ServiceLedger Getting Started Guides

Getting Started with the Equipment Manager

The Equipment Manager allows you to track the equipment assets of your customers and track equipment service history, preventative maintenance schedules, meter billing and more. Equipment is any item you sell or service for your customers where you need to track specific information about the equipment.

Note: While you can sell equipment to your customers, the Equipment Manager will allow you to enter existing equipment items for your customers that may have been sold by another party.

Creating Equipment Items:

Equipment Items are the items you define in your **Item List** that you will sell to your customers. When you create an equipment item, you are only creating the item with its related price and costs associated with the item, plus any additional item information you want to track.

Note: If you have any items that you sell or service and plan on creating equipment records for your customers when you sell the item, the item must be setup as equipment items with the Item Type = Equipment. Equipment items are special items that flags ServiceLedger that they will be associated with equipment records. Only equipment items can be associated with equipment records.

Click on **Inventory | Items** to open the **Item List** to view existing items.

Click on the ⊞ **Add New Record** button to add a new item.
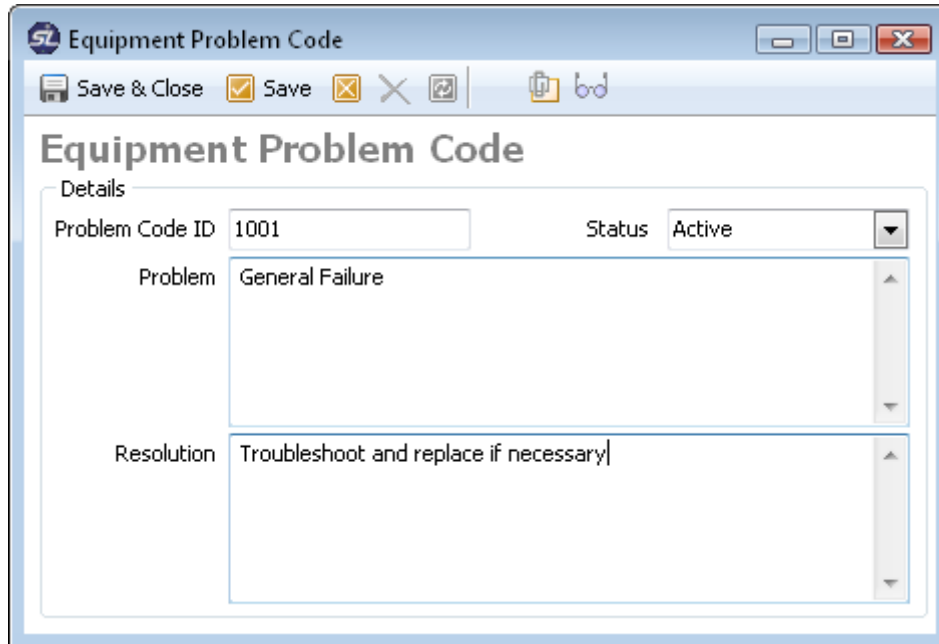
1. For equipment items, the **Item Type** must be **Equipment**.
2. Enter a unique **Item ID** for the item.
3. Enter a **Description** for the item.
4. Enter a **Price** for the item.
5. Enter a **Cost** for the item.
6. If the item is taxable, leave the **Taxable** checkbox checked.
7. Enter a **Warranty Period** for the item. Warranty period is in days; i.e. one year would be 365 days.
8. If necessary, enter any information you want, such as **Equipment Type**, **Manufacturer**, or **Model** under the Manufacturer tab. This information will show on any equipment you create using this item in the future.
9. Enter any additional information on the item you wish to record.
10. Click **Save & Close** button to save the item.

Creating Problem Codes

ServiceLedger allows you to build a knowledgebase of problem codes related to equipment to help expedite future service requests. Problem codes allow you to store the problem and resolution for quick response on future service requests. You can add problem codes in advance, or create them on-the-fly as needed.

Click on **Equipment** | **Equipment Admin** | **Problem Codes** to open the **Problem Code List** to view existing problem codes in your system.

Click the ⊞ **Add New Record** button to add a new problem code.

