Disclaimer
This document is provided “as-is”. Information and views expressed in this document, including URL and other Internet Web site references, may change without notice. You bear the risk of using it. Some examples are for illustration only and are fictitious. No real association is intended or inferred. This document does not provide you with any legal rights to any intellectual property in any Microsoft product. You may copy and use this document for your internal, reference purposes only.

Sample Code Warranty disclaimer
Microsoft Corporation disclaims any warranty regarding the sample code contained in this documentation, including the warranties of merchantability and fitness for a particular purpose.

License agreement
Use of this software is covered by a license agreement provided with it. If you have any questions, please call the Customer Assistance Department at 800-456-0025 (in the United States or Canada) or +1-701-281-6500.

Copyright
© 2014 Microsoft Corporation. All rights reserved.

Publication Date
September 2014
# Contents

## Introduction

<table>
<thead>
<tr>
<th>Equipment Maintenance Overview</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equipment Maintenance Interaction</td>
<td>2</td>
</tr>
<tr>
<td>User Guide Overview</td>
<td>3</td>
</tr>
<tr>
<td>What is Covered in the User Guide?</td>
<td>3</td>
</tr>
<tr>
<td>Who Should Use the User Guide?</td>
<td>3</td>
</tr>
<tr>
<td>How to Use the User Guide</td>
<td>3</td>
</tr>
</tbody>
</table>

## General Overview

| Define the Requirements | 4 |
| Review and Establish Procedures | 4 |
| Complete the Field Service Management Series Task List | 4 |
| Identify Required Customizations | 4 |

## Implementation Hints and Tips

| Auto Numbering Key Identifier Codes | 5 |
| Developing Manufacturers | 5 |
| Developing Models for Manufacturers | 6 |
| Developing Preventive Maintenance Codes | 7 |
| Developing Problem Codes | 8 |
| Developing Branches | 9 |
| Developing Call Statuses | 10 |
| Developing Call Types | 10 |
| Differences Between Customers and Customer Sites | 11 |
| Implementation Checklist | 14 |

## Equipment Maintenance Concepts

<table>
<thead>
<tr>
<th>Equipment Reference and ID Codes</th>
<th>23</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equipment ID</td>
<td>23</td>
</tr>
<tr>
<td>Preventive Maintenance Codes</td>
<td>23</td>
</tr>
<tr>
<td>Manufacturer ID</td>
<td>23</td>
</tr>
<tr>
<td>Manufacturers/Model ID</td>
<td>24</td>
</tr>
<tr>
<td>Equipment Type ID</td>
<td>24</td>
</tr>
<tr>
<td>Service Contract ID</td>
<td>24</td>
</tr>
<tr>
<td>Service Call ID</td>
<td>25</td>
</tr>
<tr>
<td>Customer ID</td>
<td>25</td>
</tr>
<tr>
<td>Customer Site ID</td>
<td>26</td>
</tr>
<tr>
<td>Branch ID</td>
<td>26</td>
</tr>
<tr>
<td>Call Type ID</td>
<td>26</td>
</tr>
<tr>
<td>Call Status ID</td>
<td>26</td>
</tr>
<tr>
<td>Problem Code ID</td>
<td>27</td>
</tr>
<tr>
<td>Calendar Codes</td>
<td>27</td>
</tr>
<tr>
<td>Age Codes</td>
<td>27</td>
</tr>
<tr>
<td>Usage Codes</td>
<td>27</td>
</tr>
<tr>
<td>Location Codes</td>
<td>28</td>
</tr>
<tr>
<td>Technicians</td>
<td>28</td>
</tr>
<tr>
<td>Skill ID</td>
<td>28</td>
</tr>
<tr>
<td>Inventory ID</td>
<td>28</td>
</tr>
</tbody>
</table>

## Task Guidelines

<table>
<thead>
<tr>
<th>How do I...?</th>
<th>29</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equipment Entry</td>
<td>29</td>
</tr>
<tr>
<td>PM Code Maintenance</td>
<td>30</td>
</tr>
</tbody>
</table>
Setup and Maintenance ........................................ 35
  Setting Up Other Modules ...................................... 35
    Shared Information Module ................................ 35
    General Ledger Module ..................................... 35
    System Manager Module .................................... 36
    Accounts Receivable Module ................................ 36
    Accounts Payable (Optional) ................................ 37
    Payroll (Optional) ........................................... 37
    Customization Manager ...................................... 37
    Crystal Reports .............................................. 37
  Setting Up Service Dispatch ................................ 38
  Setting Up Service Contracts ................................. 41
  Setting Up Equipment Maintenance .......................... 42
    Step 1: Establish Equipment Age Codes .................. 44
    Equipment Age Codes (SE.010.00) Required Fields .... 44
    Step 2: Create Location Categories ....................... 46
    Equipment Location Maintenance (SE.004.00) Required Fields .... 46
    Step 3: Group Similar Equipment .......................... 47
    Equipment Type Maintenance (SE.003.00) Required Fields .... 47
    Step 4: Enter Interval Codes ................................ 48
    Usage Code Maintenance (SE.009.00) Required Fields .... 48
    Step 5: Set Up PM Codes .................................... 49
    PM Code Maintenance (SE.002.00) Required Fields .... 49
    Step 6: Enter Manufacturer Information .................. 53
    Manufacturer Maintenance (SE.005.00) Required Fields .... 53
    Step 7: Enter and Link Models ............................. 55
    Manufacturer/Model Maintenance (SE.006.00) Required Fields .... 56
    Step 8: Associate Models With PM Plans .................. 59
    PM Code - Model Details Maintenance (SE.008.00) Required Fields .... 59

Equipment Entry .................................................. 63
  Entering Equipment ........................................... 63
    Required Fields for Equipment Entry (SE.001.00) ............. 64
  Enter a New Customer During Equipment Entry ............... 73
    Equipment Entry (SE.001.00) Required Fields ................ 73

Inquiry Screens ................................................... 77
  Calendar Codes (SE.007.00) ................................ 77
  Equipment Call History (SE.011.00) ........................ 79
    Required Field for Equipment Call History (SE.011.00) ...... 79
  Equipment History (SE.012.00) ................................ 81
    Required Fields for Equipment History (SE.012.00) .......... 81

Processes .......................................................... 83
Introduction

Equipment Maintenance Overview

The Equipment Maintenance module in Microsoft Dynamics® SL is designed to allow organizations to efficiently manage customer-owned equipment in order to provide quality service to customers and to maximize revenue for each piece of equipment. This comprehensive service business module along with the Service Contracts module gives users the ability to maintain important information about customers as well as their equipment, which eliminates the confusion of not knowing what equipment is covered under a customer service contract. The Equipment Maintenance module can also be used to track company-owned equipment such as vehicles used by technicians to perform services at a customer’s site.

Equipment Maintenance streamlines processing tasks needed to manage equipment because users can easily view the customer associated with a piece of equipment, the service location or site associated with a piece of equipment, and the branch responsible for servicing a piece of equipment. Manufacturer information such as manufacturer, model, serial number and warranty information can also be associated with equipment.

Equipment is entered through Equipment Entry (SE.001.00). Equipment Entry (SE.001.00) has been designed to allow users to enter equipment into the system in the most simple and time-saving manner. To begin the service contract entry process, a branch responsible for servicing a piece of equipment must first be selected. Users have the option of associating equipment to a customer and customer site for tracking purposes. When all the needed information such as Manufacturer ID and Model ID is entered and a piece of equipment is saved, the system automatically assigns an Equipment ID if this feature is enabled in Service Series Setup Maintenance (SD.000.00) of the Service Dispatch module.

After equipment has been entered into Equipment Entry (SE.001.00), the equipment can be associated with service contracts. Attaching equipment to a service contract allows users to create individual preventive maintenance schedules to determine the frequency of service required for each piece of equipment. A preventive maintenance schedule can be either auto-generated by Generate Equipment PM Tasks (SN.001.07) of the Service Contracts module using one of the predefined calendar interval codes or manually created by users.

Generate PM Service Calls Process (SE.300.00) must be performed in order to create a service call for each item of the preventive maintenance schedule. The labor and material required to complete a service call can be defined for each preventive maintenance code. This standard task list can be printed and used as checklists by the technicians in the field.

The profitability of equipment can easily and proactively be managed over the life of the equipment. The history of all service calls for a specific piece of equipment can be viewed in Equipment Call History (SE.011.00) while the profitability for a piece of equipment based on services performed can be viewed in Equipment History (SE.012.00).
Equipment Maintenance Interaction

The following figure illustrates the interaction between the Equipment Maintenance module and the core Microsoft Dynamics SL system.

Figure 1: Equipment Maintenance Interaction
User Guide Overview

This user guide provides information regarding the set up and use of the Equipment Maintenance module. Reviewing the user guide can help you make informed decisions regarding the implementation of the Equipment Maintenance 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 Equipment Maintenance 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 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 Equipment Maintenance module in order to get the most from your system.

How to Use the User 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
- A Quick Reference Task List of commonly performed tasks
- An alphabetized Index of the information provided in the user guide
General Overview

Define the Requirements
You should create a prioritized list that addresses the issues to be faced when implementing the Equipment Maintenance module, and what the module is expected to resolve. Include both the issues you are faced with using your current system, as well as procedural issues within your organization when creating this list.

Note: You should obtain all critical printed forms and reports (such as the service call profitability report) when defining system requirements.

Review and 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.

Complete the Field Service Management Series Task List
A checklist is provided for the Financial Management, Inventory and Order Processing, and Field Service Management Series modules. This list will help you properly implement the system and is broken down into several step that address pre-implementation setup issues and Field Service Management Series-related implementation issues.

Identify Required Customizations
Customizations include changes to the standard reports, which is accomplished using one of the report writers. Simple screen changes are made using the Customization Manager.
Implementation Hints and Tips

Auto Numbering Key Identifier Codes

Most data records require unique identifying codes that distinguish a record from all other data records in the database. To ensure efficient data storage and easy record retrieval for reporting purposes, it is recommended that you establish standardized record coding formats. Depending on the data record type, these codes are either assigned automatically, or they are manually assigned by users during data entry. These codes can be numeric, alphabetic, or alphanumeric.

Field Service Management gives you the option to have the ID of new customers, service calls, service contracts, and equipment manually assigned by users or automatically assigned by the system. Many of these coding schemes are maintained in Service Series Setup Maintenance (SD.000.00). Equipment-related coding schemes are set up and maintained in Equipment Entry (SE.001.00) and Equipment Setup Maintenance (SE.000.00).

Field Service Management also provides you with the option to add a corresponding branch abbreviation to the first three characters of Customer ID, Service Call ID, Service Contract ID, and Equipment ID. For example, if Auto-Number Branch Prefix is selected in Equipment Setup Maintenance (SE.000.00), then the abbreviation specified for the branch in Branch Maintenance (SD.001.00) is added to the equipment ID when the record is saved in Equipment Entry (SE.001.00).

Example: When entering a service call, the three-character branch prefix is added to Service Call ID when the service call is saved.

Developing Manufacturers

The Equipment Maintenance module allows users to enter the manufacturers of equipment to be maintained by organizations. Manufacturer Maintenance (SE.005.00) allows users to enter general information about each manufacturer such as the manufacturer's name, address, phone, and fax number. Warranty information, including whether or not material and labor is covered, the length of the time material and labor is covered, and if authorization for returned merchandise is required, can also be entered for each manufacturer.

Example: An air conditioning and heating contractor may want to set up each manufacturer that supplies units to the company to sell.
Developing Models for Manufacturers

The Equipment Maintenance module allows users to enter the models of each manufacturer of equipment to be maintained by organizations. Manufacturer/Model Maintenance (SE.006.00) allows users to link a model to a manufacturer as well as associate general information with each model such as Equipment Type, Age Code, Skill ID and the default PM Code. Default PM Code populates to equipment associated with the model of the manufacturer in Equipment Entry (SE.001.00). The PM code associated with a piece of equipment is used to auto-generate the preventive maintenance schedules created in Generate Equipment PM Tasks (SN.001.07).

Warranty information including if material and labor is covered, the length of the time material and labor is covered, and if authorization for returned merchandise is required can be entered for each manufacturer’s model. Each model’s measurements including Height, Width, Depth, and Weight can also be entered.

Contract types can be attached to a model of a manufacturer in order to associate Base Price for servicing a piece of equipment covered by a service contract. Base Price is also used to determine the Calculated Amount of service contracts for quoting purposes.

Example: An air conditioning and heating contractor may want to set up each model of a manufacturer that the company sells and maintains.

![Manufacturer/Model Maintenance (SE.006.00)](image-url)

Figure 3: Manufacturer/Model Maintenance (SE.006.00)
Developing Preventive Maintenance Codes

Preventive maintenance plans are used to create preventive maintenance schedules for maintaining equipment attached to service contracts in *Contract Equipment* (SN.001.05) of the Service Contracts module. Preventive maintenance plans determine the frequency of service on equipment based on either a calendar or a usage interval. Preventive maintenance plans are created in *PM Code Maintenance* (SE.002.00) and are attached to the models of manufacturers in *Manufacturer/Model Maintenance* (SE.006.00).

When creating a piece of equipment in *Equipment Entry* (SE.001.00), *PM Code* associated with the manufacturer’s model defaults to the piece of equipment. Only pieces of equipment that have *PM Codes* based on calendar intervals can automatically create preventive maintenance schedules in *Generate Equipment PM Tasks* (SN.001.07) of the Service Contracts module. Preventive maintenance schedules based on usage intervals have to be created manually in *Service Contract – Equipment PM Schedule* (SE.015.00).

**Example:** A preventive maintenance based on a calendar interval of monthly created in *PM Code Maintenance* (SE.002.00) can be used to generate a monthly preventive maintenance schedule in *Generate Equipment PM Tasks* (SN.001.07).

![Figure 4: PM Code Maintenance (SE.002.00)](image-url)
After running Generate Equipment PM Tasks (SN.001.07) for a service contract with a Start Date of 01/01/00 and an End Date of 12/31/00, the preventive maintenance schedule can be viewed in Service Contract – Equipment PM Schedule (SE.015.00).

![Service Contract - Equipment PM Schedule (SE.015.00)](image)

**Figure 5: Service Contract – Equipment PM Schedule (SE.015.00)**

### Developing Problem Codes

Problem codes are used to define the reason 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:** Two problem codes, HEAT01-Emergency No Heat and HEAT02 – Change Air Filter, can be associated with a HEATING call type.

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. If problem codes are not being used, 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 in order to estimate the total amount of time needed to complete a service.

To reduce the amount of time needed to train customer service representatives for service call processing, questions and notes can be attached to problem codes to assist in collecting valuable information from customers. Questions for CSRs 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. In order to activate the note feature when entering a problem code for a service call, Prompt Operator must be enabled in Problem Code Maintenance (SD.008.00) of the Service Dispatch module. If problem codes are not being used in the system, the note feature cannot be enabled.
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 grouping and masking purposes for reporting.

<table>
<thead>
<tr>
<th>Problem Code ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HEAT01</td>
<td>Emergency No Heat</td>
</tr>
<tr>
<td>HEAT02</td>
<td>Change Air Filter</td>
</tr>
<tr>
<td>AIRO1</td>
<td>Emergency No Air</td>
</tr>
<tr>
<td>AIRO2</td>
<td>No Power</td>
</tr>
<tr>
<td>PLUMBING01</td>
<td>Emergency No Water</td>
</tr>
<tr>
<td>PLUMBING02</td>
<td>Emergency Flooding</td>
</tr>
<tr>
<td>PM</td>
<td>Routine Preventive Maintenance</td>
</tr>
</tbody>
</table>

A problem code is attached to a preventive maintenance plan in PM Code Maintenance (SE.002.00). After running Generate PM Service Calls Process (SE.300.00) to create a service call based on preventive maintenance schedules of equipment, the problem code defaults to the service call created in Service Call Entry (SD.200.00) of the Service Dispatch module.

**Developing Branches**

Branches are used to represent the different divisions or locations in an organization.

**Example 1:** An organization that has locations in Columbus, Cincinnati, and Cleveland may create a branch for each city.

**Example 2:** A company that has heating and air conditioning divisions may set up a separate branch for each division.

Organizations typically choose to separate locations or divisions by branch for reporting purposes. For example, Open Service Call List prints open service calls for each branch in an organization.

Geographic zones are attached to branches in order to separate the work areas or routes by location or division. For example, a company with branches in Columbus and Cincinnati may create four work zones for the Cincinnati branch and three work zones for the Columbus branch. Geographic zones can only be assigned with one branch. However, a branch may be associated with an unlimited number of geographic zones, thus forming a one-to-many relationship. If a geographic zone exists in multiple branches, the geographic zone should not be attached to a branch. The geographic zone associated with the customer site is used to default the branch responsible for the service call when entered into Service Call Entry (SD.200.00). Therefore, the service call could be assigned to the wrong branch.

Users have the ability to view open service calls by branch using Dispatch Board (SD.201.00). Dispatch - View Maintenance (SD.004.00) is used to set up templates to display service calls for one branch or all branches. Viewing open service calls for one branch eliminates the problem of dispatching technicians located in one branch to open service calls of other branches.

Branch IDs are user-defined and can be any combination of numbers and letters up to 10 characters. For example:

<table>
<thead>
<tr>
<th>Branch ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>001</td>
<td>Columbus, Ohio</td>
</tr>
<tr>
<td>002</td>
<td>Cincinnati, Ohio</td>
</tr>
<tr>
<td>003</td>
<td>Cleveland, Ohio</td>
</tr>
</tbody>
</table>
Developing Call Statuses

Call statuses are used to define the life cycle of a service call. The call status provides dispatchers and other users with information that tracks the progress of a service call. The system allows an unlimited number of user-defined call statuses that can be any combination of numbers and letters up to 10 characters.

Examples:

- **QUOTE**: The customer has requested a quote for services needed but has not approved the service call.
- **APPROVED**: The service call has been approved by the customer but not by your organization. For example, credit checking may be required before a service call can be opened.
- **OPEN**: The service call has been approved by your organization, but no technician has been assigned to complete the work.
- **ASSIGNED**: The service call has been assigned to a technician to complete the work.
- **ONSITE**: Technicians are at the customer site performing the work specified on the service call.
- **HOLD**: The service call is on hold.
- **HOLDPARTS**: The service call is on hold pending parts to finish the work.
- **PARTSIN**: The service call is on hold but the parts are arriving that were previously back ordered.
- **PARTSOUT**: The service call is on hold because the parts needed to complete the work have been back ordered.
- **INVOICED**: The customer has been invoiced for the work performed.
- **COMPLETED**: All work on the service call has been performed, and the customer has been invoiced.
- **CANCELLED**: The service call was cancelled by the customer.

Note: One call status must be used to represent a completed service call. A service call is considered complete when the service call invoice has been printed and processed. Once a service call is complete, no changes can be made to the service call, and the service call no longer displays on the dispatching boards. Call Status on Completion in Service Series Setup Maintenance (SD.000.00) is used to define the call status automatically assigned by the invoicing process to complete a service call.

Each time the call status of a service call is changed, the system creates a log and records the date and time, as well as the user who made the change. Using the Notes/Attachments icon, users can attach notes as to why the status of a service call was changed. For example, a service call was cancelled due to a snowstorm.

Developing Call Types

Call types are extremely important to the Field Service Management system. Call types give organizations the ability to separate service calls or jobs by different divisions or lines of business. If organizations want to track the revenue and costs of each line of business in the company, subaccounts associated to the line of business can be attached to the call types for general ledger purposes. For example, if Heating, Plumbing, Electrical and Air Conditioning profit and loss statements need to be generated separately, develop a call type for each line of business and attach the appropriate subaccount.
Call type IDs are user-defined and can be any combination of numbers and letters up to 10 characters. Typically, call types are alphabetical for easy recognition during data entry and reporting.

<table>
<thead>
<tr>
<th>Call Type ID</th>
<th>Call Type Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HEAT</td>
<td>Heating Line of Business</td>
</tr>
<tr>
<td>PLUMB</td>
<td>Plumbing Line of Business</td>
</tr>
<tr>
<td>AIR</td>
<td>Air Conditioning Line of Business</td>
</tr>
<tr>
<td>ELECT</td>
<td>Electrical Line of Business</td>
</tr>
<tr>
<td>PM</td>
<td>Preventive Maintenance</td>
</tr>
</tbody>
</table>

**Differences Between Customers and Customer Sites**

To process transactions for consumers that purchase items or services from your organization, information about each customer must be set up in *Customer Maintenance* (08.260.00) of the Accounts Receivable module. Every customer has a unique ID that distinguishes that customer from all other customers in the database. All customers can have an unlimited number of locations where items can be shipped or where services can be performed. In the Service Dispatch module, these locations are considered sites.

Although customers may have one central address for billing, multiple locations may exist where work is performed. There is a one-to-one relationship with a Customer ID and a billing address. There is a one-to-many relationship with a Customer ID and Customer Sites. Therefore, when setting up customers and customer sites, the billing address is the determining factor when setting up one Customer ID or multiple Customer IDs for a consumer.

**Example:** If a customer in Cleveland also has locations in Columbus, Cincinnati, and Detroit, and the company wants all of the invoices for each location sent to the central office in Cleveland for payment, then one *Customer ID* and four customer sites must be created. One customer site must be created for each city or location. If the customer wants each location to pay its own invoices, then four customer IDs must be set up, one for each city or location.

Each customer site has a unique identifier that distinguishes one site from another site of the customer. Although a customer can only have one 001 site, every customer can have a 001 site. A site ID is only unique to the customer, not to the system. *Site Maintenance* (SD.025.00) in the Service Dispatch module is used to set up an unlimited number of sites per customer. This screen is also used to identify specific information that pertains to each site of a customer as well as set up default values that allow customer service representatives to quickly process a service call once a site is selected.

**Example:** Each site can have separate *Company Name*, *Attention*, *Address*, *Phone Number*, *Fax Number*, *Tax ID*, and *Special Pricing* information as well as a default *Geographic Zone*, *Branch ID*, *Call Type*, *Salesperson*, and *Technician*.

**Note:** In *Service Call Entry* (SD.200.00), if the customer has a site of DEFAULT, the site defaults to service call entry when the customer is selected. If the customer does not have a DEFAULT site, the customer site must be selected manually.

