



## Citrus Recurring Services

### User's Manual

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# Table of Contents

<b>Overview</b>	<b>Page 3</b>
The Setup Screen	Page 4
The Main Menu Screen	Page 5
Scheduling Routines	Page 5
Data Files Routines	Page 5
Other Routines	Page 7
The Menu Selections	Page 7
<b>Getting Started</b>	<b>Page 8</b>
Setting up the Programs Basic Files	Page 8
Creating Services and Sales Items	Page 10
Creating Customer Accounts	Page 10
Creating Service Routes (optional)	Page 12
Creating a Holiday List (optional)	Page 12
<b>Using Citrus Recurring Services</b>	<b>Page 13</b>
Viewing and Printing Work Schedules	Page 13
View or Modify Scheduled Service	Page 14
Post Service Completions	Page 14
View Account History	Page 15
Creating Work Order	Page 16
Creating Service Contract	Page 16

## Overview

**Citrus Recurring Services** is a program that schedules Service Events for a repetitive service, typically at a preset price.

**Servicing Frequency** can be from *biweekly* to *annually*.

**Billing Frequency** can be *Per Service Event*, *Monthly*, *Quarterly*, *Semi-annually* or *Annually*.

You create a list of **Services** and their associated fees.

**Service Events** are performed by up to 20 **Work Assignments** which you create.

As you create a new customer account, you select a **Service** from the list, and assign the account to a **Work Assignment**.

(Later, you can create Service Routes by assigning customers in a general area to the same assignment and perhaps weekday).

You assign the Account a **Next Service Date**, **Service Frequency** and **Preferred Time** (optional).

From that point on, future **Service Events** are automatically rescheduled based on the **Service Frequency**.

**Work Schedules** are created automatically from this data. Schedules can be printed either by selected time of day or simply in list form.

As an option, a **Field Service Invoice** can be printed for accounts where the **Billing Frequency** has been designated as *Per Service Event*. All other **Billing Frequencies** (such as Monthly), must be billed from your office.

**Service Events** that were not completed when scheduled can be rescheduled within the current cycle or skipped and rescheduled for the next cycle.

Other Features are:

- Create a Service Contract
- Service Routes can be created by selecting like streets, cities, sub-divisions, states or mailing codes. All accounts with the selected geography can be assigned to a service provider on a set weekday.
- Create a Work Order.
- Place Courtesy Calls for upcoming service
- Create a Holiday List to prevent scheduling on Holidays, Vacations etc.

## **The Setup Screen**

The ***Setup Screen*** is where you enter the information needed for the basic operation of the program.

It contains a File Folder with seven tabs; one is a ***Help*** tab that contains brief instructions about the other tabs.

### ***Business Info***

Enter the Information about your Business.

### ***Assignments***

Create a list to which ***Service Events*** will be assigned.

### ***Printing***

**Form Selection** – Service invoices can be printed using standard paper or Perforated Response Paper. Invoices can be printed in color or Black only.

If you opt for color, you can select 2 colors for Borders and Text.

You can select a font, but not a font size.

**Service Invoice Items** – You can create a list of items that will automatically print on ***Field Service Invoices***.

### ***Work Preferences***

These settings are used throughout the program to assign service events to the proper days of the week.

**Allow Scheduling These Days** – Select the Workdays that you wish to schedule. This should be your normal workweek.

**Service Event Rescheduling** – Select this option to always select the same weekday when rescheduling, else the next Scheduled Event may be any work day.

**Phone Connections** – used for auto dialing.

**Program Assistance** – set these options to be alerted when the program needs your attention.

### ***Logo***

Select a Logo and Save it.

## The Main Menu Screen

The Main Menu Screen has **three columns** of like sub-routines grouped together. At the top of the screen are the **Menu Selections**, explained later.

### Scheduling Routines

#### **Post Completed Service and Reschedule Non-completed Service**

Once a **Next Service Date** for an Account has been surpassed, some Completion Action is required.

This can be:

- Completed, reschedule for next Cycle.
- Not completed, reschedule for next Cycle.
- Not completed, reschedule for this and the next Cycle.

Regardless of the Service Completion action taken, if an account is designated as “Per Service Event”, a Service Completion Record is created.

This is not true for accounts that are any other type of billing designation such as Monthly, Annually, etc.

For more information see **Posting Service Completions**.

#### **Print Work Schedules and Service Invoices**

Schedules can be viewed and/or printed by date and assignment with this option.

For more information see **Viewing and Printing Work Schedules**

#### **View / Modify or Print Scheduled Service**

Displays the next scheduled service event for all accounts. The event can be rescheduled or reassigned and the service level can be changed for each account.

