Pricing Plan Maintenance (SP.002.00)

Once pricing plans are created, the prices associated with each plan for a flat rate along with a dollar profit amount and profit percentage can be viewed in *Flat Rate Entry* (SP.000.00).

Flat Rate Pricing Plan Maintenance (SP.002.00) Required Fields

The following fields are required for *Flat Rate Pricing Plan Maintenance* (SP.002.00):

- **Flat Rate Plan ID** (Step 2)
- **Description** (Step 3 — recommended)
- **Default Percentage** (Step 4 — recommended)

To set up pricing plans:

1. Choose **Module | Equipment Maintenance | Flat Rate Pricing Plan Maintenance** from the menu.
   *Flat Rate Pricing Plan Maintenance* (SP.002.00) displays.
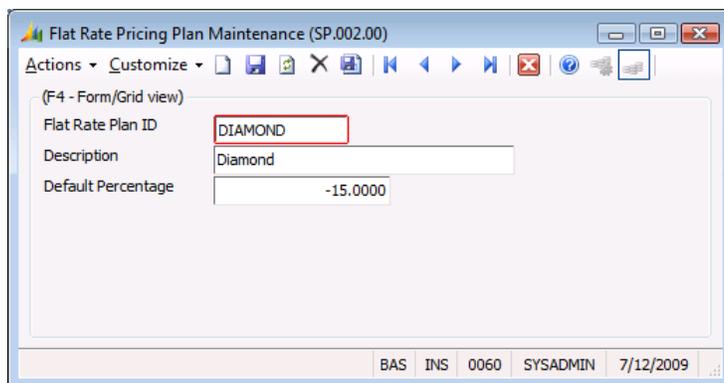
Figure 7: Flat Rate Pricing Plan Maintenance (SP.002.00)

2. Type a unique 10-character ID for the pricing plan in **Flat Rate Plan ID**.
3. Type a 30-character description of the pricing in **Description**.
4. Type the percentage amount to discount or mark up flat rates in **Default Percentage**.

   - Discounts are entered as a negative number.
   - Markups are entered as a positive number.

5. Click **Save** on the toolbar.
6. Click **Close** on the toolbar.

Step 3: Set Up Markup Tables (Optional)

Inventory Mark-Up Maintenance (SD.026.00) is used to set up an unlimited number of inventory markup tables. Markup tables are used to increase the price of inventory items associated with a flat rate price. When you run *Price Update Process* (SP.203.00), the system increases the price of individual inventory items of a flat rate price by **Cost Multiplier** based on the cost of the item.

Inventory markups are attached to a customer site in *Site Maintenance* (SD.025.00) of the Service Dispatch module.

Note: It is recommended that you set up at least three inventory markups when using the Flat Rate Pricing module: Install Parts, Repair Parts, and Labor.

Inventory Mark-Up Maintenance (SD.026.00) Required Fields

The following fields are required to complete *Inventory Mark-Up Maintenance* (SD.026.00):

- **Mark-Up ID** (Step 2)
- **Description** (Step 3 — Recommended)

To set up a markup table:

1. Choose **Module | Service Dispatch | Inventory Mark-Up Maintenance** from the menu. *Inventory Mark-Up Maintenance* (SD.026.00) displays.

Figure 8: Inventory Mark-Up Maintenance (SD.026.00)

2. Type a unique ID for the inventory markup in **Mark-Up ID**.
3. Type the description of the inventory markup in **Description**.
4. Type the cost ranges associated with the inventory markup in **From** and **To**.
5. Type the cost multiplier for the cost ranges in **Cost Multiplier**.
6. Click **Save** on the toolbar.
7. Click **Close** on the toolbar.

Flat Rate Entry

Flat rate prices are the heart of the Flat Rate Pricing module. Flat rate prices are entered into the system in *Flat Rate Entry* (SP.000.00). *Flat Rate Entry* (SP.000.00) has been designed to allow users to enter flat rate prices into the system in the most simple and time saving manner.

Entering Flat Rates

Flat Rate Entry (SP.000.00) allows users to enter an unlimited number of flat rates associated with the material, labor and overhead costs required for providing services to customers. The Flat Rate Pricing module streamlines the billing process because users can easily associate a flat rate identifier to a service call invoice in *Invoice Entry* (SD.202.00) instead of entering every material and labor item needed to complete a job or service call. Flat rate invoices are always billable to the customer.

Flat Rate Entry (SP.000.00) has been designed to allow users to enter flat rates into the system in the most simple and time saving manner. To begin the flat rate entry process, a unique flat rate ID and description has to be entered. Warranty information for both labor and parts included in the flat rate as well as the date the flat rate becomes effective can be associated to a flat rate. After the material and labor inventory items needed to complete the job or work of a flat rate are attached, users have the capability of attaching the flat rate to a problem code.

Flat Rate Pricing gives organizations the ability to set up two types of flat rates. The first flat rate type is Task. A task flat rate includes all the material, labor and overhead costs required when completing a job or service call. The other type of flat rate is Extra. An extra or "add-on" flat rate is used to increase the price of an invoice for additional services performed on a job or service call without charging the customer for overhead costs multiple times on an invoice. Extra flat rates typically do not include labor and administrative overhead costs.

Figure 9: Flat Rate Entry (SP.000.00), Materials & Labor tab

Flat Rate Entry (SP.000.00) is divided into two tabs and contains two buttons. Each tab contains information related to a particular aspect of a flat rate such as **Category** and **Sub-Category** associated

with the flat rate, **Type** of flat rate, warranty information, material and labor inventory items associated with the flat rate, and the different prices of flat rates based on the different pricing plans.

The tab...	Enables you to...
Materials & Labor	Select the material and labor inventory items to associate with the flat rate.
Pricing Plan	View the different prices of flat rates based on the different pricing plans.

The button...	Enables you to...
Problem Code	Access *Flat Rate – Problem Code Maintenance* (SP.003.00). *Flat Rate – Problem Code Maintenance* (SP.003.00) allows users to associate a flat rate with one or more problem codes set up in *Problem Code Maintenance* (SD.008.00) of the Service Dispatch module.
Class Subtotal	Access *Flat Rate – Subtotal Entry* (SP.201.00). *Flat Rate – Subtotal Entry* (SP.201.00) displays the subtotal amount and profit information for each product class used in the Flat Rate Pricing module.

Flat Rate Entry (SP.000.00) Required Fields

The following data is required for all flat rates:

- **Flat Rate ID** (Step 2)
- **Flat Rate Description** (Step 3)
- **Category** (Step 5)
- **Sub-Category** (Step 6)
- **Type** (Step 7)

To enter a flat rate:

1. Open *Flat Rate Entry* (SP.000.00) by selecting **Module | Flat Rate Pricing | Flat Rate Entry** from the menu. The **Materials & Labor** tab of *Flat Rate Entry* (SP.000.00) displays.
2. Type a 10-digit unique ID for the new flat rate in **Flat Rate ID**.
3. Type a 50-character description for the new flat rate in **Description**.
4. To associate a branch with the new flat rate, type the ID of the branch in **Branch ID**. Associating a branch to a flat rate allows users to manage and print pricing books for multiple branches.

   If the branch ID is unknown, press F3 or double-click the right mouse button. A list of all branches set up in the system displays.

   - To select a branch, highlight the ID and click **OK**, or double-click on the ID.
   - Clicking **Edit** on the **Branch Maintenance PV List** accesses *Branch Maintenance* (SD.001.00) enabling you to modify information for an existing branch.
   - Clicking **Insert** on the **Branch Maintenance PV List** accesses *Branch Maintenance* (SD.001.00) enabling you to add new branches to the system.

5. Type the ID of the flat rate category to associate with the new flat rate in **Category**.

    If the flat rate category is unknown, press F3 or double-click the right mouse button. A list of all active flat rate categories set up in *Flat Rate Category Maintenance* (SP.001.00) displays.

    *   To select a flat rate category, highlight the ID and click **OK**, or double-click on the ID.

    *   Clicking **Edit** on the **Flat Rate Category Maintenance PV List** accesses *Flat Rate Category Maintenance* (SP.001.00) enabling you to modify information for an existing flat rate category.

    *   Clicking **Insert** on the **Flat Rate Category Maintenance PV List** accesses *Flat Rate Category Maintenance* (SP.001.00) enabling you to add new flat rates categories to the system.