Customer IDs are unique identifying codes that must be manually assigned to customers in *Customer Maintenance* (08.260.00) of Accounts Receivable or *Service Call Entry* (SD.200.00). If *Auto Number Customer ID* in *Service Series Setup Maintenance* (SD.000.00) is enabled, the Customer IDs of new customers can automatically be assigned by the system in *Service Call Entry* (SD.200.00). Customer IDs can be any combination of numbers and letters up to 10 characters. If *Auto-Number Branch Prefix* is enabled in *Service Series Setup Maintenance* (SD.000.00), the corresponding branch abbreviation will default to the first three characters of the Customer ID.
Possible Customer ID formats include:

- The initial series of letters in the customer name:

<table>
<thead>
<tr>
<th>Customer ID</th>
<th>Customer Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BUSINE</td>
<td>Business Interiors</td>
</tr>
<tr>
<td>FRONTZ</td>
<td>Frontz Drilling</td>
</tr>
<tr>
<td>HAINES</td>
<td>Haines &amp; Company</td>
</tr>
<tr>
<td>LETTER</td>
<td>The Letter Shop</td>
</tr>
</tbody>
</table>

- Sequential numbers:

<table>
<thead>
<tr>
<th>Customer ID</th>
<th>Customer Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>0001</td>
<td>Business Interiors</td>
</tr>
<tr>
<td>0002</td>
<td>Frontz Drilling</td>
</tr>
<tr>
<td>0003</td>
<td>Haines &amp; Company</td>
</tr>
<tr>
<td>0004</td>
<td>The Letter Shop</td>
</tr>
</tbody>
</table>

- Combination of a name and number:

<table>
<thead>
<tr>
<th>Customer ID</th>
<th>Customer Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BUSI01</td>
<td>Business Interiors Cleveland</td>
</tr>
<tr>
<td>BUSI02</td>
<td>Business Interiors Akron</td>
</tr>
<tr>
<td>FRON01</td>
<td>Frontz Drilling Wooster</td>
</tr>
<tr>
<td>FRON02</td>
<td>Frontz Drilling Canton</td>
</tr>
<tr>
<td>HAIN01</td>
<td>Haines &amp; Company Akron</td>
</tr>
<tr>
<td>HAIN02</td>
<td>Haines &amp; Company Canton</td>
</tr>
<tr>
<td>LETT01</td>
<td>The Letter Shop Akron</td>
</tr>
<tr>
<td>LETT02</td>
<td>The Letter Shop Canton</td>
</tr>
</tbody>
</table>

Site IDs are user-defined and can be any combination of numbers and letters up to 10 characters. Possible site ID formats include:

- A series of letters in the location name:

<table>
<thead>
<tr>
<th>Site ID</th>
<th>Site Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CLEV</td>
<td>Cleveland</td>
</tr>
<tr>
<td>COLU</td>
<td>Columbus</td>
</tr>
<tr>
<td>CINC</td>
<td>Cincinnati</td>
</tr>
<tr>
<td>DETR</td>
<td>Detroit</td>
</tr>
</tbody>
</table>

- Sequential numbers:

<table>
<thead>
<tr>
<th>Site ID</th>
<th>Site Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>001</td>
<td>Cleveland</td>
</tr>
<tr>
<td>002</td>
<td>Columbus</td>
</tr>
<tr>
<td>003</td>
<td>Cincinnati</td>
</tr>
<tr>
<td>004</td>
<td>Detroit</td>
</tr>
</tbody>
</table>
- Combination of a name and number:

<table>
<thead>
<tr>
<th>Site ID</th>
<th>Site Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CLEV01</td>
<td>Cleveland North</td>
</tr>
<tr>
<td>CLEV02</td>
<td>Cleveland South</td>
</tr>
<tr>
<td>CLEV03</td>
<td>Cleveland East</td>
</tr>
<tr>
<td>CLEV04</td>
<td>Cleveland West</td>
</tr>
<tr>
<td>COLU01</td>
<td>Columbus North</td>
</tr>
<tr>
<td>COLU02</td>
<td>Columbus South</td>
</tr>
<tr>
<td>COLU03</td>
<td>Columbus East</td>
</tr>
<tr>
<td>COLU04</td>
<td>Columbus West</td>
</tr>
<tr>
<td>CINC01</td>
<td>Cincinnati North</td>
</tr>
<tr>
<td>CINC02</td>
<td>Cincinnati South</td>
</tr>
<tr>
<td>CINC03</td>
<td>Cincinnati East</td>
</tr>
<tr>
<td>CINC04</td>
<td>Cincinnati West</td>
</tr>
<tr>
<td>DETR01</td>
<td>Detroit North</td>
</tr>
<tr>
<td>DETR02</td>
<td>Detroit South</td>
</tr>
<tr>
<td>DETR03</td>
<td>Detroit East</td>
</tr>
<tr>
<td>DETR04</td>
<td>Detroit West</td>
</tr>
</tbody>
</table>
**Implementation Checklist**

The checklist below may be used as a guide when completing an Equipment Maintenance implementation:

<table>
<thead>
<tr>
<th>Description</th>
<th>Assigned To</th>
<th>Date Required</th>
<th>Date Completed</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>General Ledger:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ledger Maintenance (01.310.00)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Set up at least one ledger for posting actual account data.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chart of Accounts Maintenance (01.260.00)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GL Setup (01.950.00)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Complete General Ledger Setup screen.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Shared Information:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Flexkey Definition (21.320.00)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define subaccount segment structure.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Flexkey Table (21.330.00) — Optional</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define valid values for the segments where Valid is enabled in Flexkey Definition (21.320.00).</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>General Ledger:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subaccount Maintenance (01.270.00)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Establish subaccount for each line of business, location, or line of business and location.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Shared Information:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tax Maintenance (21.280.00)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Associate to customer by entering tax ID in <strong>Tax ID 1</strong> in Customer Maintenance (08.260.00).</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Associate to customer site by entering tax ID in <strong>Tax ID</strong> in Site Maintenance (SD.025.00).</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tax Group Maintenance (21.340.00) — Optional</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Establish tax rate groups.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Terms Maintenance (21.270.00)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Associate to customer in Customer Maintenance (08.260.00).</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>Assigned To</td>
<td>Date Required</td>
<td>Date Completed</td>
<td>Comments</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
<td>---------------</td>
<td>----------------</td>
<td>----------</td>
</tr>
<tr>
<td>Accounts Receivable:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Statement Cycle (08.280.00)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Establish at least one statement cycle for aging categories and customer statement printing.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Customer Class (08.290.00)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Establish at least one customer class to group customer for reporting purposes.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AR Setup (08.950.00)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Complete Accounts Receivable Setup screen.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salesperson Maintenance (08.310.00)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define at least one salesperson such as “House”.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shared Information:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Flexkey Definition (21.320.00)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define Customer ID structure.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Flexkey Table (21.330.00) — Optional</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define valid values for the segments where Valid is enabled in Flexkey Definition (21.320.00).</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Customer Maintenance (08.260.00)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define one customer for each billing address.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Associate to a piece of equipment in Equipment Entry (SE.001.00).</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inventory:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>IN Setup (10.950.00)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Complete IN Setup screen.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Set COGS Subaccount Source to Sales Transaction.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Product Classes (10.280.00)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define at least one product class for setting default values on new inventory items and reporting purposes.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unit Conversion (10.650.00)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define all stocking units of measure for inventory items with purchase or sales units differing from their stocking unit.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>Assigned To</td>
<td>Date Required</td>
<td>Date Completed</td>
<td>Comments</td>
</tr>
<tr>
<td>-----------------------------------------------------------------------------</td>
<td>-------------</td>
<td>---------------</td>
<td>----------------</td>
<td>----------</td>
</tr>
<tr>
<td><strong>Sites (10.250.00)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define locations or warehouses where inventory items are stocked.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Warehouse Bin Locations (10.340.00)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define all locations within a warehouse where inventory items are stored.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Inventory Items (10.250.00)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define material and labor for inventory item specific preventative maintenance tasks needed to complete a PM Code in <strong>PM Code Maintenance (SE.002.00)</strong>.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define all labor items as non-stock inventory items.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Service Dispatch:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Call Status Maintenance (SD.002.00)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define at least one call status for dispatching and reporting purposes.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Service Series Setup Maintenance (SD.000.00)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Complete Service Series Setup Maintenance screen.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Zip Code Maintenance (SD.021.00) — Optional</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define postal codes where services are performed.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Geographic Zone Maintenance (SD.009.00)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define work zones or regions where services are performed.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Associate postal codes defined in <strong>Zip Code Maintenance (SD.0021.00)</strong> to each work zone or region.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Branch Maintenance (SD.001.00)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define at least one branch for dispatching and reporting purposes.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Associate geographic zones defined in <strong>Geographic Zone Maintenance (SD.009.00)</strong> to each branch.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Call Type Maintenance (SD.003.00)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define at least one call type for dispatching, call monitoring, and reporting purposes.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>Assigned To</td>
<td>Date Required</td>
<td>Date Completed</td>
<td>Comments</td>
</tr>
<tr>
<td>-------------------------------------------------------</td>
<td>-------------</td>
<td>---------------</td>
<td>----------------</td>
<td>----------</td>
</tr>
<tr>
<td><strong>Employee Class Maintenance (SD.006.00)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define groups of employees with similar characteristics for reporting purposes.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Employee Maintenance (SD.007.00)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define an employee for each technician, volunteer, and subcontractor.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Problem Code Maintenance (SD.008.00)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define the reasons service calls are generated.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Media Group Maintenance (SD.013.00)</strong> — Optional</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define groups of marketing resources for reporting purposes.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Media Buy Maintenance (SD.012.00)</strong> — Optional</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define marketing sources to track effective sources of advertising.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Dwelling Maintenance (SD.005.00)</strong> — Optional</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define the different type of building where services are performed.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Associate a dwelling to each customer site.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Inventory Mark-Up Maintenance (SD.026.00)</strong> — Optional</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Associate an inventory mark-up to each customer site.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Site Maintenance (SD.025.00)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Set up one site for each customer location where work is performed.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Equipment:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Equipment Setup Maintenance (SE.000.00)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Determine your numbering schema for <strong>Last Equipment ID</strong>, taking into consideration the options to automatically generate the IDs and to include a branch prefix in each ID.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>Assigned To</td>
<td>Date Required</td>
<td>Date Completed</td>
<td>Comments</td>
</tr>
<tr>
<td>-------------------------------------------------</td>
<td>-------------</td>
<td>---------------</td>
<td>----------------</td>
<td>----------</td>
</tr>
<tr>
<td>Equipment Age Maintenance (SE.010.00) — Required if using Equipment Types</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Set up a schedule to account for increasing costs of maintaining equipment over time.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Establish an age code schema.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Equipment Location Maintenance (SE.004.00) — Optional</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Enter categories to account for additional costs of maintaining equipment due to the location of the equipment.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Establish location code schema.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Equipment Type Maintenance (SE.003.00)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define groups of equipment with similar characteristics for reporting purposes.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Associate age code defined in Equipment Age Maintenance (SE.010.00) to each equipment type.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Usage Code Maintenance (SE.009.00) — Optional</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define interval codes for tracking how equipment is used for reporting purposes and creating preventive maintenance schedules manually.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Establish Usage Code schema.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>Assigned To</td>
<td>Date Required</td>
<td>Date Completed</td>
<td>Comments</td>
</tr>
<tr>
<td>----------------------------</td>
<td>-------------</td>
<td>---------------</td>
<td>----------------</td>
<td>---------------------------</td>
</tr>
<tr>
<td><strong>PM Code Maintenance (SE.002.00)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define preventive</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>maintenance plans for</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>servicing equipment.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Associate a call type</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>defined in Call Type</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maintenance (SD.009.00)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Associate a problem</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>code defined Problem</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Code Maintenance (SD.008.00)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Establish how preventative</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>maintenance schedules</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>for each PM Code are</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>calculated: Calendar or</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Usage.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define specific</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>preventative maintenance</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>tasks needed to</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>complete each PM Code.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Manufacturer Maintenance (SE.005.00)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Set up all manufacturers</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>that supply equipment to</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>your organization.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Associate contact and</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>address information to</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>each manufacturer.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Associate a vendor from</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounts Payable to each</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>manufacturer.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Establish warranty</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>information for each</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>manufacturer.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>Assigned To</td>
<td>Date Required</td>
<td>Date Completed</td>
<td>Comments</td>
</tr>
<tr>
<td>----------------------------------------------------------------------------</td>
<td>-------------</td>
<td>---------------</td>
<td>----------------</td>
<td>----------</td>
</tr>
<tr>
<td><strong>Manufacturer/Model Maintenance (SE.006.00)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Set up all models of manufacturers.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define an equipment type set up in <em>Equipment Type Maintenance</em> (SE.003.00) for each model.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define an age code set up in <em>Equipment Age Maintenance</em> (SE.010.00) for each model.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define a skill set up in <em>Skills Maintenance</em> (SD.017.00) for each model.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define a PM Code defined in <em>PM Code Maintenance</em> (SE.002.00) for each model.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Establish warranty information for each model.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Associate contract types set up in <em>Contract Type Maintenance</em> (SN.003.00) with each model for pricing.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>PM Code - Model Details Maintenance (SE.008.00) — Optional</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Associate specific manufacturer model to a preventive maintenance plan and tasks.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Service Contracts — Optional:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Service Contract Set-up (SN.007.00)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Complete Service Contract Set-up.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Master Service Contract Maintenance (SN.002.00) — Optional</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Define master contracts for consolidated invoicing or billing for multiple sites of a customer.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Contract Escalation Maintenance (SN.005.00)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Determine how the contract price of multi-year service contracts increase.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Contract Type Maintenance (SN.003.00)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Establish groups of service contracts with similar characteristics for reporting purposes and set defaults for the new service calls.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>Assigned To</td>
<td>Date Required</td>
<td>Date Completed</td>
<td>Comments</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
<td>----------------</td>
<td>----------------</td>
<td>----------</td>
</tr>
<tr>
<td>Cancellation Code Maintenance (SN.004.00) — Optional</td>
<td></td>
<td></td>
<td></td>
<td>• Define reasons why service contracts are cancelled or not renewed.</td>
</tr>
</tbody>
</table>
Equipment Maintenance Concepts

Equipment Reference and ID Codes

Equipment ID
A piece of equipment has a record in the database used to track information about both company- and customer-owned items.

**Example:** A heating and air conditioning organization may enter and associate heating and air conditioning units as customer-owned equipment and enter the service trucks as company-owned equipment. Equipment is entered into the system through *Equipment Entry* (SE.001.00).

*Equipment Entry* (SE.001.000) allows users to enter pertinent information about a piece of equipment including the customer and site associated with the piece of equipment, the branch responsible for servicing the piece of equipment, the type of equipment, the vendor ID, the purchase date, and the purchase amount. Manufacturer information such as the manufacturer, model, serial number, and other warranty information can also be entered for a piece of equipment.

When all of the needed information is entered and the equipment record is saved, the system automatically assigns an *Equipment ID* if this feature is enabled in *Equipment Setup Maintenance* (SE.000.00). In addition, if *Auto-Number Branch Prefix* is selected in *Equipment Setup Maintenance* (SE.000.00), the three-character *Branch Abbreviation*, created in *Branch Maintenance* (SD.001.00) and associated with the branch of the customer, is added to the beginning of the *Equipment ID*.

Once equipment has been entered into the system, customer service representatives can attach the equipment to a service call or service contract. *Equipment ID* in *Service Call Entry* (SD.200.00) allows users to enter the equipment to be serviced on a service call.

Preventive Maintenance Codes

Preventive maintenance plans are used to create preventive maintenance schedules for maintaining equipment attached to service contracts in *Contract Equipment* (SN.001.05) of the Service Contracts module. Preventive maintenance plans determine the frequency of service on equipment based on either a calendar or a usage interval. Preventive maintenance plans are created in *PM Code Maintenance* (SE.002.00) and are attached to the models of manufacturers in *Manufacturer/Model Maintenance* (SE.006.00).

When creating a piece of equipment in *Equipment Entry* (SE.001.00), the *PM Code* associated with the manufacturer’s model defaults to the piece of equipment. Only pieces of equipment that have *PM Codes* based on calendar intervals can be used to automatically create preventive maintenance schedules in *Generate Equipment PM Tasks* (SN.001.07) of the Service Contracts module. Preventive maintenance schedules based on usage intervals have to be created manually in *Service Contract – Equipment PM Schedule* (SE.015.00) in the Service Contracts module.

*PM Code* is a unique 10-character ID that identifies each preventive maintenance scheme in the Equipment Maintenance module.

Manufacturer ID

The Equipment Maintenance module allows users to enter general information about each manufacturer that supplies pieces of equipment to be maintained by organizations such as the manufacturer’s name, address, phone and fax number. *Manufacturer Maintenance* (SE.005.00) is used to enter each manufacturer into the system.

**Example:** An air conditioning and heating contractor may want to set up each manufacturer that supplies units to the company to maintain.

*Manufacturer ID* is a unique 10-character ID that identifies each manufacturer in the Equipment Maintenance module.
Manufacturers/Model ID

The Equipment Maintenance module allows users to enter general information about each model that manufacturers supply to organizations to be maintained, such as Equipment Type, Age Code, Skill ID, and Default PM Code. Manufacturer/Model Maintenance (SE.006.00) is used to enter and link each model to a manufacturer in the system.

Example: An air conditioning and heating contractor may want to set up each model that manufacturers supply to organizations to maintain.

Model ID is a unique 10-character ID that identifies each model of a manufacturer in the Equipment Maintenance module.

Equipment Type ID

Equipment types are used to group similar pieces of equipment together for reporting purposes.

Example: An organization may want to group pieces of equipment from different manufacturers with similar operation and functions.

An equipment type is attached to a model of a manufacturer in Manufacturer/Model Maintenance (SE.006.00) and associated with a piece of equipment in Equipment Entry (SE.001.00).

Equipment Type ID is a unique 10-character ID that identifies each equipment type in the Service Contracts module.

Service Contract ID

A service contract is a document in the Service Contracts module used by organizations to record information about customers, equipment, and types of service offered to customers to cover on-site and off-site service commitments.

Example: An organization that sells heating and air conditioning units may offer a Full or Partial service contract to their customers to cover repairs or preventive maintenance on the pieces of equipment over a specified length of time. Service contracts are entered into the system in Service Contract Entry (SN.001.00) and can be associated with a specific customer and site.

Once the customer and site have been selected, values attached to the site default to the service contract. Customer service representatives can override the default values and enter the other needed data such as Contract Status, Contract Type, Contract Amount, Contract Start, Expiration Date, and Renewal Type. Several pieces of equipment can be associated with a service contract along with individual preventive maintenance schedules for each piece of equipment. Independent revenue and billing schedules can also be assigned to each service contract.

When all required information is entered and the service contract is saved, the system automatically assigns a Contract ID if Auto Number Contract ID is enabled in Service Series Setup Maintenance (SD.000.00). In addition, if Auto-Number Branch Prefix is selected in Service Series Setup Maintenance (SD.000.00), the three-character Branch Abbreviation associated with the customer branch is added to the beginning of Contract ID.

If Active Contract Notification in Service Series Setup Maintenance (SD.000.00) is activated, customer service representatives will be notified of any sites that have active service contracts at the time a service call is entered in Service Call Entry (SD.200.00). This feature allows organizations to respond to customer issues in a timely manner when problems occur for customers covered by a service contract.
Service Call ID

A service call is a document in the Service Dispatch module that is used to record information about customers and services that customers are requesting from organizations.

**Example:** A customer having a problem with an air conditioner blowing hot air may call a heating and air conditioning repair shop requesting an on-site visit from one of the service technicians. Service calls are entered into the system through Service Call Entry (SD.200.00) and are associated with a specific customer and site.

Once the customer and site have been selected, values attached to the customer site default to the service call. Customer service representatives can override default values such as scheduling information, call status, priority, start date, time promised, and primary technician. Several problem codes or reasons for the service call, along with notes or source documents specific to the issues, can be attached to the service call.

When all needed information is entered and the service call is saved, the system automatically assigns a Service Call ID if Auto Number Service Call is enabled in Service Series Setup Maintenance (SD.000.00). In addition, if Auto-Number Branch Prefix is selected in Service Series Setup Maintenance (SD.000.00), the three-character Branch Abbreviation associated with the branch of the customer is added to the beginning of the Service Call ID.

Customer ID

To process transactions for consumers that purchase items or services from your organization, information about each customer must be set up in Customer Maintenance (08.260.00) of the Accounts Receivable module. Every customer has a unique ID that distinguishes that customer from all other customers in the database. Setting up the customer in Customer Maintenance (08.260.00) requires the Customer ID to be manually entered.

Possible customer ID formats include:

- A series of letters in the customer name (SMITHBOB for Robert Smith)
- Sequential numbers (234567, 234568, 234569, 234570, etc.)
- A branch number-customer number combination (001234567 for branch 001 and customer 234567)
- A branch number-customer name combination (001SMITH for branch 001 and SMITH for customer name)

**Note:** The Flexkey feature gives users the ability to divide customer IDs into segments to allow the production of more meaningful financial and management reports. The segments might represent a variety of information.

**Example:** Segments may be established for the customer class, territory, and company. Segments are defined in the Shared Information module using Flexkey Definition (21.320.00).

Service Dispatch gives users the ability to set up new customers in Service Call Entry (SD.200.00). By clicking on the New Customer tab in Service Call Entry (SD.200.00) and typing in the necessary information, new customers can be added to Accounts Receivable. When all of the needed information is entered and Create is clicked, the system automatically assigns a Customer ID if Auto Number Customer ID is enabled in Service Series Setup Maintenance (SD.000.00). In addition, if the Auto-Number Branch Prefix is selected in Service Series Setup Maintenance (SD.000.00), the three-character Branch Abbreviation associated with the branch of the customer is added to the beginning of the Customer ID.
Customer Site ID
All customers can have an unlimited number of locations where items can be shipped or where services can be performed. In the Service Dispatch module, these locations are considered sites. Although customers may have one central address for billing, multiple locations may exist where work is performed. There is a one-to-one relationship with a Customer ID and a billing address. There is a one-to-many relationship with a Customer ID and customer sites. Sites for a customer are manually entered in Site Maintenance (SD.025.00) in the Service Dispatch module. Site ID is a 10-character user-defined unique identifier for each site of a customer.

Branch ID
Branches are used to represent the different divisions or locations in an organization.

Example: An organization that has locations in Columbus, Cincinnati, and Cleveland may create a branch for each city.

A company that has a heating and an air conditioning division may set up a separate branch for each division. Organizations typically choose to separate locations or divisions by branch for reporting purposes. Open Service Call List (SD.620.00) is used to print open service calls for each branch in an organization.

Branch IDs are user-defined and can be any combination of numbers and letters up to 10 characters. Branch IDs are set up in Branch Maintenance (SD.001.00) in the Service Dispatch module.

Call Type ID
Call types are extremely important to the Service Dispatch system. Call types give organizations the ability to separate service calls or jobs by different divisions or lines of business. If organizations want to track the revenue and costs of each line of business in the company, subaccounts associated with the lines of business can be attached to the call types for general ledger purposes.

Example: If Heating, Plumbing, Electrical and Air Conditioning profit and loss statements need to be generated separately, developing a call type for each line of business and attaching the appropriate subaccount is required.

Call type IDs are user-defined and can be any combination of numbers and letters up to 10 characters. Typically, call types are alphabetical for easy recognition during data entry and reporting. Call type IDs are set up in Call Type Maintenance (SD.003.00) in the Service Dispatch module.

Call Status ID
Call statuses are used to define the life cycle of a service call. The call status provides dispatchers and other users with information that tracks the progress of a service call. The system allows an unlimited number of user-defined call statuses that can be any combination of numbers and letters up to 10 characters. However, call status IDs are typically alphabetical for easy recognition during data entry and reporting.

Call statuses are set up in Call Status Maintenance (SD.002.00) in the Service Dispatch module.
Problem Code ID

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

Problem code IDs are user-defined and can be any combination of numbers and letters up to 10 characters. Typically, problem codes are alphanumeric because multiple problem codes can exist for one call type.

Example: A HEATING call type can have HEAT01 – Emergency No Heat, HEAT02 – Change Air Filter, and HEAT03 – Emergency Cool Air Blowing.

Problem code IDs are set up in Problem Code Maintenance (SD.008.00) in the Service Dispatch module.

Calendar Codes

Calendar Codes (SE.007.00) are hard-coded options used to create preventive maintenance schedules for equipment. Calendar Codes (SE.007.00) are attached to preventive maintenance plans in PM Code Maintenance (SE.002.00) and associated with a piece of equipment in Equipment Entry (SE.001.00).

After associating a piece of equipment to a service contract in Service Contract Entry (SN.001.00) and running Generate Equipment PM Tasks (SN.001.07), a preventive maintenance schedule based on PM Code associated with the piece of equipment is created. PM Code determines the frequency of preventive maintenance schedule records. Since calendar codes are hard-coded into the program, new codes cannot be added or existing codes cannot be modified.

Age Codes

Age codes of equipment are used to account for the increasing costs of maintaining equipment over time. Age codes allow users to enter a schedule of percentage increases based on the age of equipment in years.

Example: The cost to service a central air system increases by 10% every five years.

Age codes are entered into Equipment Age Maintenance (SE.010.00) and attached to a manufacturer’s model in Manufacturer/Model Maintenance (SE.006.00). Age codes are user-defined and can be any combination of numbers and letters up to 10 characters.

Usage Codes

Usage codes are used to enter the interval codes to track how equipment is used for reporting purposes.

Example: An organization may want to track the mileage of vehicles in order to schedule preventive maintenance oil changes and tire rotations.

Unlike Calendar Codes (SE.007.00), usage codes are user-defined and cannot be used to auto-generate preventive maintenance schedules in Generate Equipment PM Tasks (SN.001.07).

Usage codes are entered into Usage Code Maintenance (SE.009.00) and associated with a manufacturer’s model in Manufacturer/Model Maintenance (SE.006.00). Usage codes are user-defined and can be any combination of numbers and letters up to 10 characters.
Location Codes

Location codes are used to enter physical location categories for equipment in order to account for the additional maintenance costs for equipment located in places that require special attention or resources.

Example: Installing a television antenna on a two-story house may require two technicians, while installation of the antenna may only require one technician on a one-story house.

Location codes are entered in Equipment Location Maintenance (SE.004.00) and are associated with a piece of equipment in Equipment Entry (SE.001.00).

Technicians

Technicians are employees, volunteers, and subcontractors who perform the work on service calls.

Example: A heating and air conditioning company installing a central air system in a new house would want to set up all employees assigned to the job in order to track the costs associated with the installation. Employees, volunteers, and subcontractors are entered into the system in Employee Maintenance (SD.007.00) of the Service Dispatch module.

Employee ID is user-defined and can be any combination of numbers and letters up to 10 characters. It is recommended that you use the name of the employee as part of the Employee ID for easy recognition during data entry and reporting. If the Payroll module is installed, Employee ID is Service Dispatch does not need to be the same identifier as entered in the Payroll module.

Skill ID

Skills are designed to track the expertise required by technicians in an organization to perform the work needed to complete a service call. Skills are entered into the system in Skills Maintenance (SD.017.00) and attached to problem codes in Problem Code Maintenance (SD.008.00).

Skills can also be attached to employees in Employee Maintenance (SD.007.00) of Service Dispatch. After associating a problem code and primary technician to a service call in Service Call Entry (SD.200.00), the system warns CSRs (customer service representatives) when saving the service call if the technician does not have the appropriate skills to complete the work for the problem code.

Skill IDs are user-defined and can be any combination of numbers and letters up to 10 characters.

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. When inventory items are added to service calls by Generate PM Service Calls Process (SE.300.00), the items are allocated in the Inventory module to prevent over allocation of the item by other transactions. Similarly, if an inventory item is over allocated when it is added to a service call, an event log message is generated to inform the user of the conflict.
Task Guidelines

How do I...?

