

Chapter 3.14: Equipment Service

Overview

Equipment servicing plays an important role in providing excellent customer service to your customers. This chapter covers all of the equipment service options in detail.

The basic steps to this process are as follows:

1. Set up your *Equipment Service Codes*.
2. Set up equipment service schedules for each piece of equipment.
3. Run equipment service reports to indicate *Service Orders*.
4. Generate *Equipment Service Orders*.
5. Enter *Equipment Service Codes*.
6. Upload or apply the information on the desktop.

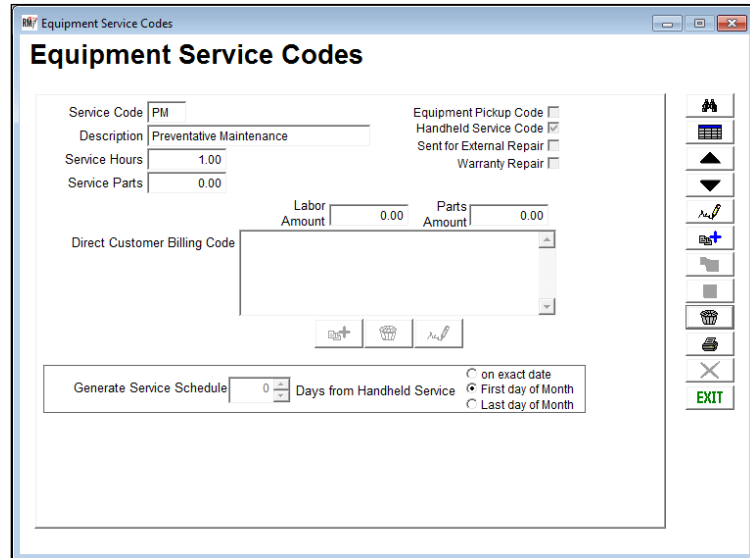
This is useful if you do filtration service or other planned, recurring services to equipment owned by you or your customer.

The system has been designed to work with handheld computers or paper tickets.

Equipment Service Code Setup

Equipment Service Codes are used to schedule cleaning, repairs, and maintenance on installed equipment. The *Equipment Service Codes* option can be found under *Lists > Equipment*.

The *Equipment Service Codes* screen allows you to set up individual codes for any “servicing” options required (i.e., *Cleaning, Filter Change, or Maintenance*).



Fields:

Service Code: The equipment service code ID (up to three characters).

Description: A description that corresponds to the service code.

Service Hours: The number of hours required to perform the indicated service.

Service Parts \$: The cost of all parts necessary to perform the service.

Equipment Pickup Code: Selecting this option will allow this code to be used by route drivers each time they pick-up a unit.

Handheld Service Code: Selecting this option will allow this code to be used on the handheld (recommended).

Sent for External Repair: Select this option when equipment will be repaired by a third party.

Warranty Repair: Check this box if this service code is covered under warranty.

Labor Amount: Enter any labor charges associated with the service code.

Parts Amount: Enter any parts cost associated with this service code.

Direct Customer Billing Code: If you would like to bill the customer directly for parts or labor, a *Product Charge Code* can be added here and will automatically be added to the customer's invoice when service is scheduled through the *Delivery Orders* screen.

Generate Service Schedule [] Days from Handheld Service: To support recurring service needs, this option will automatically schedule another service day for the equipment according to the number of days entered here.

NOTE: The service code will automatically repeat each time the previous service is completed and posted on the desktop.