See **Viewing or Modify Scheduled Service**

**Create Service Routes** - You can assign accounts to Service Assignments and create Service Routes. Service Frequency for each account assigned to a route must be the same. See **Creating Service Routes**

### Data File Routines

#### **Create or Modify Customer Information and Account Scheduling and Billing Options**

This is where you create new accounts or change information about existing Accounts.

The left side of the screen shows the basic Account information.

The right side displays the Service Frequency and Billing Frequency Information.

When creating a new account, select a **Service Frequency** from the 1<sup>st</sup> drop down list. Select the 1<sup>st</sup> Date the Service should be performed from the calendar, **Next Service Date**.

The **Scheduled Weekday** will appear automatically.

The **Last Service Date** will be the date you create the account.

Assign the account to a Service assignment from the *Performed by* drop down list.  
Select the Service to perform from the *Service Item* List.  
The price should appear automatically if the *Auto Find Fee* box is ticked.  
If not, select it from the drop down list.

Next, select a **Billing Frequency** from the list.

If you select any **Billing Frequency** other than per Service Event, you'll need to review the Fee entry.

You might have a service for which you charge \$25.00 yet you provide the Service 3 times a month and bill monthly.

You need to enter \$75.00 as the Fee.

Note that per Service Event Billing is the only selection that will automatically print a Field Service Invoice. All other Billing Frequencies will be billed using the Completion Manager program.

**NOTE:**

The customer screen can be selected via many routines, but with the exception of 2<sup>nd</sup> Billing Address Information, account settings can not be altered. You must select **Create or Modify Customer Information and Account Scheduling and Billing Options** to change scheduling and billing settings. This is done to prevent inadvertent changes to account data.

See **Creating Customer Accounts** for more details.

**Create or Modify Services and Sales Items**

Create a list of the Services that you will offer along with a price.

These Services and prices will be presented in drop down lists for selection when creating accounts.

The "Time" feature is not used by this program.

Create a list of Additional Items that might be sold at the time the Service is provided.

These items will be similar to the list of items you created for addition to each Field Service Invoice.

This list will be used by this program and other Invoicing programs.

**Create Holiday List**

As Recurring Services are scheduled and rescheduled, the program checks that the day/date is a valid workday and that the day is not a Holiday.

Click each day that is a Holiday and save the list.

**View Account History**

Service History is generated as you enter Completion Data using the Completion Manager program. This information can be viewed and printed via this routine.

## **Other Routines**

### **Create a Work Order**

Produce a set of documents you can give to installers, etc detailing the needs of a job. Services and Sales Items can be added to the Work Order. This is not a Customer Document.

### **Create a Service Contract**

You can easily create a Service Contract using the service data created for an account. Information about the account is automatically selected. The Services you offer are preloaded into a drop down selection box. Select the duration of the contract from a drop down list or enter manually. You can select to automatically renew after the duration period. You save the document and can modify or print it using a Word Program.

### **Place Courtesy Calls**

Select a date, and a grid is populated with events for that date. The phone dialer screen is then presented and you can call accounts and remind them of the upcoming service.

## **The Menu Selections**

The “**Main Menu Screen**” contains drop down menus:

**Files** - displays a drop down menu with the following sub menus:

#### **Create/Modify**

Information needed about your Business and the way you do business is entered and can be modified by selecting this menu. See **Entering Information** (previously) for details.

#### **Backup**

Backup is performed each time the program shuts down.

The data files that the program uses are copied to the Backup Folder in your Citrusware Folder.

You can Backup at any time.

#### **Exit**

Exit ends the program.

**Order Forms** – an Internet link to companies that supply the forms needed for Citrusware Programs.

## Getting Started

### **Setting up the Programs Basic Files**

When the program is first run, some information does not exist, unless you have previously installed a different Citrusware Program.  
(Programs share common information).

The **Setup Screen** will automatically display. You can also display it at any time to modify existing information by selecting *Files* from the Startup Menu Bar, and then *Create/Modify* from the Drop down Menu.  
(Clicking on our Logo advances the Tab Selection)

### ***Business Info***

Enter the Information about your Business.

Select the Type of address scheme to use (USA or International)

If you use a USA Style address, you must enter a zip code.

The Pencil image reloads your data from a previously saved file.

The Eraser image clears all Business Data Boxes so you can re-enter if needed.

### ***Assignments***

You can create up to 20 Assignments.

We recommend you use generic terms rather than names.

It is best to refer to a service area such as City Route #1, Rural Route #2, etc.