6. Type the ID of the flat rate subcategory to associate with the new flat rate in **Sub-Category**.

    If the flat rate subcategory is unknown, press F3 or double-click the right mouse button. A list of all active flat rate subcategories associated with the **Category** setup in *Flat Rate Category Maintenance* (SP.001.00) displays.

    *   To select a flat rate subcategory, highlight the ID and click **OK**, or double-click on the ID.

7. Select the flat rate type in **Type**.

    *   A **Task** flat rate is used to account for all costs including overhead costs associated with completing a job or service call.

    *   An **Extra** flat rate is used to create discounts for invoicing multiple tasks of a job or service call in order to prevent the system from charging customers for overhead multiple times on one invoice.

8. Type the duration material associated with a flat rate is covered by a warranty in **Parts**. **Parts** is for informational purposes only.

    *   Days

    *   Months

    *   Year(s)

9. Type the duration labor associated with a flat rate is covered by a warranty in **Labor**. **Labor** is for informational purposes only.

    *   Days

    *   Months

    *   Year(s)

10. Type the amount of labor time needed to complete the work or services of the flat rate in **Est Duration**. **Est Duration** is for informational purposes only. It can be used to compare with the actual time needed to complete the work or services.

11. Type the date the new flat rate will become effective in **Date Price Effective**.

12. Type the date a *Price Book* (SP.606.00) report with the current flat rate information was printed in **Date Printed**.

13. Type the date the new flat rate was entered into *Flat Rate Entry* (SP.000.00) in **Last Updated**.

    After a flat rate is entered into the system, **Last Updated** will be used to display the last time any modifications were made to the flat rate.

14. Type the ID of the tax or tax group to associate with the new flat rate in **Tax ID**.

    - If the tax is unknown, press `F3` or double-click the right mouse button. A list of all taxes set up in *Tax Maintenance* (21.280.00) displays.

        – To select a tax, highlight the ID and click **OK**, or double-click on the ID.

        – Clicking **Edit** on the **Sales Tax List** accesses *Tax Maintenance* (21.280.00) enabling you to modify information for an existing sales tax.

        – Clicking **Insert** on the **Sales Tax List** accesses *Tax Maintenance* (21.280.00) enabling you to add new sales taxes to the system.

    - When a flat rate is used for invoicing a service call, the tax ID attached to the site of the customer overrides the tax ID associated with the flat rate.

15. Select the tax basis for the new flat rate in **Tax Basis**.

    - Cost

    - Sales Price

16. Type the ID of the material and labor inventory items needed to complete the work in **Item ID**.

    - If the inventory ID is unknown, press `F3` or double-click the right mouse button. A list of all inventory items setup in *Inventory Items* (10.250.00) displays.

        – To select an inventory item, highlight the ID and click **OK**, or double-click on the ID.

        – Clicking **Edit** on the **Inventory Item List** accesses *Inventory Items* (10.250.00) enabling you to modify information for an existing inventory item.

        – Clicking **Insert** on the **Inventory Item List** accesses *Inventory Items* (10.250.00) enabling you to add new inventory items to the system.

    - The description of the inventory item displays in the field to the right of **Item ID**.

    - Inventory is not allocated at this time. Items are allocated in the Inventory module when they are used during *Invoice Entry* (SD.202.00).

17. **Class** defaults to the product class associated with the inventory items.

    - Product classes are associated with inventory items in *Inventory Items* (10.250.00) of the Inventory module.

    - Clicking **Class Subtotal** accesses *Flat Rate – Subtotal Entry* (SP.201.00) enabling you to view the profit and profit percentages for each product class.

18. Type a markup ID to associate with each inventory item in **Markup ID**.

    - **Markup ID** is used to recalculate the price of flat rates based on the cost of inventory items and the markup tables using *Price Update Process* (SP.203.00).

19. Type the amount needed of each inventory item to associate with the flat rate in **Quantity**.

    - If the inventory item is labor, type the number of hours needed for the specific labor inventory item.

    - If the inventory item is material, type the quantity needed for each inventory item.

    - **Quantity** is not the total parts or hours needed to complete the work or services of the flat rate, but only for a particular item.

20. Type the sales price for each inventory item in **Unit Price**.

    - **Unit Price** defaults from the **Stock Base Price** of inventory items in *Inventory Items* (10.250.00).

    - **Unit Price** can be recalculated based on the cost of inventory items and the **Markup ID** associated with the inventory items using *Price Update Process* (SP.203.00).

21. Type the total price for each inventory item in **Extended Price**.

    - **Extended Price** is calculated by multiplying **Unit Price** by **Quantity**.

    - **Subtotal** of the flat rate equals the total of **Extended Price** for all inventory items associated with the flat rate.

22. Determine whether or not each inventory item is taxable in **Tax Exempt**.

    - If the inventory item is taxable, select **No**.

    - If the inventory item is not taxable, select **Yes**.

23. View the taxable amount for each inventory item in **Taxable Amt**.

    - If the inventory item is exempt from tax, **Taxable Amt** is zero.

    - If the tax is based on cost and the inventory item is taxable, **Taxable Amt** is calculated by multiplying **Unit Cost** of the inventory item by **Quantity**.

    - If the tax is based on sales price and the inventory item is taxable, **Taxable Amt** is calculated by multiplying **Unit Price** of the inventory item by **Quantity**.

24. View the amount of sales tax associated with each inventory item in **Tax Amt**.

    - **Tax Amt** is calculated by multiplying the tax rate associated with the **Tax ID** (group) by **Taxable Amount**.

    - If the inventory item is tax exempt, **Tax Amt** is zero.

25. View the cost associated with each inventory item in **Unit Cost**.

    - **Unit Cost** defaults from the cost associated with the inventory item in *Inventory Items* (10.25.00).

    - If the valuation method of the inventory item is **User Specified**, type the cost associated with the inventory item.

26. **Profit** allows users to view the dollar profit amount earned for each inventory item of the flat rate. It is a display-only field.

27. **Profit %** allows users to view the percentage of profit earned on each inventory item of the flat rate. It is a display-only field.

28. Click the **Pricing Plan** tab. The **Pricing Plan** tab displays.

The **Pricing Plan** tab allows users to view the different prices of a flat rate based on the pricing plans set up in *Flat Rate Pricing Plan Maintenance* (SP.002.00).

Figure 10: Flat Rate Entry (SP.000.00), Pricing Plan tab

29. **Plan ID** is a display-only field that shows the ID of each pricing plan offered.

30. **Description** is a display-only field that shows the description of each flat rate pricing plan.

31. **Percentage** is a display-only field that shows the markup or discount percentage associated with each flat rate pricing plan.

32. **Price** is a display-only field that shows the price of the flat rate based on the markup or discount percentage associated with each flat rate pricing plan.

33. **Profit** is a display-only field that shows the dollar profit figure earned on each flat rate pricing plan.

34. **Profit %** is a display-only field that shows the percent of profit earned on each flat rate pricing plan.

35. Click **Problem Code**. *Flat Rate – Problem Code Maintenance* (SP.003.00) displays.

Flat Rate – Problem Code Maintenance (SP.003.00) allows users to associate a flat rate with one or more problem codes set up in *Problem Code Maintenance* (SD.008.00) of the Service Dispatch module.
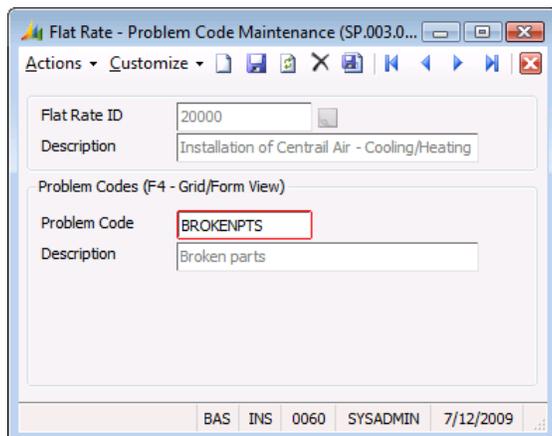

Figure 11: Flat Rate – Problem Code Maintenance (SP.003.00)

36. **Flat Rate ID** is a display-only field showing the selected flat rate.

37. **Description** is a display-only field showing the description of the selected flat rate.