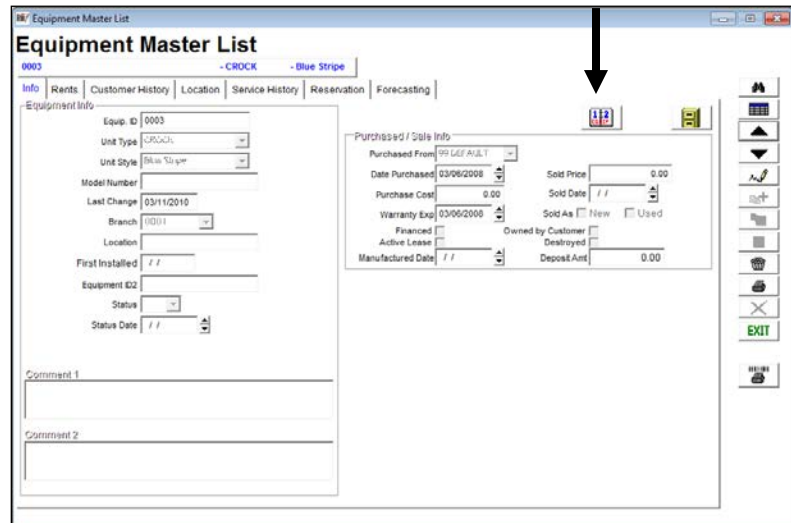
This last field is helpful if you do a service on a fixed timeframe such as once a quarter, every six months, or once a year. This value is always entered in days:

- ▶ 90 days = once a quarter
- ▶ 180 days = twice a year
- ▶ 360 days = every year
- ▶ 720 days = every two years

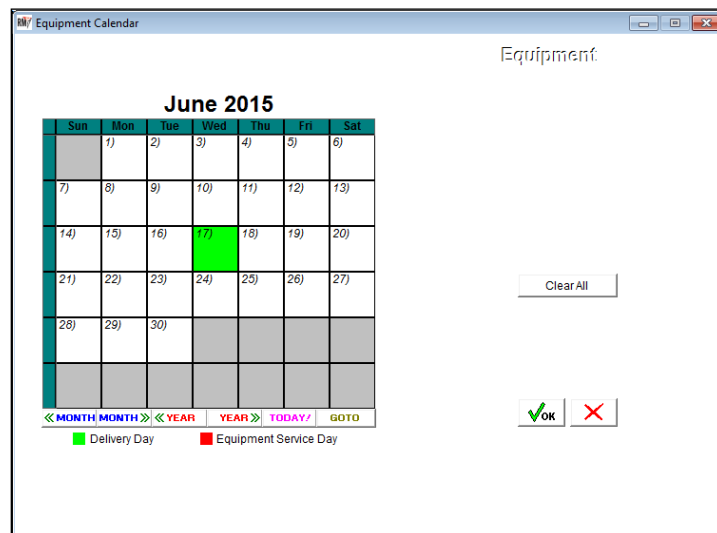
This will establish a pattern so that the service will be automatically repeated.

Equipment Service Schedules

Once you have created your *Equipment Service Codes*, you need to assign them to the *Equipment Service Calendar*. Go to *Lists > Equipment > Master List*. Select a piece of equipment for service (Equipment Master List) and click on the small calendar button on the top-right portion of the screen.

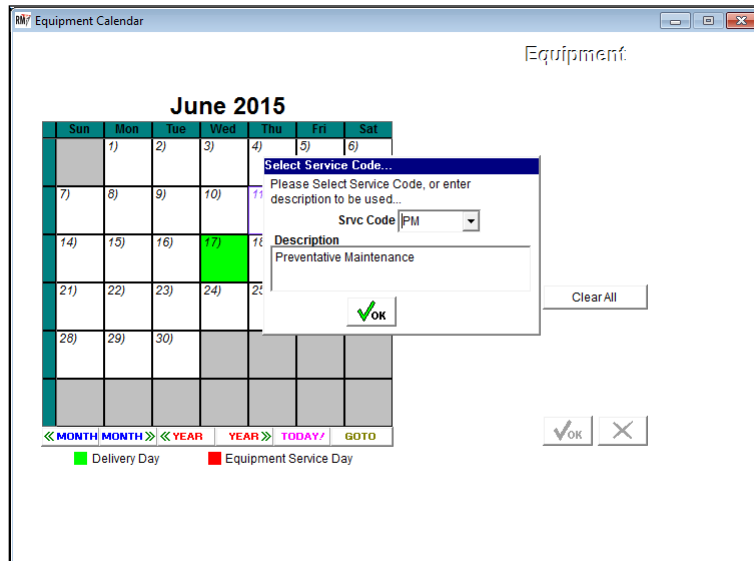


Click directly on the day that you would like to schedule service.