Assignments are common to other Citrusware Dispatching Programs and may appear automatically.

Adding or deleting Assignments will affect other dispatching programs.

We suggest you create one more assignment than you think you need.

### ***Printing***

**Form Selection** – Service invoices can be printed using standard paper or Perforated Response Paper to create a tear off Summary Slip.

The Summary slip is used by the Office to post the Service Completion information and for Service Attention tracking.

Invoices can be printed in color or Black only.

If you opt for color, you can select 2 colors for Borders and Text.

You can select a font, but not a font size.

**Service Invoice Items** – You can create a list of items that will automatically print on **Field Service Invoices**. Field Service Invoices print for any account that has been created with the **Billing Frequency** set as **Per Service Event**. An Invoice is NOT printed for accounts created with any other Billing Frequency option such as weekly, monthly, or annually.

When the **Field Service Invoice** prints, the 1<sup>st</sup> line item is the **Service** with the charge, and then the items list you created. This will be a list of items that are frequently used during the Scheduled Service.

### ***Work Preferences***

These settings are used throughout the program to assign service events to the proper days of the week.

**Allow Scheduling These Days** – Select the Workdays that you wish to schedule. This should be your normal workweek.

**Service Event Rescheduling** – Rescheduling a Service Event after completion does not always result in the same day of the week being selected. This is almost always true with Semi-annual and Annual service schedules.

Tick this option to force the same weekday when rescheduling, untick to force the same calendar date.

**Phone Connections** – You can use your Computers Modem to dial customers from a number of places within the program. Daisy chain a telephone off of your modem card. Tick the ***A Phone is Connected*** checkbox. Find your modem port number in your computers Control Panel; Click START (lower left), Settings, Control Panel, Double click the Phone and Modem ICON, select the Modem Tab. Find the port number of your modem under the Attached To column and select that number from the ***Modem is connect to Com Port*** Box.

**Program Assistance** – Circumstances may arise where the program needs your attention. Set the Alarms option to sound the system alarm when attention is needed. Set the Show Prompts to display a helpful message when attention is need. There are times when the alarm will sound or a message will display even if the option is turned off.

### ***Logo***

Your Logo consists of two files; the actual Logo image file which you provide, and a Logo description file the program creates.

It is important you copy your logo image file to your Citrusware Folder BEFORE selecting it.

Location: Hard Drive (usually C) : /Program Files/Citrusware

The program creates the Logo description file and locates it where the Logo image file resides.

If you were to select an image from a removable disc or a system disc which might not be available at all times, the program can not find it and an error will occur.

When all data is to your satisfaction, Click Save ***Changes / Return to the Menu*** button. Setup is complete.

## Creating Services and Sales Items

After completing the Setup Screen procedures, create a list of Services and Sales Items you offer and sell.

Services will appear on the Customer Screen in a drop down list where you select a service for each account.

The Sales items will appear for selection when creating a Work Order.

The *No Services Found* prompt will display, click the *GOTO* Button.

To add Services or Sales items at a later time, select *Create or Modify Services and Sales Items* from the Main Menu.

Click the *Add New* Button.

Enter a service description, Cost and Time. (Time is not used by Citrus Recurring Services but it is a good idea to enter it now.)

Click *Save Service* button.

The procedure is identical for Sales Items except no time is entered.

## Creating Customer Accounts

Once you have created Services and Sale Items, you can begin to enter Customers.

The Main Screen has four tabs, click *Files/Records*, and select **Create or Modify Customer Information and Account Scheduling and Billing Options**.

You will be instructed that your Customer File is empty. If you are upgrading from another Citrusware Program that uses a Customer File, then your Recurring Service File will be automatically created using default information.

The Customer Main Screen is displayed. The left half is general Customer Information, upper right is Service Information, and lower right is Billing Information.

The Toggle 2<sup>nd</sup> Address button presents another window where you can enter a vacation address or a 3<sup>rd</sup> Party Billing address.

**General Information** – Enter the general information about your customers here. The City Box is a “Drop Down” box containing a list of cities that is updated as you create accounts. Click the button to see more cities from which to select, or type in a new city. If you do not enter an account number, then the account telephone number will be used by default.

At the bottom of the General Information Section is a series of buttons used to navigate through your Customer Account Records.

Hover your Mouse over each until the tip window opens and you can see the function of each.

### **Service Information**

Select a **Service Frequency** from the “Drop Down” list. This is how often service will be regularly scheduled for this account.

If you select **Biweekly**, a sub window opens and you can select the two week days on which service will be provided. When you select the 1<sup>st</sup> weekday, the **Next Service Date**

is automatically selected. If you wish to delay the starting date, be sure to select a date that corresponds to the same day of the week.