Equipment Entry

- Enter a new piece of equipment? See “Required Fields for Equipment Entry (SE.001.00)” on page 64, step 1.
- Attach a piece of equipment to a customer? See “Required Fields for Equipment Entry (SE.001.00)” on page 64, step 6.
- Attach a piece of equipment to a customer site? See “Required Fields for Equipment Entry (SE.001.00)” on page 64, step 7.
- Enter a new piece of equipment without a customer site? See “Required Fields for Equipment Entry (SE.001.00)” on page 64, step 1.
- Associate a branch responsible for a piece of equipment? See “Required Fields for Equipment Entry (SE.001.00)” on page 64, step 5.
- Associate a manufacturer with a piece of equipment? See “Required Fields for Equipment Entry (SE.001.00)” on page 64, step 8.
- Associate a model to a piece of equipment? See “Required Fields for Equipment Entry (SE.001.00)” on page 64, step 9.
- Associate a serial number to a piece of equipment? See “Required Fields for Equipment Entry (SE.001.00)” on page 64, step 10.
- Enter warranty information for a piece of equipment? See “Required Fields for Equipment Entry (SE.001.00)” on page 64, step 13.
- Change the status of a piece of equipment? See “Required Fields for Equipment Entry (SE.001.00)” on page 64, step 20.
- Change an active piece of equipment to inactive? See “Required Fields for Equipment Entry (SE.001.00)” on page 64, step 4.
- Associate a PM code to a piece of equipment? See “Required Fields for Equipment Entry (SE.001.00)” on page 64, step 11.
- Enter a manufactured year for a piece of equipment? See “Required Fields for Equipment Entry (SE.001.00)” on page 64, step 15.
- Attach an asset number to a piece of equipment? See “Required Fields for Equipment Entry (SE.001.00)” on page 64, step 21.
- Enter a location for a piece of equipment? See “Required Fields for Equipment Entry (SE.001.00)” on page 64, step 26.
- Link a piece of equipment to a parent piece of equipment? See “Required Fields for Equipment Entry (SE.001.00)” on page 64, step 32.
- Enter vehicle information for a piece of equipment? See “Required Fields for Equipment Entry (SE.001.00)” on page 64, step 35.
- Enter purchase information for a piece of equipment? See “Required Fields for Equipment Entry (SE.001.00)” on page 64, step 52.
- Attach the vendor used to purchase a piece of equipment? See “Required Fields for Equipment Entry (SE.001.00)” on page 64, step 53.
- Enter meter/usage for a piece of equipment? See “Required Fields for Equipment Entry (SE.001.00)” on page 64, step 58.
PM Code Maintenance

- Enter specific inventory items needed to complete PM tasks? See “PM Code – Model Details Maintenance (SE.008.00) Required Fields” on page 59, step 13.
- Enter the number of hours needed to complete PM tasks? See “PM Code – Model Details Maintenance (SE.008.00) Required Fields” on page 59, step 7.
- Enter specific instructions needed to complete PM tasks? See “PM Code – Model Details Maintenance (SE.008.00) Required Fields” on page 59, step 15.
- Enter special comments needed to complete PM tasks? See “PM Code – Model Details Maintenance (SE.008.00) Required Fields” on page 59, step 15.
- Attach seasonal information to specific PM code tasks? See “PM Code Maintenance (SE.002.00) Required Fields” on page 49, step 16.
- Create model-specific PM codes? See “Manufacturer/Model Maintenance (SE.006.00) Required Fields” on page 56, step 7.
- Assign a default technician to a PM code? See “PM Code Maintenance (SE.002.00) Required Fields” on page 49, step 6.
- Associate a call type to PM code? See “PM Code Maintenance (SE.002.00) Required Fields” on page 49, step 4.
- Associate a problem code to a PM code? See “PM Code Maintenance (SE.002.00) Required Fields” on page 49, step 5.
- Associate a PM level to a PM code? See “PM Code Maintenance (SE.002.00) Required Fields” on page 49, step 8.

PM Code-Model Details Maintenance

- Associate a calendar-based problem code to a model? See “PM Code – Model Details Maintenance (SE.008.00) Required Fields” on page 59, step 8.
- Associate usage-based problem codes to a model? See “PM Code – Model Details Maintenance (SE.008.00) Required Fields” on page 59, step 9.
- Enter specific inventory items needed to complete PM tasks for a model? See “PM Code – Model Details Maintenance (SE.008.00) Required Fields” on page 59, step 13.
- Enter the number of hours needed to complete PM tasks for a model? See “PM Code – Model Details Maintenance (SE.008.00) Required Fields” on page 59, step 14.
- Enter specific instructions needed to complete PM tasks for a model? See “PM Code – Model Details Maintenance (SE.008.00) Required Fields” on page 59, step 12.
- Enter special comments needed to complete PM tasks for a model? See “PM Code – Model Details Maintenance (SE.008.00) Required Fields” on page 59, step 12.

Age Code Maintenance

- Create an age code? See “Equipment Type Maintenance (SE.003.00) Required Fields” on page 47, step 4.
- Attach an age code to an equipment type? See “Equipment Age Codes (SE.010.00) Required Fields” on page 44, step 2.

Manufacturer

- Attach contact information to a manufacturer? See “Manufacturer Maintenance (SE.005.00) Required Fields” on page 53, step 4.
- Attach a vendor to a manufacturer? See “Manufacturer Maintenance (SE.005.00) Required Fields” on page 53, step 11.
- Specify that labor is covered under the manufacturer's warranty? See “Manufacturer Maintenance (SE.005.00) Required Fields” on page 53, step 15.
• Specify the length of time labor is covered under the manufacturer's warranty? See “Manufacturer Maintenance (SE.005.00) Required Fields” on page 53, step 16.

• Specify that material is covered under the manufacturer's warranty? See “Manufacturer Maintenance (SE.005.00) Required Fields” on page 53, step 17.

• Specify that a manufacturer requires an RMA prior to accepting return merchandise? See “Manufacturer Maintenance (SE.005.00) Required Fields” on page 53, step 14.

Manufacturer/Model

• Enter specific models of a manufacturer? See “Manufacturer/Model Maintenance (SE.006.00) Required Fields” on page 56, step 3.

• Assign a PM code to a model/manufacturer? See “Manufacturer/Model Maintenance (SE.006.00) Required Fields” on page 56, step 7.

• Assign an age code to a model/manufacturer? See “Manufacturer/Model Maintenance (SE.006.00) Required Fields” on page 56, step 5.

• Assign skills required to a model/manufacturer? See “Manufacturer/Model Maintenance (SE.006.00) Required Fields” on page 56, step 6.

• Assign an equipment type to a model/manufacturer? See “Manufacturer/Model Maintenance (SE.006.00) Required Fields” on page 56, step 4.

• Enter warranty information specific to a model? See “Manufacturer/Model Maintenance (SE.006.00) Required Fields” on page 56, step 9.

• Indicate that a manufacturer requires RMA prior to accepting any returned merchandise per model? See “Manufacturer/Model Maintenance (SE.006.00) Required Fields” on page 56, step 8.

• Indicate that labor is covered under warranty for a specific model? See “Manufacturer/Model Maintenance (SE.006.00) Required Fields” on page 56, step 9.

• Indicate the length of time labor is covered under warranty for a specific model? See “Manufacturer/Model Maintenance (SE.006.00) Required Fields” on page 56, step 10.

• Indicate that material is covered under warranty for a specific model? See “Manufacturer/Model Maintenance (SE.006.00) Required Fields” on page 56, step 11.

• Indicate the length of time labor is covered under warranty for a specific model? See “Manufacturer/Model Maintenance (SE.006.00) Required Fields” on page 56, step 12.

• Enter specific attributes for a specific model? For example: Height/width/depth/weight? See “Manufacturer/Model Maintenance (SE.006.00) Required Fields” on page 56, step 13.

• Assign specific contract types to a model/manufacturer? See “Manufacturer/Model Maintenance (SE.006.00) Required Fields” on page 56, step 17.

• Assign a base price per contract type for a model/manufacturer? See “Manufacturer/Model Maintenance (SE.006.00) Required Fields” on page 56, step 18.

Inquiries

• View a list of calendar codes used to create PM schedules? See “Calendar Codes (SE.007.00)” on page 77, step 1.

• View information related to a piece of equipment? See “Required Fields for Equipment Entry (SE.001.00)” on page 64.

• View all the service calls associated with a piece of equipment? See “Required Field for Equipment Call History (SE.011.00)” on page 79, step 1.

• View the profitability of a piece of equipment? See “Required Fields for Equipment History (SE.012.00)” on page 81, step 1.

• View the period and YTD net sales associated with a piece of equipment? See “Required Fields for Equipment History (SE.012.00)” on page 81, step 5.
• View the period and YTD total costs associated with the repair and maintenance for a piece of equipment? See “Required Fields for Equipment History (SE.012.00)” on page 81, step 6.
• View the period and YTD other costs associated with a piece of equipment? See “Required Fields for Equipment History (SE.012.00)” on page 81, step 7.
• View the period and YTD gross margins associated with a piece of equipment? See “Required Fields for Equipment History (SE.012.00)” on page 81, step 9.
• View the period and YTD gross margin percentages for a piece of equipment? See “Required Fields for Equipment History (SE.012.00)” on page 81, step 10.
• View the period and YTD labor costs associated with a piece of equipment? See “Required Fields for Equipment History (SE.012.00)” on page 81, step 11.
• View the period and YTD number of labor hours for a piece of equipment? See “Required Fields for Equipment History (SE.012.00)” on page 81, step 11.
• View service history for a site? See “Required Field for Equipment Call History (SE.011.00)” on page 79, step 1.
• View service history for a piece of equipment? See “Required Field for Equipment Call History (SE.011.00)” on page 79, step 1.
• View when a service call was completed for a piece of equipment? See “Required Field for Equipment Call History (SE.011.00)” on page 79, step 9.
• View the technician who performed the service call for a piece of equipment? See “Required Field for Equipment Call History (SE.011.00)” on page 79, step 5.
• View the call status of a service call for a piece of equipment? See “Required Field for Equipment Call History (SE.011.00)” on page 79, step 12.
• View when service calls were created? See “Required Field for Equipment Call History (SE.011.00)” on page 79, step 4.
• View the person who requested a service call? See “Required Field for Equipment Call History (SE.011.00)” on page 79, step 8.

Processes

• Generate service calls for equipment based on a PM schedule? See “Required Fields for Generate PM Service Calls Process (SE.300.00)” on page 84, step 1.
• Generate service calls for a range of contracts? See “Required Fields for Generate PM Service Calls Process (SE.300.00)” on page 84, step 2.
• Generate service calls for a date range? See “Required Fields for Generate PM Service Calls Process (SE.300.00)” on page 84, step 4.
• Generate service calls for a customer or a range of customers? See “Required Fields for Generate PM Service Calls Process (SE.300.00)” on page 84, step 9.
• Generate service calls for each PM task? See “Required Fields for Generate PM Service Calls Process (SE.300.00)” on page 84, step 16.
• Generate service calls based on scheduled dates? See “Required Fields for Generate PM Service Calls Process (SE.300.00)” on page 84, step 15.
• Generate service calls based on unscheduled dates? See “Required Fields for Generate PM Service Calls Process (SE.300.00)” on page 84, step 13.
• Generate PMs based on a single branch? See “Required Fields for Generate PM Service Calls Process (SE.300.00)” on page 84, step 7.
• Generate service calls for a geographic zone? See “Required Fields for Generate PM Service Calls Process (SE.300.00)” on page 84, step 14.
• Track the user who generated the service calls for preventive maintenance? See “Required Fields for Generate PM Service Calls Process (SE.300.00)” on page 84, step 24.

• Create a service call to automatically release to the dispatch board? See “Required Fields for Generate PM Service Calls Process (SE.300.00)” on page 84, step 18.

• Create Billable detail lines on the invoice for a service call for preventative maintenance? See “Required Fields for Generate PM Service Calls Process (SE.300.00)” on page 84, step 19.

• Create a PM task for a service call with a specific status? See “Required Fields for Generate PM Service Calls Process (SE.300.00)” on page 84, step 20.

**Miscellaneous**

• Enter a specific location for a piece of equipment? See “Required Fields for Equipment Entry (SE.001.00)” on page 64, step 26.

• Enter user-defined measurements to track equipment usage? See “Required Fields for Equipment Entry (SE.001.00)” on page 64, step 35.

• Copy contract notes to a service call? See “Required Fields for Generate PM Service Calls Process (SE.300.00)” on page 84, step 18.

• Group similar pieces of equipment? See “Equipment Age Codes (SE.010.00) Required Fields” on page 44, step 1.

**Why...?**

• Service calls were not created after running the generate PM service call process? See “Generate PM Service Calls Process (SE.300.00)” on page 83, step 12.

**How Do I Define...?**

• A new customer? See “Required Fields for Equipment Entry (SE.001.00)” on page 64, step 1.

• A new site for a customer? See “Required Fields for Equipment Entry (SE.001.00)” on page 64, step 1.

• A manufacturer? See “Manufacturer Maintenance (SE.005.00) Required Fields” on page 53, step 1.

• A model? See “Manufacturer/Model Maintenance (SE.006.00) Required Fields” on page 56, step 3.

• Equipment? See “Required Fields for Equipment Entry (SE.001.00)” on page 64, step 1.

• Equipment IDs manually? See “Required Fields for Equipment Entry (SE.001.00)” on page 64, step 2.

• Equipment types? See “Equipment Type Maintenance (SE.003.00) Required Fields” on page 47, step 2.

• A preventive maintenance code? See “PM Code Maintenance (SE.002.00) Required Fields” on page 49, step 1.

• A usage code? See “Usage Code Maintenance (SE.009.00) Required Fields” on page 48, step 1.

• A location ID? See “Equipment Location Maintenance (SE.004.00) Required Fields” on page 46, step 1.

• An age code? See “Equipment Age Codes (SE.010.00) Required Fields” on page 44, step 1.

**How...?**

• Does the manufactured year affect the cost to perform maintenance of a piece of equipment? See “Required Fields for Equipment Entry (SE.001.00)” on page 64, step 15.
• Does the system handle additional costs associated with the maintenance and repair of aging equipment? See “Equipment Type Maintenance (SE.003.00) Required Fields” on page 47, step 4.

• Does the system handle additional costs and resources associated with the location of a piece of equipment? See “Equipment Location Maintenance (SE.004.00) Required Fields” on page 46, step 4.

**When...?**

• Does the profitability of a piece of equipment get updated? See “Required Fields for Equipment History (SE.012.00)” on page 81, step 1.

• Do net sales get updated in the equipment history screen? See “Required Fields for Equipment History (SE.012.00)” on page 81, step 5.

• Do other costs get updated in the equipment history screen? See “Required Fields for Equipment History (SE.012.00)” on page 81, step 7.

• Does gross margin get updated in the equipment history screen? See “Required Fields for Equipment History (SE.012.00)” on page 81, step 9.

• Does gross % get updated in the equipment history screen? See “Required Fields for Equipment History (SE.012.00)” on page 81, step 10.

• Do labor costs get updated in the equipment history screen? See “Required Fields for Equipment History (SE.012.00)” on page 81, step 11.

• Do labor hours get updated in the equipment history screen? See “Required Fields for Equipment History (SE.012.00)” on page 81, step 11.

• Does the system generate equipment IDs automatically? See “Required Fields for Equipment History (SE.012.00)” on page 81, step 2.

**What is the Difference Between...?**

• A manufacturer and a model? See “Step 7: Enter and Link Models” on page 55.

• The total cost and labor cost in the equipment history screen? See “Labor Cost” on page 109.

• Company- and customer-owned equipment? See “Equipment Entry, General Info Tab” on page 89.

• Unscheduled and scheduled tasks? See “Required Fields for Generate PM Service Calls Process (SE.300.00)” on page 84, step 12.
Setup and Maintenance

Setting up Equipment Maintenance essentially involves four areas:

1. Setting Up Other Modules that integrate with Field Service Management
2. Setting Up Service Dispatch — Overview
3. Setting Up Service Contracts — Overview (Optional)
4. Setting Up Equipment Maintenance

Setting Up Other Modules

The first steps in setting up the Equipment Maintenance 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
Accounts Payable
Payroll
Customization Manager
Crystal Reports

Shared Information Module

The following screens must be completed before the Field Service Management modules can be set up.

1. Tax Maintenance (21.280.00) — Required
   
   Any Tax IDs used in Invoice Entry (SD.202.00) must have a Calculation Type of Document.

   **Note:** Sales tax is critical for Invoice Entry (SD.202.00) in Field Service Management and is required when creating a new site for customers in Site Maintenance (SD.0250.00).

2. Tax Group Maintenance (21.340.00) — Optional
3. Terms Maintenance (21.270.00) — Required

General Ledger Module

The Service Dispatch module does not directly update the General Ledger module when a service call is completed and invoiced; however, the accrual and revenue processes of the Service Contracts module do directly update the General Ledger. Integration with the General Ledger is achieved through the Financial Management and Inventory and Order Processing modules. The subaccount associated with each service call is defined using Call Type Maintenance (SD.003.00), using either SubAccount or Use Subaccount from Site. When making this choice, consider how the end-user would like to review the Profit and Loss Statement—by trade, branch, or combination of the two.

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

- General Ledger Setup (01.950.00)
- Chart of Accounts Maintenance (01.260.00)
- Subaccounts Maintenance (01.270.00)
System Manager Module

1. *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 *Service Dispatch* module.

2. *Access Rights* (95.270.00) — Optional
   - Set the appropriate access rights for all Service Dispatch users and groups in *Access Rights* (95.270.00) for the Service Dispatch module.
   - Click *Preload* to open *Preload Screens* (95.270.01) and select Service Dispatch from the list to view the screens for the *Service Dispatch* module.
   - Specify the appropriate level of rights for each screen for each Service Dispatch user or group.

Accounts Receivable Module

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.

1. *Customer Maintenance* (08.260.00) — Required
   When converting customers from a legacy system, if the legacy system did not have a one-to-many relationship between customers and sites, the data may have to be modified before the conversion process.

2. *Statement Cycle* (08.280.00) — Required

3. *Customer Class* (08.290.00) — Required

4. *Salesperson Maintenance* (08.310.00)
   Define at least one salesperson, such as “House.”

5. *AR Setup* (08.950.00) — Required
   - Select the *Auto Reference Numbering* check box to have the system generate sequential invoice numbers during *Invoice Entry* (SD.202.00).
   - Set *Credit Checking Type* to Warning Only.

Notes:

- When converting customers from the old system, if the old system did not have a one-to-many relationship between customers and sites, you will need to massage the data in order to clean it up prior to conversion.
- When converting old sites to the new system, it is recommended that you use a unique identifying code of three numeric characters (for example, 001, 002, 003) for each site record.
- You must select the *Auto Reference Numbering* check box if you want the system to generate sequential invoice numbers.
- Set the *Credit Checking Type* drop-down list on the *Other Options* tab of *AR Setup* (08.950.00) to Warning Only.
Accounts Payable (Optional)

Accounts Payable integration is necessary if you want to create purchase orders from Invoice Entry (SD.202.00). In this case, a vendor ID is required in order to use the purchase order functionality. Otherwise, the Field Service Management does not push any data into the Accounts Payable module directly, but only pulls the vendor ID for use with the purchase order functionality.

The following Accounts Payable screens integrate with the Field Service Management modules:

- Accounts Payable Setup (03.950.00)
- Vendor Maintenance (03.270.00)

Payroll (Optional)

Field Service Management integrates with the Payroll module by pushing data from Invoice Entry (SD.202.00) into Payroll Time and Dollar Entry (02.020.00). Field Service Management uses the Employee ID from Payroll by linking the payroll employee ID with the employee ID in Employee Maintenance (SD.007.00) of Service Dispatch. In addition, the earnings type plays a vital role in identifying whether the labor record in Invoice - T & M Details (SD.203.00) or Flat Rate Order - Modify Details (SP.202.00) has a multiplier of regular, overtime, or double time. Compensable labor hours are pushed to Payroll Time and Dollar Entry (02.020.00) using Generate Payroll Process (SD.302.00) in Service Dispatch.

The following Payroll screens integrate with Field Service Management modules:

1. Payroll Setup (02.950.00)
2. Employee Maintenance (02.250.00)
   - Work Location on the Defaults tab.
   - Earnings Type on the Defaults tab.
   - Pay Type on the Pay Info tab, must be set to Hourly.
   - Std Unit Rate on the Pay Info tab, is used for the default hourly pay rate. During invoicing, the hourly pay rate defaults from Employee Maintenance (SD.007.00) of the Service Dispatch module.
3. Earnings Type Maintenance (02.270.00)
   - Pay Rate Multiplier should be associated with the user’s normal and overtime work hours.

Customization Manager

Customization Manager gives users the ability to modify Service Dispatch screens to meet the accounting requirements of an organization.

Example: New fields and controls can be added, data fields and objects can be hidden, and default 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 Customization Manager, the module must be purchased and installed separately in order to make modifications to the Service Dispatch screens.

Crystal Reports

Crystal Reports gives users the ability to modify Service Dispatch reports to meet the accounting requirements of an organization.

Example: New labels and fields can be added and data fields and objects can be removed.

Although there are no setup procedures required for Crystal Reports, the module must be installed in order to make modifications to the 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 in the Service Dispatch online help or user guide.

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) — Optional
   
   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 mark-up 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 mark-up 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.
Setting Up Service Contracts

This section provides an overview explaining how to adapt the Service Contracts module to your business needs and practices. Use the following general procedures to set up the Service Contracts module.

1. Create default values using Service Contracts Set-up (SN.007.00)
   Service Contracts Set-up (SN.007.00) is the first screen that must be completed when setting up the Service Contracts module. This setup screen is used to create default values and options for Service Contract Adjustments and Deposits Entry (SN.009.00) and Service Contract Miscellaneous Entry (SN.010.00) such as Auto-Print Batch Reports on Release, Auto Batch Numbering, Deposit Acct, and Misc Charge Acct.

2. Create master contracts using Master Service Contract Maintenance (SN.002.00)
   Master Service Contract Maintenance (SN.002.00) is used to group service contracts from multiple sites of a customer for consolidated invoicing or billing.

3. Create contract escalation codes using Contract Escalation Maintenance (SN.005.00)
   Contract Escalation Maintenance (SN.005.00) is used to enter an unlimited number of escalation codes for increasing the contract price of service contracts over a multi-year time period. Contract prices can be increased by a percentage of the contract price of the preceding year or by a specific dollar amount.

4. Set up contract types using Contract Type Maintenance (SN.003.00)
   Contract Type Maintenance (SN.003.00) is used to group service contracts with similar characteristics together for setting default information for the creation of service calls and reporting purposes. Special pricing and general ledger account/subaccount information such as contract receivable, deferred revenue and revenue is also associated with contract types.

5. Set up cancellation codes using Cancellation Code Maintenance (SN.004.00)
   Cancellation Code Maintenance (SN.004.00) is used to enter an unlimited number of reasons why service contracts have been cancelled or not renewed.
Setting Up Equipment Maintenance

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

1. Establish Equipment Age Codes using Equipment Age Maintenance (SE.010.00) — Required if using Equipment Types.
   
   Equipment Age Maintenance (SE.010.00) is used to enter an unlimited number of age codes to account for the increasing costs of maintaining equipment over time. Age codes allow users to enter a schedule of percentage increases based on the age of equipment in years.

   Example: The cost to service a central air system increases by 10% every five years.

2. Create location categories using Equipment Location Maintenance (SE.004.00) — Optional.
   
   Equipment Location Maintenance (SE.004.00) is used to enter physical location categories for equipment in order to account for the additional maintenance costs for equipment located in places that require special attention or resources.

   Example: A water heater located in the basement of a house may require more resources to service than a water heater located on the first floor of a house.

3. Group similar equipment using Equipment Type Maintenance (SE.003.00) — Optional.
   
   Equipment Type Maintenance (SE.003.00) is used to enter similar pieces of equipment into groups for reporting purposes.

   Example: An organization may want to group equipment from different manufacturers that have the same functions or operations together such as Power Equipment.

4. Enter interval codes using Usage Code Maintenance (SE.009.00) — Optional.
   
   Usage Code Maintenance (SE.009.00) is used to enter the interval codes to track how equipment is used for reporting purposes.

   Example: An organization may want to track the mileage of vehicles in order to schedule preventive maintenance oil changes and tire rotations.

5. Set up PM codes using PM Code Maintenance (SE.002.00).
   
   PM Code Maintenance (SE.002.00) is used to enter an unlimited number of preventive maintenance plans for servicing equipment. The tasks needed to complete the maintenance work of a PM code can also be established.

   Example: To change the oil and filter of a vehicle may require four quarts of oil, one filter, and two hours of labor.

6. Enter manufacturer information using Manufacturer Maintenance (SE.005.00).

   Manufacturer Maintenance (SE.005.00) allows users to enter general information about each manufacturer of equipment to be maintained by organizations such as the manufacturer’s name, address, phone and fax number. Warranty information including whether or not material and labor is covered, the length of the time material and labor is covered, and if authorization for returned merchandise is required can also be entered for each manufacturer.

   Example: An air conditioning and heating contractor may want to set up each manufacturer that supplies units to the company to sell and maintain.
7. Enter and link models using Manufacturer/Model Maintenance (SE.006.00).

   Manufacturer/Model Maintenance (SE.006.00) is used to enter and link the models of each manufacturer of equipment to be maintained by organizations.