38. Type the code that describes the reason for the service call in **Problem Code**.

   - If the problem code is unknown, press `F3` or double-click the right mouse button. A list of all problem codes set up in *Problem Code Maintenance* (SD.008.00) in the Service Dispatch module displays.

     – To select a problem code, highlight the ID and click **OK**, or double-click on the ID.

     – Clicking **Edit** on the **Problem Code Maintenance PV List** accesses *Problem Code Maintenance* (SD.008.00) enabling you to modify information for an existing problem code.

     – Clicking **Insert** on the **Problem Code Maintenance PV List** accesses *Problem Code Maintenance* (SD.008.00) enabling you to add new problem codes to the system.

   - After a problem code has been selected, the problem code description defaults to **Description**.

   - Multiple problem codes can be attached to each flat rate.

39. **Description** is a display-only field that shows the description of the problem codes associated with a flat rate.

40. Click **Close** on the toolbar to close *Flat Rate – Problem Code Maintenance* (SP.003.00).

41. Click **Class Subtotals**. *Flat Rate – Subtotal Entry* (SP.201.00) displays.

Figure 12: Flat Rate – Subtotal Entry (SP.201.00)

Flat Rate – Subtotal Entry (SP.201.00) allows users to view the subtotal amount and profit information for the product class of each inventory item used in the flat rate.

When creating a new flat rate, the value for each product class is zero.

42. **Flat Rate ID** is a display-only field showing the selected flat rate.

43. **Description** is a display-only field showing the description of the selected flat rate.

44. **Class ID** is a display-only field showing the product class of each inventory item associated with the flat rate.

45. **Description** is a display-only field showing the description of product class of each inventory item associated with the flat rate.

46. **Subtotal** is a display-only field that shows the total dollar amount used for each product class for the inventory items associated with the flat rate.

47. **Profit** is a display-only field that shows the profit amount used for each product class associated with the flat rate.

48. **Profit %** is a display-only field that shows the profit percentage earned for each product class associated with the flat rate.

49. Click **OK** to close *Flat Rate – Subtotal Entry* (SP.201.00).

50. **Sub Total** is a display-only field that shows the subtotal associated with the flat rate. It is calculated by adding the **Extended Price** for all inventory items associated with the flat rate.

51. **Tax** is a display-only field that shows the total sales tax associated with the flat rate. It is calculated by adding the sales tax from each inventory item associated with the flat rate.

52. To mark up or mark down the total flat rate price by a percentage, type the percentage in **Markup %.**

53. **Total** is a display-only field that shows the price of the flat rate. It is calculated by adding **Sub Total** and **Tax**, then multiplying the sum with **Markup %**

54. Click **Save** on the toolbar to save the new flat rate.

55. Click **Close** on the toolbar to close *Flat Rate Entry* (SP.000.00).

Price Update Process

The Flat Rate Pricing module is a comprehensive service business system that is designed to track and manage every detail of flat rate prices. *Price Update Process* (SP.203.00) enables users to efficiently and accurately maintain inventory stock base prices and flat rate prices.

Price Update Process (SP.203.00) enables users to make global updates to flat rate prices when the cost of inventory items associated with flat rates increase and update **Stock Base Price** of inventory items. *Price Update Process* (SP.203.00) provides users with the ability to control the inventory items and/or flat rates to be updated, as well as give users the flexibility to generate the update process on all or one **Mark-Up ID, Product Class ID, Item ID**, and/or **Branch ID**.

When updating **Stock Base Price** of inventory items, *Price Update Process* (SP.203.00) gives users the ability to update all inventory items or just a range of inventory items. When updating flat rate prices, *Price Update Process* (SP.203.00) allows users to choose to process one or all inventory items, all or a range of flat rate categories, and/or all or a range of flat rates.
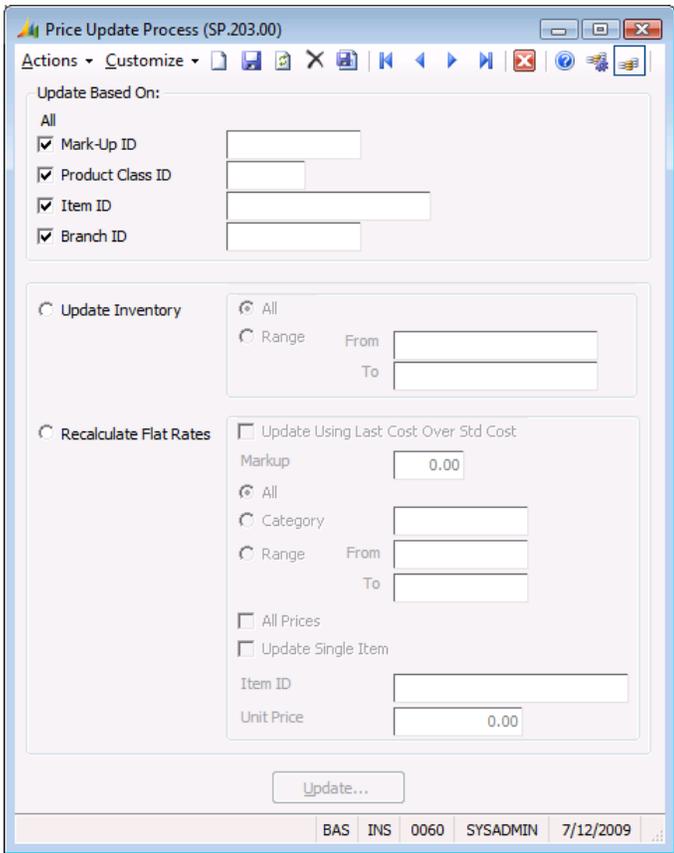

Figure 13: Price Update Process (SP.203.00)

Required Field for Updating Stock Base Price

The following field is required to complete *Price Update Process* (SP.203.00):

Update Inventory (Step 10 below)

To update the stock base price:

1. Choose **Module | Flat Rate Pricing | Price Update Process** from the menu. *Price Update Process* (SP.203.00) displays.

2. To generate *Price Update Process* (SP.203.00) for all inventory markups, verify **Mark-Up ID** is selected.

   Mark-Up ID is selected by default when you first access *Price Update Process* (SP.203.00).

3. To restrict *Price Update Process* (SP.203.00) to an inventory markup, clear the **Mark-Up ID** check box and type the ID of the inventory markup in the field to the right of **Mark-Up ID**

   If the markup needs to be changed and the ID is unknown, press F3 or double-click the right mouse button. A list of all inventory markup IDs set up in *Inventory Mark-Up Maintenance* (SD.026.00) displays.

   - To select a **Pricing Markup ID**, highlight the ID and click **OK**, or double-click on the ID.

4. To generate *Price Update Process* (SP.203.00) for all product classes, verify **Product Class ID** is selected.

   Product Class ID is selected by default.

5. To restrict *Price Update Process* (SP.203.00) to a product class, type the ID of the product class in the field to the right of **Product Class ID.**

   If the product needs to be changed and the class is unknown, press F3 or double-click the right mouse button. A list of all product classes set up in *Product Classes* (10.280.00) displays.

   - To select a product class, highlight the ID and click **OK,** or double-click on the branch.

   - Clicking **Edit** on the **Product Class List** accesses *Product Classes* (10.280.00) enabling you to modify information for an existing product class.

   - Clicking **Insert** on **the Product Class List** accesses *Product Classes* (10.280.00) enabling you to add new product classes to the system.

6. To generate *Price Update Process* (SP.203.00) for all inventory items, verify **Item ID** is selected.

   Item ID is selected by default.

   Note: Generally, labor inventory items are excluded when updating **Stock Base Price** of inventory items during *Price Update Process* (SP.203.00).

7. To restrict *Price Update Process* (SP.203.00) to a specific inventory item, type the ID of the inventory item in the field to the right of **Item ID**.

   If the inventory item needs to be changed and the ID is unknown, press F3 or double-click the right mouse button. A list of all inventory items set up in *Inventory Items* (10.250.00) of the Inventory module displays.

   - To select an inventory item, highlight the ID and click **OK**, or double-click on the ID.

   - Clicking **Edit** on the **Inventory Item List** accesses *Inventory Items* (10.250.00) enabling you to modify information for an existing inventory item.

