

Chapter 3.05: Equipment Movement on the Desktop

Overview

This chapter will guide you through the process of moving equipment from location to location on the desktop in Route Manager.

There are four primary options available for moving equipment:

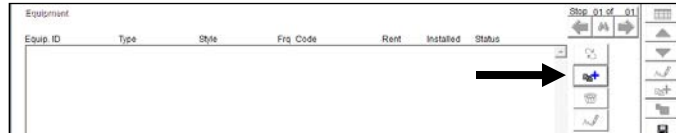
- ▶ Installing
- ▶ Pickup
- ▶ Exchange
- ▶ Warehouse Movement

All of these items are discussed within this chapter.

Installing Equipment

Follow the steps below to assign equipment on a customer's account:

1. Navigate to *Lists > Customer Information*, and select the *Equipment* tab.
2. Click **Modify** on the toolbar.
3. Select the **Add** button next to the *Equipment* area of the screen.



4. Select the serial number of the equipment you wish to install from the drop-down list, and click the **OK** button.

Equip. ID	Type	Freq	Chrg. C
00521014		On Truck	
0110	C	Warehouse	
0113	C	On Truck	
0117	C	Warehouse	
0120	C	Warehouse	
0121	C	Warehouse	
0122	C	Warehouse	
0128	C	Warehouse	
0129	C	Warehouse	
0130	C	Warehouse	
0132	C	Warehouse	
0133	C	Warehouse	

NOTE: If you select a piece of equipment that is already installed at another location, you will be prompted to either remove the equipment or swap between accounts. To do this, check the 'Allow installed equipment to be re-assigned' option available under *Branch Setup*, on the *Equipment* tab.

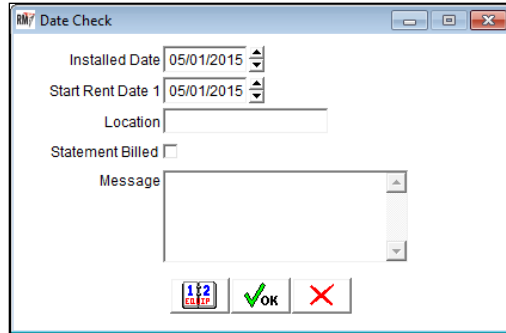
5. Select the billing frequency and rental code.

NOTE: The frequency is how often a rent will be billed on the current piece of equipment (e.g., 'M' for Monthly). The rental code is any *Product Class* '4' item in the program.

6. Input the amount of rent to be charged on each billing cycle, as shown below:

Equip. ID	Type	Freq	Chrg. Code	Rent
0120	01	M	401	24.99

7. Click the **OK** button.
8. Enter the date the equipment was installed.



9. Enter the dates you wish to start charging rent and click the **OK** button.

NOTE: If you are not prorating rents you will need to set the *Start Rent Date* to the first day of the billing period you would like to start rent on (i.e., the first day of the current month).

10. Click the **Save** option on the account.

Pick up Equipment

Follow the steps below to remove equipment from a customer's account:

1. Navigate to *Lists > Customer Information*, and select the *Equipment* tab.
2. Pull up the account that requires an equipment pick up.
3. Select the **Modify** button.
4. Click on the piece of equipment that you wish to remove:

Equip ID	Type	Style	Frq Code	Rent	Installed	Status
0121	CROCK	Blue Stripe	M 401	24.99	05/01/2015	

5. Click the  *Delete* key on the toolbar.

Equip ID	Type	Style	Frq Code	Rent	Installed	Status
0121	CROCK	Blue Stripe	M 401	24.99	05/01/2015	

6. Enter the date you picked up the equipment, enter an optional note, and click the **OK** button.

RMV Pickup Date

Date to be used

Comment

7. Click the **Save** option on the account.

Exchanging Equipment

Follow the steps below to exchange (swap) equipment on a customer's account.

1. Navigate to *Lists > Customer Information*, and select the *Equipment* tab.
2. Pull up the account that requires an equipment exchange.
3. Choose the **Modify** button on the account.
4. Click on the serial number that will be exchanged.

Equip. ID	Type	Style	Frq. Code	Rent	Installed	Status
0121	CROCK	Blue Stripe	M 401	24.99	05/01/2015	

5. Click on the  *Exchange* key.

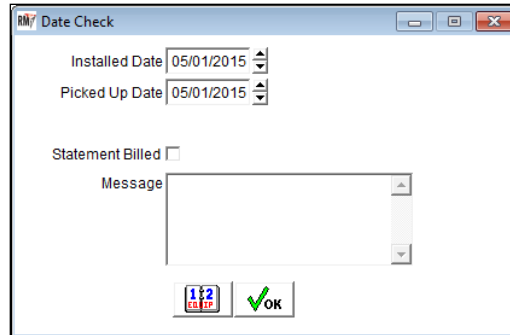
Equip. ID	Type	Style	Frq. Code	Rent	Installed	Status
0121	CROCK	Blue Stripe	M 401	24.99	05/01/2015	

6. Enter, or select from the drop-down list, the serial number of the equipment you wish to install and click **OK**.

Equip. ID	Type	Freq	Chrg. Code	Rent
0130	01	M	401	20.00

NOTE: The *Frequency*, *Charge Code*, and *Rent* do not change on an exchange. With an exchange, only the *Equipment ID* and *Type/Style* is updated.