   Warranty information, including if material and labor is covered, the length of the time material and labor is covered, and if authorization for returned merchandise is required, can be entered for each manufacturer’s model.

8. Associate models with PM plans using PM Code – Model Details Maintenance (SE.008.00) – Optional.

   PM Code – Model Details Maintenance (SE.008.00) is used to associate a model of a manufacturer to a preventive maintenance plan. Specific material, labor and special instructions can be associated with each model.

   **Example:** Even though Mercedes and BMWs are both luxury cars, each needs a different type of oil filter and parts to complete a preventive maintenance oil change.
Step 1: Establish Equipment Age Codes

*Equipment Age Maintenance* (SE.010.00) is used to enter an unlimited number of age codes to account for the increasing costs of maintaining equipment over time. Age codes allow users to enter a schedule of percentage increases based on the age of equipment in years.

**Example:** The cost to service a central air system increases by 10% every five years.

The age of equipment is based on the year the equipment was manufactured entered as indicated in *Equipment Entry* (SE.001.00).

### Equipment Age Codes (SE.010.00) Required Fields

The following fields are required in *Equipment Age Maintenance* (SE.010.00):

- **Age Code** (Step 2)
- **Age Code Description** (Step 3 — recommended)

To enter an age code:

1. Choose **Module | Equipment Maintenance | Equipment Age Code Maintenance** from the menu. *Equipment Age Maintenance* (SE.010.00) displays.

2. Type a unique 10-character ID for the age code schedule in **Age Code**.
3. Type a 30-character description of the age code schedule in the field to the right of **Age Code**.
4. Type the starting age when the percentage increase will begin for the equipment in **Age in Years**.
5. Type the percentage increase for the year in **Percent Increase**.
   
   The percentage is multiplied by the base price of the equipment to calculate the new price of equipment for a service contract.

6. Type a 30-character description for the percentage increase in **Description**.
7. Click **Save** on the toolbar.
8. Click **Close** on the toolbar.

![Figure 7: Equipment Age Maintenance (SE.010.00)](image-url)
Step 2: Create Location Categories

*Equipment Location Maintenance* (SE.004.00) is used to enter physical location categories for equipment in order to account for the additional maintenance costs for equipment located in places that require special attention or resources.

**Example:** A water heater located in the basement of a house may require more resources to service than a water heater located on the first floor of a house.

**Equipment Location Maintenance** (SE.004.00) Required Fields

The following fields are required to complete *Equipment Location Maintenance* (SE.004.00):

- **Location Code** (Step 2)
- **Description** (Step 3 – recommended)
- **Pricing % Factor** (Step 4 – recommended)

To enter an equipment location:

1. Choose **Module | Equipment Maintenance | Equipment Location Maintenance** from the menu. 
   *Equipment Location Maintenance* (SE.004.00) displays.

2. Type a unique 10-character ID for the location category in **Location Code**.
3. Type a 30-character description of the location category in **Description**.
4. Type the percentage amount to account for the additional maintenance costs for servicing equipment in a location that requires more resources in **Pricing % Factor**.

5. Click **Save** on the toolbar.
6. Click **Close** on the toolbar.
Step 3: Group Similar Equipment

*Equipment Type Maintenance* (SE.003.00) is used to group similar pieces of equipment together for reporting purposes.

**Example:** An organization may want to group equipment from different manufacturers that have the same functions or operations together, such as Power Equipment.

Defining equipment groups can also allow organizations to associate different equipment models from a manufacturer.

**Equipment Type Maintenance (SE.003.00) Required Fields**

The following fields are required to complete *Equipment Type Maintenance* (SE.003.00):

- **Equipment Type** (Step 2)
- **Description** (Step 3)
- **Age Code** (Step 4)

To group similar pieces of equipment together:

1. Choose **Module | Equipment Maintenance | Equipment Type Maintenance** from the menu. *Equipment Type Maintenance* (SE.003.00) displays.

   ![Figure 10: Equipment Type Maintenance (SE.003.00)](image)

2. Type a unique 10-character ID for the group of equipment in **Equipment Type**.
3. Type a 30-character description of the group of equipment in **Description**.
4. Type a default age code for the equipment type in **Age Code**.
   - **Age Codes** are used to account for the increasing costs of maintaining equipment over time.
   - When associating a model to a manufacturer in **Manufacturer/Model Maintenance** (SE.006.00) and an **Equipment Type** is selected, the **Age Code** associated with the equipment type defaults to the model.
5. Select a type of schedule for the equipment type in **Schedule Type**.
   - Contract Life
   - Date Range

**Schedule Type** is for reporting purposes only.

![Figure 11: Equipment Type Maintenance (SE.003.00)](image)

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

**Step 4: Enter Interval Codes**

**Usage Code Maintenance** (SE.009.00) is used to enter the interval codes that track how equipment is used for reporting purposes.

**Example:** An organization may want to track the mileage of vehicles in order to schedule preventive maintenance oil changes and tire rotations.

Unlike **Calendar Codes** (SE.007.00), usage codes are user-defined and cannot be used to auto-generate preventive maintenance schedules in **Generate Equipment PM Tasks** (SN.001.07).

**Usage Code Maintenance (SE.009.00) Required Fields**

The following fields are required to complete **Usage Code Maintenance** (SE.009.00):

- **Interval Code** (Step 2)
- **Description** (Step 3 — recommended)

**To enter interval codes:**

1. Choose **Module | Equipment Maintenance | Usage Code Maintenance** from the menu. **Usage Code Maintenance (SE.009.00)** displays.

![Figure 12: Usage Code Maintenance (SE.009.00)](image)

2. Type a unique 10-character ID for the usage code in **Interval Code**.
3. Type a 30-character name of the usage code in **Description**.
4. Type a user-defined amount that is allowed over the scheduled preventive maintenance in **Schedule Tolerance**. **Schedule Tolerance** is for reporting purposes only.

**Example:** If a vehicle is scheduled to have a preventive maintenance oil change every thirty-five hundred miles, how many miles over the scheduled preventive maintenance oil change is allowed.

![Figure 13: Usage Code Maintenance (SE.009.00)]

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

**Step 5: Set Up PM Codes**

**PM Code Maintenance (SE.002.00)** is used to enter an unlimited number of preventive maintenance plans for servicing equipment. The tasks needed to complete the maintenance work of a PM code can also be established.

**Example:** To change the oil and filter of a vehicle may require four quarts of oil, one filter, and two hours of labor.

A PM code is associated with the model of a manufacturer in **Manufacturer/Model Maintenance** (SE.006.00) and a specific piece of equipment in **Equipment Entry** (SE.001.00).

The frequency of each PM code can be based on either a predefined calendar code or a user-defined usage code. While a PM code based on a usage code cannot generate a preventive maintenance schedule for a piece of equipment, a PM code based on a calendar interval can generate a preventive maintenance schedule.

**Example:** A piece of equipment attached to a five-year service contract with a yearly PM code can generate a preventive maintenance schedule for service work to be performed once a year.

Use **Generate Equipment PM Tasks** (SN.001.07) to create a PM schedule for the piece of equipment.

**PM Code Maintenance (SE.002.00) Required Fields**

The following fields are required to complete **PM Code Maintenance** (SE.002.00):

- **PM Code** (Step 2)
- **Description** (Step 3 – Recommended)
- **Call Type** (Step 4)
- **Problem Code** (Step 5)
- **Calendar** (Step 9 – Recommended if auto-generating preventive maintenance schedules for equipment)
- **Interval** (Step 10 - Recommended if auto-generating preventive maintenance schedules for equipment)
• **Calendar Code** (Step 11 – Recommended if auto-generating preventive maintenance schedules for equipment)

**To set up PM codes:**

1. Choose **Module | Equipment Maintenance | PM Code Maintenance** from the menu. **PM Code Maintenance (SE.002.00) displays.**

   ![PM Code Maintenance (SE.002.00)](image)

   **Figure 14: PM Code Maintenance (SE.002.00)**

2. Type the unique 10-character ID to identify the preventive maintenance plan in **PM Code**.
3. Type a 30-character description for the preventive maintenance plan in **Description**.
4. Type a call type to associate with the preventive maintenance plan in **Call Type**.
   - When a service call is generated from the preventive maintenance schedule for a piece of equipment associated with a service contract in **Generate PM Service Calls Process (SE.300.00)**, the call type defaults to the service call in **Service Call Entry (SD.200.00)**.
   - If the call type ID is unknown, press F3 or double-click the right mouse button. A list of all call types set up in **Call Type Maintenance (SD.003.00)** displays.
     - To select a call type, highlight the ID and click **OK**, or double-click on the ID. Clicking **Edit** on the **Call Type Maintenance PV List** accesses **Call Type Maintenance (SD.003.00)** enabling you to modify information for an existing call type.
     - Clicking **Insert** on the **Call Type Maintenance PV List** accesses **Call Type Maintenance (SD.003.00)** enabling you to add new call types to the system.
5. Type a problem code to associate with the preventive maintenance plan in **Problem Code**.
   - When a service call is generated from the preventive maintenance schedule for a piece of equipment associated with a service contract in **Generate PM Service Calls Process (SE.300.00)**, the problem code defaults to the service call in **Service Call Entry (SD.200.00)**.
   - If the problem code ID 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.
6. Type the technician responsible for completing the work on the service call in **Tech ID**.
   - The technician defaults to the preventive maintenance schedules of equipment associated with the **PM Code** in *Service Contract Entry (SN.001.00)*
   - If the technician ID is unknown, press F3 or double-click the right mouse button. A list of all technicians displays.
     - To select a technician, highlight the ID and click **OK**, or double-click on the ID.
     - Clicking *Edit* on the **Employee Maintenance PV List** accesses *Employee Maintenance (SD.007.00)* enabling you to modify information for an existing technician.
     - Clicking *Insert* on the **Employee Maintenance PV List** accesses *Employee Maintenance (SD.007.00)* enabling you to add new technicians to the system.

7. Type the time needed to perform the preventive maintenance plan in **Estimated Time**. **Estimated Time** overrides the time estimated to perform the work of the **Problem Code** associated with the preventive maintenance plan.

8. Determine the precedence of the preventive maintenance plan if multiple preventive maintenance plans are scheduled for the same date in **PM Level**.
   - Associating a **PM Level** with preventive maintenance plans eliminate the possibility of creating multiple preventive maintenance service calls for the same piece of equipment on the same date.
   - The preventive maintenance plan with the highest **PM Level** takes precedence.

9. Select **Calendar** if preventive maintenance schedules for equipment associated with the **PM Code** are based on a **Calendar Code**.
   - Preventive maintenance schedules for equipment based on a **Calendar Code** can be auto-generated by *Generate Equipment PM Tasks (SN.001.07)*.

10. If the preventive maintenance schedules for the **PM Code** is based on **Calendar**, type the length of time between preventive maintenance service calls in **Interval**.

11. If the preventive maintenance schedule for the **PM Code** is based on **Calendar**, type the **Calendar Code** in the field to the right of **Interval**.
   - If the calendar code ID is unknown, press F3 or double-click the right mouse button. A list of all calendar codes from *Calendar Codes (SE.007.00)* displays.
   - To select a calendar code, highlight the ID and click **OK**, or double-click on the ID.

12. Select **Usage** if preventive maintenance schedules for equipment associated with the **PM Code** are to be based on a **Usage Code**.
   - Preventive maintenance schedules for equipment based on a **Usage Code** cannot be auto-generated by *Generate Equipment PM Tasks (SN.001.07)*.
   - Preventive maintenance schedules for equipment based on a **Usage Code** have to be manually created in *Service Contract – Equipment PM Schedule (SE.015.00)*.

13. If the preventive maintenance schedule for the **PM Code** is based on **Usage**, type the length of time between preventive maintenance service calls in **Interval**.

14. If the preventive maintenance schedule for the **PM Code** is based on **Usage**, type the **Usage Code** in the field to the right of **Interval**.
   - If the usage code ID is unknown, press F3 or double-click the right mouse button. A list of all usage code IDs displays.
   - To select a usage code ID, highlight the ID and click **OK**, or double-click on the ID.
   - Clicking *Edit* on the **Interval Code PV List** accesses *Usage Code Maintenance (SE.009.00)* enabling you to modify information for an existing usage.
   - Clicking *Insert* on the **Interval Code PV List** accesses *Usage Code Maintenance (SE.009.00)* enabling you to add new usages to the system.
15. Select the specific preventive maintenance tasks needed to complete the **PM Code** in **Detail Type**.
   - Materials
   - Labor
   - Instructions
   - Comment

16. Select the season or combination of seasons the preventive maintenance task must be performed in **Season**. **Season** is for informational purposes only.
   - SP (Spring)
   - SP/SU (Spring/Summer)
   - SP/SU/F (Spring/Summer/Fall)
   - SP/SU/F/W (Spring/Summer/Fall/Winter)
   - SU (Summer)
   - SU/F (Summer/Fall)
   - SU/F/W (Summer/Fall/Winter)
   - F (Fall)
   - F/W (Fall/Winter)
   - F/SP (Fall/Spring)
   - W (Winter)
   - W/SU (Winter/Summer)

17. If **Detail Type** is Materials or Labor, select an inventory item to associate with the preventive maintenance tasks in **Inventory ID**.
   - If the inventory item ID is unknown, press F3 or double-click the right mouse button. A list of all inventory code IDs 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.
   - Inventory items needed to perform the preventive maintenance plan default to **Invoice – T & M Details** (SD.203.00) when invoicing a service call with the **PM Code**. These items are allocated in the Inventory module to prevent over allocation of the item by other transactions. Similarly, if an inventory item is over allocated when it is added to a service call, an event log message is generated to inform the user of the conflict.

18. Type the number of the material item needed or the hours of labor needed to complete the preventive maintenance tasks in **Quantity**.
   **Quantity** is only available when **Detail Type** is Materials or Labor.
19. Type a 60-character text explanation for the preventive maintenance tasks in **Description**.
   - **Description** is only available if **Detail Type** is Instructions or Comments.
   - **Description** displays the description of **Inventory ID** if **Detail Type** is Materials or Labor.

![Figure 15: PM Code Maintenance (SE.002.00)](image)

20. Click **Model PM Details** to access **PM Code – Model Details Maintenance (SE.008.00)**.
   - **PM Code – Model Details Maintenance (SE.008.00)** is used to associate a preventive maintenance plan to a specific model of a manufacturer.
   - Refer to Step 8: Associate Models with PM Plans Using **PM Code – Model Details Maintenance (SE.008.00)**.

21. Click **Save** on the toolbar.
22. Click **Close** on the toolbar.

**Step 6: Enter Manufacturer Information**

**Manufacturer Maintenance (SE.005.00)** allows users to enter general information about each manufacturer of equipment to be maintained by organizations such as the manufacturer’s name, address, phone, and fax number. Warranty information including whether or not material and labor is covered, the length of the time material and labor is covered, and if authorization for returned merchandise is required can also be entered for each manufacturer.

**Example**: An air conditioning and heating contractor may want to set up each manufacturer who supplies units to the company to sell and maintain.

**Manufacturer Maintenance (SE.005.00) Required Fields**

The following fields are required to complete **Manufacturer Maintenance (SE.005.00)**:
- **Manufacturer ID** (Step 2)
- **Description** (Step 3)
To enter manufacturer information:

1. Choose Module | Equipment Maintenance | Manufacturer Maintenance from the menu.

Manufacturer Maintenance (SE.005.00) displays.

![Manufacturer Maintenance (SE.005.00)](image)

2. Type a 10-character unique ID of the manufacturer in **Manufacturer ID**.
3. Type a 30-character name of the manufacturer in the field to the right of **Manufacturer ID**.
4. Type a 30-character name for the main contact at the manufacturer in **Contact**.
5. Type the main address of the manufacturer in **Address**. There are two address lines available for your convenience.
6. Type the city where the manufacturer is located in **City**.
7. Type the state where the manufacturer is located in **State**.
8. Type the zip code where the manufacturer is located in **Zip Code**.
9. Type the phone number of the manufacturer in **Phone #**.
10. Type the fax number of the manufacturer in **Fax #**.
11. Type the ID of the vendor set up in **Vendor Maintenance** (03.270.00) of the Accounts Payable module for the manufacturer in **Vendor ID**.

   If the vendor ID is unknown, press F3 or double-click the right mouse button. A list of all vendor IDs displays.
   - To select a vendor, highlight the ID and click OK, or double-click on the ID.
   - Clicking **Edit** on the **Vendor List** accesses **Vendor Maintenance** (03.270.00) enabling you to modify information for existing vendor.
   - Clicking **Insert** on the **Vendor List** accesses **Vendor Maintenance** (03.270.00) enabling you to add new vendors to the system.
12. Select **Authorization Required** if the manufacturer requires authorization for warranty repairs on equipment over a specified dollar amount.

   **Authorization Required** is for informational purposes only.
13. If the manufacturer requires authorization for warranty repairs on equipment over a specified dollar amount, type the amount in **Authorization For Repair Over**.

   **Authorization For Repair Over** is for informational purposes only.
14. Select **RMA On Returns** if the manufacturer requires authorization for returning equipment prior to accepting any returned equipment.

   **RMA On Returns** is for informational purposes only.
15. Select **Labor Included** if labor is covered under warranty for a piece of equipment.
16. If labor is covered under warranty for a piece of equipment, type the length of time labor is covered in the fields below **Labor Included**.
   - Days
   - Months
   - None
   - Year(s)

17. Select **Material Included** if material is covered under warranty for a piece of equipment.

18. If material is covered under warranty for a piece of equipment, type the length of time material is covered in the fields below **Material Included**.
   - Days
   - Months
   - None
   - Year(s)

19. Click **Save** on the toolbar.

20. Click **Close** on the toolbar.

**Step 7: Enter and Link Models**

**Manufacturer/Model Maintenance** (SE.006.00) is used to enter and link the models of each manufacturer of equipment to be maintained by organizations. General information can be associated with each model such as **Equipment Type**, **Age Code**, **Skill ID**, and **Default PM Code**. Default PM Code populates to equipment associated with the model of the manufacturer in **Equipment Entry** (SE.001.00). The PM code associated with a piece of equipment is used to auto-generate the preventive maintenance schedules created in **Generate Equipment PM Tasks** (SN.001.07).

Warranty information including whether or not material and labor is covered, the length of the time material and labor is covered, and if authorization for returned merchandise is required can be entered for each manufacturer’s model. Each model’s measurements including **Height**, **Width**, **Depth**, and **Weight** can also be entered.
Manufacturer/Model Maintenance (SE.006.00) Required Fields

The following fields are required in Manufacturer/Model Maintenance (SE.006.00):

- **Manufacturer ID** (Step 2)
- **Model ID** (Step 3)
- **Default PM Code** (Step 7)

To link models and manufacturers:

1. Choose **Module | Equipment Maintenance | Manufacturer/Model Maintenance** from the menu. Manufacturer/Model Maintenance (SE.006.00) displays.

2. Type the ID of the manufacturer in **Manufacturer ID**.
   - The description of the manufacturer displays in the field to the right of **Manufacturer ID**.
   - If the manufacturer ID is unknown, press F3 or double-click the right mouse button. A list of all manufacturer IDs displays.
     - To select a manufacturer, highlight the ID and click OK, or double-click on the ID.
     - Clicking **Edit** on the Manufacturer PV List accesses Manufacturer Maintenance (SE.005.00) enabling you to modify information for an existing manufacturer.
     - Clicking **Insert** on the Manufacturer PV List accesses Manufacturer Maintenance (SE.005.00) enabling you to add new manufacturers to the system.

3. To associate a model of a manufacturer to a preventive maintenance plan, type a 10-digit ID for the model in **Model ID**.
   - The description of the model displays in the field to the right of **Model ID**.
   - If the model ID is unknown, press F3 or double-click the right mouse button. A list of all models set up in Manufacturer/Model Maintenance (SE.006.00) displays. To select a model, highlight the ID and click OK, or double-click on the ID.
4. Type an equipment group to associate with the model of a manufacturer in Equipment Type.
   - The description of the equipment type displays in the field to the right of Equipment Type.
   - If the equipment type must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all equipment type IDs displays.
     - To select an equipment type, highlight the ID and click OK, or double-click on the ID.
     - Clicking Edit on the Equipment Type PV List accesses Equipment Type Maintenance (SE.003.00) enabling you to modify information for an existing equipment type.
     - Clicking Insert on the Equipment Type PV List accesses Equipment Type Maintenance (SE.003.00) enabling you to add new equipment types to the system.
   - Equipment Type defaults from Manufacturer Maintenance (SE.005.00)

5. If the cost of maintaining the model increases with the age of the model, type an age code to associate with the model of the manufacturer in Age Code.
   - The description of the age codes displays in the field to the right of Age Code.
   - If the age code must be changed and the ID is unknown, press F3 or double-click the right mouse button. A list of all age code IDs displays.
     - To select an age code, highlight the ID and click OK, or double-click on the ID.
     - Clicking Edit on the Age Code Maintenance PV List accesses Equipment Age Maintenance (SE.010.00) enabling you to modify information for an existing age code.
     - Clicking Insert on the Age Code Maintenance PV List accesses Equipment Age Maintenance (SE.010.00) enabling you to add new age codes to the system.
   - Age Code defaults from Manufacturer Maintenance (SE.005.00)

6. If a special skill is required to service the model of the manufacturer, type the ID of the skill in Skill ID.
   - The description of the skill displays in the field to the right of Skill ID.
   - If the skill must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all skill IDs displays.
     - To select a skill, highlight the ID and click OK, or double-click on the ID.
     - Clicking Edit on the Skills Maintenance PV List accesses Skills Maintenance (SD.017.00) enabling you to modify information for an existing skill.
     - Clicking Insert on the Skills Maintenance PV List accesses Skills Maintenance (SD.017.00) enabling you to add new skills to the system.

7. To associate a preventive maintenance plan to a model of a manufacturer, type the ID of the preventive maintenance plan in Default PM Code.
   - The description of the preventive maintenance plan displays in the field to the right of PM Code.
   - If the preventive maintenance plan must be changed and the ID is unknown, press F3 or double-click the right mouse button. A list of all equipment type IDs displays.
     - To select a preventive maintenance plan, highlight the ID and click OK, or double-click on the ID.
     - Clicking Edit on the PM Type Maintenance PV List accesses PM Code Maintenance (SE.002.00) enabling you to modify information for an existing preventive maintenance plan.
     - Clicking Insert on the PM Type Maintenance PV List accesses PM Code Maintenance (SE.002.00) enabling you to add new preventive maintenance plans to the system.
   - PM Code defaults from Manufacturer Maintenance (SE.005.00)
8. Select **RMA Required** if the manufacturer requires authorization for return of the model prior to accepting the returned model.
   - **RMA Required** is for informational purposes only.
   - **RMA Required** defaults from **Manufacturer Maintenance** (SE.005.00)
9. Select **Labor Included** if labor is covered under warranty for the model.
10. If labor is covered under warranty for the model, type the length of time labor is covered in the fields below **Labor Included**.
    - Days
    - Months
    - None
    - Year(s)
    - **Labor Included** defaults from **Manufacturer Maintenance** (SE.005.00)
11. Select **Material Included** if material is covered under warranty for the model.
    **Material Included** defaults from **Manufacturer Maintenance** (SE.005.00)
12. If material is covered under warranty for the model, type the length of time material is covered in the fields below **Material Included**.
    - Days
    - Months
    - None
    - Year(s)
13. Type the height for the model in **Height**.
14. Type the width for the model in **Width**.
15. Type the depth for the model in **Depth**.
16. Type the weight for the model in **Weight**.
17. Type the ID of the service contract types that the model can be associated with in **Contract Type ID**.
    - When a service contract is being entered into **Service Contract Entry** (SN.001.00) and a contract type is selected, **Base Price** associated with the contract type defaults to **Calculated Amount** for the piece of equipment attached to the service contract in **Contract Equipment** (SN.001.05).
    - Associating contract types to a model allows users to have a different **Base Price** for each contract type.
    - If the contract type ID is unknown, press F3 or double-click the right mouse button. A list of all contract type IDs displays.
      - To select a contract type, highlight the ID and click **OK**, or double-click on the ID.
      - Clicking **Edit** on the **Service Contract Type PV List** accesses **Contract Type Maintenance** (SN.003.00) enabling you to modify information for an existing contract type.
      - Clicking **Insert** on the **Service Contract Type PV List** accesses **Contract Type Maintenance** (SN.003.00) enabling you to add new contract types to the system.
18. Type the price for the contract types in **Base Price**.
    - When a service contract is being entered into **Service Contract Entry** (SN.001.00) and a contract type is selected, **Base Price** associated with the contract type defaults to **Calculated Amount** for the piece of equipment attached to the service contract in **Contract Equipment** (SN.001.05).
    - Associating contract types with a model allows users to have a different **Base Price** for each contract type.
19. **Description** is a display-only field showing the description of the contract type.

Figure 19: Manufacturer/Model Maintenance (SE.006.00)

20. Click **Save** on the toolbar.

21. Click **Close** on the toolbar.

**Step 8: Associate Models With PM Plans**

*PM Code – Model Details Maintenance (SE.008.00)* is used to associate a model of a manufacturer with a preventive maintenance plan. Specific material, labor and special instructions can be associated with each model.

**Example:** Even though Mercedes and BMWs are both luxury cars, both need different types of oil filters and parts to complete preventive maintenance oil changes.

