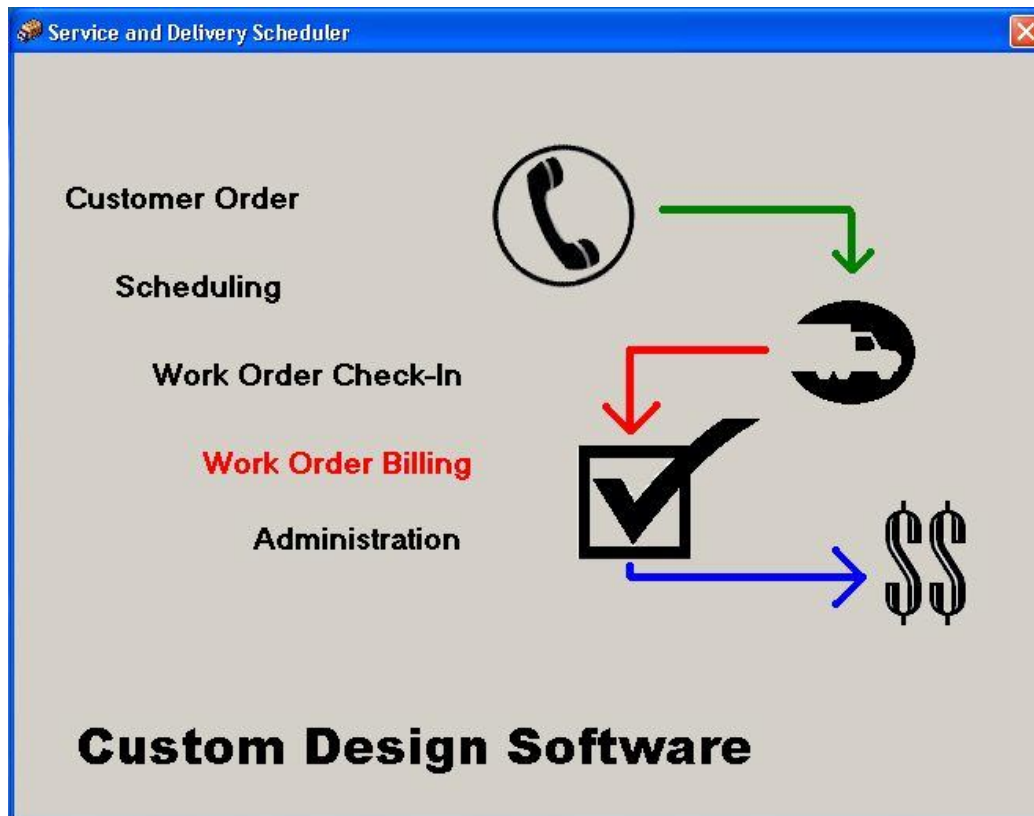




Service & Delivery Scheduler



Custom Design Software, Inc.
1731 Treyborne Circle
Commerce, MI 48390
Sales 800.884.0606
Fax 248.669.9514

One Truck or Multiple Trucks

Single Store or Multiple Stores

Pool & Spa Service Companies
Billiards Stores
Plumbing Contractors
Electrical Contractors
Heating/Air Conditioning
Carpet Installers

Since 1991

Customer Order

Date: 10/10/2005

Customer Order: None

New Customer:

First: Address: Lookup Clear

Last: City/Zip:

Phone:

Services:

Service Name	Price
<input type="checkbox"/> 5x10 Slate	\$150.00
<input type="checkbox"/> Additional Antique Table Recovery	\$100.00
<input type="checkbox"/> Additional Non-Slate Table Recovery	\$100.00
<input type="checkbox"/> Antique Slate (over 30 years)	\$150.00
<input type="checkbox"/> Bed and rails 10'	\$160.00
<input type="checkbox"/> Bed and rails 7'	\$90.00
<input type="checkbox"/> Bed and rails 8'	\$112.00
<input type="checkbox"/> Bed and rails 8 1/2'	\$124.00

Sales Tax [0.00]: \$0.00

Total: \$0.00

Schedule:

Status: Open Schedule Type: Does Not Repeat

Customer Order Detail:

Starting: 10/10/2005 Ending: 10/10/2005 Preferred Time: Morning Afternoon Evening WkrOrds

Save Print Next Clear Return

Customer calls or comes in to request service. You can manually enter their name address, etc, however, if they had service before, you can simply click the Look Up and find then by telephone number or name. From your built in Service List, which you can build yourself in the Administration section, you can select the service the customer requested. Or, if it is something not listed, you can add it "On the fly" in the memo box below the Service List. You can price it out accordingly.

If the customer has a special request, it can be entered in the memo box on the right side of the form in the Schedule section.

Next, we need to set up the service appointment on the lower right side of the form. If this is just a one time service, you just set the date on the built in calendar.