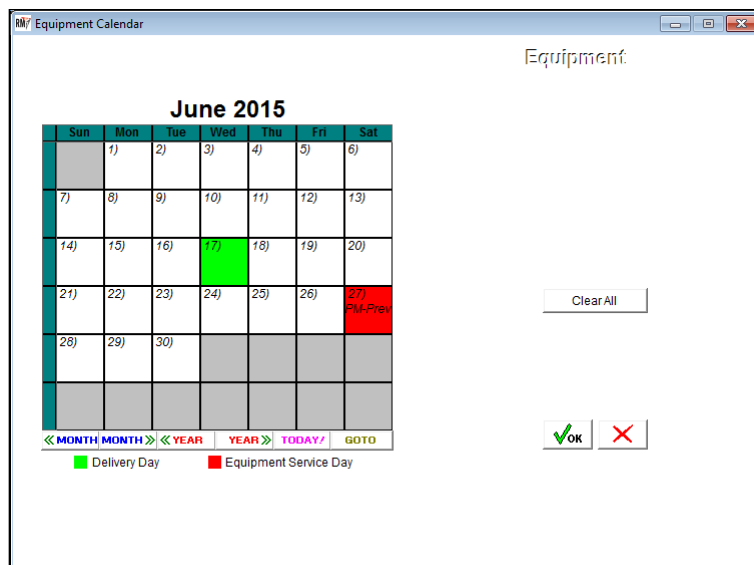


NOTE: The customer's regularly scheduled delivery day is highlighted green. If you coincide the service day with the delivery day, the driver will be prompted to perform the service.

The *Select Service Code* screen will be displayed. This screen allows you to select a service code and enter a detailed description.



Click **OK**. The service day will now be highlighted in red.

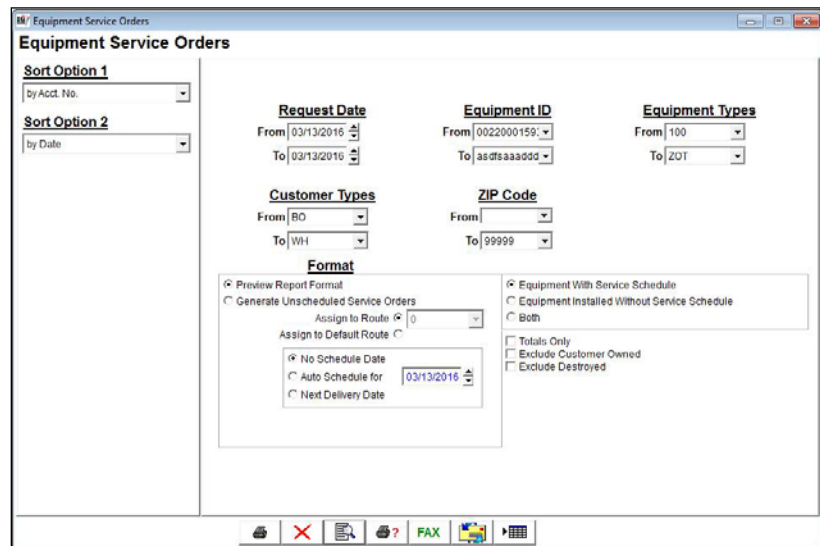


There can be more than one entry on the calendar at once if required. Click **OK** to exit the screen and repeat this process. However, it is not necessary to have two entries representing two successive services. If you set the service date to automatically generate every 'xxx' days, then a new date will appear on the calendar once the first service is performed. You may want to select two dates if you are doing two types of service. For example, you may change a filter once a year, but do a safety inspection every quarter on this piece of equipment.