If you select “None” then the **Next Service Date** is set to 12/31/9999. (Inactive). The **Service Item** is set to “None, the **Recurring Fee** is set to 0.00.

Use this setting to keep track of Customers that do not have a Recurring Service but perhaps you do maintenance for from time to time. This setting is also useful for accounts that are seasonal. During the off period set the account to none, then when Service is resumed reset their Service and Recurring Information.

Select the “**Next Service Date**” by clicking on the calendar. Click on a date. The **Scheduled Weekday** will automatically be assigned.

The **Last Serviced Date** will be assigned today’s date.

Note: During the setup process you stated what your typical workweek is (Monday – Friday for example).

If you select a non-work day, such as Sunday, the calendar will automatically advance to the next acceptable workday. This is also true if you have created a “*Holiday List*” and the selected date is a Holiday.

The **Performed By Box** contains a list of the Service Assignments that you created during setup.

Assign this account to an entry in the list.

### ***Recurring Information***

The **Service Item Box** contains a list of the Services that you created during setup.

Select A Service from the list. The coinciding Service Fee is automatically selected.

The Service fee can be overridden.

Next select a Billing Frequency from the “Drop Down” box.

To create your next account, click Files | Add a Customer. The current customer is automatically saved.

This is also true when navigating through your Customer File or exiting the Customer Screen via the Create or Menu buttons.

**Tip:** If your Servicing Scheme is similar for all accounts (Service Weekly, Bill Monthly for example), then just set your first account to the correct Service and Billing Information. Continue to create accounts by entering the General Information for each account.

Once completed, position to your first account and click the “*Set to Current*” Button. All accounts will be assigned the Service and Billing Information that you first Customer was created with. You can then proceed to the Route Creation process and assign accounts individually to assignments.

## Creating Service Routes

Creating Service Routes is not a mandatory setup procedure. It can be done at any time. Click **Create Service Routes** from the Main Menu screen.

Use this routine to assign accounts to an assignment and a day of the week by groups. Initially, the grid is populated with all accounts.

Customize the grid by selecting a Search Criteria from the “Drop Down” box (Street, Address 2, City, State, Postal Code). Enter a specific “Name” to search for in the “Entry Box”.

**Note:** All items containing the entered data will be found, even if the data is only part of the item found.

**Example:** “Main” will find Main St, N Main St, Main Way, etc.

The grid will be repopulated with only the accounts that meet the entered Data within the selected criteria.

You can toggle the selection of any account by clicking the Include column in the grid.

Select the Service Information to apply to each selected account. Click “Assign to Route” to add the selected accounts to the Assignment selected.

Select a different criteria and proceed to assign more accounts.

You can refine your selections by selecting accounts individually on the Customer Screen.

The Reload Accounts to the Grid button loads all accounts to the grid. Reloading will not alter assignments that you have made. (New assignments remain intact.)

## Creating a Holiday List

Click Create **Holidays List** on the Main Menu Screen

The “**Holidays Screen**” is displayed.

Click on the calendar to select day to assign as Holidays.

**Important:** Click Selections Complete when the list is to your satisfaction. Then click Save.

When creating New accounts and assigning the first Service Date, and automatically rescheduling as a result of Service Completion Posting, if the selected date is a Holiday, then the next available date is selected. This can result in a “pile-up” on Mondays and Tuesdays, something you should watch for.

## Using Recurring Schedule Services

### **Viewing and Printing Work Schedules**

From the **Main Menu Screen**, select **Work Schedules Tab**, then the **Print Work Schedules Button**.

Click Goto.

The “**Print Work Schedules Screen**” is displayed.

From this screen, you can select a date and team assignment.

If Service Events exist for the selected assignment and date, then the grid will be populated with those events.

The accounts enter the grid in the order they exist in your Customer File.

### Selecting a Mode

There are two Scheduling Modes. List Mode and Hourly Mode. You can change the Mode by clicking the “*Change Schedule Mode*” button.

### List Mode

You can arrange the order in which the accounts are serviced by clicking on them in any order that you wish. The account will be added to the list on the right. Continue until all Accounts are loaded to the list.

(The next time the same Assignment and Day are selected, the Accounts will enter the grid prearranged).

The Schedule Event list now contains all Accounts scheduled for the selected date, that you wish to service.

The Work Schedule will contain the General Customer Information, the Service that is recurring, and you can select to include or delete the Price by selecting or deselecting the checkbox.

### Hourly Mode

The Hourly Mode allows you to assign each Service to a start time and an amount of time per Service Event. (From 15 minutes to 4 Hours).