**PM Code – Model Details Maintenance (SE.008.00) Required Fields**

The following fields are required to complete *PM Code – Model Details Maintenance (SE.008.00)*:

- **PM Code** (Step 2)
- **Manufacturer ID** (Step 3)
- **Model ID** (Step 4)
To associate a model with a PM plan:

1. Choose **Module | Equipment Maintenance | PM Code – Model Detail Maintenance** from the menu. **PM Code – Model Details Maintenance (SE.008.00)** displays.

   **PM Code – Model Details Maintenance (SE.008.00)** can be accessed by clicking **Model PM Details** in **PM Code Maintenance (SE.002.00)**.

   ![PM Code - Model Details Maintenance (SE.008.00)](image)

   **Figure 20: PM Code - Model Details Maintenance (SE.008.00)**

2. To associate a model of a manufacturer to a preventive maintenance plan, type the ID of the preventive maintenance plan in **PM Code**.

   - The description of the preventive maintenance plan displays in the field to the right of **PM Code**.
   - If the preventive maintenance plan ID is unknown, press **F3** or double-click the right mouse button. A list of all equipment type IDs displays.
     - To select a preventive maintenance plan, highlight the ID and click **OK**, or double-click on the ID.
     - Clicking **Edit** on the **PM Type Maintenance** PV List accesses **PM Code Maintenance (SE.002.00)** enabling you to modify information for an existing preventive maintenance plan.
     - Clicking **Insert** on the **PM Type Maintenance** PV List accesses **PM Code Maintenance (SE.002.00)** enabling you to add new preventive maintenance plans to the system.

3. To associate a model of a manufacturer to a preventive maintenance plan, type the ID of the manufacturer in **Manufacturer ID**.

   - The description of the manufacturer displays in the field to the right of **Manufacturer ID**.
   - If the manufacturer ID is unknown, press **F3** or double-click the right mouse button. A list of all manufacturer IDs displays.
     - To select a manufacturer, highlight the ID and click **OK**, or double-click on the ID.
     - Clicking **Edit** on the **Manufacturer PV List** accesses **Manufacturer Maintenance (SE.005.00)** enabling you to modify information for an existing manufacturer.
     - Clicking **Insert** on the **Manufacturer PV List** accesses **Manufacturer Maintenance (SE.005.00)** enabling you to add new manufacturers to the system.
4. To associate a model of a manufacturer to a preventive maintenance plan, type the ID of model in **Model ID**.
   - The description of the model displays in the field to the right of **Model ID**.
   - If the model ID is unknown, press F3 or double-click the right mouse button. A list of all model IDs displays. To select a model, highlight the ID and click **OK** or double-click on the ID.

5. Type the time that must be allocated to perform the preventive maintenance plan in **Estimated Time**.

6. Select **Calendar** if the preventive maintenance plan for the specific model of the manufacturer is to be based on a **Calendar Code**.
   - If the preventive maintenance schedule for the specific model of the manufacturer is based on **Calendar**, then **Calendar** for the model defaults to the value of **Calendar** of the **PM Code**.

7. If the preventive maintenance schedule for the specific model of the manufacturer is based on **Calendar**, type the length of time between preventive maintenance service calls in **Interval**.
   - If the calendar code must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all calendar code IDs displays.
   - To select a calendar code, highlight the ID and click **OK**, or double-click on the ID.

8. If the preventive maintenance schedule for the specific model of the manufacturer is based on **Calendar**, type the calendar code in the field to the right of **Interval**.
   - Preventive maintenance schedules for equipment based on a **Usage Code** cannot be auto-generated by **Generate Equipment PM Tasks** (SN.001.07).
   - Preventive maintenance schedules for equipment based on a **Usage Code** have to be manually created in **Service Contract – Equipment PM Schedule** (SE.015.00).
   - If the preventive maintenance schedule for the specific model of the manufacturer is based on **Usage**, then **Usage** for the model defaults to the value of **Usage** of the **PM Code**.

9. Select **Usage** if the preventive maintenance plan for the specific model of the manufacturer is to be based on a **Usage Code**.
   - Preventive maintenance schedules for equipment based on a **Usage Code** cannot be auto-generated by **Generate Equipment PM Tasks** (SN.001.07).
   - Preventive maintenance schedules for equipment based on a **Usage Code** have to be manually created in **Service Contract – Equipment PM Schedule** (SE.015.00).
   - If the preventive maintenance schedule for the specific model of the manufacturer is based on **Usage**, then **Usage** for the model defaults to the value of **Usage** of the **PM Code**.

10. If the preventive maintenance schedule for the specific model of the manufacturer is based on **Usage**, type the length of time between preventive maintenance service calls in **Interval**.

11. If the preventive maintenance schedule for the specific model of the manufacturer is based on **Usage**, type the usage code in the field to the right of **Interval**.
    - If the usage code must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all usage code IDs displays.
    - To select a usage code, highlight the ID and click **OK**, or double-click on the ID.
    - Clicking **Edit** on the **Interval Code PV List** accesses **Usage Code Maintenance** (SE.009.00) enabling you to modify information for an existing usage.
    - Clicking **Insert** on the **Interval Code PV List** accesses **Usage Code Maintenance** (SE.009.00) enabling you to add new usages to the system.

12. Select the specific preventive maintenance tasks needed to complete the **PM Code** for the specific model of the manufacturer in **Detail Type**.
    - Materials
    - Labor
    - Instructions
    - Comment
Material line types allow users to designate inventory items needed to perform the preventive maintenance plan for the specific model of the manufacturer that defaults to Invoice – T & M Details (SD.203.00) when invoicing a service call with the PM Code. When inventory items are added to service calls by Generate PM Service Calls Process (SE.300.00), the items are allocated in the Inventory module to prevent over allocation of the item by other transactions. Similarly, if an inventory item is over allocated when it is added to a service call, an event log message is generated to inform the user of the conflict.

Labor line types allow users to designate inventory items needed to perform the preventive maintenance plan for the specific model of the manufacturer that default to Invoice – T & M Details (SD.203.00) when invoicing a service call with the PM Code.

13. If Detail Type is Materials or Labor, select an inventory item to associate with the preventive maintenance tasks for the specific model of the manufacturer in Inventory ID.

- If the inventory must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all inventory IDs 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.
- Inventory items needed to perform the preventive maintenance plan default to Invoice – T & M Details (SD.203.00) when invoicing a service call with the PM Code.

14. Type the number of the material item needed or the hours of labor needed to complete the preventive maintenance tasks for the specific model of the manufacturer in Quantity. Quantity is only available when the Detail Type is Materials or Labor.

15. Type a 60-character text explanation for the preventive maintenance tasks for the specific model of the manufacturer in Description.

- Description is only available if Detail Type is Instructions, Comments, or Labor.
- Description displays the description of the Inventory ID if Detail Type is Materials or Labor.

![Figure 21: PM Code – Model Details Maintenance (SE.008.00)](image)

16. Click Save on the toolbar.

17. Click Close on the toolbar.
Equipment Entry

Entering Equipment

*Equipment Entry* (SE.001.00) enables users to enter both company and customer-owned equipment for tracking purposes in one central screen. *Equipment Entry* (SE.001.00) streamlines the processing tasks needed to manage equipment because users can easily attach and view the customer associated with a piece of equipment, the service location or site associated with a piece of equipment, and the branch responsible for servicing a piece of equipment.

Manufacturer information such as manufacturer, model, serial number and warranty information can also be associated with equipment.

When all of the needed information is entered and a piece of equipment is saved, the system automatically assigns an **Equipment ID** if **Auto Number Equipment ID** is enabled in *Service Series Setup Maintenance* (SD.000.00) of the Service Dispatch module.

![Figure 22: Equipment Entry (SE.001.00)](image-url)
Equipment Entry (SE.001.00) is divided into several tabs. Each tab contains information related to a particular aspect of equipment such as the Customer and Site associated with the equipment, Manufacturer ID and Model ID associated with the equipment, the year the equipment was manufactured, Primary and Secondary Technician, Purchase Date, and Purchase Amount.

<table>
<thead>
<tr>
<th>The tab...</th>
<th>Enables you to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Info</td>
<td>Associate and view general set up information to equipment such as a Customer ID, Site ID, manufacturer, model, serial number, PM Code, equipment type, warranty information and manufactured year.</td>
</tr>
<tr>
<td>Misc Info</td>
<td>Associate and view miscellaneous set up information to equipment such as contact, contact phone number, physical location of the equipment, condition of the equipment, parent equipment ID, primary and secondary technician.</td>
</tr>
<tr>
<td>Attributes</td>
<td>Associate and view attribute information to equipment such as vehicle identification number, license number, registration information, number of axles, gross vehicle weight, tare weight, and fuel information.</td>
</tr>
<tr>
<td>Purchase Info</td>
<td>Associate and view purchasing information of equipment such as vendor ID, purchase date, purchase order number and purchase amount.</td>
</tr>
<tr>
<td>Meter/Usage Info</td>
<td>Associate and view meter and usage information of equipment such as reading date and amount.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>The button...</th>
<th>Enables you to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service History</td>
<td>Access Equipment Call History (SE.011.00). Equipment Call History (SE.011.00) allows users to view the history of service calls for a specific piece of equipment.</td>
</tr>
<tr>
<td>Profitability</td>
<td>Access Equipment History (SE.012.00). Equipment History (SE.012.00) displays the history and profitability for a piece of equipment based on service work performed on the equipment.</td>
</tr>
</tbody>
</table>

Note: Rental History is a feature of the Rental Billing module and is currently not being used.

Required Fields for Equipment Entry (SE.001.00)

The following data is required for all pieces of equipment:

- **Equipment ID** (Step 2)
- **Equipment Description** (Step 3 — Recommended)
- **Status** (Step 4)
- **Branch ID** (Step 5)
- **Manufacturer ID** (Step 8)

To enter a piece of equipment:

1. Open Equipment Entry (SE.001.00) by selecting Module | Equipment Maintenance | Equipment Entry from the menu. The General Info tab of Equipment Entry (SE.001.00) displays.
2. Type a unique 10-digit ID for the new piece of equipment in Equipment ID. The system automatically assigns an Equipment ID if Auto Number Equipment ID is enabled in Service Series Setup Maintenance (SD.000.00) of the Service Dispatch module.
3. Type a 60-character description for the new piece of equipment in the field to the right of Equipment ID.
4. Select the status for the new piece of equipment in **Status**.
   - Active
   - Inactive
   - Rented
   - Repaired
   - New Rental

5. Type the ID of the branch responsible for servicing the new piece of equipment in **Branch ID**.
   If the branch ID is unknown, press F3 or double-click the right mouse button. A list of all branches displays.
   - To select a branch ID, 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.

6. Type the ID of the customer to associate with the new piece of equipment in **Customer ID**.
   - If the customer must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all customers displays.
     - To select a customer, highlight the ID and click OK, or double-click on the ID.
     - Clicking **Edit** on the Customer Maintenance List accesses Customer Maintenance (08.260.00) enabling you to modify information for an existing customer.
     - Clicking **Insert** on the Customer Maintenance List accesses Customer Maintenance (08.260.00) enabling you to add new customers to the system.
   - Pressing F3 on **Equipment ID** of Contract Equipment (SN.001.05) displays a list of all equipment associated with the site of the customer.
   - Selecting a customer displays the name of the customer in the field to the right of **Site ID**.

7. Type the site ID of the customer to associate with the new piece of equipment in **Site ID**.
   - If the site must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all sites displays.
     - To select a site ID, highlight the ID and click OK, or double-click on the ID.
     - Clicking **Edit** on the Service Site List accesses Site Maintenance (SD.025.00) of the Service Dispatch module enabling you to modify information for an existing site of a customer.
     - Clicking **Insert** on the Service Site List accesses Site Maintenance (SD.025.00) of the Service Dispatch module enabling you to add new sites for customers to the system.
   - Pressing F3 on **Equipment ID** of Contract Equipment (SN.001.05) displays a list of all equipment associated with the site of the customer.
   - Selecting a site displays the name of the site in the field to the right of **Site ID**.
8. Type the manufacturer to associate with the new piece of equipment in Manufacturer ID.
   - If the manufacturer ID is unknown, press F3 or double-click the right mouse button. A list of all manufacturers displays.
     - To select a manufacturer, highlight the ID and click OK, or double-click on the ID.
     - Clicking Edit on the Manufacturer PV List accesses Manufacturer Maintenance (SE.005.00) enabling you to modify information for an existing manufacturer.
     - Clicking Insert on the Manufacturer PV List accesses Manufacturer Maintenance (SE.005.00) enabling you to add new manufacturers to the system.
   - After selecting a manufacturer, the description of the manufacturer displays in the field to the right of Manufacturer ID.

9. Type the ID of the manufacturer’s model to associate with the new piece of equipment in Model ID.
   - If the model ID is unknown, press F3 or double-click the right mouse button. A list of all models displays. To select a model, highlight the ID and click OK, or double-click on the ID.
   - After selecting a model, the description of the model displays in the field to the right of Model ID.

10. Type the serial number for the new piece of equipment in Serial Number.

11. Type the ID of the preventive maintenance plan to associate with the new piece of equipment in PM Code.
    The PM Code determines the frequency the piece of equipment must be serviced.

12. Type the date the new piece of equipment was installed or placed into service in Installed Date.
    Installed Date is for informational purposes only.

13. If the new piece of equipment is covered by a manufacturer’s warranty, type the date the warranty coverage starts in Warr Start.
    Warr Start is for reporting purposes only.

14. If the new piece of equipment is covered by a manufacturer’s warranty, type the date the warranty coverage expires in Warr End.
    Warr End is for reporting purposes only.

15. Type the date the new piece of equipment was manufactured in Mfg Year.
    - Mfg Year is used to calculate the increasing cost of servicing equipment over time related to the Age Code associated with the manufacturer’s model of the equipment.
    - Age Code is associated with the manufacturer’s model in Manufacturer/Model Maintenance (SE.006.00).

16. If the new piece of equipment is covered by a manufacturer’s extended warranty, type the date the extended warranty coverage starts in Ext Warr Start.
    Ext Warr Start is for reporting purposes only.

17. If the new piece of equipment is covered by a manufacturer’s extended warranty, type the date the extended warranty coverage expires in Ext Warr End.
    Ext Warr End is for reporting purposes only.
18. Select the current status of the manufacturer’s warranty for the piece of equipment in Warranty Status.
   - Standard: The piece of equipment is currently covered by a standard warranty.
   - Extended: The piece of equipment is currently covered by an extended warranty.
   - Expired: The piece of equipment is no longer covered by a warranty.
   - Other
   
   **Warranty Status** is for reporting purposes only.
   
   **Warranty Status** does not change based on the warranty start and end dates.

19. Type the ID of the equipment group to associate with the new piece of equipment in Equipment Type.
   - The description of the equipment type displays in the field to the right of **Equipment Type**.
   - If the equipment type must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all equipment displays.
     - To select an equipment type, highlight the ID and click **OK**, or double-click on the ID.
     - Clicking **Edit** on the **Equipment Type PV List** accesses **Equipment Type Maintenance (SE.003.00)** enabling you to modify information for an existing equipment type.
     - Clicking **Insert** on the **Equipment Type PV List** accesses **Equipment Type Maintenance (SE.003.00)** enabling you to add new equipment types to the system.

20. Select the type of ownership for the new piece of equipment in Status Type.
   - Owned: The new piece of equipment is owned by the customer.
   - Leased: The new piece of equipment is being leased by the customer.
   - Rented: The new piece of equipment is being rented by the customer.
   - Unknown: The ownership of the new piece of equipment is not known.

21. Type the internal number for the new piece of equipment in Asset Nbr.
   **Asset Nbr** is for reporting purposes only.

22. Type the date **Status Type** of the new piece of equipment was changed in **Status Date**.
23. Click the **Misc Info** tab. The **Misc Info** tab displays.

![Figure 23: Equipment Entry (SE.001.00), Misc Info tab](image)

24. Type the main contact person for the new piece of equipment in **Contact**.
25. Type the phone number of the main contact person for the new piece of equipment in **Phone Nbr**.
26. Type the ID of the physical location for the new piece of equipment in **Location ID**.
   - If the location ID is unknown, press `F3` or double-click the right mouse button. A list of all locations displays.
     - To select a location code, highlight the ID and click **OK**, or double-click on the ID.
     - Clicking **Edit** on the **Location Code PV List** accesses **Equipment Location Maintenance** (SE.004.00) enabling you to modify information for an existing location code.
     - Clicking **Insert** on the **Location Code PV List** accesses **Equipment Location Maintenance** (SE.004.00) enabling you to add new location codes to the system.
   - **Location Codes** are used to account for the increasing costs of maintaining equipment due to the physical location of equipment.
   - After selecting a **Location ID**, the description of **Location Code** displays in **Location Desc**.
27. Type a different location for the new piece of equipment in **Location Desc**.
   - **Location Desc** defaults when a **Location ID** is selected.
   - **Location Desc** can be changed to be more specific. For example, “Roof” could be changed to “Northwest Corner of Roof.”
28. Type the physical condition of the new piece of equipment in **Condition**.
   - **Condition** is for informational purposes only.
29. Type the technician responsible for completing the work on the service call associated with the new piece of equipment in **Primary Tech**.
   
   If the technician must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all technicians displays.
   
   - To select a technician, highlight the ID and click **OK**, or double-click on the ID.
   - Clicking **Edit** on the **Employee Maintenance PV List** accesses **Employee Maintenance** (SD.007.00) enabling you to modify information for an existing technician.
   - Clicking **Insert** on the **Employee Maintenance PV List** accesses **Employee Maintenance** (SD.007.00) enabling you to add new technicians to the system.

30. Type a secondary technician responsible for completing the work on the service call associated with the service contract in **Secondary Tech**.
   
   If the technician must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all technicians displays.
   
   - To select a technician, highlight the ID and click **OK**, or double-click on the ID.
   - Clicking **Edit** on the **Employee Maintenance PV List** accesses **Employee Maintenance** (SD.007.00) enabling you to modify information for an existing technician.
   - Clicking **Insert** on the **Employee Maintenance PV List** accesses **Employee Maintenance** (SD.007.00) enabling you to add new technicians to the system.

31. **Company ID** is a display-only field that shows the company associated with the new piece of equipment.
   
   **Company ID** defaults to the current company.

32. Type the ID of a piece of equipment to associate with the new piece of equipment in **Parent Equip ID**.
   
   - **Parent Equip ID** allows users to relate one piece of equipment to another piece of equipment for reporting purposes.
   - **Example:** If the motor of a vehicle and the vehicle itself are entered as a piece of equipment, **Parent Equip ID** is used to relate the motor to the vehicle.

33. **Rent Code** is a feature of the Rental Billing module and is currently not used.
34. Click the **Attributes** tab. The **Attributes** tab displays.

![Equipment Entry (SE.001.00), Attributes tab](image)

**Figure 24**: Equipment Entry (SE.001.00), Attributes tab

35. Type the vehicle identification number associated with the new piece of equipment in **VIN**. 
   **VIN** is for informational purposes only.

36. Type the license number to associate with the new piece of equipment in **License Nbr**. 
   **License Nbr** is for informational purposes only.

37. Type the registration number of the new piece of equipment in **Registration Nbr**. 
   **Registration Nbr** is for informational purposes only.

38. Type the state where the new piece of equipment is registered in **Registered State**. 
   **Registered State** is for informational purposes only.

39. Type the date the new piece of equipment was registered in **Registered Date**. 
   **Registered Date** is for informational purposes only.

40. Type the number of axles the new piece of equipment has in **Axles**. 
   **Axles** is for informational purposes only.

41. Type the maximum number of usage miles recommended for the new piece of equipment in **Max Miles**. 
   **Max Miles** is for informational purposes only.

42. Type the gross vehicle weight per the manufacturer for the new piece of equipment in **GVW**. 
   **GVW** is for informational purposes only.

43. Type the tare weight per the manufacturer for the new piece of equipment in **Tare Wt**. 
   **Tare Wt** is for informational purposes only.

44. Type the load capacity per the manufacturer for the new piece of equipment in **Capacity**. 
   **Capacity** is for informational purposes only.

45. Type the fuel used by the new piece of equipment in **Fuel Type**. 
   **Fuel Type** is for informational purposes only.
46. Type the total number of gallons the primary fuel tank holds for the new piece of equipment in **Tank 1 - Gallons**.
   *Tank 1 – Gallons* is for informational purposes only.

47. Type the total number of gallons the secondary fuel tank holds for the new piece of equipment in **Tank 2 - Gallons**.
   *Tank 2 – Gallons* is for informational purposes only.

48. If any enhancements were added to the new piece of equipment, type a 10-character description of the addition in **Enhancement**.
   *Enhancement* is for informational purposes only.

49. If any enhancements were added to the new piece of equipment, type the date the additions were made in **Enhancement Date**.
   *Enhancement Date* is for informational purposes only.

50. If any modifications were made to the new piece of equipment, type a 10-character description of the modification in **Revision**.
   *Revision* is for informational purposes only.

51. If any modifications were made to the new piece of equipment, type the date the modifications were made in **Revision Date**.
   *Revision Date* is for informational purposes only.

52. Click the **Purchase Info** tab. The **Purchase Info** tab displays.

![Figure 25: Equipment Entry (SE.001.00), Purchase Info tab](image-url)
53. Type a valid ID of the vendor associated the new piece of equipment in **Vendor ID**.
   - If the vendor ID is unknown, press F3 or double-click the right mouse button. A list of all vendors displays.
     - To select a vendor, highlight the ID and click **OK**, or double-click on the ID.
     - Clicking **Edit** on the **Vendor List** accesses **Vendor Maintenance** (03.270.00) enabling you to modify information for existing vendor.
     - Clicking **Insert** on the **Vendor List** accesses **Vendor Maintenance** (03.270.00) enabling you to add new vendors to the system.
   - **Vendor ID** is for informational purposes only.

54. Type the date the new piece of equipment was purchased in **Purchase Date**. **Purchase Date** is for informational purposes only.

55. Type the purchase order associated with the purchase of the new equipment in **Purchase Nbr**. **Purchase Nbr** is for informational purposes only.

56. Type the purchase price for the new piece of equipment in **Purchase Amount**. **Purchase Amount** is for informational purposes only.

57. Type the actual cost of purchasing the new piece of equipment in **Pur Act Cost**. **Pur Act Cost** is for informational purposes only.

58. Click the **Meter/Usage Info** tab. The **Meter/Usage Info** tab displays.

59. Type the date the meter or odometer reading was taken in **Reading Date**. **Reading Date** is for reporting purposes only.

60. Type the meter or odometer reading in **Reading Amount**.

61. Type a 30-character explanation or comment for the usage in **Description**.

62. Click **Save** on the toolbar to save the new piece of equipment.

63. Click **Close** on the toolbar to close **Equipment Entry** (SE.001.00).
Enter a New Customer During Equipment Entry

In order to enter a service contract for a customer, the customer must exist in the system. Customers are entered and maintained in Customer Maintenance (08.260.00) of the Accounts Receivable module. If the customer is not set up during Equipment Entry (SE.001.00) and the user entering the service contract has the appropriate rights to enter new customers in Customer Maintenance (08.260.00), the customer can be added through the Quick Maintenance feature.

Equipment Entry (SE.001.00) Required Fields

The following fields are required to complete Equipment Entry (SE.001.00):

- Customer ID (Step 4)
- Class ID (Step 5)
- Name (Step 7 - Recommended)
- Terms ID (Step 10)
- Credit Check (Step 11)

To enter a new customer during service contact entry:

1. Open Equipment Entry (SE.001.00) by selecting Module | Equipment Maintenance | Equipment Entry from the menu. Equipment Entry (SE.001.00) displays.
2. Press F3 or double-click the right mouse button. A list of all active customers set up in Customer Maintenance (08.260.00) displays.
3. Click Insert on the Customer Maintenance List. Customer Maintenance (08.260.00) displays.

Figure 27: Customer Maintenance (08.260.00)
4. Type a 10-character alphanumeric code to uniquely identify the new customer in **Customer ID**.

5. Type an ID for the customer class grouping to associate with the new customer in **Class ID**.
   - If the class ID is unknown, press F3 or double-click the right mouse button. A list of all class IDs displays.
   - To select a class ID, highlight the ID and click **OK**, or double-click on the ID.
   - Clicking **Edit** on the **Customer Class List** accesses **Customer Class** (08.290.00) enabling you to modify information for an existing customer class.
   - Clicking **Insert** on the **Customer Class List** accesses **Customer Class** (08.290.00) enabling you to add a new customer class to the system.

6. Select **Active** from the **Status** drop-down list.

7. Type the name of the customer in **Name**.
   - Type the @ symbol before the portion of the name to use when alphabetizing. For example, the software alphabetizes The @Bank of Ohio by Bank.

8. Type a flat discount percentage that should be deducted from invoices associated with the new customer in **Trade Discount %**.

9. Type the ID of a price level to associate with the new customer in **Price Class**.
   - Customer price classes are used to set up special sales prices for different customers.
   - If the price class ID is unknown, press F3 or double-click the right mouse button. A list of all price class IDs displays.
   - To select a price class, highlight the ID and click **OK**, or double-click on the ID.

