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## SRO and GSX

If your store provides services that involve your customers booking in equipment, the ordering of parts, or you doing work that needs to be documented, the Service Repair Order (SRO) module provides a workflow to accommodate all this and more.

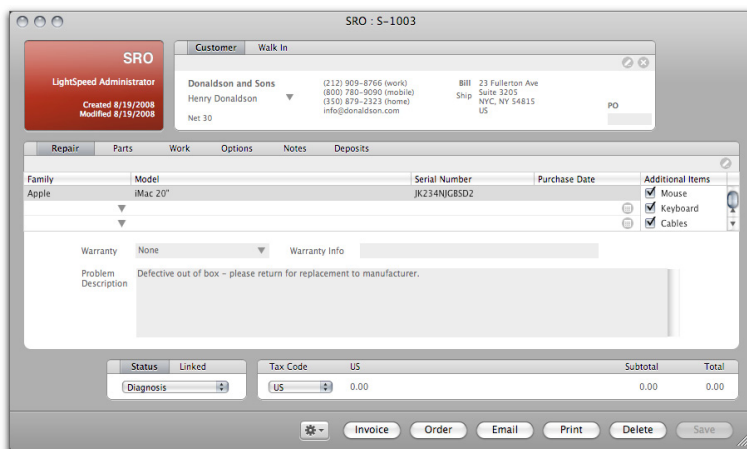
Customers are attached to SROs the same way as with all documents. If your customer is booking in equipment, choose the *Family* (if desired) from the pull-down menu that appears in the Family column, or simply enter it. Enter the description in the *Model* column, and the serial number (if applicable) in the *Serial Number* column. Clicking inside the *Purchase Date* field will call up a calendar that will let you enter the original purchase date of the equipment.

Additional Items is a list of items that you can customize at **Tools > Setup > SRO Additional Items** and will allow you to indicate what additional items are being checked in that might normally get overlooked when the equipment is returned.

*Warranty* is a pre-defined list of warranty terms you can choose, and can be set at **Tools > Setup > Warranties**, and warranty details can be entered in the Warranty Info field.

The *Problem Description* field is where you enter all the details required for the service incident.

The *Status* of the SRO reflects the stage that the incident is currently in, and is comprised of a pre-defined list that can be edited at **Tools > Setup > SRO Status**.



SRO



Any statuses you add to this list will also create a new Tracker that can be installed in your set of Trackers.

As with all documents, the *Linked* tab will list all the documents associated with this one.

## Tabs

The *Parts* tab is where you attach Products to the SRO in the same way you would with Quotes or Invoices. The *Work* tab is where you log the work that is performed on the incident. Remember, you can use LightSpeed's date/time stamp by using the key combination Command+=. The *Options*, *Notes*, and *Deposits* tabs all behave the same way as with the other sales documents.

## Action Menu

The *Action* menu indicated by the gear icon at the bottom of all sales documents will give you access to a range of features unique to that document, as well as features common to all sales documents. Features unique to SROs accessible in the Action menu are the ability to print an SRO Claim Check, SRO Label, or a Packing Slip.


## Invoicing

If you need to charge your Customer for any parts or labor that you have added to your SRO in the Parts tab, click the *Invoice* button at the bottom of the SRO window. All the Products on the SRO will be put on a new, unsaved Invoice. When you save the Invoice, the status of the SRO will change to Invoiced.

## GSX

GSX, or Global Service Exchange, is Apple Computer Inc's single service, repair and order management tool available to Apple's partners to conduct service business with Apple worldwide. GSX Web Services is a data exchange mechanism that allows partners to integrate their applications with GSX. LightSpeed allows you to instantly access the GSX database for warranty and service parts lookups.

LightSpeed requires a properly setup GSX account to enable Warranty and Parts Lookups. Apple recommends that you set up a new GSX account for doing LightSpeed GSX lookups. You must then request that the 'Can Access Web Services' privilege be added to this GSX account by Apple.

 Please include the words 'LightSpeed GSX Setup' in the notes field to ensure correct setup of your GSX account.

**To make this request, follow these steps:**

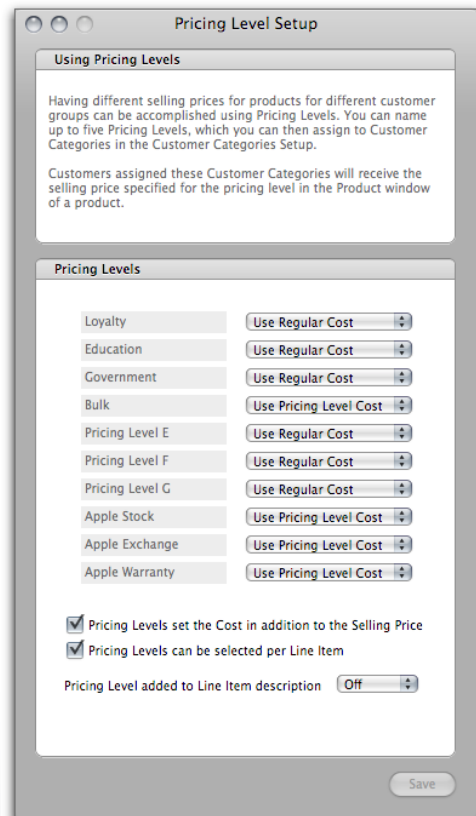
- 1 Create <<https://gsx.apple.com>> a unique AppleID to be used when accessing GSX (usually a good idea, however you can use an existing Apple ID)
- 2 Apply for GSX access to your SoldTo account in GSX
- 3 Verify that the Apple ID has access to GSX under your SoldTo
- 4 Submit the request form <<http://aboutgsx.info.apple.com/integration/WSSStart/GettingStarted/helpform.htm>> to have API access enabled (selecting the correct environment of Production from the drop down). Ensure that the User ID entered is the same user ID created in the previous steps. Fill in the GSX account info and specify the following in these fields:
  - **Environment:** GSX Production (Do NOT select GSXUT, which is the default option)
  - **APIs Required:** PartsLookup, WarrantyStatus