Equipment Service Orders Report

The primary function of this report is to provide equipment, account, and service code information for customers that have a service day scheduled. It can also be used to create *Delivery Orders* when using the handheld (or paper tickets) to fulfill your service calls.

This report is found under *Reports > Equipment > Equipment Service Orders*.



The screenshot shows the 'Equipment Service Orders' report interface. It includes several filter sections: 'Sort Option 1' (by Acct. No.), 'Sort Option 2' (by Date), 'Request Date' (From: 03/13/2016, To: 03/13/2016), 'Equipment ID' (From: 0022000159, To: asdfsaaaadd), 'Equipment Types' (From: 100, To: ZOT), 'Customer Types' (From: BO, To: WH), and 'ZIP Code' (From: , To: 99999). There is also a 'Format' section with options for 'Preview Report Format', 'Generate Unscheduled Service Orders', and 'Assign to Route' (set to 0). Other options include 'No Schedule Date', 'Auto Schedule for' (03/13/2016), 'Next Delivery Date', 'Equipment With Service Schedule', 'Equipment Installed Without Service Schedule', 'Both', 'Totals Only', 'Exclude Customer Owned', and 'Exclude Destroyed'.

NOTE: To create *Delivery Orders* for the criteria entered, choose the option 'Generate Unscheduled Service Orders' and select the 'Assign to Route' option; enter the route and date the order(s) should be assigned to (or leave it on 'Default'), and once you select *Print* or *Preview*, the orders will be generated.

Processing Equipment Service Orders

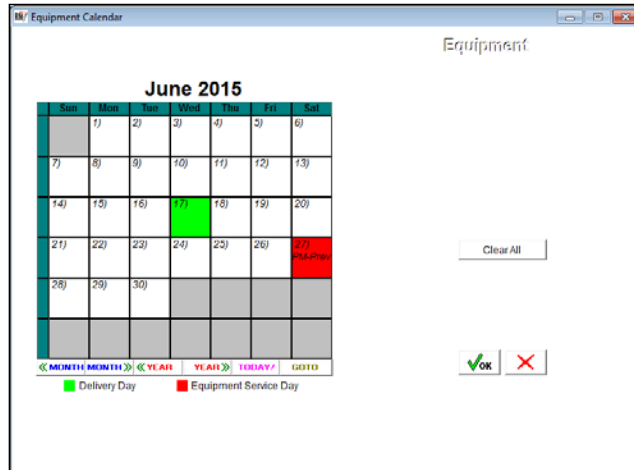
After you have assigned your service codes to the *Equipment Service Calendar*, the *Service Orders* can be entered and processed. Read through this section carefully to assess which option works best for your company.

Equipment Service Orders – Handheld

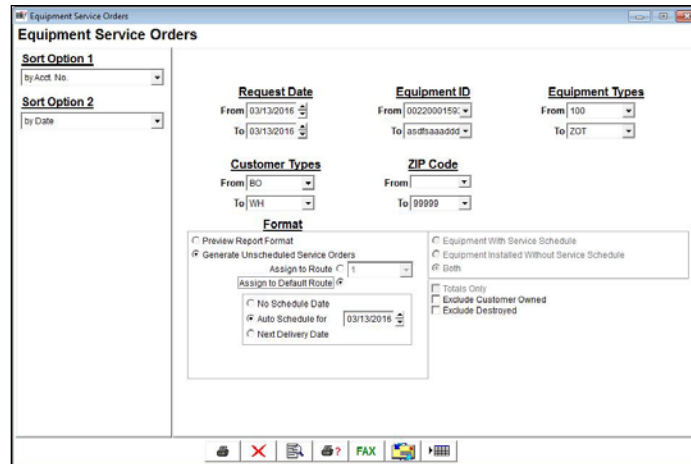
Scheduling *Service Orders* on the handheld can be accomplished using multiple methods:

Schedule the order on the customer’s delivery day – the order will pop-up as an *Alert Message* on the handheld.