10. Type the terms ID that controls the discount date, the due date and the discount amount of invoices associated with the new customer in **Terms ID**.
    - If the Terms ID is unknown, press F3 or double-click the right mouse button. A list of all Term IDs displays.
    - To select a Term ID, highlight the account number and click **OK**, or double-click on the ID.
    - Clicking **Edit** on the **Terms List** accesses **Terms Maintenance** (21.270.00) enabling you to modify information for an existing Term ID.
    - Clicking **Insert** on the **Terms List** accesses **Terms Maintenance** (21.270.00) enabling you to add a new Term ID to the system.

11. Select the type of credit limit checking to associate with the new customer in **Credit Check**.
    - Credit Limit Only
    - Credit Limit + Past Due
    - Always Hold
    - Never Sell
    - No Credit Checking

    **Note:** When entering a service call in **Service Call Entry** (SD.200.00), the system will not allow customer service representatives to save a service call for a customer if credit rules are violated.

12. If credit checking is based on an amount, type the amount in **Limit**.

    **Note:** Zero specifies that the customer has unlimited credit.

13. If credit checking is based on the number of days an invoice is past due, enter the number of days over the day credit limit this customer is allowed before services are stopped in **Grace Period**.
14. Type the credit manager for the customer in Credit Manager.

   If the credit manager ID is unknown, press F3 or double-click the right mouse button. A list of all credit managers displays.
   - To select a credit manager ID, highlight the ID and click OK, or double-click on the ID.
   - Clicking Edit on the Credit Manager List accesses Credit Manager (40.225.00) enabling you to modify information for an existing credit manager.
   - Clicking Insert on the Credit Manager List accesses Credit Manager (40.225.00) enabling you to add new credit managers to the system.

15. Click the Address tab. The Address tab of Customer Maintenance (08.260.00) displays.
16. Type the main address information of the customer in the Main Address frame.
17. Type the billing address information of the customer in the Bill To frame.

   Note: If the billing address of the customer is the same as the main address, click Copy to Bill To.

18. Click the Defaults tab. The Defaults tab of Customer Maintenance (08.260.00) displays.
19. Type the tax information of the customer in the Tax frame.
20. Type the currency information of the customer in the Currency frame.
21. Type the account and subaccount defaults of the customer in the GL Accounts frame.
22. Click the Other Options tab. The Other Options tab of Customer Maintenance (08.260.00) displays.
23. Type processing default information of the customer in the Statement Options frame.
24. Type credit card information of the customer in the Credit Card frame.
25. Type the territory the customer is associated with in Sales Territory ID.

   If the sales territory ID is unknown, press F3 or double-click the right mouse button. A list of all credit managers displays.
   - To select a sales territory ID, highlight the ID and click OK, or double-click on the ID.
   - Clicking Edit on the Territory List accesses Sales Territory (08.320.00) enabling you to modify information for an existing sales territory.
   - Clicking Insert on the Territory List accesses Sales Territory (08.320.00) enabling you to add new sales territories to the system.

26. Type the default Salesperson ID for the new customer in Salesperson.

   If the salesperson ID is unknown, press F3 or double-click the right mouse button. A list of all salesperson IDs displays.
   - To select a salesperson ID, highlight the ID and click OK, or double-click on the ID.
   - Clicking Edit on the Salesperson List accesses Salesperson Maintenance (08.310.00) enabling you to modify information for existing salespersons.
   - Clicking Insert on the Salesperson List accesses Salesperson Maintenance (08.310.00) enabling you to add new salespersons to the system.

27. Click Save on the toolbar to save the new customer.
28. Click Close on the toolbar to close Customer Maintenance (08.260.00).
29. Select the ID of the new customer and click OK.
Inquiry Screens

The Equipment Maintenance module is designed to allow organizations to efficiently manage customer-owned and company-owned pieces of equipment. Several inquiry screens exist in the system that enables users to effectively manage customers and equipment.

Equipment Call History (SE.011.00) gives users the ability to view the history of service calls performed on a piece of equipment while Equipment History (SE.012.00) allows users to view the profitability of equipment based on service work performed and invoiced.

Calendar Codes (SE.007.00) allows users to view the hard-coded options for creating preventive maintenance schedules for equipment.

Calendar Codes (SE.007.00)

Calendar Codes (SE.007.00) allow users to view the hard-coded options for creating preventive maintenance schedules for equipment. Calendar Codes (SE.007.00) are attached to preventive maintenance plans in PM Code Maintenance (SE.002.00) and associated with a piece of equipment in Equipment Entry (SE.001.00). After associating a piece of equipment with a service contract in Service Contract Entry (SN.001.00) and running Generate Equipment PM Tasks (SN.001.07), a preventive maintenance schedule based on the PM code associated with the piece of equipment is created. PM codes determine the frequency of preventive maintenance schedule records. Since calendar codes are hard-coded into the program, new codes cannot be added and existing codes cannot be modified.

Example: Attaching the ANNUAL01 calendar code to a PM code with a frequency interval of 1 creates a preventive maintenance schedule record on January 1 for the life of the service contract. If a service contract has a Start Date of 01/01/01 and an End Date of 12/31/05, a preventive maintenance schedule record is created with a Suggested Date of 01/01/01, 01/01/02, 01/01/03, 01/01/04 and 01/01/05.

Figure 28: Calendar Codes (SE.007.00)
To view a calendar code:
1. Choose Module | Equipment Maintenance | Calendar Codes from the menu. Calendar Codes (SE.007.00) displays.
2. Calendar Code is a display-only field that uniquely identifies each calendar code.
3. Description is a display-only field that shows the description associated with the Calendar Code.
4. Click Close on the toolbar to close Calendar Codes (SE.007.00).
Equipment Call History (SE.011.00)

*Equipment Call History* (SE.011.00) allows users to view the history of service calls that have *Invoice - T & M Detail* (SD.203.00) records associated with a specific piece of equipment. Once a piece of equipment is selected, a list of all service calls associated with the piece of equipment displays, giving users the ability to view all of the service work performed on a piece of equipment.

![Figure 29: Equipment Call History (SE.011.00)](image)

**Required Field for Equipment Call History (SE.011.00)**

The following data is required for all pieces of equipment:

**Equipment ID** (Step 2)

To view service call history for a specific piece of equipment:

1. Choose **Module | Equipment Maintenance | Equipment Call History** from the menu. *Equipment Call History* (SE.011.00) displays.
   
   Clicking **Service History** in *Equipment Entry* (SE.001.00) also accesses *Equipment Call History* (SE.011.00).

2. To view the service call history for a specific piece of equipment, type the ID of the piece of equipment in **Equipment ID**.

   - The description of the piece of equipment displays in the field to the right of **Equipment ID**.
   - **Manufacturer ID** and description of the manufacturer associated with the piece of equipment displays.
   - **Model ID** and description of the model associated with the piece of equipment displays.
   - The serial number associated with the piece of equipment displays in **Serial Nbr**.
   - The internal asset number assigned to the piece of equipment displays in **Asset Nbr**.
   - All service calls associated with the piece of equipment display.

3. **Service Call ID** is a display-only field showing the service calls associated with the piece of equipment.

4. **Call Date** is a display-only field showing the dates of the service call associated with the piece of equipment were taken.
5. **Service Technician** is a display-only field showing the technician assigned to performing the work on the service call associated with the piece of equipment.

6. **Call Type ID** is a display-only field showing the call types of the service call associated with the piece of equipment.

7. **Call Status ID** is a display-only field showing the status of the service call associated with the piece of equipment.

8. **Caller Name** is a display-only field showing the name of the person who placed the service call associated with the piece of equipment.

9. **Completed Date** is a display-only field showing the date the service call associated with the piece of equipment was completed.

10. **Completed Time** is a display-only field showing the time the service calls associated with the piece of equipment were completed.

11. **Duration** is a display-only field showing the duration status of service calls associated with the piece of equipment.
    - Long
    - Short

    **Note:** Currently, **Duration** is assigned to Short for all service calls.

12. **Status** is a display-only field showing the handling status of the service calls associated with the piece of equipment.

13. **Order Nbr** is a display-only field showing **Invoice/Memo Number** for the service calls associated with the piece of equipment.

14. **Order Amount** is a display-only field showing the invoice total amount for the service calls associated with the piece of equipment.

15. Click **Close** of the toolbar to close Equipment Call History (SE.011.00)
Equipment History (SE.012.00)

Equipment History (SE.012.00) allows users to view profitability for a specific piece of equipment based on service work performed and invoiced in Service Call Invoice (SD.640.00) on the piece of equipment. Equipment History (SE.012.00) gives users the ability to view period-to-date totals for each month of the year as well as the year-to-date totals for equipment.

Figure 30: Equipment History (SE.012.00)

Required Fields for Equipment History (SE.012.00)

The following data is required for all pieces of equipment:

- **Equipment ID** (Step 2)
- **Cal Year** (Step 3)

To view the profitability for a specific piece of equipment:

1. Choose **Module | Equipment Maintenance | Equipment History** from the menu. Equipment History (SE.012.00) displays.

   Clicking **Profitability** in Equipment Entry (SE.001.00) also accesses Equipment History (SE.012.00).

2. To view the profitability for a specific piece of equipment, type the ID of the piece of equipment in **Equipment ID**.
   - The description of the piece of equipment displays in the field to the right of **Equipment ID**.
   - **Branch ID** and the description of the branch associated with the piece of equipment displays below **Equipment ID**.

3. To view the profitability of a piece of equipment for a specific calendar year, type the year in **Cal Year**.

4. **Branch ID** and the description of the branch are display-only fields showing the branch associated with the piece of equipment.
5. **Net Sales** is a display-only field showing the total revenue or amount invoiced for each piece of equipment.
   - **Net Sales** is updated by the total amount of service call invoice detail lines associated with the piece of equipment, excluding taxes from *Invoice – T & M Details* (SD.203.00).
   - **Net Sales** is calculated from **Base Price** of inventory items entered in *Inventory Maintenance* (10.25.00) of the Inventory Module.

6. **Labor Cost** is a display-only field showing the total labor costs associated with servicing a piece of equipment.
   - **Labor Cost** is updated by the total amount of labor detail lines of service call invoices associated with the piece of equipment in *Invoice – T & M Details* (SD.203.00).
   - **Labor Cost** is based on **Pay Rate** of the technician in *Employee Personal Information* (SD.007.01) of the Service Dispatch module.

7. **Other Costs** is a display-only field showing the total amount of other costs associated with servicing a piece of equipment.
   - **Other Costs** is updated by the total amount of material detail lines of service call invoices associated with the piece of equipment in *Invoice – T & M Details* (SD.203.00).
   - **Other Costs** is calculated by the valuation method cost of material inventory items entered in *Inventory Maintenance* (10.25.00) of the Inventory Module.

8. **Total Costs** is a display-only field showing the total amount of labor and material costs associated with servicing a piece of equipment. Total Costs = Labor Cost + Other Costs.

9. **Gross Margin** is a display-only field showing the difference between **Net Sales** and **Total Costs**.

10. **Gross %** is a display-only field showing the gross margin earned for a piece of equipment.
    - **Gross %** is calculated by dividing **Gross Margin** by **Net Sales**.

11. **Labor Hours** is a display-only field showing the total labor hours associated with servicing a piece of equipment.
    - **Labor Hours** is updated by the total number of labor hours entered on detail lines of service call invoices associated with the piece of equipment in *Invoice – T & M Details* (SD.203.00).

12. Click **Close** of the toolbar to close *Equipment History* (SE.012.00).
Processes

The Equipment Maintenance module is a comprehensive service business system that is designed to track and manage every detail of customer-owned and company-owned pieces of equipment. Several processing screens exist in the system that enables users to completely make equipment processing efficient and accurate.

Generate Equipment PM Tasks (SN.001.07) in the Service Contracts module enables users to automate the creation of preventive maintenance schedules for one or all pieces of equipment displayed on Contract Equipment (SN.001.05). Generate PM Service Calls Process (SE.300.00) enables users to generate service calls in Service Call Entry (SD.200.00) for the preventative maintenance schedules associated with equipment.

Generate PM Service Calls Process (SE.300.00)

Generate PM Service Calls Process (SE.300.00) enables users to generate service calls in Service Call Entry (SD.200.00) for preventive maintenance schedules associated with equipment in Generate Equipment PM Tasks (SN.001.07) of the Service Contracts module. Generate PM Service Calls Process (SE.300.00) creates a service call for each of the preventive maintenance records within the range of service contracts and range of dates specified.
Required Fields for Generate PM Service Calls Process (SE.300.00)

- Contract ID – Starting (Step 2)
- Contract ID – Ending (Step 3)
- PM Date – Starting (Step 4)
- PM Date – Ending (Step 5)
- Branch ID (Step 7)
- Customer (Step 9)
- Contract Type ID (Step 13)
- Geographic Zone ID (Step 14)
- Call Status ID (Step 18)

To generate a service call:

1. Choose **Module | Equipment Maintenance | Generate PM Service Calls Process** from the menu. **Generate PM Service Calls Process (SE.300.00)** displays.

2. To restrict **Generate PM Service Calls Process (SE.300.00)** to a range of service contracts, type the ID of the first service contract in **Contract ID - Starting**.

   If the contract ID is unknown, press **F3** or double-click the right mouse button. A list of all contracts displays.
   - To select a contract ID, highlight the contract ID and click **OK**, or double-click on the contract.
3. To restrict Generate PM Service Calls Process (SE.300.00) to a range of service contracts to process, type the ID of the last service contract in **Contract ID - Ending**. If the contract ID is unknown, press F3 or double-click the right mouse button. A list of all contracts displays.
   - To select a contract ID, highlight the contract ID and click **OK**, or double-click on the contract.

4. To restrict Generate PM Service Calls Process (SE.300.00) to preventive maintenance schedule records with a range of dates, type the first date in **PM Date - Starting**.

5. To restrict Generate PM Service Calls Process (SE.300.00) to preventive maintenance schedule records with a range of dates, type the second date in **PM Date - Ending**.

6. Select **Include All Branches** to generate service calls for all branches. **Include All Branches** defaults to Selected when Generate PM Service Calls Process (SE.300.00) opens.

7. To restrict Generate PM Service Calls Process (SE.300.00) to a specific branch, clear **Include All Branches** and type the ID of the appropriate branch in **Branch ID**. If the branch ID is unknown, press F3 or double-click the right mouse button. A list of all branches displays.
   - To select a branch, highlight the ID and click **OK**, or double-click on the branch.
   - 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.

8. When a branch is selected, the name of the branch displays.

9. Select **All Customers** to generate service calls for all customers.

10. To restrict Generate PM Service Calls Process (SE.300.00) to a specific customer, clear **All Customers** and type the ID of the appropriate customer in **Customer**.
    - If the customer ID is unknown, press F3 or double-click the right mouse button. A list of all customers displays. To select a customer, highlight the ID and click **OK**, or double-click on the customer.
    - When a customer is selected, the name of the customer displays.

11. To restrict Generate PM Service Calls Process (SE.300.00) to a range of customers, clear **All Customers**, type the ID of the appropriate starting customer in **Customer**, and type the ID of the appropriate ending customer in **Thru**.
    - If the customer ID is unknown, press F3 or double-click the right mouse button. A list of all customers displays. To select a customer, highlight the ID and click **OK**, or double-click on the customer.
    - When a customer is selected, the name of the customer displays.

12. Select **All Contract Types** to generate service calls for all contract types.

13. To restrict Generate PM Service Calls Process (SE.300.00) to a specific contract type (also known as Agreement Type), clear **All Contract Types** and type the ID of the appropriate contract type in **Contract Type ID**.
    - If the contract type ID is unknown, press F3 or double-click the right mouse button. A list of all contract types displays. To select a contract type, highlight the ID and click **OK**, or double-click on the contract type.
    - When a contract type is selected, the description of the contract type displays.
14. To restrict Generate PM Service Calls Process (SE.300.00) to a specific geographic zone, clear All Geo Zones and type the ID of the appropriate zone in Geographic Zone ID.

- If the geographic zone ID is unknown, press F3 or double-click the right mouse button. A list of all geographic zones displays. To select a geographic zone, highlight the ID and click OK, or double-click on the geographic zone.
- When a geographic zone is selected, the description of the geographic zone displays.

15. Select Include Unscheduled PM Tasks to include preventive maintenance schedule records for which Schedule Date is blank and Suggested Date is between PM Date – Starting and PM Date – Ending.

- After creating preventive maintenance schedules for equipment in Generate Equipment PM Tasks (SN.001.07), the system sets Suggested Date of the preventive maintenance schedule records based on the frequency of the PM Code associated with equipment and Starting Date of the service contract.
- Schedule Date for preventive maintenance schedule records can be populated manually in Service Contract – Equipment PM Schedule (SE.015.00).
- Clicking View PM Schedule in Contract Equipment (SN.001.05) accesses Service Contract – Equipment PM Schedule (SE.015.00).

Clicking Equipment in Service Contract Entry (SN.001.00) accesses Contract Equipment (SN.001.05).

16. Select Generate Call for Each PM Task to create a service call for each preventive maintenance schedule record of a service contract.

Selecting Generate Call for Each PM Task enables Copy Equip ID to Customer PO.

17. In Service Call Status, select the status of the new service call being created in Service Call Entry (SD.200.00).

- Completed
- Hold
- Invoiced
- Quote
- Released
- UnReleased

To view the service calls in Dispatch (SD.201.00) after Generate PM Service Calls Process (SE.300.00), select Released in Service Call Status.

18. Select the ID of the call status to default to the new service calls in Call Status ID.

If the call status ID is unknown, press F3 or double-click the right mouse button. A list of all call statuses displays.

- To select a call status, highlight the ID and click OK, or double-click on the ID.
- Clicking Edit on the Call Status Maintenance PV List accesses Call Status Maintenance (SD.003.00), enabling you to modify information for an existing call status.
- Clicking Insert on the Call Status Maintenance PV List accesses Call Status Maintenance (SD.003.00), enabling you to add new call statuses to the system.

Note: Entering an Open or In Progress Status ID automatically releases the new service call to Dispatch Board (SD.202.00).
19. In **Line Type**, select the line type of the new invoice created in **Invoice – T & M Details (SD.203.00)** for the new service calls.
   - Service Contract
   - Billable

   **Line Type** defaults to Svc Contract when **Generate PM Service Calls Process (SE.300.00)** opens.

20. In **Task Status**, select the status of the preventative maintenance task for the new service calls.
   - Unassigned
   - Assigned
   - In-route
   - WIP
   - Completed
   - P/U Parts
   - Parts-out
   - Parts-in
   - Hold
   - Incomplete
   - User 1
   - User 2
   - User 3
   - User 4

   Task Status defaults to Unassigned when **Generate PM Service Calls Process (SE.300.00)** opens.

21. Select **Copy Contract Notes to Service Call** to have the notes attached to service contracts in **Service Contract Entry (SN.001.00)** copied to the service calls created in **Service Call Entry (SD.200.00)**.

22. Select **Generate Task Details** to populate **Invoice – T & M Details (SD.203.00)** with the preventive maintenance tasks associated with the **PM Code** attached to equipment. When inventory items are added to service calls by **Generate PM Service Calls Process (SE.300.00)**, the items are allocated in the Inventory module to prevent over allocation of the item by other transactions. Similarly, if an inventory item is over allocated when it is added to a service call, an event log message is generated to inform the user of the conflict.

   **Generate Task Details** defaults to Selected when **Generate PM Service Calls Process (SE.300.00)** opens.

23. Select **Copy Equip ID to Customer PO** to display the equipment ID in **Customer PO** of the equipment associated with the preventive maintenance schedule records for the new service calls in **Service Call Entry (SD.200.00)**.

   Copy Equip ID to Customer PO is enabled after selecting **Generate Call for Each PM Task**.

24. Select **Copy User ID to Caller Name** to display in **Caller Name** the user ID of the person using **Generate PM Service Calls Process (SE.300.00)**.

25. Click **Begin Processing** to create the new service calls in **Service Call Entry (SD.200.00)**.

26. Click **Cancel** or **Close** on the toolbar to close **Generate PM Service Calls Process (SE.300.00)**.
Data Entry Screens

Equipment Entry (SE.001.00)

*Equipment Entry* (SE.001.00) enables users to enter both company- and customer-owned equipment for tracking purposes in one central screen. *Equipment Entry* (SE.001.00) streamlines the processing tasks needed to manage equipment because users can easily attach and view the customer associated with a piece of equipment, the service location or site associated with a piece of equipment, and the branch responsible for servicing a piece of equipment.

Manufacturer information such as manufacturer, model, serial number and warranty information can also be associated with equipment.

When all of the needed information is entered and a piece of equipment is saved, the system automatically assigns an *Equipment ID* if *Auto Number Equipment ID* is enabled in *Service Series Setup Maintenance* (SD.000.00) of the Service Dispatch module.

**Equipment Entry, General Info Tab**

*Equipment Entry* (SE.001.00) contains information about equipment in the database that is both company- and customer-owned.

**Example:** A contracting company may enter an air conditioning unit as a piece of customer-owned equipment and enter truck #32 as a piece of company-owned equipment.

This screen enables you to create a unique identifier or thumbprint for a piece of equipment. If *Auto Number Equipment ID* is enabled on *Service Series Setup Maintenance* (SD.000.00), the system assigns a sequential ID number to the piece of equipment when the record is saved. If the check box is cleared, you enter a user-defined equipment ID. The equipment ID associated with a piece of equipment provides you with the ability to track the service history, and view the revenue generated and the cost associated with the repair and maintenance of a piece of equipment.
Using *Equipment Entry* (SE.001.00) you can enter or track pertinent equipment information including the customer associated with the piece of equipment, the service location or site associated with the equipment, and the branch responsible for the equipment. Manufacturer information is also associated with a piece of equipment including the manufacturer, model, serial number, and warranty information.

![Equipment Entry (SE.001.00), General Info tab](image)

**Figure 32: Equipment Entry (SE.001.00), General Info tab**

Following are the field descriptions of the *General Info* tab for *Equipment Entry* (SE.001.00).

**Equipment ID**

**Equipment ID** is the unique identifier or “thumbprint” assigned to each piece of equipment in the database. The system either auto-generates an equipment identifier or you can manually enter a user-specified identifier.

**Note:** If the system is auto-generating the **Equipment ID**, select the **Auto Number Equipment ID** check box on *Service Series Setup Maintenance* (SD.000.00) in the Service Dispatch module. After the check box is selected, type the desired information for a piece of equipment.

**Equipment ID (Description)**

**Equipment ID (Description)** is an explanation of the **Equipment ID**.
Status

Status is a drop-down list that defines the status of the equipment. Select from the following options:

- **Active**: Select this option if the piece of equipment is currently active and in use.
- **Inactive**: Select this option if the piece of equipment is currently not being used.
- **Rented**: When a piece of equipment is rented from the Rental module, this option is defaulted from Rental Transaction. If you are not using the Rental module, select this option if the piece of equipment at the customer's site is rented.
- **Repair**: When a piece of equipment is rented from the Rental module and then returned for a repair, this option defaults from Rental Transaction.
- **New Rental**: This option is currently not being used.

**Note**: The Rental module is not currently available.

Branch ID

Branch ID associates a specific piece of equipment to a branch.

Customer ID

Customer ID associates or links a piece of equipment to a customer.

Customer ID (Description)

Customer ID (Description) displays the customer name.

Site ID

Site ID contains the site identifier associated with a piece of equipment and customer. This field is only required if a customer ID is entered.

Site ID (Description)

Site ID (Description) displays the site name.

Manufacturer ID

Manufacturer ID links a piece of equipment to the manufacturer of the equipment.

Manufacturer ID (Description)

Manufacturer ID (Description) displays the explanation of the Manufacturer ID.

Model ID

Model ID associates a unique model identifier for the selected manufacturer and piece of equipment.

**Note**: The model PV list is filtered to display-only those models associated with the selected manufacturer.

Model ID (Description)

Model ID (Description) displays an explanation of the Model ID.

Serial Nbr

Serial Nbr contains the serial number assigned by the manufacturer for the entered piece of equipment.
PM Code
PM Code contains the default preventive maintenance code for this equipment. This code determines the frequency this piece of equipment must be maintained.

Installed Date
Installed Date displays the date the piece of equipment was installed in its current location. This is a descriptive field only and does not affect processing.

Warr Start/End
Warr Start/End contains the date the manufacturer’s warranty goes into effect and when it expires.

Mfg. Year
Mfg. Year contains the year a piece of equipment was manufactured. This field is used to calculate the cost to maintain this piece of equipment over time as related to the Age Code.

Ext Warr Start/End
Ext Warr Start/End contains the extended warranty start and end dates.

Warranty Status
Warranty Status defines the current status of the warranty for a piece of equipment. Select from the following options:
- Standard: Select this option if the piece of equipment is currently under a standard warranty.
- Extended: Select this option if the piece of equipment is currently under a standard warranty. Extended indicates that either the length of the warranty or the actual coverage is greater than the standard coverage.
- Expired: Select this option if the piece of equipment is no longer under warranty.
- Other: Select this option for all other miscellaneous status types.

Note: Warranty status does not change based on the starting and ending dates.

Equipment Type
Equipment Type associates a piece of equipment to a group of similar equipment by assigning an equipment type.