   - Clicking **Insert** on the **Inventory Item List** accesses *Inventory Items* (10.250.00) enabling you to add new items to Inventory.

8. To generate *Price Update Process* (SP.203.00) for all branches, verify **Branch ID** is selected.

   Branch ID is selected by default.

9. To restrict *Price Update Process* (SP.203.00) to a specific branch, type the branch ID in the field to the right of **Branch ID**.

    If the branch needs to be changed and the ID is unknown, press `F3` or double-click the right mouse button. A list of all branches set up in *Branch Maintenance* (SD.001.00) displays.

    * To select a branch, highlight the ID and click **OK**, or double-click on the ID.
    * Clicking **Edit** on the **Branch Maintenance PV List** accesses *Branch Maintenance* (SD.001.00) enabling you to modify information for an existing branch.
    * Clicking **Insert** on the **Branch Maintenance PV List** accesses *Branch Maintenance* (SD.001.00) enabling you to add new branches to the system.

10. Select **Update Inventory** to have *Price Update Process* (SP.203.00) update the **Stock Base Price** of inventory items.

    * With **Update Inventory** selected, you can use additional filtering information related to updating the **Stock Base Price** of inventory items.
    * Selecting **Update Inventory** enables **All** and **Range** in the **Inventory** frame to give you the option of updating all inventory items or a range of inventory items.

11. Select **All** to update **Stock Base Price** of all inventory items. Proceed to Step 14.

    – OR –

    Select **Range** to update **Stock Base Price** for a range of inventory items. Selecting **Range** activates inventory **From** and **To**.

12. To restrict the inventory update process to a range of inventory items, type the ID of the first inventory item in **From**.

    If the inventory item needs to be changed and the ID is unknown, press `F3` or double-click the right mouse button. A list of all inventory items set up in *Inventory Items* (10.250.00) of the Inventory module displays.

    * To select an inventory item, highlight the ID and click **OK**, or double-click on the ID.
    * Clicking **Edit** on the **Inventory Item List** accesses *Inventory Items* (10.250.00) enabling you to modify information for an existing inventory item.
    * Clicking **Insert** on the **Inventory Item List** accesses *Inventory Items* (10.250.00) enabling you to add new inventory items to Inventory.

13. To restrict the inventory update process to a range of inventory items, type the ID of the second inventory item in **To**.

    If the inventory item needs to be changed and the ID is unknown, press `F3` or double-click the right mouse button. A list of all inventory items set up in *Inventory Items* (10.250.00) of the Inventory module displays.

    * To select an inventory item, highlight the ID and click **OK**, or double-click on the ID.
    * Clicking **Edit** on the **Inventory Item List** accesses *Inventory Items* (10.250.00) enabling you to modify information for an existing inventory item.
    * Clicking **Insert** on the **Inventory Item List** accesses *Inventory Items* (10.250.00) enabling you to add new inventory items to Inventory.

14. Click **Update** to start *Price Update Process* (SP.203.00).

15. Click **OK** to close the Price Update warning and begin the price update process or click **Cancel** to abort the price update process.
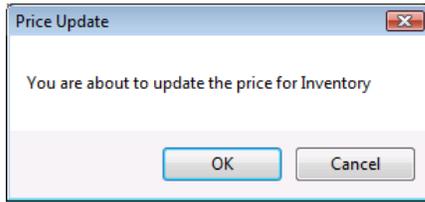

Figure 14: Price Update

16. Click **OK** to close the **Process completed** message.
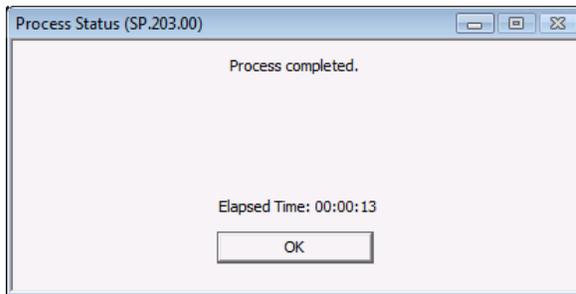
Figure 15: Process Status (SP.203.00)

17. Click **Close** on the toolbar to close *Price Update Process* (SP.203.00).

Required Field for Updating Flat Rate Prices

The following field is required to complete *Price Update Process* (SP.203.00):

Recalculate Flat Rates (Step 10)

To update a flat rate price:

1. Choose **Module | Flat Rate Pricing | Price Update Process** from the menu. *Price Update Process* (SP.203.00) displays.

2. To generate *Price Update Process* (SP.203.00) for all inventory markups, verify **Mark-Up ID** is selected.

   Mark-Up ID is selected by default to Selected when you open *Price Update Process* (SP.203.00).

3. To restrict *Price Update Process* (SP.203.00) to an inventory markup, clear **Mark-Up ID** and type the ID of the inventory markup in the field to the right of **Mark-Up ID.**

   If the inventory markup needs to be changed and the ID is unknown, press F3 or double-click the right mouse button. A list of all inventory markup IDs set up in *Inventory Mark-Up Maintenance* (SD.026.00) displays.

   - To select a **Pricing Markup ID**, highlight the ID and click **OK**, or double-click on the ID.

4. To generate *Price Update Process* (SP.203.00) for all product classes, verify **Product Class ID** is selected.

   Product Class ID is selected by default.

5. To restrict *Price Update Process* (SP.203.00) to a product class, type the ID of the product class in the field to the right of **Product Class ID**.

   If the product class needs to be changed, press F3 or double-click the right mouse button. A list of all product classes set up in *Product Classes* (10.280.00) displays.

   - To select a product class, highlight the ID and click **OK**, or double-click on the branch.

   - Clicking **Edit** on the **Product Class List** accesses *Product Classes* (10.280.00) enabling you to modify information for an existing product class.

   - Clicking **Insert** on the **Product Class List** accesses *Product Classes* (10.280.00) enabling you to add new product classes to the system.

6. To generate *Price Update Process* (SP.203.00) for all inventory items, verify **Item ID** is selected.

   Item ID is selected by default.

   Note: Generally, labor inventory items are excluded when updating flat rate prices during *Price Update Process* (SP.203.00).

7. To restrict *Price Update Process* (SP.203.00) to a specific inventory item, type the ID of the inventory item in the field to the right of **Item ID**.

   If the inventory item needs to be changed and the ID is unknown, press F3 or double-click the right mouse button. A list of all inventory items set up in *Inventory Items* (10.250.00) in the Inventory module displays.

   - To select an inventory item, highlight the ID and click **OK**, or double-click on the ID.

   - Clicking **Edit** on the **Inventory Item List** accesses *Inventory Items* (10.250.00) enabling you to modify information for an existing inventory item.

   - Clicking **Insert** on the **Inventory Item List** accesses *Inventory Items* (10.250.00) enabling you to add new inventory items to Inventory.

8. To generate *Price Update Process* (SP.203.00) for all branches, verify **Branch ID** is selected.

   Branch ID is selected by default

9. To restrict *Price Update Process* (SP.203.00) to a specific branch, type the branch ID in the field to the right of **Branch ID**.

   If the branch needs to be changed and the ID is unknown, press `F3` or double-click the right mouse button. A list of all branches set up in *Branch Maintenance* (SD.001.00) displays.

   - To select a branch, highlight the ID and click **OK**, or double-click on the ID.

   - Clicking **Edit** on the **Branch Maintenance PV List** accesses *Branch Maintenance* (SD.001.00) enabling you to modify information for an existing branch.

   - Clicking **Insert** on the **Branch Maintenance PV List** accesses *Branch Maintenance* (SD.001.00) enabling you to add new branches to the system.

10. Select **Recalculate Flat Rates** to update flat rate prices with the increased costs of the inventory items associated with the flat rates.

    - With **Recalculate Flat Rates** selected, you can use additional filtering information related to updating flat rate prices.

    - Selecting **Recalculate Flat Rates** enables the fields in the **Flat Rate** frame.

11. Select **Update Using Last Cost Over Std Cost** to use **Last Cost** of inventory items to update flat rate prices instead of **Standard Cost**.

12. To mark up flat rate prices by a specified percentage, type the percentage increase amount in **Markup**.

13. Select **All** to update the flat rate prices for all flat rate categories and all flat rates. Proceed to Step 14.

    – OR –

    Select **Category** to update the flat rate price for one flat rate category.