Select each account individually.

Select Duration from the Time Box.

Click the Start Time in the Day Schedule.

If enough time is available consecutively and enough time remains in the day, the event will be scheduled.

Note that in the Hourly Mode, any existing Service Requirements scheduled using a Citrusware Dispatcher Program will be entered into the Day Schedule Grid.

### Printing (either mode)

Click Print to print a single team assignment.

A Field Service Invoice will be printed for all accounts that are designated as “**Per Service Event**” billing.

An Hourly Schedule will be printed if the Hourly Mode was selected.

### **View or Modify Scheduled Service**

You can view or modify account settings in groups. First you select a date range. This is the date of the next Scheduled Service. All accounts within the date range are loaded to the grid.

If you wish to modify the account, click the Account number column in the grid for that account.

The account data will be loaded (displayed) in the boxes in the lower portion of the screen.

Select from the calendar or drop down boxes to change the Next Scheduled Date, Change Assignment or Scheduled Service. Click **Modify Account Settings** to change the settings in the grid.

When you have made all of the desired changes, click **SAVE Changes and Return to Menu**.

The data in the grid can be printed in report form, click **Print Schedule**.

If you do not wish to make or save any changes, click **Return to Menu WITHOUT Saving Changes**.

### **Post Service Completions**

From the “**Main Menu Screen**”, select the **Billing Tab** then **Post Completed Service and Reschedule Non-completed Service**. Click Goto.

The “**Post Service Completions Screen**” is displayed.

The grid is populated with all Services that were scheduled prior to the current date.

All Assignments are included.

#### **STEP 1**

Tick each Account that has been completed and Click Post.

Each account with a **Billing Frequency** of “**Per Service Event**” will generate a Service Completion Record.

(The Service Completion Record must then be completed (Posted) using the **Completion Manager** program.

The account is rescheduled for the next service date based upon the **Service Frequency** setting for that account.

Accounts that have any other form of **Billing Frequency** (Monthly, etc.) will not generate a Service Completion Record.

#### **STEP 2**

The completed events will be removed from the grid, leaving those that were not completed.

Select the remaining events in groups.

Tick each event that will not be performed (rescheduled) for this service cycle.

Click the **Cancel Selected Accounts for this Cycle** Button.

These events will be scheduled for the next cycle based on the **Service Frequency** setting for each account.

The remaining accounts can be rescheduled within this cycle.

Select the accounts in groups based on the **date and/or Assignment** to which the event will be rescheduled.

Continue until all Events have been rescheduled or deleted.

All selected accounts will be rescheduled for the next cycle regardless of whether they are completed, deleted or rescheduled at this time.

If you are unsure about any event, leave it unposted and return to the menu. No action will be taken and the events will re-appear for processing the next time this procedure is invoked.

### **View Account History**

As Service Completion Data is entered (via the Completion Manager program), records about each service visit are recorded.

Select this option to View Account History.

The grid is initially loaded with all accounts for the past month.

To view History for a single account:

- tick the *Display Single Account* checkbox
- select an account from the drop down *Account No* box
- select a date range
- click **Load Grid**

The **Purge** buttons allow you to delete *all History Records* or *History Records* for a selected Account.

The date Range is not in effect. All records are deleted.

## Creating a Work Order

Click **Create a Work Order** on the **Main Menu**

Select a Customer from your Customer List.

Click **Create**.

The **Work Order Creation Window** is opened.

If you have previously created a Work Order Template, it will be loaded into the Work Order Narrative Box.

If not, you can create a Narrative and save it for use with future Work Orders.

If the loaded Narrative is not suitable, you can clear the box and type a new narrative.

Select a Heading from the drop down Heading Box.

Choices are Work Order, Service Order or Repair Order.

(You can enter something different but be careful that it will fit when printed).

Sales Items and Services that you created earlier can be added to the Work Order.

Select them from the list.

You can change a preset price at this time.

If you wish to print a Completion Summary Report at this time, set the Checkbox , **Print Completion Summary Report** to on.

A Completion Summary Report is a separate document that can be used by the Servicing Personnel to state any anomalies found and any tasks that could not be completed.

Click Print WO when the Work Order is prepared.

## Creating a Contract

Click **Create a Service Contract** on the **Main Menu**.

Select a Customer from your Customer List.

Click **Create**.

The Service Contract **Creation Window** is opened.

Follow the instructions on the left side of the window.

NOTE: The Billing Frequency will the same as the Account Billing Frequency unless Per Service Event is selected, then the display defaults to Monthly.)