Status Type
Status Type defines the ownership of the equipment. Select from the following options:
- Owned: Select this option if the customer owns the equipment.
- Leased: Select this option if the customer leases the equipment.
- Rented: Select this option if the customer rents the equipment.
- Unknown: Select this option if the ownership is not known.

Asset Nbr
Asset Nbr is an asset identifier.

Status Date
Status Date contains the date the status was last updated.
**Service History (Button)**

**Service History** accesses *Equipment Call History* (SE.011.00) which displays a list of all the service calls related to this piece of equipment.

**Profitability (Button)**

**Profitability** accesses *Equipment History* (SE.012.00) which displays the profitability for the price of equipment by calendar year.

**Rental History (Button)**

**Rental History** is currently not activated.
Equipment Entry, Misc Info Tab

The *Equipment Entry* (SE.001.00) **Misc Info** tab associates information with a piece of equipment including a contact and phone number, the location of the equipment, (which may increase its base price when under a service contract), and the condition of the equipment. In addition, two technicians may be associated with the piece of equipment. This allows you to view technicians who are familiar with the specific piece of equipment.

![Equipment Entry (SE.001.00), Misc Info tab](image)

Following are the field descriptions of the **Misc Info** tab for *Equipment Entry* (SE.001.00).

**Equipment ID**

**Equipment ID** contains the unique identifier or “thumbprint” assigned to each piece of equipment in the database. The system either auto-generates an equipment ID or you can manually enter a user-specified identifier.

**Note:** If the system is auto-generating the Equipment ID, select **Auto Number Equipment ID** on Service Series Setup Maintenance (SD.000.00) in the Service Dispatch module. After the check box is selected, type the desired information for a piece of equipment.

**Equipment ID (Description)**

**Equipment ID (Description)** is an explanation of the **Equipment ID**.
Status

Status is a drop-down list that defines the status of the equipment. Select from the following options:

- Active: Select this option if the piece of equipment is currently active and in use.
- Inactive: Select this option if the piece of equipment is currently not being used.
- Rented: When a piece of equipment is rented from the Rental module, this option is defaulted from Rental Transaction. If you are not using the Rental module, select this option if the piece of equipment at the customer’s site is rented.
- Repair: When a piece of equipment is rented from the Rental module and then returned for a repair, this option defaults from Rental Transaction.
- New Rental: This option is currently not being used.

Note: The Rental module is not currently available.

Branch ID

Branch ID associates a specific piece of equipment to a branch.

Contact

Contact contains the contact person for this piece of equipment. For example, Contact could be a maintenance man on a property who has access to the roof.

Phone Nbr

Phone Nbr contains the phone number for the Contact.

Location ID

Location ID associates a location code to a piece of equipment. This code is used in calculating the maintenance cost for the equipment using the Pricing % Factor in Equipment Location Maintenance (SE.004.00).

Location Desc

Location Desc contains the explanation of the location for a piece of equipment. However, this description can be customized to give more specific information.

Example: For a Location ID of “Roof,” you might change the description to “Southwest corner of roof.”

Condition

Condition is a brief description of the condition of the equipment.

Primary Tech

Primary Tech associates a service technician to a piece of equipment.

Secondary Tech

Secondary Tech associates a secondary technician to a piece of equipment.

Company ID

Company ID displays the company identifier associated with a piece of equipment.

Parent Equip ID

Parent Equip ID associates a piece of equipment to a parent piece of equipment. For example, if a motor for a truck is entered as a piece of equipment, use this field to associate the motor to the truck.
Rent Code
Rent Code is not currently used.

Service History (Button)
Service History accesses Equipment Call History (SE.011.00) which displays a list of all the service calls related to this piece of equipment.

Profitability (Button)
Profitability accesses Equipment History (SE.012.00) which displays the profitability for the price of equipment by calendar year.

Rental History (Button)
Rental History is currently not activated.
Equipment Entry, Attributes Tab

The *Equipment Entry* (SE.001.00) **Attributes** tab contains vehicle information and enhancement or revision information for the piece of equipment.

![Equipment Entry (SE.001.00), Attributes tab](image)

Following are the field descriptions of the **Attributes** tab for *Equipment Entry* (SE.001.00).

**Equipment ID**

**Equipment ID** contains the unique identifier or “thumbprint” assigned to each piece of equipment in the database. The system either auto-generates an equipment ID or you can manually enter a user-specified identifier.

**Note:** If the system is auto-generating the Equipment ID, select the **Auto Number Equipment ID** check box on *Service Series Setup Maintenance* (SD.000.00) in the Service Dispatch module. After the check box is selected, type the desired information for a piece of equipment.

**Equipment ID (Description)**

**Equipment ID (Description)** is an explanation of the **Equipment ID**.
Status

Status is a drop-down list that defines the status of the equipment. Select from the following options:

- Active: Select this option if the piece of equipment is currently active and in use.
- Inactive: Select this option if the piece of equipment is currently not being used.
- Rented: When a piece of equipment is rented from the Rental module, this option is defaulted from Rental Transaction. If you are not using the Rental module, select this option if the piece of equipment at the customer’s site is rented.
- Repair: When a piece of equipment is rented from the Rental module and then returned for a repair, this option defaults from Rental Transaction.
- New Rental: This option is currently not being used.

Note: The Rental module is not currently available.

Branch ID

Branch ID associates a specific piece of equipment to a branch.

VIN

VIN contains the vehicle identification number associated with a piece of equipment.

License Nbr

License Nbr contains the license number associated with a piece of equipment.

Registration Nbr

Registration Nbr contains the registration number associated with a piece of equipment.

Registered State

Registered State contains the state in which the piece of equipment is registered.

Registered Date

Registered Date contains the date when the piece of equipment was registered.

Axles

Axles contains the number of axles, if any, associated with a piece of equipment.

Max Miles

Max Miles contains the suggested maximum miles recommended for the equipment.

GVW

GVW contains the gross vehicle weight per the manufacturer.

Tare Wt

Tare Wt contains the tare weight per the manufacturer.

Capacity

Capacity contains the load capacity per the manufacturer.

Fuel Type

Fuel Type contains the fuel type, if any, recommended for a piece of equipment.
**Tank 1 - Gallons**
*Tank 1 - Gallons* contains the total gallon capacity for the primary fuel tank.

**Tank 2 - Gallons**
*Tank 2 - Gallons* contains the total gallon capacity for the secondary fuel tank.

**Enhancement**
*Enhancement* is a 10-character free-form description of the enhancement.

**Enhancement date**
*Enhancement date* contains the date the enhancement was installed.

**Revision**
*Revision* contains the 10-character free-form description of the revision.

**Revision Date**
*Revision Date* contains the date the revision was installed.

**Service History (Button)**
*Service History* accesses *Equipment Call History* (SE.011.00) which displays a list of all the service calls related to this piece of equipment.

**Profitability (Button)**
*Profitability* accesses *Equipment History* (SE.012.00) which displays the profitability for the piece of equipment by calendar year.

**Rental History (Button)**
*Rental History* is currently not activated.
Equipment Entry, Purchase Info Tab

The Equipment Entry (SE.001.00) Purchase Info tab contains purchase information associated with a piece of equipment.

![Equipment Entry (SE.001.00), Purchase Info tab](image)

Following are the field descriptions of the Purchase Info tab for Equipment Entry (SE.001.00).

**Equipment ID**

Equipment ID contains the unique identifier or “thumbprint” assigned to each piece of equipment in the database. The system either auto-generates an equipment ID or you can manually enter a user-specified identifier.

**Note:** If the system is auto-generating the Equipment ID, select the Auto Number Equipment ID check box on Service Series Setup Maintenance (SD.000.00) in the Service Dispatch module. After the check box is selected, type the desired information for a piece of equipment.

**Equipment ID (Description)**

Equipment ID (Description) is an explanation of the Equipment ID.
**Status**

*Status* is a drop-down list that defines the status of the equipment. Select from the following options:

- **Active**: Select this option if the piece of equipment is currently active and in use.
- **Inactive**: Select this option if the piece of equipment is currently not being used.
- **Rented**: When a piece of equipment is rented from the Rental module, this option is defaulted from *Rental Transaction*. If you are not using the Rental module, select this option if the piece of equipment at the customer's site is rented.
- **Repair**: When a piece of equipment is rented from the Rental module and then returned for a repair, this option defaults from *Rental Transaction*.
- **New Rental**: This option is currently not being used.

**Note**: The Rental module is not currently available.

**Branch ID**

Branch ID associates a specific piece of equipment with a branch.

**Vendor ID**

Vendor ID contains the valid vendor number associated with the purchase of a piece of equipment.

**Purchase Date**

Purchase Date contains the date the equipment was originally acquired.

**Purchase Nbr**

Purchase Nbr contains the purchase order number associated with the purchase of the piece of equipment.

**Purchase Amount**

Purchase Amount contains the dollar amount for which the equipment was purchased.

**Pur Act Cost**

Pur Act Cost contains the actual purchase cost associated with the piece of equipment.

**Service History (Button)**

Service History accesses *Equipment Call History* (SE.011.00) which displays a list of all the service calls related to this piece of equipment.

**Profitability (Button)**

Profitability accesses *Equipment History* (SE.012.00) which displays the profitability for the piece of equipment by calendar year.

**Rental History (Button)**

Rental History is currently not activated.
**Equipment Entry, Meter/Usage Info Tab**

The **Meter/Usage Info** tab contains equipment usage information for a specific piece of equipment.

![Image of Meter/Usage Info tab](image)

*Figure 36: Equipment Entry (SE.001.00), Meter/Usage Info tab*

Following are the field descriptions of the **Meter/Usage Info** tab for **Equipment Entry (SE.001.00)**.

**Equipment ID**

**Equipment ID** contains the unique identifier or “thumbprint” assigned to each piece of equipment in the database. The system either auto-generates an equipment ID or you can manually enter a user-specified identifier.

**Note:** If the system is auto-generating the Equipment ID, select the **Auto Number Equipment ID** check box on **Service Series Setup Maintenance (SD.000.00)** in the Service Dispatch module. After the check box is selected, type the desired information for a piece of equipment.

**Equipment ID (Description)**

**Equipment ID (Description)** is an explanation of the **Equipment ID**.

**Status**

**Status** is a drop-down list that defines the status of the equipment. Select from the following options:

- **Active:** Select this option if the piece of equipment is currently active and in use.
- **Inactive:** Select this option if the piece of equipment is currently not being used.
- **Rented:** When a piece of equipment is rented from the Rental module, this option is defaulted from **Rental Transaction**. If you are not using the Rental module, select this option if the piece of equipment at the customer’s site is rented.
- **Repair:** When a piece of equipment is rented from the Rental module and then returned for a repair, this option defaults from **Rental Transaction**.
- **New Rental:** This option is currently not being used.

**Note:** The Rental module is not currently available.
Branch ID
Branch ID associates a specific piece of equipment to a branch.

Reading Date
Reading Date contains the date the reading was made.

Reading Amount
Reading Amount contains the appropriate data for the reading, which may be a meter reading, an odometer reading, etc.

Description
Description is the 30-character explanation of the usage or a comment.

Service History (Button)
Service History accesses Equipment Call History (SE.011.00) which displays a list of all the service calls related to this piece of equipment.

Profitability (Button)
Profitability accesses Equipment History (SE.012.00) which displays the profitability for the piece of equipment by calendar year.

Rental History (Button)
Rental History is currently not activated.
Inquiry Screens

Calendar Codes (SE.007.00)

Calendar Codes (SE.007.00) contains the hard-coded options for maintenance schedules. Each code allows you to auto-generate a preventive maintenance schedule for a piece of equipment.

Example: If the “Month” calendar code is associated with a preventive maintenance, the preventive maintenance is assigned to a piece of equipment and the auto-generate preventive maintenance process is run for this piece of equipment. A preventive maintenance schedule is created with PMs scheduled to be performed every month. Since these codes are hard-coded, they cannot be edited nor can new codes be entered in the table.

![Figure 37: Calendar Codes (SE.007.00)](image_url)

Following are the field descriptions for Calendar Codes (SE.007.00).

**Calendar Code**

**Calendar Code** contains the calendar codes that are available for selection.

**Description**

**Description** contains the explanation associated with the calendar code.
Equipment Call History (SE.011.00)

Equipment Call History (SE.011.00) contains the history of service calls for a specific piece of equipment. Once the specified piece of equipment is selected, the grid displays a list of past service calls associated with the selected equipment. Access this screen either from the Equipment Maintenance module menu or by clicking Service History in Equipment Entry (SE.001.00).

![Equipment Call History (SE.011.00)](image)

Figure 38: Equipment Call History (SE.011.00)

Following are the field descriptions for Equipment Call History (SE.011.00).

**Equipment ID**

**Equipment ID** selects a piece of equipment for which a history is desired. If this screen was accessed from Equipment Entry (SE.001.00), this field is display-only and populated with the selected equipment information.

**Equipment ID (Description)**

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

**Manufacturer ID**

**Manufacturer ID** displays the manufacturer identifier and the associated description for the specified piece of equipment.

**Model ID**

**Model ID** displays the model number and associated description for the specified piece of equipment.

**Serial Nbr**

**Serial Nbr** displays the serial number for the specified piece of equipment.

**Asset Nbr**

**Asset Nbr** displays the asset number for the specified piece of equipment.
Service Call ID
Service Call ID displays the service call number for the service call.

Call Date
Call Date displays the date the service call was received.

Service Technician
Service Technician displays the primary service technician assigned to the service call.

Call Type ID
Call Type ID displays the call type associated with the service call.

Call Status ID
Call Status ID displays the last call status associated with the service call.

Caller Name
Caller Name displays the name of the person who placed the service call.

Completed Date
Completed Date displays the date a service call was completed.

Completed Time
Completed Time displays the time a service call was completed.

Duration
Duration displays the length of time the service call was given. A call is either long or short.

Note: Currently all durations are shown as short term. The call type associated with a service call defines the duration.

Status
Status displays the handling status of the service call.

Order Nbr
Order Nbr displays the invoice/memo number of the invoice.

Order Amount
Order Amount displays the total invoice amount.
Equipment History (SE.012.00)

Equipment History (SE.012.00) displays the profitability for a piece of equipment based on services performed. Access this screen either from the Equipment Maintenance module menu or by clicking Profitability in Equipment Entry (SE.001.00).

Following are the field descriptions for Equipment History (SE.012.00).

Equipment ID

Equipment ID selects a piece of equipment for which a history is desired. If this screen is accessed from Equipment Entry (SE.001.00), this field is display-only and populated with the selected equipment information.

Equipment ID (Description)

Equipment ID (Description) displays an explanation of Equipment ID.

Branch ID

Branch ID contains the branch associated with the selected piece of equipment.

Branch ID (Description)

Branch ID (Description) contains the name of the branch.

Cal Year

Cal Year contains the calendar year for requested history information.

Net Sales

Net Sales displays the revenue associated with a piece of equipment.
Labor Cost

Labor Cost contains the cost of labor associated with maintaining a piece of equipment for a specific month. The labor cost is captured from details entered in Invoice - T & M Details (SD.203.00) and associated with Equipment ID. After the payroll process is run, the cost is displayed for the appropriate month. This is a display-only field.

Note: You must have the Payroll module installed. If the module is not installed, Other Costs contains both the labor and materials cost.

Other Costs

Other Costs displays the amount of non-labor costs associated with maintaining a piece of equipment for a specific month. Costs are captured from details entered in Invoice - T & M Details (SD.203.00) and associated with Equipment ID. After the service invoice process is run, costs are displayed for the appropriate month.

Note: All costs entered in Invoice - T & M Details (SD.203.00) appear as “other costs.”

Total Cost

Total Cost displays the total dollar amount associated with maintaining a piece of equipment for a specific month. Cost is calculated by adding Labor Cost and Other Costs.

Gross Margin

Gross Margin displays the gross margin for a piece of equipment for a specific month. This field is calculated by subtracting the total cost from the revenue.

Gross %

Gross % displays the percentage of gross margin earned for a piece of equipment for a specific month. This field is calculated by dividing the gross margin by the revenue.

Labor Hours

Labor Hours displays the number of hours worked on a specific piece of equipment.

OK (Button)

OK saves the information typed into Equipment History (SE.012.00).
Maintenance Screens

Equipment Setup Maintenance (SE.000.00)

*Equipment Setup Maintenance* (SE.000.00) enables you to track the last equipment ID used in *Equipment Entry* (SE.001.00).

![Equipment Setup Maintenance (SE.000.00)](image)

*Figure 40: Equipment Setup Maintenance (SE.000.00)*

Following are the field descriptions for *Equipment Setup Maintenance* (SE.000.00).

**Last Equipment ID**

*Last Equipment ID* is incremented by *Equipment Entry* (SE.001.00) if *Auto-Number Equipment ID* is selected. *Last Equipment ID* also can be edited here.

**Auto-Number Equipment ID**

*Auto-Number Equipment ID*, if selected, automatically increments *Last Equipment ID*.

**Auto-Number Branch Prefix**

*Auto-Number Branch Prefix* is available if *Auto-Number Equipment ID* is selected. Select *Auto-Number Branch Prefix* to replace the first three digits in the *Last Equipment ID* with the branch prefix.
PM Code Maintenance (SE.002.00)

*PM Code Maintenance* (SE.002.00) allows the creation of an unlimited number of user-defined preventive maintenance tasks associated or linked to a piece of equipment.

This screen allows you to define the general characteristics of a preventive maintenance task. This includes defining the preventive maintenance level and the frequency of preventive maintenance, which is based on either a calendar code or a usage code. It allows the association of a problem code and a call type for a preventive maintenance code. When a preventive maintenance record is created, the associated call type and problem code defaults to the generated service call (these fields can be overridden after the call has been generated).

Clicking **Model PM Details** enables the creation of model-specific preventive maintenance codes. For example, even though Mercedes and BMWs are both luxury automobiles with the same preventive maintenance requirements, they require different types of oil filters and parts to complete the same task. This screen provides the ability to handle such scenarios.

**Note:** The **Notes/Attachments** icon beside **PM Code** accepts notes and source documents related to a preventive maintenance code.

![PM Code Maintenance (SE.002.00)](image)

Following are the field descriptions for **PM Code Maintenance** (SE.002.00).

**PM Code**

**PM Code** is an unlimited number of user-specified codes used to identify a preventive maintenance task.

**PM Code (Description)**

**PM Code (Description)** contains the explanation of the **PM Code**.

**Call Type**

**Call Type** associates a call type to a preventive maintenance code. When a preventive maintenance request is generated into a service call, the associated call type defaults to the call generated.
Problem Code

Problem Code associates a problem code to a preventive maintenance code. When a preventive maintenance request is generated into a service call, the associated problem code defaults to the call generated.

Tech ID

Tech ID is a valid technician identifier. This ID is used to default on the preventive maintenance schedule in Service Contract Entry (SN.001.00).

Estimated Time

Estimated Time contains the length of time allocated to perform this specific preventive maintenance task. Estimated Time overrides the estimated time associated with the selected problem code.

PM Level

PM Level determines the precedence of multiple preventive maintenance codes that are scheduled for the same date. This eliminates the possibility of creating multiple preventive maintenance codes for the same piece of equipment on the same date. The higher the preventive maintenance level, the higher it is in the chain of precedence. For example, if a minor air conditioning service is made up of changing the air filters every three months and a major air conditioning service is made up of changing the air filters every six months, the preventive maintenance level prevents the system from creating two preventive maintenance calls. It creates the preventive maintenance call with the higher preventive maintenance level.

Calendar

Calendar indicates that the task is performed based on a calendar schedule.

Interval (Calendar)

Interval (Calendar) contains the interval between performing a task based on a calendar. The field to the right of Interval contains calendar codes from the Calendar Code PV List. The PV list displays the hard-coded calendar codes used to auto-generate preventive maintenance schedules for a piece of equipment.

Usage

Usage indicates that the task is performed based on a usage meter reading. For example, a particular task may be performed every 5,000 clicks.

Interval (Usage)

Interval (Usage) contains the usage interval between performing a task based on the usage of the equipment. The first field accepts a numeric value. The second field requests a unit measurement usage. Unlike calendar codes, usage codes are user-defined and do not have any coding or intelligence behind them. Therefore, the system cannot auto-generate a preventive maintenance schedule for a piece of equipment based on its usage.
**Detail Type**

**Detail Type** indicates the detail line type. Select from the following options:

- **Materials**: Indicates the inventory parts and materials needed to perform a preventive maintenance task. If selected, you may select an inventory item from the inventory list. Line items with this line type default to *Invoice - T & M Details* (SD.203.00) when the call is generated. When inventory items are added to service calls by *Generate PM Service Calls Process* (SE.300.00), the items are allocated in the Inventory module to prevent over allocation of the item by other transactions. Similarly, if an inventory item is over allocated when it is added to a service call, an event log message is generated to inform the user of the conflict.

- **Labor**: Indicates the labor needed to perform a preventive maintenance task. If selected, you may enter a labor inventory item from the inventory list. Line items with this line type default to *Invoice - T & M Details* (SD.203.00) when the call is generated.

- **Instructions**: Designates instructions needed to complete a preventive maintenance task. If this line type is selected, you cannot access the inventory list.

- **Comment**: Contains comments needed to complete a preventive maintenance task. If this line type is selected, you cannot access the inventory list.

**Season**

**Season** selects which task is to be completed for the season or combination of seasons. SP represents spring, SU is summer, F is fall, and W is winter.

**Inventory ID**

**Inventory ID** associates inventory IDs created in *Inventory Items* (10.250.00) in the Inventory module with a preventive maintenance task. This field is enabled if **Line Type** of Materials or Labor is selected.

**Note:** The selected inventory items default to *Invoice - T & M Details* (SD.203.00).

**Quantity**

**Quantity** is either the number of labor hours needed to complete a preventive maintenance task or the number of specific items needed to complete the task. **Quantity** is enabled only if **Line Type** of Materials or Labor is selected.

**Note:** The quantities entered default to *Invoice - T & M Details* (SD.203.00).

**Description**

**Description** is an explanation of the labor inventory item or parts inventory item if **Line Type** is Materials or Labor. If either Instructions or Comments is selected, you can type a 60-character free-form text message.

**Model PM Details (Button)**

**Model PM Details** accesses *PM Code - Model Details Maintenance* (SE.008.00) used to create model-specific preventive maintenance codes. The system accepts specific inventory parts needed to perform a preventive maintenance task and special instructions or comments specific to the model.
Equipment Type Maintenance (SE.003.00)

*Equipment Type Maintenance* (SE.003.00) groups similar pieces of equipment into a single equipment type. For example, several manufacturers may offer a product with similar operations or functions. You can define equipment groups or types and associate equipment models together. This screen also accepts a default age code for an equipment type.

![Figure 42: Equipment Type Maintenance (SE.003.00)](image)

Following are the field descriptions for *Equipment Type Maintenance* (SE.003.00).

**Equipment Type**

*Equipment Type* defines equipment groups or types and associates different equipment models together. For example, several manufacturers may offer a product with similar operations or functions.

**Description**

Description is an explanation of *Equipment Type*.

**Age Code**

*Age Code* contains the default age code for an equipment type. When a model is being created in *Manufacturer/Model Maintenance* (SE.006.00) and *Equipment Type* is selected, the age code associated with the equipment type defaults.

**Schedule Type**

*Schedule Type* is for informational purposes only.
Equipment Location Maintenance (SE.004.00)

*Equipment Location Maintenance* (SE.004.00) defines and creates a unique location code that identifies a location category for a specific piece of equipment. This code calculates the maintenance cost for a specific piece of equipment located in a place that requires special attention or resources. You may also enter a value in *Pricing % Factor*. This percentage is multiplied by the base price of the equipment, which increases the calculated amount of the contract.

![Figure 43: Equipment Location Maintenance (SE.004.00)](image)

Following are the field descriptions for *Equipment Location Maintenance* (SE.004.00).

**Location Code**

*Location Code* is a unique identifying code for creating a new location code.

**Description**

*Description* is an explanation of *Location Code* with a maximum of 30 characters.

**Pricing % Factor**

*Pricing % Factor* is a pricing factor percentage for use in populating the calculated price value in *Contract Equipment* (SN.001.05).
Manufacturer Maintenance (SE.005.00)

Manufacturer Maintenance (SE.005.00) contains general information about the manufacturer of the equipment to be maintained, including the manufacturer’s name, address, phone number, and fax number. You may also enter useful warranty information, including the length of the warranty and authorization for return.

![Manufacturer Maintenance (SE.005.00)](image)

Following are the field descriptions for Manufacturer Maintenance (SE.005.00).

**Manufacturer ID**

Manufacturer ID assigns a unique identifier to a manufacturer. Manufacturer ID is used to associate a manufacturer with a piece of equipment.

**Manufacturer ID (Description)**

Manufacturer ID (Description) contains the manufacturer’s name.

**Contact**

Contact contains the name of the primary contact for a manufacturer.

**Address**

Address contains the street address for the manufacturer. Two lines are available for input.

**City**

City contains the city where the manufacturer resides.

**State**

State contains the state where the manufacturer resides.

**Zip Code**

Zip Code contains the manufacturer’s zip code.

**Country/Region**

Country/Region contains the manufacturer’s country or region.
Phone #
Phone # contains the phone number of the manufacturer, including an extension for the contact.