1. Enter a unique **Problem Code ID** for the problem code.
2. Enter the **Problem** for the problem code.
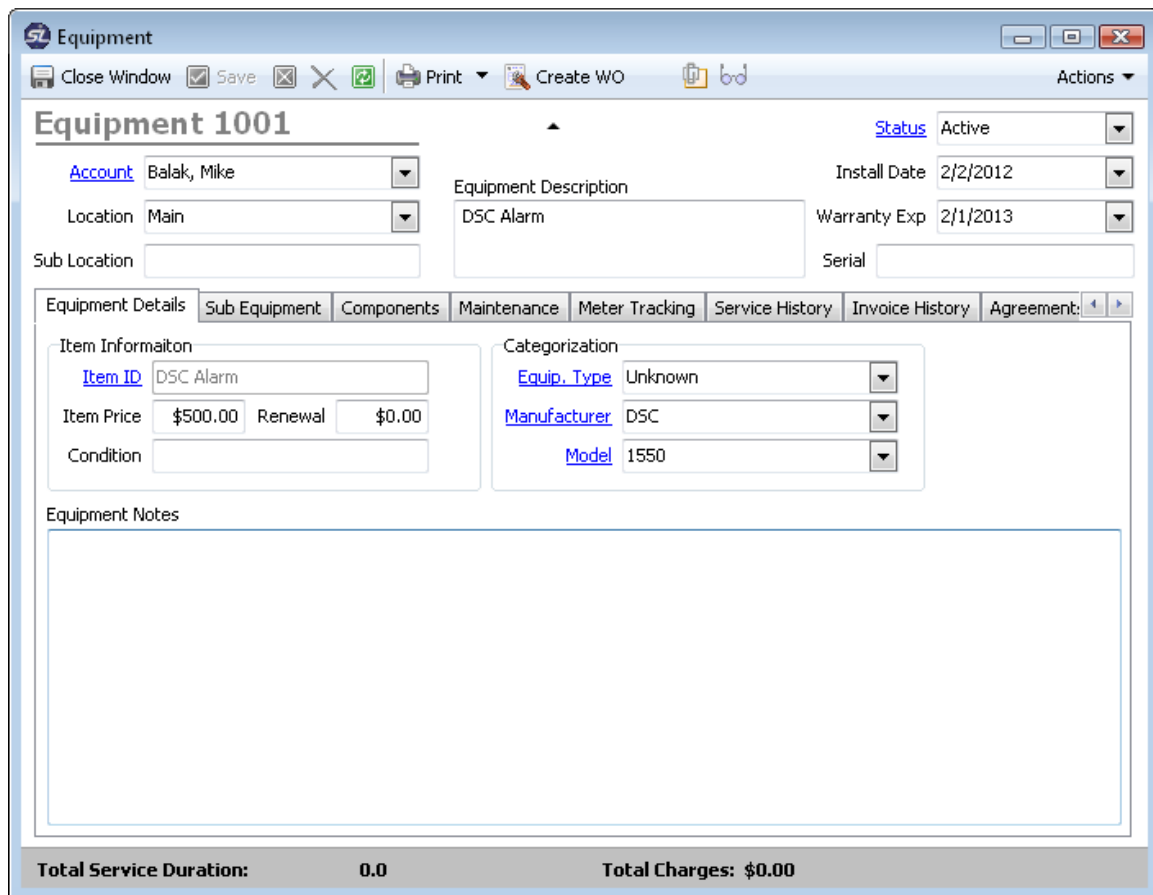3. Enter the **Resolution** for the problem code.

Creating Equipment Records:

There are two primary ways an equipment record can be created in ServiceLedger. The first way is a manual creation of the equipment record where you enter the equipment information. This is the primary way of entering existing equipment assets that your customers may have. The second way is an automated creation of the equipment record where the equipment record is created after you sell it to a customer on either a work order or invoice. This guide will cover both ways.

To manually create an equipment record, click on **Customers** | **Equipment** to view the listing of current equipment records you have created.

Alternatively, you can create an equipment record from an account record by clicking on the **Add Equipment** action button on the account screen. When you add an equipment record from an account record, it is assumed that the equipment record is being created for the account it is being created from.

Click the ⊞ **Add New Record** button to add a new equipment record.