    - Selecting **Category** activates the field to the right of **Category**.

    - If the flat rate category needs to be changed and the ID is unknown, press `F3` or double-click the right mouse button. A list of all flat rate categories set up in *Flat Rate Category Maintenance* (SP.001.00) displays.

      — To select a flat rate category, highlight the ID and click **OK**, or double-click on the ID.

      — Clicking **Edit** on the **Flat Rate Category Maintenance PV List** accesses *Flat Rate Category Maintenance* (SP.001.00) enabling you to modify information for an existing flat rate category.

      — Clicking **Insert** on the **Flat Rate Category Maintenance PV List** accesses *Flat Rate Category Maintenance* (SP.001.00) enabling you to add new flat rate categories to the Flat Rate Pricing module.

    – OR –

    Select **Range** to restrict the update flat rate price process to a range of flat rates.

    - Selecting **Range** activates flat rate **From** and **To**.

    - If the flat rate price needs to be changed and the ID is unknown, press `F3` or double-click the right mouse button. A list of all flat rate prices set up in *Inventory Items* (10.250.00) displays.

      — To select a flat rate price, highlight the ID and click **OK**, or double-click on the ID.

14. Select **All Prices** to update all of the detail lines items of flat rates. Proceed to Step 17.

    – OR –

    Select **Update Single Item** to update flat rate prices for a specific inventory item.

    - Selecting **Update Single Item** activates **Item ID** and **Unit Price**.

    - Not selecting **Update Single Item** updates flat rate prices for all inventory items.

15. To restrict *Price Update Process* (SP.203.00) to a specific inventory item, type the ID of the inventory item in **Item ID**.

    If the inventory item needs to be changed and the ID is unknown, press `F3` or double-click the right mouse button. A list of all inventory items set up in *Inventory Items* (10.250.00) in the Inventory module displays.

    - To select an inventory item, highlight the ID and click **OK**, or double-click on the ID.
    - Clicking **Edit** on the **Inventory Item List** accesses *Inventory Items* (10.250.00) enabling you to modify information for an existing inventory item.
    - Clicking **Insert** on the **Inventory Item List** accesses *Inventory Items* (10.250.00) enabling you to add new inventory items to Inventory.

16. If you are restricting *Price Update Process* (SP.203.00) to a specific inventory item, type the new price of the inventory item in **Unit Price**.

17. Click **Update** to run *Price Update Process* (SP.203.00).

18. Click **OK** to close the **Price Update** warning and start the flat rate price update process or click **Cancel** to not start the flat rate price update process.
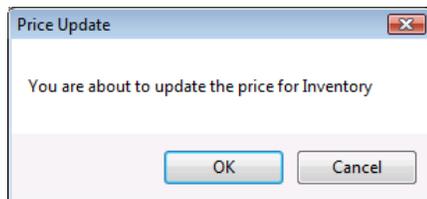
Figure 16: Price Update

19. Click **OK** to close the **Process completed** message.
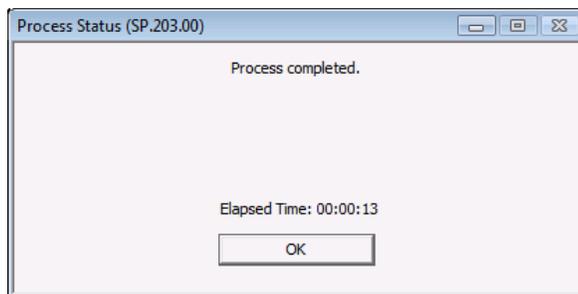
Figure 17: Process Status (SP.203.00)

20. Click **Close** on the toolbar to close *Generate PM Service Calls Process* (SE.300.00).

Data Entry and Inquiry Screens

Data entry and inquiry screens are used to set up flat rate prices and review/modify rates, discounts, and markups as necessary. Flat rate prices are the heart of the Flat Rate Pricing module. Flat rate prices are entered into the system in *Flat Rate Entry* (SP.000.00). *Flat Rate Entry* (SP.000.00) has been designed to allow users to enter flat rate prices into the system in the most simple and time saving manner.

Flat Rate Entry (SP.000.00)

Flat Rate Entry (SP.000.00) allows you to create an unlimited number of user-defined flat rates. Flat rates can be printed in the *Price Book* (SP.606.00) report and used for outside retail pricing or internal breakdown pricing. Each flat rate is recognized by the system using a flat rate identification code (a 10-character user-defined code). You can include a description to explain the code. Each flat rate is placed in a category and subcategory, allowing you to print the *Price Book* (SP.606.00) report in an organized manner.

Flat Rate Pricing gives organizations the ability to set up two types of flat rates. The first flat rate type is Task. A task flat rate includes all the material, labor and overhead costs required when completing a job or service call. The other type of flat rate is Extra. An extra or "add-on" flat rate is used to increase the price of an invoice for additional services performed on a job or service call without charging the customer for overhead costs multiple times on an invoice. Extra flat rates typically do not include labor and administrative overhead costs.

Flat Rate Entry (SP.000.00) contains warranty information for both parts and labor included in the flat rate. Pricing history information is also available, including the date the flat rate becomes effective, the date the flat rate was last printed in a book, and the last time the flat rate was updated. The **Problem Code** button associates a flat rate with a problem code. Detailed notes can be entered or source documents can be attached for each flat rate by using the **Notes/Attachments** icon .

Use the **Materials & Labor** tab to select inventory items from the Inventory table, along with the associated description and the product class. The markup ID and quantity are also selected from this tab. Once this information is entered, the **Unit Price**, **Extended Price**, and **Sub Total** fields are populated with the calculated figures.

Use the **Pricing Plan** tab to view different markups and prices associated with each plan for a flat rate along with a dollar profit figure and a profit percentage. Profits are broken down by product class. View Product class and profit figures by clicking **Class Subtotal**.

Note: This screen is viewed in either form view or grid view by double-clicking or by pressing `F4`.

Flat Rate Entry, Materials & Labor Tab

Use the **Materials & Labor** tab to select inventory items from the Inventory table, along with the associated description and the product class. The markup ID and quantity are also selected in this tab. Once this information is entered, the **Unit Price**, **Extended Price**, and **Sub Total** fields are populated with the calculated figures.

Figure 18: Flat Rate Entry (SP.000.00), Materials & Labor tab

Following are the field descriptions for the **Materials & Labor** tab of *Flat Rate Entry* (SP.000.00).

Flat Rate ID

Flat Rate ID creates an unlimited number of user-defined identifying codes assigned to a flat rate.

Note: It is recommended that you reserve identification codes beginning with nine (9) for Extra type flat rates.

Description

Description contains a 50-character explanation of the **Flat Rate ID**.

Branch ID

Branch ID contains a valid branch identifier used to manage and generate price books for multiple branches.

Category

Category assigns a flat rate to a category or a group. You can further divide groups into a subcategory. This field is used for grouping when generating your Price Book.

Sub-Category

Sub-Category assigns a flat rate to a subcategory, allowing you to separate tasks.

Type

Type is a drop down list for flat rates. Two options are available:

- A **Task** flat rate is used to account for all costs including overhead costs associated with completing a job or service call.

- An **Extra** flat rate is used to create discounts for invoicing multiple tasks of a job or service call in order to prevent the system from charging customers for overhead multiple times on one invoice.

Parts

Parts contains the length of time the parts associated with a flat rate are under warranty.

Labor

Labor contains the duration the labor associated with the flat rate is under warranty.

Est Duration

Est Duration contains a "best guess" amount of labor time needed to complete the flat rate task. You can compare the estimated time with the actual time.

Date Price Effective

Date Price Effective contains the date a flat rate becomes effective.

Date Printed

Date Printed contains the last date a *Price Book* (SP.606.00) report was printed.

Last Update

Last Update contains the date a flat rate was last updated.

Tax ID

Tax ID contains the tax identifier (tax group) associated with line item(s) in a flat rate. This allows you to estimate the flat rate with sales tax. If **Flat Rate ID** is used when invoicing a call, the default tax ID from *Site Maintenance* (SD.025.00) overrides the tax ID entered in this field. Use the sales tax ID from the site when you know the actual tax rate for the applicable municipality. It is recommended that you always use a tax ID, even if the rate is 0.