Schedule:

Status: Open Schedule Type: Does Not Repeat

Customer Order Detail:

Starting: 10/10/2005 Ending: Preferred Time: Morning Afternoon Evening WkrOrds

Save Print Next Clear Return

October 2005

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Today: 10/10/2005

If they need repetitive service, like cleaning a pool bi-weekly, you can set the Beginning Service Date and the Ending Service Date along with the requested time slot; morning, afternoon or evening.

Schedule:

Status:

Customer Order Detail:

Starting:

Ending:

Schedule Type:

☒ Morning
☐ Afternoon
☐ Evening

WrkOrds

Save Print Next Clear Return

Once the service call is entered, it is automatically set in the data base until completed or canceled. The service call is ready for scheduling at the times requested.

Each morning, when your service manager comes in, he opens the **Work Order Scheduling** form off the main menu. As below, we have three columns, a list of all trucks, list of all drivers and a list of all service calls which were automatically generated by the computer from the Customer Order Intake form. The service manager **Drags & Drops** the drivers onto the trucks. Some service calls might require 1 or 2 drivers depending on the day's calls. Then he **Drags & Drops** the service calls to the appropriate truck. He may double click on any service call to open it up to the service intake form if he needs more information.

Service Call Schedule

Work Order Scheduling

Service Date:

Vehicle Schedules:

- Red Truck
- Van #2892
- 8x9 Red Trailer
- Flat-Bed Trailer

Drivers:

- Reinhard Bonnke
- Bob Jones
- Luis Palau
- Aimee Semple-Macpherson

Service Calls (4 items not placed):

- Fillmore Millard
135 S Woodward
Birmingham, MI 48009
- Truman Harry S.
24529 12 Mile Rd
Southfield, MI 48034
- Nixon Richard
27845 Orchard Lake Rd
Farmington Hills, MI 48334
- CARTER JOHN
259 LOCUST ST
JACKSON, OH 45640

Task List:

- 4 call(s) need trucks.
- 4 call(s) need confirmation.

Calendar Route Confirm Print Save Exit

Change this to schedule a different day.

The completed Work Order Schedule

Here we show the completed **Work Order Schedule** with the drivers and the service calls scheduled for the day. After, you confirm the stops; you can print out the actual service calls for each stop and each truck separately. If you purchase Microsoft's Map Point Software, you can click the Route button and the software will automatically calculate the best possible route, with time stops, and print a detailed route and map for the drivers to follow. We can even install a GPS tracking module in each of the trucks so you know where they are at any moment!

Service Call Schedule

Work Order Scheduling

Service Date: 10/12/2005

Vehicle Schedules:

- Red Truck
 - Bob Jones
 - Reinhard Bonnke
 - Millard Fillmore
 - Richard Nixon
- Van #2892
 - Luis Palau
 - Harry S. Truman
- 8x9 Red Trailer
 - Aimee Semple-Macpherson
- Flat-Bed Trailer
 - JOHN CARTER

Drivers:

- Reinhard Bonnke
- Bob Jones
- Luis Palau
- Aimee Semple-Macpherson

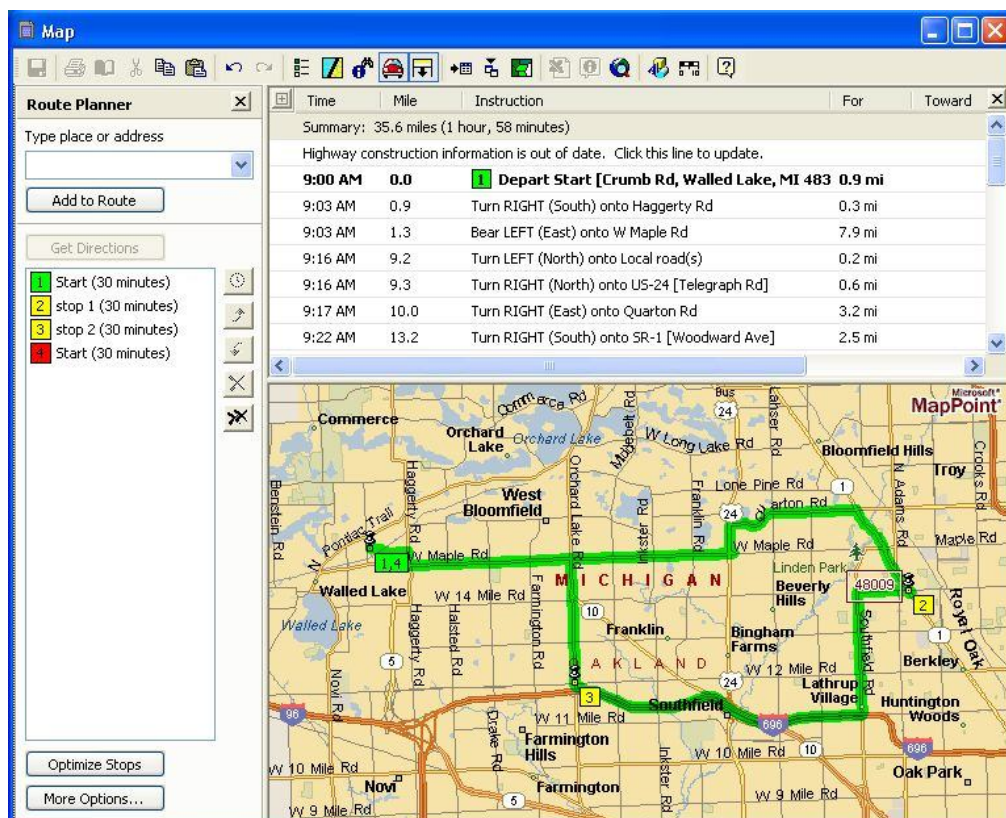
Service Calls:

- Fillmore, Millard
135 S Woodward
Birmingham, MI 48009
- Truman, Harry S.
24529 12 Mile Rd
Southfield, MI 48034
- Nixon, Richard
27845 Orchard Lake Rd
Farmington Hills, MI 48334
- CARTER, JOHN
259 LOCUST ST
JACKSON, OH 45640

Task List:

- 4 call(s) need confirmation.

Buttons: Calendar, Route, Confirm, Print, Save, Exit



Work Order Check In

After the driver finishes his calls for the day, he goes to the computer and checks in all work orders. This is where he can add to the work order if the customer request additional services or needs to order parts. Here the customer added a new pool filter. Unlimited notes can be added to the service call. He can even add unlimited digital pictures if he has the need. When the service call is complete, he checks it Complete under Status and the call is set for Billing to the customer.

The screenshot shows the 'Work Order Check In' window. At the top, it displays 'Work Order No: 223' and 'Customer Order No: 13'. Below this is a 'Customer Information' section with fields for First Name (JOHN), Last Name (CARTER), Address (259 LOCUST ST), Phone ((740) 286-3125), City/Zip (JACKSON, OH. 45640). To the right is a 'Site Pictures' section with 'Pictures Available: 0' and buttons for 'Add Picture' and 'View Pictures'. The main area is divided into two panes. The left pane, 'Services (Dbl Click Price To Customize)', lists various services with their prices: Bed and rails 8' (\$112.00), Bed and rails 8 1/2' (\$124.00), Bed and rails 9' (\$148.00), Championship Felt (per inch) (\$1.00), Clean Pool (\$75.00), Facings (Regular) (\$20.00), Facings (Thick) (\$30.00), and Level table only external (\$120.00). A 'Pool Filter 3243543A' is added with a price of \$69.95. The 'Sales Tax (0.06)' is \$8.70, and the 'Total' is \$153.65. The right pane, 'Work Order Details', shows 'Status' with 'Confirmed' checked, 'Completed' and 'Cancelled' unchecked. 'Scheduled date' is 10/12/2005, and 'Scheduled Time' is (Morning). 'Work Order Notes' contain the text 'Installed a filter no 3243543A'. 'Technician' is Aimee, 'Time In' is 9:15 AM, and 'Time Out' is 10:45 AM. At the bottom are buttons for 'Add Service', 'Remove Service', 'Save', 'Print', 'Next', 'Clear', and 'Return'.

Work Order Billing

You can bill your customers at the beginning of the month or at any time during the month to even out your cash flow by having money coming in regularly, not just after the first. Basically, you come into this screen and a list of all the non billed work orders will appear. All you do is click Bill Orders and a completed Invoice is ready to be sent to the customer

The screenshot shows the 'Work Order Billing' window. It has a 'Display Options' section with 'Display Bills' set to 'Not Been Billed' (radio button selected), and 'Billed - Current' and 'Billed - Past Due' as unselected options. The 'Due Date' is 11/12/2005. Below this is a 'Bill Orders' button with a printer icon. The 'Unbilled Accounts' section contains a table with the following data:

WkrOrd	Billed Date	Billed Amount	Paid Amount	Due Date	Paid
223	Unbilled			Unbilled	

At the bottom are buttons for 'View Invoice', 'Payments', and 'Done'.



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CUSTOMER ORDER FORM

(Multi-Stores: Use One Form Per Store)

*Please carefully fill out as this is how your store
will be set up!*

Store Name _____

Address _____

City/State _____ Zip _____

Phone _____ Fax _____

Owners Name _____

E-mail _____

Introductory Special:

Regular: \$1995.00

\$1500.00

Valid for 30 days upon receipt
Michigan add 6% Sales Tax

Microsoft's MapPoint available separately.

Credit Card Information

Name on card _____ Signature _____

Type of card Visa Master Card Discoverer American Express

Card Number _____

Expiration _____

Vin number on rear of card _____