1. Select the **Account** from the drop-down box. An account must be setup for the customer prior to creating an equipment record for the customer.
2. Select the **Location** from the drop-down box. This is useful if the customer has multiple service locations and you need to track where the equipment is located.
3. If desired, enter a **Sub Location**. This can be any info that is useful for locating the equipment at the customer's site.
4. **Item #** is the item as defined in your Item List. Only items where the Item Type = Equipment will display in this list.
5. **Description** is the default item description as defined at the time you created the item. You can overwrite the item description if you like.
6. **Price** is the default item price, or the amount the item was sold for if it is being automatically created from a work order or invoice.

7. **Renewal** is the default contract renewal rate and is useful if the equipment on a contract is going to determine the renewal rate.
8. **Type** is the type of equipment and can be used to categorize different types of equipment you sell or service.
9. **Manufacturer** is the manufacturer of the equipment and will either default to the default manufacturer as defined by the item or you can overwrite.
10. **Model** is the model of the equipment and will either default to the default model as defined by the item or you can overwrite.
11. **Serial Number** is the serial number for the item.
12. **Install Date** is the date you installed the item.
13. **Warranty Exp.** is the date the warranty expires for the item. It will default to the default warranty expiration as defined on the item.
14. **Equipment Notes** can be used to enter any miscellaneous notes you need to record about the specific equipment record.

Tracking Equipment PM Schedules:

You can track equipment preventative maintenance schedules by adding equipment tasks that should be performed on a regular basis. Any tasks on a piece of equipment will alert you via the **PM Scheduler** of equipment that is due for preventative maintenance, service, inspection or repair. After you process an equipment preventative maintenance job, the **Next PM Due Date** of the task will default to the next date based upon the frequency you selected.

1. **Next PM Due** is the next date, or starting date, for the preventative maintenance scheduling.
2. **Due Every (X) Months** is entered to let ServiceLedger know how often the equipment record needs to be scheduled for service.
3. **Recur from date completed** allows you to delay service for the next occurrence of the task until the work order for the last PM has been completed. So, for instance, if one PM is five months late, you can do the

next one six months after that, rather than in the next month immediately afterwards that would originally have been scheduled.

Tracking Equipment Meter Usage:

You can track equipment meter usage by clicking on any of the **Track Meter Usage** checkboxes. This will flag ServiceLedger that the item is setup for meter usage tracking and will remind users that the meter usage needs to be tracked when the equipment is serviced.

1. Enter the last or starting meter count. Each time you service the equipment on the work order, you will be prompted to update the meter count.
2. Enter a meter item to be used for billing. If the rate is $0.00, the item you choose does not matter.
3. If desired, enter a number at which a meter PM should be due. This field is informational only and will not place the equipment in the PM schedule when the meter reaches this number.

Tracking Equipment Service History:

Each equipment record will have a **Service History** tab where you can view the service history. This is useful if you need to see the history on an equipment record and need to view the details. You can view the details of any work order by double-clicking on the row to open the work order and equipment service notes.

Tracking Invoice History:

Each equipment record will have an Invoice History tab where you can view the invoice history on the equipment record. This is useful if you want to track what you have invoiced the customer for service on that particular equipment record.

Creating Jobs/Work Orders from the Equipment Record:

ServiceLedger offers a shortcut to allow you to create jobs directly from the equipment record by clicking on the **Create WO** button. This action will create a work order for the customer and open the equipment service note so that you can enter any problems reported on the equipment. This feature is useful if you

have customers that call you with an equipment identifier, serial number or other number first and you lookup the equipment first via the **Equipment List**.

Searching For Equipment Records:

The **Equipment List** is a powerful tool to allow you to search for any equipment record you are looking for. You can search by **Equipment ID**, **Serial Number**, **Account Name**, **Account Location** or **Item** by default, or you can have the **Equipment List** modified to suit your needs. This list will show you all equipment for all customers.

You can see a listing of all equipment records assigned to any specific account by opening the account record for the customer, selecting the **History** tab and selecting the **View Type** to **Equipment**. This list will show you all equipment for the specific customer record you are on.

Attaching Equipment and Updating Service History on Jobs:

From any job, you can attach equipment to the job by clicking on the **Equipment** tab on the work order. Any equipment records defined for the customer will be available to be attached to the job, or you can add equipment records on-the-fly if no equipment record exists.

Click on the **Attach Equipment** to add a new equipment record to the job.