Tax Basis

Tax Basis provides the ability to tax a flat rate either on the sales price or the cost of the flat rate. The basis at which a flat rate is taxed varies from state to state. In many states and municipalities, the ability to calculate sales tax based on cost is an advantage for the service provider.

Item ID

Item ID links a valid inventory item from the Inventory module to a flat rate.

Item ID (Description)

Item ID (Description) displays an explanation of the inventory item.

Class

Class contains the product class associated with the selected inventory item. When the inventory item is selected, the product class defaults from *Inventory Items* (10.250.00) in the Inventory module.

Note: By clicking on **Class Subtotal**, you can view breakdowns for each flat rate based on the product class.

Markup ID

Markup ID selects a markup identifier for each inventory item, enabling you to recalculate the unit price and extended price automatically across all flat rates using *Price Update Process* (SP.203.00).

Quantity

Quantity contains the amount of a certain inventory item needed to make up a flat rate. This is not the total parts or hours needed to make up a flat rate, only the amount of a particular item.

Unit Price

Unit Price contains the unit price for a particular inventory item. The default value populates from **Stock Base Price** in *Inventory Items* (10.250.00). This field can be recalculated using *Price Update Process* (SP.203.00).

Extended Price

Extended Price contains the extended price for a particular inventory item. **Extended Price** is calculated by multiplying the unit price by the quantity. The total of all extended prices reflect the subtotal.

Tax Exempt

Tax Exempt provides the ability to make a specific line item tax exempt. Select Yes if the line item is exempt. No is the default value; in many cases, labor items are not taxable sales.

Taxable Amt

Taxable Amt contains the taxable amount of a line item. If the tax is based on the cost and the item is not exempt, the taxable amount is calculated by multiplying the unit cost of the inventory item by the quantity. If the tax is based on the sales price and the item is not exempt, the taxable amount is calculated by multiplying the unit price of the item by the quantity. If the item is tax exempt, the taxable amount is 0.00.

Tax Amt

Tax Amt contains the amount of sales tax associated with a line item. The tax amount is calculated by multiplying the tax rate associated with the tax ID (group) by the taxable amount.

Note: If the line item is exempt, the tax amount equals 0.00.

Unit Cost

Unit Cost contains the unit cost for the associated inventory item. This cost defaults from *Inventory Items* (10.250.00), **Direct Cost**. If the costing method is user-specified, a cost is entered. If the line item is labor related, then the value entered is an average or estimated cost based on an hourly rate or commission percent.

Profit

Profit displays the dollar profit figure earned on a single line item of the flat rate.

Profit %

Profit % displays the percent of profit earned on a single line item of the flat rate.

Sub Total

Sub Total displays the subtotal of the flat rate.

Tax

Tax displays the total sales tax associated with the flat rate. This figure is calculated by adding the sales tax from each individual line.

Markup %

Markup % allows the markup of the total flat rate price by any percentage desired. Type a percentage into **Markup %**.

Total

Total contains the total of the flat rate. **Total** is calculated by first adding the **Sub Total** and the **Tax,** then multiplying the sum with the **Markup %**.

Problem Code (Button)

Problem Code accesses *Flat Rate - Problem Code Maintenance* (SP.003.00), which allows you to link or associate a flat rate with a problem code. This creates a one-to-many relationship between one flat rate and many problem codes.

Class Subtotal (Button)

Class Subtotal accesses *Flat Rate - Subtotal Entry* (SP.201.00), which allows you to view selected class identifiers for a particular flat rate and a description of the class ID. It also allows you to view the price along with the profit and profit percentages produced by each class ID.

Flat Rate Entry, Pricing Plan Tab

The **Pricing Plan** tab allows you to view the different prices of a flat rate based on different pricing plans. It also allows you to view the discount percentage for each pricing plan, the profit earned by the flat rate, and the profit percentage.

Note: The pricing plan information is included in the *Price Book* (SP.606.00) report.

Figure 19: Flat Rate Entry (SP.000.00), Pricing Plan tab

Following are the field descriptions for the **Pricing Plan** tab of *Flat Rate Entry* (SP.000.00).

Flat Rate ID

Flat Rate ID creates an unlimited number of user-defined identifying codes assigned to a flat rate.

Note: It is recommended that you reserving identification codes beginning with nine (9) for Extra type flat rates.

Description

Description contains a 50-character explanation of the **Flat Rate ID**.

Branch ID

Branch ID contains a valid branch identifier used to manage and generate price books for multiple branches.

Category

Category assigns a flat rate to a category or a group. You can further divide groups into a subcategory. This field is used for grouping when generating your *Price Book* (SP.606.00) report.

Sub-Category

Sub-Category assigns a flat rate to a subcategory, allowing you to separate tasks.

Type

Type is a drop down list for flat rates. Two options are available:

- A **Task** flat rate is used to account for all costs including overhead costs associated with completing a job or service call.

- An **Extra** flat rate is used to create discounts for invoicing multiple tasks of a job or service call in order to prevent the system from charging customers for overhead multiple times on one invoice.

Parts

Parts contains the length of time the parts associated with a flat rate are under warranty.

Labor

Labor contains the duration the labor associated with the flat rate is under warranty.

Est Duration

Est Duration contains a "best guess" amount of labor time needed to complete the flat rate task. You can compare the estimated time with the actual time.

Date Price Effective

Date Price Effective contains the date a flat rate becomes effective.

Date Printed

Date Printed contains the last date a *Price Book* (SP.606.00) report was printed.

Last Update

Last Update contains the date a flat rate was last updated.

Plan ID

Plan ID contains user-defined alphanumeric codes for each pricing plan offered by your service department.

Description

Description displays an explanation of the flat rate pricing plan.

Percentage

Percentage displays the markup or discount percentage associated with a pricing plan. Discounts are shown as negative numbers.

Price

Price displays the price of the flat rate using the pricing plan discount/markup.

Profit

Profit displays the dollar amount of profit earned on this plan.

Profit %

Profit % displays the percent of profit earned on this plan.

Sub Total

Sub Total displays the subtotal of the flat rate.

Tax

Tax displays the total sales tax associated with the flat rate. This figure is calculated by adding the sales tax from each individual line.

Markup %

Markup % allows the markup of the total flat rate price by any percentage desired. Type a percentage into **Markup %.**

Total

Total contains the total of the flat rate. **Total** is calculated by first adding the **Sub Total** and the **Tax** then multiplying the sum with the **Markup %.**

Problem Code (Button)

Problem Code accesses *Flat Rate - Problem Code Maintenance* (SP.003.00), which allows you to link or associate a flat rate with a problem code. This action creates a one-to-many relationship between one flat rate and many problem codes.

Class Subtotal (Button)

Class Subtotal accesses *Flat Rate - Subtotal Entry* (SP.201.00), which allows you to view the selected class identifiers for a particular flat rate and a description of the class ID. It also allows you to view the price along with the profit and profit percentages produced by each class ID.

Flat Rate - Problem Code Maintenance (SP.003.00)

Flat Rate - Problem Code Maintenance (SP.003.00) enables you to link or associate a flat rate with one or more problem code. Access this screen by clicking **Problem Code** in *Flat Rate Entry* (SP.000.00).
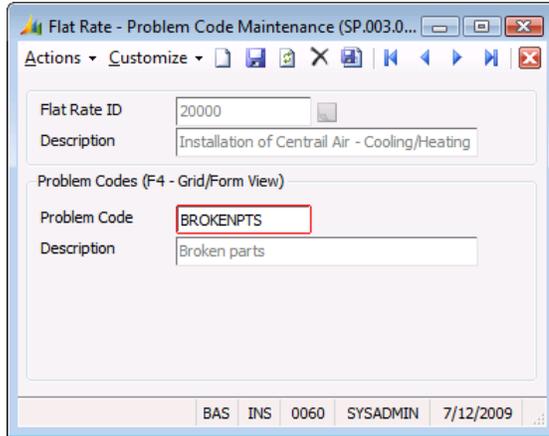
Figure 20: Flat Rate - Problem Code Maintenance (SP.003.00)

Following are the field descriptions for *Flat Rate - Problem Code Maintenance* (SP.003.00).

Flat Rate ID

Flat Rate ID displays the selected flat rate identifier.

Description (Flat Rate ID)

Description (Flat Rate ID) displays an explanation of the selected **Flat Rate ID**.