This single GSX account is shared by all users when doing Warranty Lookups, and you may choose to create a specific account for this purpose. The account must have the 'Can Access Web Services' privilege enabled by Apple Service Provider Support in order for LightSpeed to authenticate securely to the GSX server.

**Stock, Exchange, Warranty Parts**

You can configure LightSpeed to handle alternate costs for Apple's service parts, particularly in the case of stock or exchange repairs. To do this, create Pricing Levels named "Apple Stock", "Apple Exchange", and "Apple Warranty" in the Pricing Level setup panel, and check their checkboxes to enable an alternative Cost for that level. For each of these levels, select the "Use Pricing Level Cost" option from each pop-up menu.

It is important that you have both checkboxes enabled near the bottom of the Pricing Level Setup window.



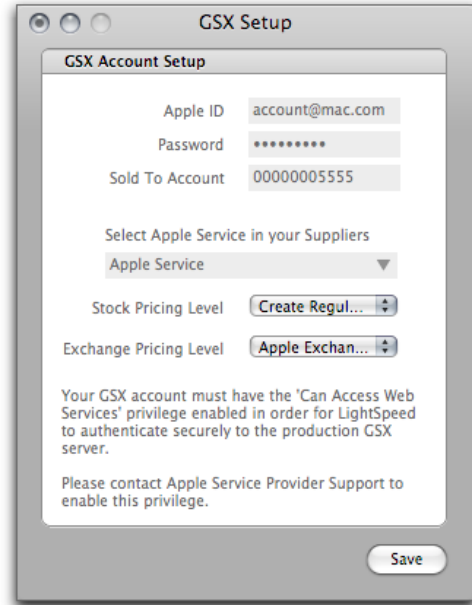
Pricing Levels

### GSX Setup

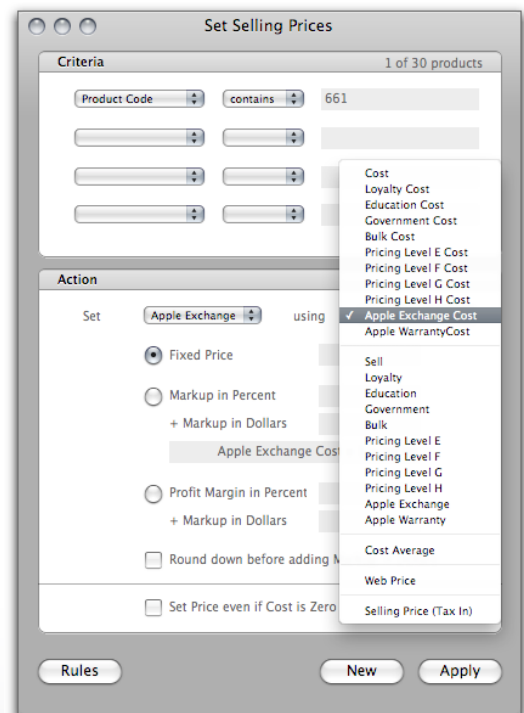
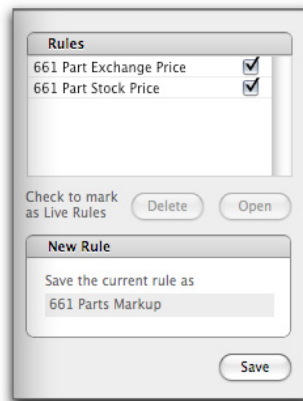
After having set up "Apple Service" as a Supplier in your list of Suppliers, choose it in the "Select Apple Service in your Suppliers" drop-down menu. In the "Stock Pricing Level" drop-down menu, choose "Apple Stock" level you have set in the Pricing Levels setup panel as explained above. In the "Exchange Pricing Level" menu, choose the "Apple Exchange" level you have set in the Pricing Levels setup panel. This will now populate the Alternate Price and Alternate Cost you have set up for the Apple Exchange and Stock Pricing Levels when you create a new Product from Apple's parts list.

### Automated Pricing

To mark up the Selling Prices for both the Stock Pricing and Apple Exchange Levels, use the *Set Selling Prices* panel in the Tools menu. Set the criteria for the Product Code to select which Products are affected, and set the drop-down menus in the *Action* section for the Pricing Level you wish to set. Once you've set your criteria and your action, you can either use the *Apply* button to apply the pricing change to the existing Products in the database, or use the *Rules* button to create a Rule which will be saved for later use. Click the checkbox beside the Rule to make it "live" and applicable on the fly as new Products are created. For more information, see the *Set Selling Prices and Set Product Info* help document on the documentation page of our website.



GSX Setup



Set Selling Prices and Live Rules