1. Select the **Equipment ID** that you are attaching to the job.
2. Most information is read-only and pulled from the equipment record. If the equipment is setup for Preventative Maintenance Scheduling or Meter Usage Tracking, those fields will become editable to allow you to update with current information.
3. Enter the **Problem** for the equipment.
4. Enter the **Resolution** for the equipment to track what was done to correct the problem. Oftentimes, this is done after the work is completed.
5. Click **OK** to save the attachment.

Using Problem Codes on Jobs:

You can use **Problem Codes** to quickly identify problems and resolutions on the **Equipment Service Note** for each equipment record attached to a job. If you

have existing problem codes in ServiceLedger, you can add them to the **Equipment Service Note** or add new problem codes on-the-fly.

If you want to add a new problem code, click on the **Add New** button to open the **Problem Code** window to add a new problem code to the system.

1. Click the **Add** button to add a new problem code.
2. Use the drop-down box to find the problem code you want to add.
3. The **Problem** and **Resolution** will automatically fill in based upon the problem code definition.
4. Click on the **Summarize to Details** button to summarize all of the problem codes to the **Problem** and **Resolution** fields under the **Details** tab.

Updating Invoice Charges for Equipment Records:

This feature allows you to track the invoice charges for each equipment record. It is useful if you want to track total invoice charges you charged your customer for service, parts or repair of their equipment.

Click the **Add Invoice Charge** button to add a new invoice charge from the **Charges & Problem Code** tab on the **Equipment Service Note** window.

Note: All invoice charges will be updated on the work order invoice charges. Adding invoice charges from the equipment record is necessary only if you want to track the revenue you generated off of the equipment.

Updating Next PM Due Date:

If the equipment you are servicing is on a **PM Schedule**, you can update the **Next PM Due Date** by changing the **Due Date** or accepting the default in the PM task under equipment tasks. The default will always default to the next due date as defined on the equipment record. If you change the **Due Date**, it will update the equipment record that the next **Due Date** is due on the changed date.

Updating Meter Usage:

If the equipment record is setup for meter tracking, you can update the meter usage by entering the new meter count into the **Current Meter** field. After you update the **Current Meter**, it will give you a calculated **Meter Usage** that you can use for meter usage billing.
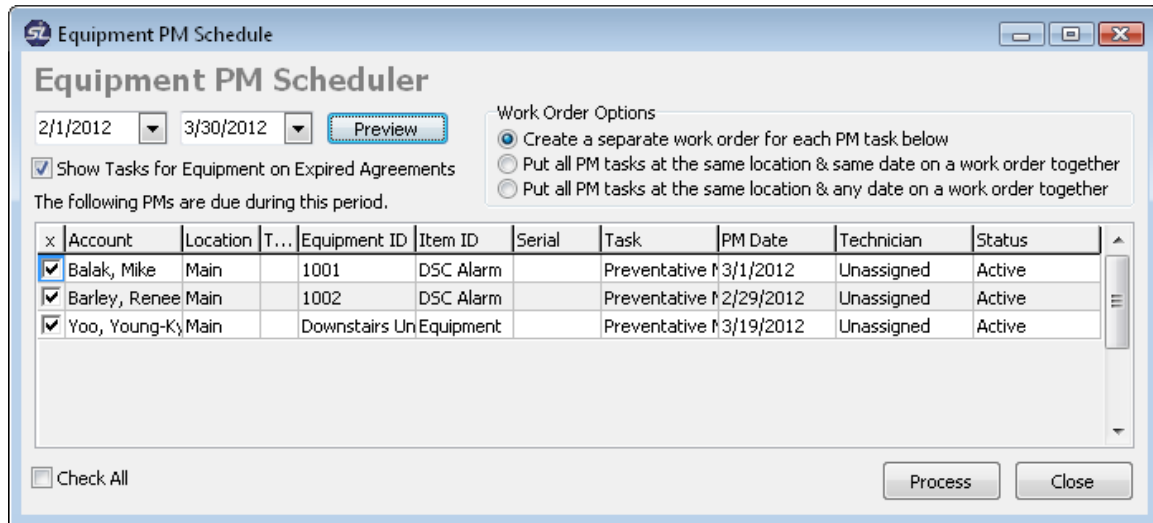

Using Meter Usage Billing:

If you are going to invoice for meter usage, you can do so from the **Meter Tracking** tab at the bottom, using the **Process Meter Charges** button. This will create a line item on the work order for the meter usage based on the meter item you have set up on the equipment window. After you have processed meter charges, the line item visisble on the **Charges & Problem Code** tab of the **Equipment Service Note**.