Problem Code ID

Problem Code ID contains the problem code identifier you are linking to this flat rate.

Description (Problem Code ID)

Description (Problem Code ID) displays an explanation of **Problem Code ID**.

Invoice - Flat Rate Order (SP.200.00)

You can use *Invoice - Flat Rate Order* (SP.200.00) while in Service Dispatch to create an invoice using flat rate IDs. Click the **Details** button in *Invoice Entry* (SD.202.00) to open this screen. The flat rates you designate can consist of both materials and labor necessary for the flat rate detail. Flat rate entries are always billable to the customer. Therefore, line types are not required.

See "Flat Rate Price Invoicing" in the Service Dispatch help or user guide for more information about *Invoice Entry* (SD.202.00) and how it interacts with this screen.

Figure 21: Invoice - Flat Rate Order (SP.200.00)

Following are the field descriptions for *Invoice - Flat Rate Order* (SP.200.00).

Service Call ID

Service Call ID displays the service call. It is populated with the service call ID entered in *Invoice Entry* (SD.202.00).

Customer ID

Customer ID displays the customer identifier and name associated with a service call selected in *Invoice Entry* (SD.202.00).

Site ID

Site ID displays the site identifier and name associated with the service call. **Site ID** is populated by information entered in *Service Call Entry* (SD 200.00).

Total

Total calculates and displays the sum of extended price of all Flat Rate IDs.

Flat Rate ID

Flat Rate ID displays a flat rate identifier and description associated with the invoice. There may be more than one flat rate ID per invoice.

Price

Price displays the total price associated with the flat rate identifier.

Invt Loc ID

Invt Loc ID associates an inventory location with the service call (warehouse, truck, etc.). The detail quantities used decrement quantities on hand and quantities available for this inventory location.

Pricing Plan ID

Pricing Plan ID displays the pricing plan associated with the invoice. The pricing plan defaults from the site associated with the service call. The display-only field to the right allows you to view the percentage discount associated with the pricing plan ID. The pricing plan ID must be changed in order to change the percentage or discount. **Pricing Plan ID** is used for discounting purposes; you cannot change a percentage directly.

Extended Price

Extended Price displays the extended amount associated with the flat rate.

Task Detail (button)

Task Detail accesses the material and labor detail line items associated with the flat rate ID. The detail line items may be modified.

OK (button)

OK closes the screen and saves the entry.

Cancel (button)

Cancel prompts you to save your changes and closes the screen.

Flat Rate - Subtotal Entry (SP.201.00)

Flat Rate - Subtotal Entry (SP.201.00) enables you to view the subtotal amount and profit information for each class ID used in the flat rate. Access this screen by clicking **Class Subtotal** in *Flat Rate Entry* (SP.000.00).

Figure 22: Flat Rate – Subtotal Entry (SP.201.00)

Following are the field descriptions for *Flat Rate – Subtotal Entry* (SP.201.00).

Flat Rate ID

Flat Rate ID displays the selected flat rate identifier.

Description (Flat Rate ID)

Description (Flat Rate ID) displays an explanation of the selected **Flat Rate ID**.

Class ID

Class ID displays all the product class identifiers used when identifying materials and labor for the flat rate.

Description (Class ID)

Description (Class ID) displays an explanation of **Class ID**.

Subtotal

Subtotal displays the subtotal of the class ID for this flat rate.

Profit

Profit displays the dollar amount of profit earned on this plan.

Profit %

Profit % displays the percent of profit earned on this plan.

OK (Button)

OK asks whether you want to save changes and closes *Flat Rate – Subtotal Entry* (SP.201.00).

Maintenance Screens

The Flat Rate Pricing module is a comprehensive service business system that is designed to track and manage every detail of flat rate prices. Several maintenance screens exist in the system that enable users to efficiently and accurately process invoices.

Refer to the "Setting Up Flat Rate Pricing" section of this manual for detailed procedures explaining how to adapt the Flat Rate Pricing module to your business needs and practices.

Flat Rate Category Maintenance (SP.001.00)

Flat Rate Category Maintenance (SP.001.00) allows you to create categories used to separate flat rate codes into similar groupings. It also creates and assigns subcategories to a category. Once you have created and assigned codes to categories and entered your flat rates, you can create a *Price Book* (SP.606.00) report organized by categories and subcategories.

Figure 23: Flat Rate Category Maintenance (SP.001.00)

Following are the field descriptions for *Flat Rate Category Maintenance* (SP.001.00).

Category ID

Category ID contains a user-defined alphanumeric code. It is recommended that you use letters rather than numbers.

Description (Category ID)

Description (Category ID) displays an explanation of **Category ID**.

Sub-Category ID

Sub-Category ID attaches an unlimited number of user-defined subcategories to a category. This is accomplished by selecting the desired category and entering the user-defined subcategory identifier.

Description (Sub-Category ID)

Description (Sub-Category ID) contains an explanation of **Sub-Category ID**.

Flat Rate Pricing Plan Maintenance (SP.002.00)

Flat Rate Pricing Plan Maintenance (SP.002.00) allows you to create an unlimited number of user-defined pricing plans. A pricing plan is used to discount or mark up a flat rate. For example, a priority pricing plan can be created for service contract customers, which entitles them to a 10% discount on all services performed on a flat rate basis.

The *Price Book* (SP.606.00) report prints prices based on the flat rate pricing plans in a columnar format. This allows technicians to easily determine the flat rate price based on the pricing plans.
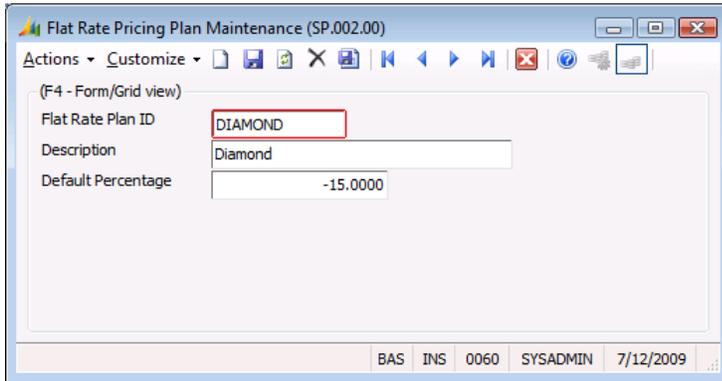
Figure 24: Flat Rate Pricing Plan Maintenance (SP.002.00)

Following are the field descriptions for *Flat Rate Pricing Plan Maintenance* (SP.002.00).

Flat Rate Plan ID

Flat Rate Plan ID contains a user-defined alphanumeric code for each pricing plan offered by your service department.

Description

Description contains an explanation of the flat rate pricing plan. The explanation is a maximum of 30 characters.

Default Percentage

Default Percentage associates a markup or discount percentage with a pricing plan. The default percentage is multiplied by the sum of the subtotal and the tax total for a flat rate. Discounts are entered as negative numbers. Markups are entered as positive numbers.

Inventory Mark-Up Maintenance (SD.026.00)

Inventory Mark-Up Maintenance (SD.026.00) allows you to create an unlimited number of user-defined inventory markup tables. These tables are used to mark up the price of inventory items that are associated with a flat rate. For example, when recalculating detail for a flat rate using *Price Update Process* (SP.203.00), if an inventory item and a markup identifier are entered, the system looks at the cost of the item and selects the proper cost multiplier. This action marks up the price of the individual inventory items. Access this screen through the Service Dispatch menu.

Figure 25: Inventory Mark-Up Maintenance (SD.026.00)

Following are the field descriptions for *Inventory Mark-Up Maintenance* (SD.026.00).

Mark-Up ID

Mark-Up ID contains a user-defined alphanumeric markup identifier. It is recommended that you have one markup ID for labor with a cost multiplier of zero. Generally, labor items are excluded when using *Price Update Process* (SP.203.00), as labor rates are usually fixed amounts.

Description

Description contains an explanation of the markup ID. The explanation is a maximum of 30 characters.

From and To

From and **To** are a cost range. The cost multiplier is dependent upon the ranges created in **From** and **To**.

Cost Multiplier

Cost Multiplier contains a number that is multiplied to an inventory cost based on the applicable cost range.

Above

Above contains the multiplier for the highest level of the markup table.