The customer below has a delivery and service day scheduled for the 27th of June.

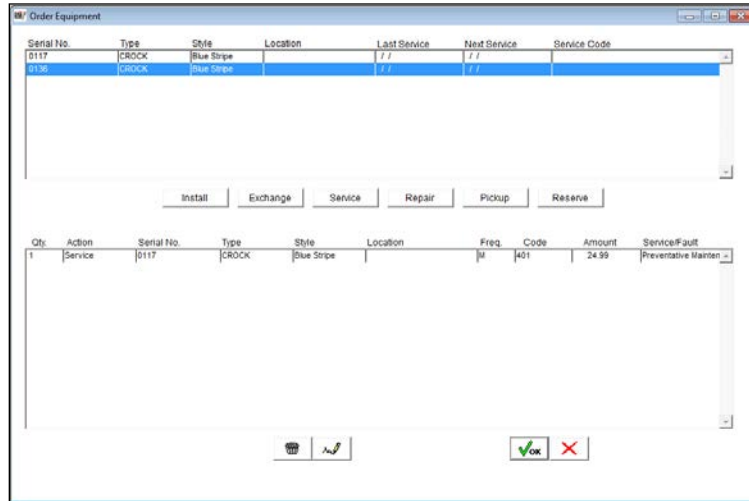


Generate a *Delivery Order* for the scheduled service day – generate a *Delivery Order* using the *Equipment Service Orders Report*.



1. Browse to *Reports > Equipment > Equipment Service Orders*.
 2. Enter your *Service Order* criteria.
 3. Choose the *Generate Unscheduled Service Orders* option.
 4. Enter the route and date the order(s) should be assigned to (or leave it on 'Default').
 5. Choose *Preview* or *Print*.
 6. *Delivery Orders* are created and scheduled on the accounts that qualify.
- Once you have orders in the system, you can use a variety of tools to schedule them to the best service technician. These tools include:
1. Route Dispatch Manager (RDM)
 2. Modify Order Due Dates (MODD)

Create a *Delivery Order* manually – Create a *Delivery Order* with an assigned *Equipment Service Code*.



The screenshot shows a software window titled "Order Equipment". It contains two main tables and a set of action buttons.

Serial No.	Type	Style	Location	Last Service	Next Service	Service Code
0117	CROCK	Blue Stripe		1/1	1/1	
0136	CROCK	Blue Stripe		1/1	1/1	

Buttons: Install, Exchange, Service, Repair, Pickup, Reserve

Qty	Action	Serial No.	Type	Style	Location	Freq.	Code	Amount	Service/Fault
1	Service	0117	CROCK	Blue Stripe		M	401	24.99	Preventative Mainten

Buttons: [OK] [X]

1. Select the customer requiring service.
2. Create a new *Delivery Order* for the customer.
3. Click on the *Equipment* area of the *Delivery Order* screen.
4. Select the *Service* option.
5. Choose the serial number to service.
6. Input an *Equipment Service Code*.
7. Click *OK*.
8. Schedule the *Delivery Order* as normal.
The order will be sent to the handheld.

Affect on the Handheld Screen

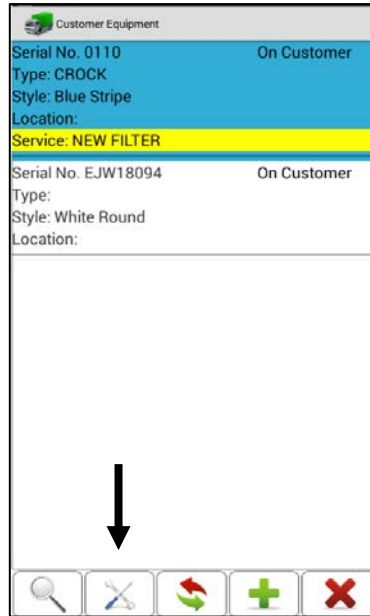
An *Alert Message* will be passed to the handheld with a description of the service to perform:



The *Service Code* entry on the handheld is done from within the **E** *Equipment* option on the invoice screen:



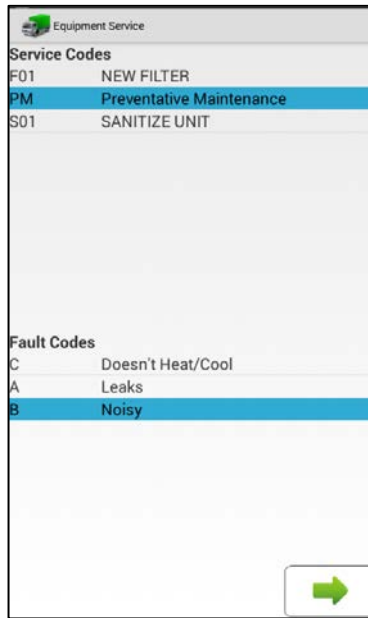
1. Highlight the correct serial number and select the **Service** option on the *Change Equipment* screen.



2. Select the *Add* option and choose the correct *Service Code*.



3. Choose any applicable *Fault Codes* (if necessary) and tap the *green arrow* to *Continue*.



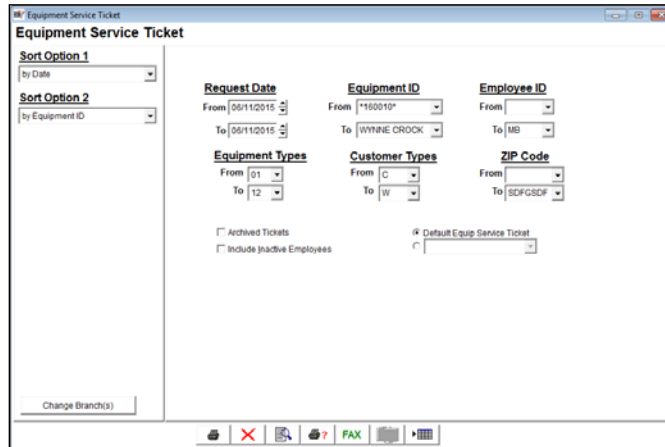
4. Exit the screen to complete the service.

NOTE: In order for *Service Codes* to be entered on the handheld, the option 'Handheld Service Code' must be checked within *Lists > Equipment > Equipment Service Codes*.

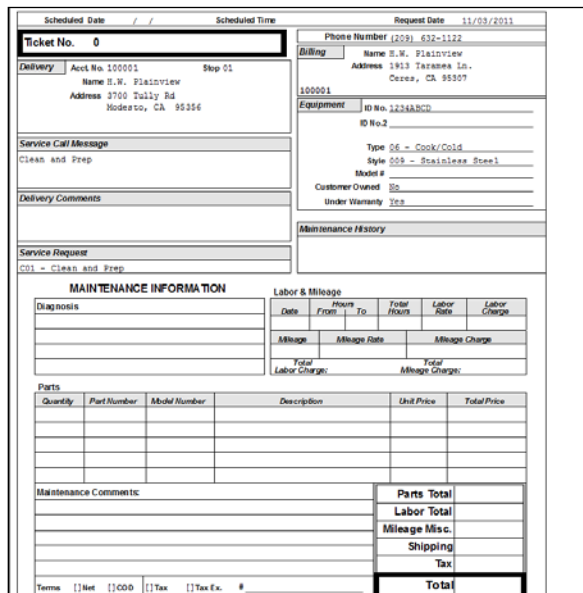
Equipment Service Orders – Desktop

Service tickets can be printed and distributed to your service technicians should you choose to do them on paper.

Navigate to *Reports > Equipment > Equipment Service Ticket*.