7. Input the *Installed* and *Picked Up* dates on the *Date Check* screen, and click **OK**.



RM Date Check

Installed Date 05/01/2015

Picked Up Date 05/01/2015

Statement Billed

Message

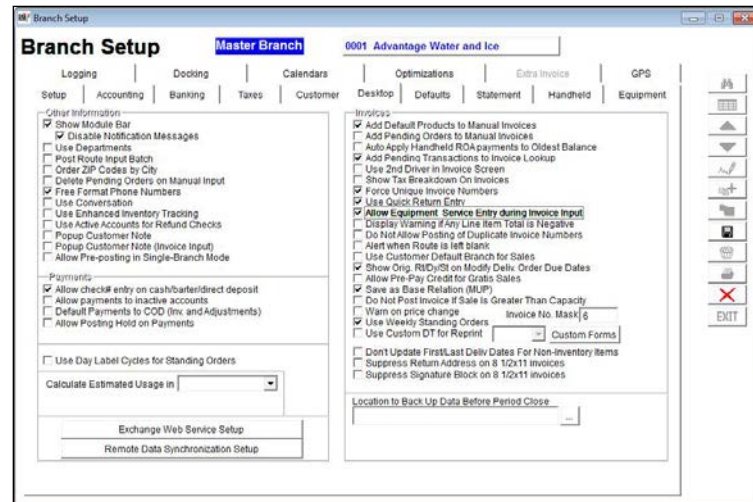
Help OK


8. Click the **Save** button on the customer's account.

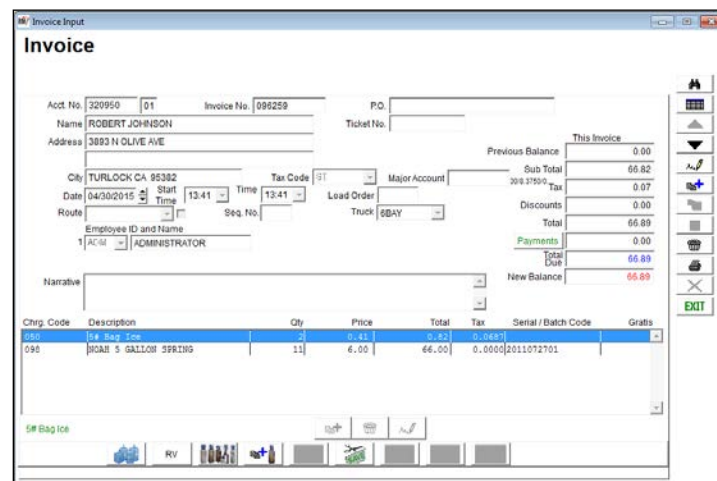
Update Equipment (Invoices and Adjustments)

The optional 'Update Equipment' feature on the *Invoices and Adjustments* screen can be used to update equipment information while entering invoice data in the program.

To enable this feature, go to *File > Branch Setup > Desktop*, and choose 'Allow Equipment Service Entry during Invoice Input'.



The new  *Update Equipment* option will now be available on the bottom of the invoice screen:

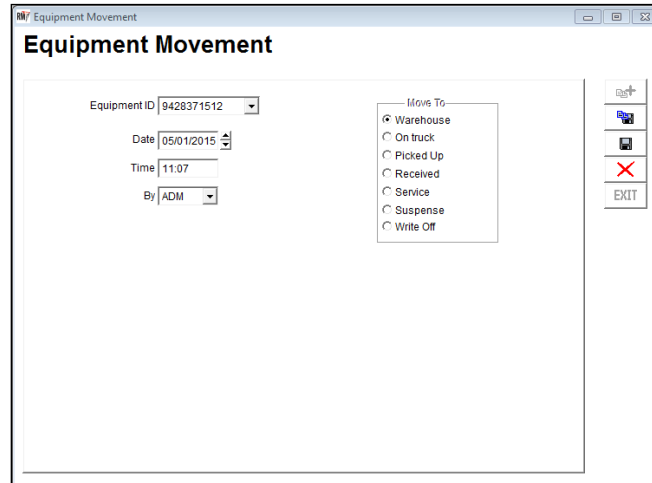


Equipment exchanges, installations, and pickups can be completed using this option and follow the same procedures that have been discussed in previous sections.

Warehouse Movement

There are times when you may need to move equipment around internally in the system. The *Equipment Movement* option allows you to manually move equipment from one location to another; for example, this is helpful for moving equipment from a 'Service' location back to the 'Warehouse'.

1. Navigate to *Modules > Equipment Processing > Equipment Movement*.



2. Click the **Add** key.
3. Select the equipment to be moved from the dropdown list.
4. Enter the date the equipment is/was moved.
5. Enter the time the equipment is/was moved.
6. Select the employee that is completing the transfer.
7. In the 'Move To' field, select the new location for the equipment:
 - ▶ Warehouse
 - ▶ On Truck
 - ▶ Picked Up
 - ▶ Received
 - ▶ Service
 - ▶ Suspense

NOTE: If you select a piece of equipment that is installed, the program will display a warning message.

8. Click the **Save** button if this is the only piece of equipment you want to move, or click the **More** button to transfer another.

Summary

The equipment movement options available on the desktop give you the tools needed to properly maintain and track your equipment. If you have any further questions or concerns, please contact Advantage Route Systems.

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Advantage Route Systems, Inc.

3201 Liberty Square Parkway

Turlock, CA 95380 USA

Phone: 1.209.632.1122

Web Site: www.AdvantageRS.com

Email: info@AdvantageRS.com

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Series 7: Version Date, June 5, 2015