Process Screens

The Flat Rate Pricing module is a comprehensive service business system that is designed to track and manage every detail of flat rate prices. *Price Update Process* (SP.203.00) enables users to efficiently and accurately maintain inventory stock base prices and flat rate prices.

Price Update Process (SP.203.00)

Price Update Process (SP.203.00) updates both flat rate prices and the inventory record's stock base price. It allows you to make sweeping changes quickly to the flat rate price structure based on inventory cost changes or markup schedule changes. **Update Based On** allows you to control the inventory items or flat rate items to be updated. You can select one or all markup IDs, product classes, item IDs, or branches.

Figure 26: Price Update Process (SP.203.00)

When updating inventory item stock base price values, you can choose to update all items or just a range of inventory items. If updating flat rate prices, you can choose to update all records, only records in a certain flat rate category, or a range of flat rate ID values. Flat rate prices (and the inventory stock base price) are calculated by marking up the item's direct cost. However, if the last cost is zero, then the standard cost value is used.

Use the markup ID based on the product class to determine a revised price. Use the markup ID defined in *Flat Rate Entry* (SP.000.00)--defined for each item in the detail--when calculating the price for the flat rate item. Additionally, you can override the overall markup percent on each flat rate item being updated.

Note: There are no accounting transactions related to this process.

Following are the field descriptions for *Price Update Process* (SP.203.00).

Mark-Up ID

Mark-Up ID filters the update selection based on all or a specific markup identifier.

Product Class ID

Product Class ID filters the update selection based on all or a specific product class identifier.

Item ID

Item ID filters the update selection based on all or a specific item identifier.

Branch ID

Branch ID filters the update selection based on all or a specific branch identifier.

Update Inventory

Update Inventory selects additional filtering information related to updating the inventory stock base price. Prior to updating the flat rates, it is suggested you update the inventory parts to ensure desired markup and profit margins on flat rates. The system allows you to globally update all inventory or to update based on a specific range of inventory IDs. Checking **Update Inventory** enables **All** and **Range** in the Inventory section.

All/Range From/To

All Range From/To select whether to update inventory information based on all inventory IDs or on a range of IDs.

Recalculate Flat Rates

Recalculate Flat Rates selects additional filtering information related to updating flat rates. Unless otherwise specified using the additional filters, the system updates and recalculates all the flat rates, including the extended price and total price. By checking this box, the fields in the Flat Rate frame are enabled.

Update Using Last Cost Over Std Cost (check box)

Update Using Last Cost Over Std Cost overrides the costing basis from standard cost to use the last cost.

Markup

Markup increases the flat rate prices by the specified percentage.

All/Category

All/Category recalculates the flat rates within a specific category or for all categories.

Range/From/To

Use **Range/From/To** to select a range of flat rate identifiers to recalculate.

All Prices (check box)

All Prices updates all detail items throughout the selected flat rate identifiers.

Update Single Item (check box)

Select this check box to enable **Item ID** and **Unit Price Amount** and enter an item to be recalculated.

Item ID

Item ID contains the inventory item to be recalculated within selected flat rate identifiers.

Unit Price

Unit Price contains the new unit price for the item identified in **Item ID**.

Reports

Flat Rate Entry (SP.600.00)

The *Flat Rate Entry* (SP.600.00) report displays the existing flat rate pricing plans. Information include price plan ID, description, and the markup or discount percent. Flat rate price plans are entered on *Flat Rate Pricing Plan Maintenance* (SP.002.00).

```
Date 7/12/2009 01:59pm                    Contoso, Ltd                       Page 1
                                     Flat Rate Pricing Plan              Report SP600


  Plan ID                      Description                             Percentage

  DIAMOND                      Diamond                                  -15.0000 %


Records Printed: 1
```

Figure 27: Flat Entry (SP.600.00) report

Flat Rate Category (SP.601.00)

The *Flat Rate Category* (SP.601.00) report displays the flat rate categories, descriptions, and associated subcategories and descriptions. Categories and subcategories are defined on *Flat Rate Category Maintenance* (SP.001.00).

```
Date 7/12/2009 02:02pm                    Contoso, Ltd                       Page 1
                                      Flat Rate Category               Report SP601


  Category ID     Description              Sub-Category ID      Description

  CENTRAL         Central Air - Cool/Heat
                                           S-CENTRAL            Subsystem - central CH
```

Figure 28: Flat Rate Category (SP.601.00) report

Flat Rate Maintenance (SP.602.00)

Flat Rate Maintenance (SP.602.00) report displays the setup details for each flat rate ID. Key data includes pricing and profitability for the flat rate ID, both as a total and for each item included in the flat rate ID. Flat rate IDs are set up in the *Flat Rate Entry* (SP.000.00) screen.

Figure 29: Flat Rate Maintenance (SP.602.00) report

Report Tab

The **Report** tab of the *Flat Rate Maintenance* (SP.602.00) report contains information unique to the report. See the Reporting Guide help or user guide for information about the other fields on the tab.

Report Format

Specifies the type of report to print. The options are:

- Flat Rate - Standard — Generates the report showing setup details of flat rate ID, including pricing and profitability, warranty days, category, subcategory, and markup percentage.

- Flat Rate - Pricing Plan — Generates the report showing flat rate pricing by price plan.

- Flat Rate - Problem Code — Generates the report showing flat rate ID and details by associated problem code.

- Flat Rate - General — Generates the report showing details of flat rate ID setup. Similar to the Standard format but displays standard cost of items associated with the flat rate ID.

Flat Rate Quote (SP.603.00)

The *Flat Rate Quote* (SP.603.00) report is a quotation letter that can be sent to customers who request a flat rate quote. Key information includes customer name and address, project name, and the estimated cost of the project. Estimated cost will only be generated for those service calls that are entered as quotes and also use flat rate pricing. Specific quotes can be selected for printing by using the **Select** tab.

Flat rate quotes are entered on the Service Dispatch module's *Service Call Entry (*SD.200.00) and *Invoice Entry* (SD.202.00) screens.

Figure 30: Flat Rate Quote (SP.603.00) report

Material Catalog (SP.605.00)

The *Material Catalog* (SP.605.00) report displays a list of all inventory items by inventory product class. Key information includes product class, inventory ID, and description, as well as stock unit of measure and the inventory item stock base price. Inventory class is determined by the first four letters of the inventory item ID.

```
Date 7/12/2009 02:09pm                     Contoso, Ltd                              Page 1
                                      Material Catalog Report                    Report SP605


Product Class & Description                   Inventory Class

MMGWO      WO Items                               ORBO

    Inventory ID      Description                                  Stock Unit      Base Price
    ORBOLT            Carriage Bolts                                   EA              0.00


MMGWO      WO Items                               ORCH

    Inventory ID      Description                                  Stock Unit      Base Price
    ORCHAIN           Bicycle Chain                                    FT              0.00
    ORCHAINGUARD      Bicycle Chainguard                               EA              0.00


MMGWO      WO Items                               ORCO

    Inventory ID      Description                                  Stock Unit      Base Price
    ORCOASTBRAKE      Coasting Brake Mechanism                         EA              0.00
```

Figure 31: Material Catalog (SP.605.00) report

Price Book (SP.606.00)

The *Price Book* (SP.606.00) report displays flat rate task information by category and subcategory. Information includes flat rate task ID, standard rate, and priority rate. Warranty information is also provided. Task ID and rate information can be entered on *Flat Rate Entry* (SP.000.00). Priority rate is calculated as 90% of the standard rate. To print a specific category or subcategory, use the **Select** tab.

```
Date 7/12/2009 02:09pm                     Contoso, Ltd                              Page 1
                                      Material Catalog Report                    Report SP605


Product Class & Description                   Inventory Class

MMGWO      WO Items                               ORBO

    Inventory ID      Description                                  Stock Unit      Base Price
    ORBOLT            Carriage Bolts                                   EA              0.00


MMGWO      WO Items                               ORCH

    Inventory ID      Description                                  Stock Unit      Base Price
    ORCHAIN           Bicycle Chain                                    FT              0.00
    ORCHAINGUARD      Bicycle Chainguard                               EA              0.00


MMGWO      WO Items                               ORCO

    Inventory ID      Description                                  Stock Unit      Base Price
    ORCOASTBRAKE      Coasting Brake Mechanism                         EA              0.00
```

Figure 32: Price Book (SP.606.00) report

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