Enter your desired criteria and select *Print*. The printed *Service Ticket* will resemble the following:



Diagnosis	Date	From	To	Hours	Total Hours	Labor Rate	Labor Charge

Mileage	Mileage Rate	Mileage Charge

Quantity	Part Number	Model Number	Description	Unit Price	Total Price

Parts Total	
Labor Total	
Mileage Misc.	
Shipping	
Tax	
Total	

Along with the type of service to perform, the form also leaves adequate writing room for the service technician.

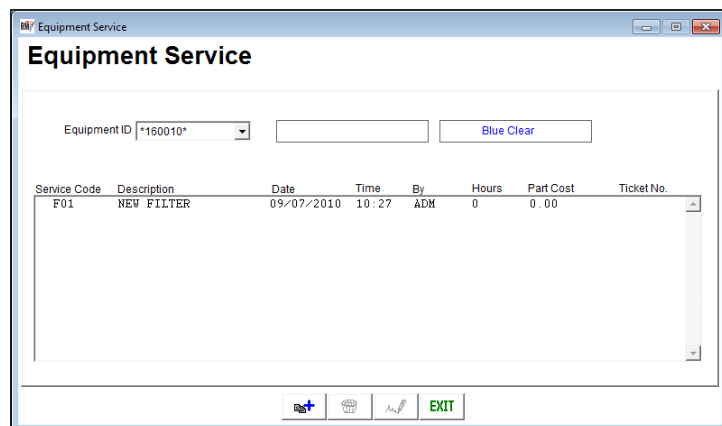
NOTE: Entries for *Service Tickets* can be found under *Transactions > Equipment Processing > Equipment Service Call*. The information on the existing ticket can be modified from this location.

Completing Equipment Service Orders

Service Orders processed on the handheld are automatically completed upon upload. When you are processing *Equipment Service Tickets* (on paper) you can use one of two options within the program to complete the orders.

Equipment Service (Desktop)

The *Equipment Service* screen is used for inputting *Service Codes* on the desktop. This option can be found under *Modules > Equipment Processing > Equipment Service*.



Service Code	Description	Date	Time	By	Hours	Part Cost	Ticket No.
F01	NEW FILTER	09/07/2010	10:27	ADM	0	0.00	

Follow these steps to successfully enter a *Service Code* on a piece of equipment:

1. Input or select a serial number in the *Equipment ID* field.


Click the **Add**  key.

2. Enter the *Service Code*.
3. Enter the printed *Service Ticket Number* (if one is being used).

NOTE: Service tickets are printed and distributed from Transactions > Equipment Processing > Equipment Service Ticket.

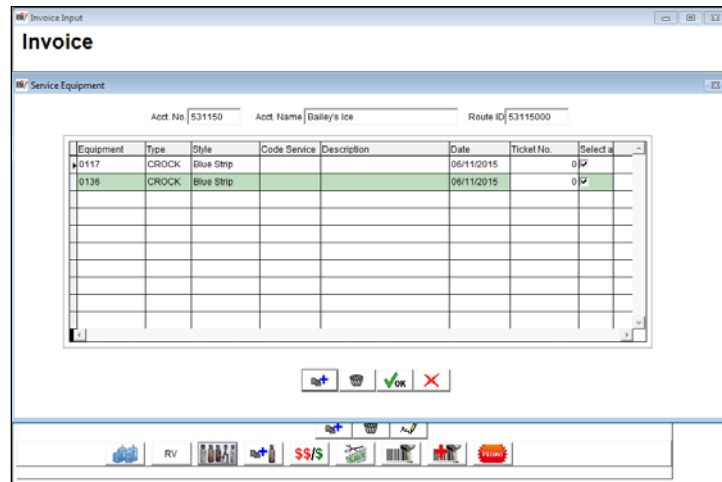
4. Enter any *Reported Fault* and *Actual Fault* information applicable.

NOTE: Faults are optional and can be added to the *Equipment Service Codes* list; these items generally represent a reason there may be a problem that requires service (e.g., *Broken Spigot, Faulty Hardware*).