Fax #
Fax # contains the fax number of the manufacturer.

Vendor ID
Vendor ID is a valid vendor identifier.

Authorization Required
Authorization Required indicates that warranty repair authorization is required from the manufacturer if the allotted amount entered in Authorization For Repair Over is exceeded.

Authorization For Repair Over
Authorization For Repair Over contains the maximum warranty repair amount that a piece of equipment may accumulate before the manufacturer needs authorization. Used if Authorization Required is checked.

RMA On Returns
RMA On Returns indicates that the manufacturer requires a return merchandise authorization prior to accepting any returned merchandise. This field is informational only and does not affect processing.

Labor Included
Labor Included indicates that the cost of labor is included for a piece of equipment under warranty. The length of the warranty labor coverage is entered in the fields below the check box.

Material Included
Material Included indicates that the cost of material is included for a piece of equipment under warranty. The length of the warranty material coverage is entered in the fields below the check box.
Manufacturer/Model Maintenance (SE.006.00)

*Manufacturer/Model Maintenance* (SE.006.00) links a model to a manufacturer and its related information. It also associates a model to an equipment type, age code, and a skill ID. By entering a default PM code, you attach preventive maintenance codes to a specific model. To auto-generate a preventive maintenance schedule for a piece of equipment, the default preventive maintenance code entered in this field is used. Warranty information for a specific model and information regarding the model's measurements including the height, width, depth, and weight are available from *Manufacturer/Model Maintenance* (SE.006.00).

The grid portion accepts contract types associated with a piece of equipment. For each contract type, link a base price to maintain a piece of equipment under a service contract.

![Manufacturer/Model Maintenance (SE.006.00)](image)

**Figure 45: Manufacturer/Model Maintenance (SE.006.00)**

Following are the field descriptions for *Manufacturer/Model Maintenance* (SE.006.00).

**Manufacturer ID**

*Manufacturer ID* contains the unique identifier for a manufacturer. This ID enables you to link a model to a manufacturer.

**Manufacturer ID (Description)**

*Manufacturer ID (Description)* contains the manufacturer's name.

**Model ID**

*Model ID* contains the model number assigned by the manufacturer, thus linking the model ID to the manufacturer ID.

**Model ID (Description)**

*Model ID (Description)* is a brief explanation of Model ID.
**Equipment Type**

*Equipment Type* associates the model with an equipment type created in *Equipment Type Maintenance* (SE.003.00).

**Equipment Type (Description)**

*Equipment Type (Description)* is an explanation of the equipment type.

**Age Code**

*Age Code* associates the model with an age code, which was created in the *Equipment Age Maintenance* (SE.010.00). Once the *Equipment Type* is selected, the age code, which was associated with the selected equipment type, defaults.

**Age Code (Description)**

*Age Code (Description)* is an explanation of the age code.

**Skill ID**

*Skill Code* associates a model with a skill identifier that was created in *Skill Maintenance* (SD.017.00).

**Skill ID (Description)**

*Skill Code (Description)* is an explanation of the skill ID.

**Default PM Code**

*Default PM Code* is a default preventive maintenance code that attaches a PM code to a specific model. To auto-generate a preventive maintenance schedule for a piece of equipment, use the default preventive maintenance code entered in this field.

**Default PM Code (Description)**

*Default PM Code (Description)* is an explanation of the preventive maintenance code.

**RMA Required**

*RMA Required*, if checked, indicates that the manufacturer requires a return merchandise authorization prior to accepting any returned merchandise for a specific model.

**Labor Included**

*Labor Included*, if checked, indicates that the cost of labor is included for a piece of equipment under warranty.

**(Labor) Duration**

*Duration* displays the length of the warranty labor coverage.

**Materials Included**

*Materials Included*, if checked, indicates that the cost of material is included for a piece of equipment under warranty.

**(Materials) Duration**

*Duration* displays the length of the warranty material coverage.

**Height**

*Height* contains the height for a specific model.
Width
Width contains the width for a specific model.

Depth
Depth contains the depth for a specific model.

Weight
Weight contains the weight for a specific model.

Contract Type ID
Contract Type ID links an unlimited number of contract type IDs to a model. When a service contract is created and a contract type is selected, the base price associated with the contract type defaults to Contract Equipment (SN.001.05).

Base Price
Base Price contains the base price for a specific contract type ID. The appropriate base price for a piece of equipment defaults to Contract Equipment (SN.001.05). Default base price is based on the model of the equipment and the service contract type associated with the service contract.

Description
Description is an explanation of the contract type identifier.
PM Code - Model Details Maintenance (SE.008.00)

PM Code - Model Details Maintenance (SE.008.00) contains model-specific information related to a preventive maintenance task to be performed. You can view and/or enter any parts and special instructions related to a specific model. This screen is accessed by clicking on Model PM Details from PM Code Maintenance (SE.002.00) or by selecting PM Code Model Details Maintenance in the Equipment Maintenance module menu.

When a model-specific preventive maintenance code is associated with a piece of equipment, the system displays the frequency and detail of the preventive maintenance code, as well as the model-specific preventive maintenance code information.

![Figure 46: PM Code - Model Details Maintenance (SE.008.00)](image)

Following are the field descriptions for PM Code - Model Details Maintenance (SE.008.00).

**PM Code**

PM Code contains a preventive maintenance identifier for the task to be performed. If PM Code - Model Details Maintenance (SE.008.00) is accessed using Model PM Details, PM Code is display-only and populated with the selected PM code.

**PM Code (Description)**

PM Code (Description) is an explanation of the preventive maintenance code.

**Manufacturer ID**

Manufacturer ID associates a manufacturer by a unique identifier created in Manufacturer Maintenance (SE.005.00) with a preventive maintenance code or task.

**Manufacturer ID (Description)**

Manufacturer ID (Description) contains the manufacturer’s name.

**Model ID**

Model ID associates a model by a unique identifier created in Manufacturer/Model Maintenance (SE.006.00) to a preventive maintenance code or task.

**Model ID (Description)**

Model ID (Description) contains the name of the model.
Estimated Time

**Estimated Time** contains the time allocated to perform this specific preventive maintenance task. The estimated time entered here overrides the estimated time associated with the selected fault code.

Calendar

**Calendar**, if checked, indicates that the task is performed based on a calendar schedule.

Interval (Calendar)

**Interval (Calendar)** contains the interval between performing a task based on a calendar. The field to the right of **Interval** contains calendar codes from the **Calendar Code PV List**. The PV list displays the hard-coded calendar codes used to auto-generate preventive maintenance schedules for a piece of equipment.

Usage

**Usage**, if checked, indicates that the task is performed based on a usage meter reading. For example, a particular task may be performed every 5,000 clicks.

Interval (Usage)

**Interval (Usage)** contains the usage interval between performing a task based on the usage of the equipment. The first field accepts a numeric value. The second field accepts a unit measurement usage code. Unlike calendar codes, usage codes are user-defined and do not have any coding or intelligence behind them. Therefore, the system cannot auto-generate a preventive maintenance schedule for a piece of equipment based on its usage.

Detail Type

**Detail Type** indicates the detail line type. Select from the following options:

- **Materials**: Indicates the inventory parts and materials needed to perform a preventive maintenance task. If selected, you may select an inventory item from the inventory list. Line items with this line type default to **Invoice - T & M Details (SD.203.00)** when the call is generated.
- **Labor**: Indicates the labor needed to perform a preventive maintenance task. If selected, you may enter a labor inventory item from the inventory list. Line items with this line type default to **Invoice - T & M Details (SD.203.00)** when the call is generated.
- **Instructions**: Designates instructions needed to complete a preventive maintenance task. If this line type is selected, you cannot access the inventory list.
- **Comment**: Contains comments needed to complete a preventive maintenance task. If this line type is selected, you cannot access the inventory list.

Inventory ID

**Inventory ID** associates inventory IDs, which are created in **Inventory Items (10.250.00)** in the Inventory module to a preventive maintenance task. This field is enabled only if a **Line Type** of Materials or Labor is selected.

**Note**: The selected inventory items default to **Invoice - T & M Details (SD.203.00)**. When quantity tracking inventory items (that is, not non-stocked items) are added to service calls by **Generate PM Service Calls Process (SE.300.00)**, the items are allocated in the Inventory module to prevent over allocation of the item by other transactions. Similarly, if an inventory item is over allocated when it is added to a service call, an event log message is generated to inform the user of the conflict.
Quantity

Quantity is either the number of labor hours needed to complete a preventive maintenance task or the number of specific items needed to complete a preventive maintenance task. This field is enabled only if a Line Type of Materials or Labor is selected.

Note: The quantities entered default to Invoice - T & M Details (SD.203.00).

Description

Description contains an explanation of the labor inventory item or parts inventory item if Line Type is Materials or Labor. If Instructions or Comments is selected, you can enter a 60-character free-form text message.
Usage Code Maintenance (SE.009.00)

*Usage Code Maintenance* (SE.009.00) creates interval usage codes. Unlike *Calendar Codes* (SE.007.00), these codes are all user-defined and cannot auto-generate preventive maintenance schedules. Interval codes are descriptive only and do not affect processing.

![Usage Code Maintenance (SE.009.00)](image)

Figure 47: Usage Code Maintenance (SE.009.00)

Following are the field descriptions for *Usage Code Maintenance* (SE.009.00).

**Interval Code**

*Interval Code* contains a unique interval code associated with the maintenance of a piece of equipment.

**Description**

*Description* contains a 30-character explanation of *Interval Code*.

**Schedule Tolerance**

*Schedule Tolerance* is a user-defined measurement associated with the *Interval Code*. For example, a vehicle should have an oil change every 3,500 miles may wait for 4,000 miles before the oil must be changed. Enter the difference (500 miles) in *Schedule Tolerance*. 

Equipment Age Maintenance (SE.010.00)

*Equipment Age Maintenance* (SE.010.00) accepts an unlimited number of age codes in the database. Age codes allow you to create a schedule of percentages over the base equipment maintenance, used to account for increasing maintenance costs for an aging piece of equipment. The age of the equipment is based on the year it was manufactured. This is entered in *Equipment Entry* (SE.001.00).

![Equipment Age Maintenance (SE.010.00)](image)

*Figure 48: Equipment Age Maintenance (SE.010.00)*

Following are the field descriptions for *Equipment Age Maintenance* (SE.010.00).

**Age Code**

*Age Code* is an unlimited number of user-specified codes, which may identify the percentage schedule, based on equipment age.

**Age Code (Description)**

*Age Code (Description)* contains an explanation of this age/percentage schedule.

**Age in Years**

*Age in Years* contains the starting age of the equipment when the percentage increase starts.

**Percent Increase**

*Percent Increase* contains the percentage increase. This is used when calculating the equipment price in a service contract.

**Description**

*Description* contains a 30-character explanation of the increase.
Process Screens

Generate PM Service Calls Process (SE.300.00)

Generate PM Service Calls Process (SE.300.00) generates service calls associated with preventive maintenance schedules. One piece of equipment may have many preventive maintenance tasks scheduled over many service contracts. The call type and problem code populate the service call from the preventive maintenance code. If more than one preventive maintenance code/task for any service call exists, the system uses the first call type.

**Note:** Starting and ending contract IDs and preventive maintenance starting and ending dates are required.

![Generate PM Service Calls Process (SE.300.00)](image)

*Figure 49: Generate PM Service Calls Process (SE.300.00)*

Following are the field descriptions for Generate PM Service Calls Process (SE.300.00).

**Contract ID - Starting/Ending**

*Contract ID - Starting/Ending* selects the range of contract IDs to process. Select the first and last contract IDs to ensure all contracts are processed.

**PM Date - Starting/Ending**

*PM Date - Starting/Ending* selects the range of preventive maintenance tasks to create in Service Call Entry (SD.200.00).
All Branches
All Branches, if selected, includes all branches in the process.

Branch ID
Branch ID generates preventive maintenance tasks for a single branch. The branch name displays next to Branch ID.

All Customers
All Customers, if selected, includes all customers in the process.

Customer
Customer generates preventive maintenance tasks for a selected customer or a range of customers. The name of the customer displays next to Customer.

All Contract Types
All Contract Types, if selected, includes all contract types in the process.

Contract Type ID
Contract Type ID generates preventive maintenance tasks for a selected contract type (also known as Agreement Type). An explanation of the contract type ID displays next to Contract Type ID.

All Geographic Zones
All Geographic Zones, if selected, includes all geographic zones in the process.

Geographic Zone ID
Geographic Zone ID generates preventive maintenance tasks for a selected geographic zone. An explanation of the geographic zone ID displays next to Geographic Zone ID.

Include Unscheduled PM Tasks
Include Unscheduled PM Tasks. if selected, includes tasks where Scheduled Date is blank on Service Contract - Equipment PM Schedule (SE.015.00).

Generate Call for Each PM Task
Generate Call for Each PM Task creates a service call for each line item of each service contract in a preventive maintenance task. If checked, Copy Equip ID to Customer PO is enabled.

Service Call Status
Service Call Status manages whether the service call is released to dispatch.

Note: Service Call Status should be set to Released.

Call Status ID
Call Status ID contains the valid call status identifier.

Note: Call Status ID should be set to the status defined as the starting point of a service call.

Line Type
Line Type contains the valid invoice line type identifier. Line Type defaults to Svc Contract when Generate PM Service Calls Process (SE.300.00) opens.

Note: Line Type should be set to the type defined as the starting point of an invoice for a service call.
Task Status

**Task Status** contains the valid task status identifier. **Task Status** defaults to Unassigned when *Generate PM Service Calls Process (SE.300.00)* opens.

**Note:** **Task Status** should be set to the status defined as the starting point of a service call task.

Copy Contract Notes to Service Call

**Copy Contract Notes to Service Call**, if selected, copies service contract ID notes to the service call ID note.

Generate Task Details

**Generate Task Details**, if selected, displays details in *Invoice - T & M Details (SD.203.00)* based on the items defined for the PM tasks. When quantity tracking inventory items (not non-stocked items) are added to service calls by *Generate PM Service Calls Process (SE.300.00)*, the items are allocated in the Inventory module to prevent over allocation of the item by other transactions. Similarly, if an inventory item is over allocated when it is added to a service call, an event log message is generated to inform the user of the conflict.

Copy Equip ID to Customer PO

**Copy Equip ID to Customer PO**, if selected, displays the equipment ID in **Customer PO** in the service call.

Copy User ID to Caller Name

**Copy User ID to Caller Name**, if selected, displays your user ID in **Caller Name** in the service call.

Begin Processing (Button)

**Begin Processing** generates PM service calls.

Cancel (Button)

**Cancel** closes the screen and ignores any changes made in *Generate PM Service Calls Process (SE.300.00)*.
Reports

Unscheduled PM Calls (SE.016.00)

The Unscheduled PM Calls (SE.016.00) report displays preventative maintenance (PM) tasks that have not been scheduled. Detail provided includes the customer ID, service site, contract ID, and contract expiration date. The suggested date and a description of each task are also provided. This list of unscheduled PM tasks corresponds to the equipment PM tasks that appear in Service Contract – Equipment PM Schedule (SE.015.00) that do not yet have a call generated. To schedule the PM tasks and remove the PM tasks from the report, use Generate PM Service Calls Process (SE.300.00).

![Figure 50: Unscheduled PM Calls (SE.016.00)](image)

Manufacturer Warranty Report (SE.400.00)

The Manufacturer Warranty Report (SE.400.00) report displays manufacturer’s warranties that apply to service calls that have a completed date within the date range specified. Detail provided includes the manufacturer ID and name, the model ID, the service call ID, and the cost. This information is based in part on entries in the Warranty Information section of the Manufacturer/Model Maintenance (SE.006.00) screen.

![Figure 51: Manufacturer Warranty Report (SE.400.00), T&M](image)
In-House Warranty Report (SE.401.00)

The In-House Warranty Report (SE.401.00) report displays in-house warranties that apply to service calls that have a completed date within the date range specified. Detail provided includes the model ID, the service call ID, and the cost.

![In-House Warranty Report (SE.401.00)](image1)

Figure 52: In-House Warranty Report (SE.401.00)

Scheduled PM Calls (SE.402.00)

The Scheduled PM Calls (SE.402.00) report displays a list of the scheduled PM tasks. Detail provided includes contact information for the customer, the contract ID and expiration date, the preventative maintenance code, and a description of the task.

![Scheduled PM Calls (SE.402.00)](image2)

Figure 53: Scheduled PM Calls (SE.402.00)

Calendar Code List (SE.600.00)

The Calendar Code List (SE.600.00) report displays the calendar codes that are available. The Description column provides an example of when a task would be scheduled with a specific calendar code. Calendar codes are defined by the system and cannot be added by the user.

![Calendar Code List (SE.600.00)](image3)

Figure 54: Calendar Code List (SE.600.00)
Equipment Information (SE.601.00)

The Equipment Information (SE.601.00) report displays detailed information for existing equipment. Key information includes equipment ID, status, customer/site, manufacturer, and model. Equipment can be added on Equipment Entry (SE.001.00).

Equipment Type List (SE.602.00)

The Equipment Type List (SE.602.00) report displays the existing equipment types. Key information includes equipment type, age code and schedule type. Equipment types are entered on Equipment Type Maintenance (SE.003.00).

Equipment Age Code List (SE.603.00)

The Equipment Age Code List (SE.603.00) report displays the existing age codes, description, age in years, and the associated increases. Equipment age codes are entered on Equipment Age Maintenance (SE.010.00).
Manufacturer & Warranty Information (SE.604.00)

The Manufacturer & Warranty (SE.604.00) report displays manufacturer contact information and warranty information. The warranty information indicates if materials and labor are covered and includes any authorization requirements. This information is entered in Manufacturer Maintenance (SE.005.00).

Figure 58: Manufacturer & Warranty Information (SE.604.00)

Manufacturer/Model Information (SE.605.00)

The Manufacturer/Model Information (SE.605.00) report provides a list of all models associated with a manufacturer and any required skills. The warranty and contract pricing information for that model are also included. Key information includes manufacturer, model, equipment type, and age code, as well as contract type and base price. This information can be entered on Manufacturer/Model Maintenance (SE.006.00).

Figure 59: Manufacturer/Model Information (SE.605.00)

PM Code List (SE.606.00)

The PM Code List (SE.606.00) displays existing preventive maintenance codes and associated detail. This detail includes call type, fault code, frequency of performance, and any labor or materials required for the completion of the preventative maintenance task. PM codes can be entered on PM Code Maintenance (SE.002.00).

Figure 60: PM Code List (SE.606.00)
PM Model Detail (SE.607.00)

The PM Model Detail (SE.607.00) report displays preventative maintenance information by PM code, manufacturer and model. Detail includes any labor or materials required for the completion of the maintenance task. Preventive maintenance requirements can be defined for a model on PM Code – Model Details Maintenance (SE.008.00).

![Figure 61: PM Model Detail (SE.607.00)](image)

Job / Warranty Service (SE.612.00)

The Job / Warranty Service (SE.612.00) report displays service calls in progress or quotes by call type and customer. Detail provided includes contact information for the customer, as well as the service call ID, total cost, and total revenue information for each call. Total cost and revenue values are provided by customer site.

![Figure 62: Job / Warranty Service (SE.612.00)](image)
Index

A

Accounts Payable Integration 37
Accounts Receivable Integration 36
Setup and Maintenance 36
Age Codes 27
Auto Numbering Key Identifier Codes 5
Auto-generating preventative maintenance schedules 105

B

Branch ID
overview 26
Branches
developing 9

C

Calendar Codes 27
Calendar Codes (SE.007.00) 77, 105
Call Status ID
overview 26
Call statuses
developing 10
Call Type ID
overview 26
Call types
developing 10
Cancellation Code Maintenance (SN.004.00) 41
required fields 73
Concepts
Age Codes 27
Calendar Codes 27
Equipment Maintenance 23
Equipment Type ID 24
Inventory ID 28
Location Codes 28
Manufacturer ID 23, 24
Model ID 24
PM Codes 23
Service Contract ID 24
Skill ID 28
Technicians 28
Usage Codes 27
Contract Escalation Maintenance (SN.005.00) 41
Contract Type Maintenance (SN.003.00) 41
Create contract escalation codes 41
Create default values 41
Create master contracts 41
Crystal Reports
Setup and Maintenance 37
Customer ID
overview 25

Customer Maintenance (08.260.00) 73
Customer Site ID
overview 26
Customers and customer sites
differences 11
Customization Manager
Setup and Maintenance 37
Customizations
Identifying 4

D

Define the Requirements 4
Defining preventative maintenance
tasks 112
Developing branches 9
Developing call statuses 10
Developing call types 10

E

Entering
age codes for increasing
maintenance costs 126
equipment information 89
interval usage codes 125
manufacturer information 117
manufacturer/model
information 119
model-specific preventative
maintenance information 122
Entering Equipment 63
Equipment
age codes for increasing
maintenance costs 126
customer-owned 89
customer-owned 89
contact information 94
customer-owned 89
enhancement information 97
genral information 89
grouping by location 116
grouping by type 115
purchase information 100
service call history 106
technician information 94
usage information 102
vehicle information 97
Equipment Age Codes (SE.010.00)
Required Fields 44
Equipment Age Maintenance
(SE.010.00) 126
Setup and Maintenance 42
Equipment Call History (SE.011.00) 79, 106
Equipment Entry 63
Equipment Entry (SE.001.00) 89
Attributes tab 97
General Info tab 89
Meter/Usage Info tab 102
Misc Info tab 94
Purchase Info tab 100
Required Fields 64, 79, 81
Equipment History (SE.012.00) 108
Equipment ID overview 23
Equipment Location Maintenance
(SE.004.00) 116
  Required Fields 46
  Setup and Maintenance 42
Equipment Maintenance
  concepts 23
  Setup and Maintenance 42
Equipment Maintenance Concepts
  Service Contract ID 24
Equipment profitability
  viewing 108
Equipment Setup Maintenance
(SE.000.00) 111
  Equipment Type ID 24
Equipment Type Maintenance
(SE.003.00) 115
  Required Fields 47
  Setup and Maintenance 42
  Establish Procedures 4

F
Field Service Management Series Task List
  Completion 4

G
General Ledger 14
  Integration 35
  Setup and Maintenance 35
Generate PM Service Calls Process
(SE.300.00) 83, 127
Grouping equipment by location 116
Grouping equipment by type 115

H
Hints and tips
  developing manufacturers 5
  developing models 6
  developing PM Codes 7
  Developing Problem Codes 8

I
Identifier codes key 5
Identification check list 14
Implementation hints and tips 5
Inquiry Screens 105
Integration
  Accounts Payable 37
  Payroll 37
Inventory ID 28

K
Key Identifier Codes
  Auto-numbering 5

L
Location Codes 28

M
Maintenance Screens 111
Manufacturer
  linking model information 119
Manufacturer ID 23, 24
Manufacturer information, viewing or entering 117
Manufacturer Maintenance (SE.005.00) 117
  Required Fields 53
Manufacturer/Model Maintenance
(SE.006.00) 119
  Required Fields 56
  Setup and Maintenance 43
Master Service Contract Maintenance
(SN.002.00) 41
Model
  developing 6
  linking to manufacturer 119
Model-specific preventative maintenance codes 112

N
New customers
  entering 73

P
Payroll integration 37
PM Code - Model Details Maintenance
(SE.008.00) 122
PM Code - Model Details Maintenance
(SE.008.00)
  Setup and Maintenance 43
PM Code Maintenance (SE.002.00) 112
  Required Fields 49
PM Code Maintenance (SE.008.00)
  Required Fields 59
PM Codes
  Concepts 23
  developing 7
Preventative maintenance
  defining tasks 112
  generating service calls 127
  model-specific codes 112
  model-specific information 122, 125
  problem codes 112
Preventative Maintenance Codes 23
Problem Code ID
  overview 27
Problem codes and preventative maintenance 112
Problem Codes, developing 8
Procedures
  Establishing 4
  Reviewing 4
Processes, generate PM service calls 83
Index

R
Requirements, defining 4
Review Procedures 4

S
Service Call ID 25
Service calls, generating 127
Service Contract ID 24
Service contracts
  entering new customers 73
  Setup and Maintenance 41
Service Contracts Set-up (SN.007.00) 41
Service Dispatch
  Reference and ID codes 25
  Setup and Maintenance 38
Set up cancellation codes 41
Set up contract types 41
Setting up Other Modules 35
Setup and Maintenance 35
  Accounts Receivable 36
  Crystal Reports 37
  Customization Manager 37
  General Ledger 35
  service contracts 41
  Service Dispatch 38
  Shared Information 38
  System Manager 36
Shared Information set up 35
Skill ID 28
System Manager setup and maintenance 36

T
Technician 28
Technician information 94

U
Usage Code Maintenance (SE.009.00)
  Required Fields 48
  Setup and Maintenance 42
Usage Codes 27
Usage information 102
Usage Maintenance (SE.009.00) 125
User guide overview
  what is covered 3
  who should use 3

V
Vehicle information 97
Viewing
  age codes for increasing maintenance costs 126
  equipment information 89
  equipment profitability 108
  interval usage codes 125

Purchase equipment information 100
manufacturer information 117
manufacturer/model information 119
model-specific preventative maintenance information 122
options for maintenance schedules 105
service call history 106