If meter charges have already been processed, the Process meter charges button and all meter fields will be disabled.

Using the PM Scheduler:

The **PM Scheduler** allows you to quickly identify what equipment is due for a specific time period and process work orders to create jobs for the equipment preventative maintenance.

To launch the **PM Scheduler**, click on **Equipment | PM Scheduler** from the **Navigator**. By default, the **PM Scheduler** will default the date range to the current month.

Changing the PM Schedule Date Range:

You can change the PM Schedule Date Range by updating the start and ending date to filter out equipment schedules you are not ready for yet by using the drop-down boxes to define a new starting or ending date. Click the **Preview** button to refresh the list after you enter the new date range.

Selecting Equipment PM's for Job Creation:

You have the ability to select what equipment you want to schedule and what equipment you want to leave alone for the time being with the **Equipment Select** option. Simply select which equipment you want to create jobs for and schedule or click on the **Check All** checkbox to select all.

Updating PM Dates:

Be default, the **PM Date** will default to the **Next PM Due Date** as defined on the equipment record. You have the ability to change the schedule date of the preventative maintenance on each equipment pm by selecting the equipment record to be serviced and updating the **PM Date** as necessary. This is useful if

you want to manipulate the date for scheduling purposes. When the work order is created, it will set the date to the updated date you enter.

Updating Technicians:

Like **PM Dates**, you can update the **Technician** to be assigned to an equipment pm by selecting the equipment record to be serviced and updating the **Technician** as necessary. This is useful if you want ServiceLedger to automatically assign and schedule the job to a specific technician when the work order is created.

Consolidating Equipment PM's for the Same Location, Date & Technician:

If you have multiple pieces of equipment needing to be serviced for the same location (customer), date and technician, you can consolidate the equipment PMs to a single work order by clicking on the **Work Order Options** radio buttons.

Processing Work Orders for Equipment PM's:

When you are ready to process the equipment service to create work orders, click on the **Process** button to process the work orders. When you process the

work orders, it will update the equipment records with the new **Next PM Due Date** as defined on the equipment record automatically and create new work orders in ServiceLedger. After the work order is processed for the date range you have selected, it will disappear from the **PM Scheduler** to avoid having duplicate work orders created for the same equipment in the same period.

Auto-Scheduling Work Orders:

Be default, ServiceLedger will create work orders with a status of **New** regardless on if you have assigned a technician or not to the work order at the time you processed your Equipment PM's. This is done to allow you to still have control over your scheduling and schedule the jobs using any of the **Scheduling Options** available to you.

You have the option to auto-schedule that will automatically schedule the job to a technician's calendar when you process the Equipment PM's. While this is a powerful feature that is used by many customers, some customers prefer that ServiceLedger not auto-schedule and elects to keep it off. Below is the summary of an FAQ on the auto-schedule feature if you wish to turn it on.

The ServiceLedger Auto-Schedule Feature is a custom option you can setup if you wish to have ServiceLedger automatically schedule new jobs onto the dispatch board. It is useful for companies that do preventative maintenance schedules, or have a job importer that is importing jobs for you. The purpose of the auto-schedule feature is to automatically take new jobs created in ServiceLedger and schedule them to either the unassigned category on the dispatch board or to assign them to a specific resource you have defined. The date of the schedule will default to the job start date or promise start date in ServiceLedger on the work order.

To activate this feature, follow these instructions:

1. **Administration | Administration** and open the **Administration Window**.
2. Click on **ALT** and **F8** simultaneously to open the **Global Preferences** tab.
3. Click the **Add** button on the **Global Preferences** tab to add a new option.
4. Enter **work_order.auto_schedule** and set the value to **1**.
5. Be sure to click in another row to ensure that the option is saved then close the window.

If you are going to use this feature, please keep in mind that any new work order you create in ServiceLedger will automatically create a schedule on the dispatch board for either unassigned for the current date the work order is created or the **Start Date** as defined on the work order OR schedule on the dispatch board for the resource assigned for the current date the work order is created or the **Start Date** as defined on the work order.

For Equipment PM's, the schedule date will be the **PM Date** you select when you process the work orders for Equipment PM's and the technician will be either unassigned or the **Technician** you assign for the Equipment PM.