5. Enter any comments you would like to attach to the service.
6. Click the **Save**  key.
7. Exit the screen.

Equipment Service – Invoices and Adjustments (Optional)

When you are entering an invoice on the desktop through the *Invoices and Adjustments* screen, you can also enter equipment service detail.



Equipment	Type	Style	Code Service	Description	Date	Ticket No.	Select all
0117	CROCK	Blue Strip			06/11/2015	0	<input checked="" type="checkbox"/>
0138	CROCK	Blue Strip			06/11/2015	0	<input checked="" type="checkbox"/>

1. Browse to *Transactions > Invoices and Adjustments*.
2. Choose the *Add* key to create a new invoice.
3. Select the *Equipment Service*  icon on the bottom of the invoice.

NOTE: If this option is not visible, select the option 'Allow Equipment Service Entry during Invoice Input' under *File > Branch Setup > Desktop* tab.

4. Enter a *Service Code* on the serial number being serviced (choose *Add* if more than one service code needs to be entered).
5. Enter a *Ticket Number* if you are entering the information from a *Service Ticket*.

NOTE: Service tickets are printed and distributed from *Transactions > Equipment Processing > Equipment Service Ticket*.

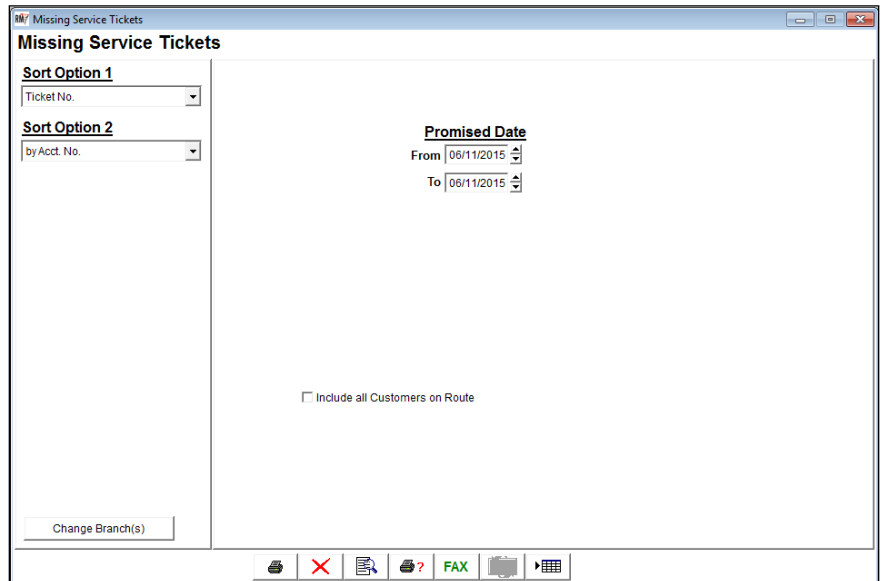
6. Click *OK* and complete the invoice as normal.

NOTE: The next scheduled equipment service date will not be updated until the invoice with the equipment service is posted to the account.

Missing Service Tickets

The *Missing Service Tickets* provides you with a list of equipment service tickets that have been processed but not entered into the program.

Navigate to *Reports > Equipment > Missing Service Tickets*.



Enter the *Promised Date* criteria and you will be provided with a list of tickets that have not been completed or may have been overlooked.

Equipment Service Tips

Equipment Service Ticket Numbers are generated from *File > Branch Setup > Equipment* tab and can be updated.

Equipment Service Ticket Numbers are not used when you schedule a service option from the *Delivery Order* screen.

Be sure to select the option 'Handheld Service Code' within the *Equipment Service Codes* screen in order to make them available on the handheld.

Summary

The *Equipment Service* features in Route Manager are part of an already robust equipment management system in Route Manager designed to work for you. If you have any questions regarding this feature or its usage, please contact Advantage Route Systems.

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