ServiceLedger 2009

Getting Started Guides

Getting Started with the Equipment Manager

This guide will document how to use the ServiceLedger Equipment Manager to track customer equipment inventory, record equipment service history, track and schedule preventative maintenance and track and invoice for meter usage.

Introduction:

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. An equipment record is any item you sell or service for your customers where you need to track specific information about the equipment, including service history on the equipment, preventative maintenance schedules on the equipment and meter billing.

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.

What's New in ServiceLedger Version 2009

The following new functionality has been added in ServiceLedger Version 2009:

1. Ability to add sub-equipment to equipment allowing you to track all equipment and their sub-equipment with ability to track full service history, preventative maintenance schedules and meter usage and billing for the sub-equipment records.
2. Ability to track meter usage and meter billing for up to four meters per equipment record.
3. Ability to trigger preventative maintenance off of a meter usage amount instead of the current date driven format.
4. Added a new Meter Entry Billing window to easily record multiple meters from one screen instead of having to update the meter usage and billing from the work order.

Benefits of Tracking Customer Equipment:

There are many benefits in tracking your customer's specific equipment that you may sell or service. From the equipment record, you can view all pertinent data about the equipment including equipment item and description, manufacturer and model, serial number, installation and warranty expiration dates and general notes about the equipment. This general information gives you a quick idea about the equipment itself and when it was installed and when the warranty expires.

As you service the equipment, recording the service notes allows you to quickly view the service history of the equipment with a click of a button. This history can be used to quickly analyze any problems and determine if past corrective actions are not working.

If you schedule any preventative maintenance for equipment, ServiceLedger allows you to track as many different schedules as you like for each equipment record allowing you to schedule different kinds of preventative maintenance at different schedules. This time-saving feature allows you to quickly identify any equipment that is due for service at any time and further allows you to consolidate multiple equipment preventative maintenance schedules to a single work order if you choose.

Meter billing has been enhanced in ServiceLedger 2009 allowing you to track up to four different meters per equipment, identify different rates for meter billing and includes a new Meter Billing page that allows you to easily update all meter billings at one time and invoice for the meter usage.

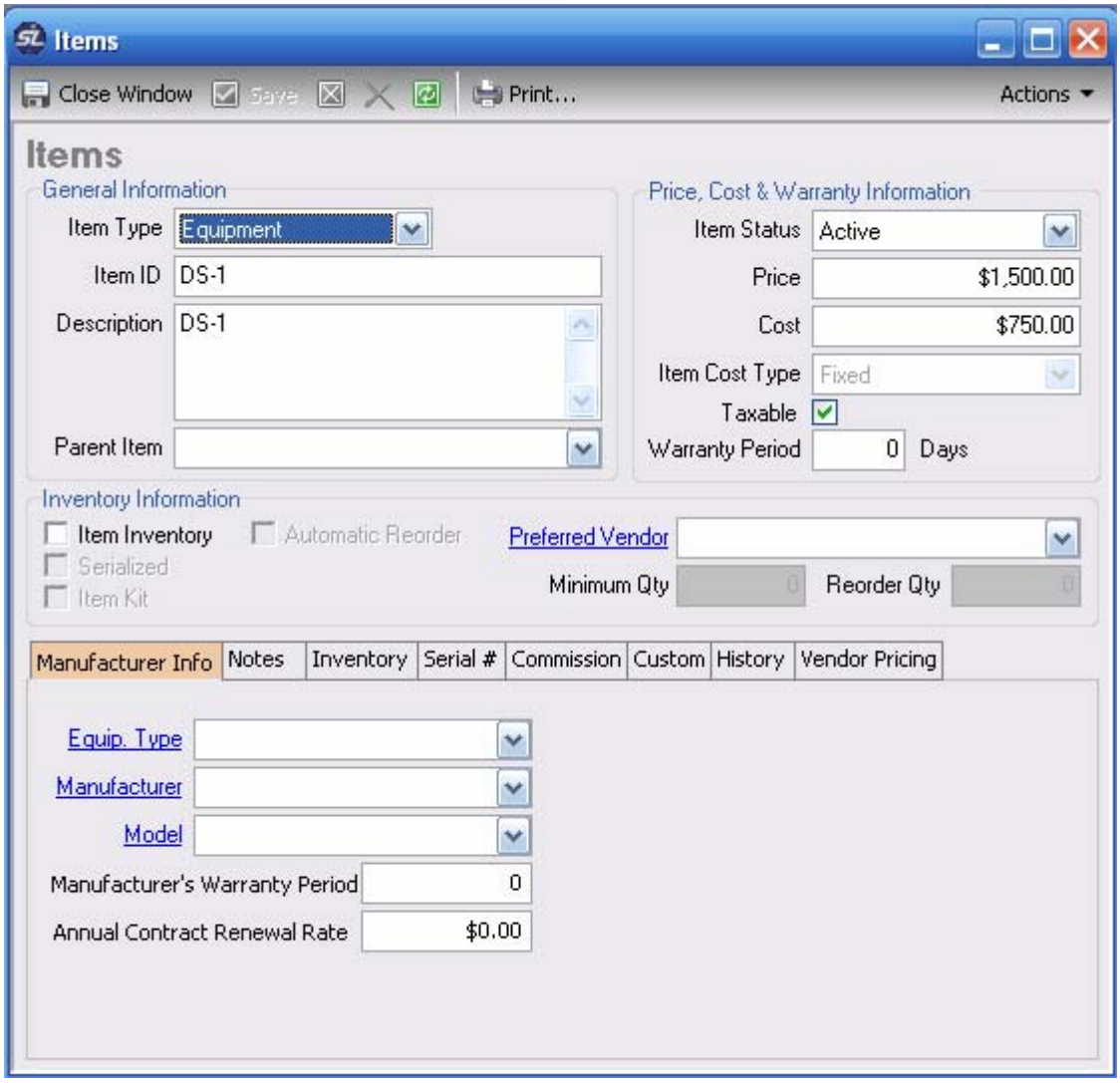
Creating Equipment Items:

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.

From the Navigator, click on **Equipment | Equipment Admin | Equipment Items** to open the **Item List** to view existing equipment items you have defined in ServiceLedger.

Click on the  **Add New Record** button to add a new equipment 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. Enter any additional information on the item you wish to record.
9. Click **Save & Close** button to save the item.

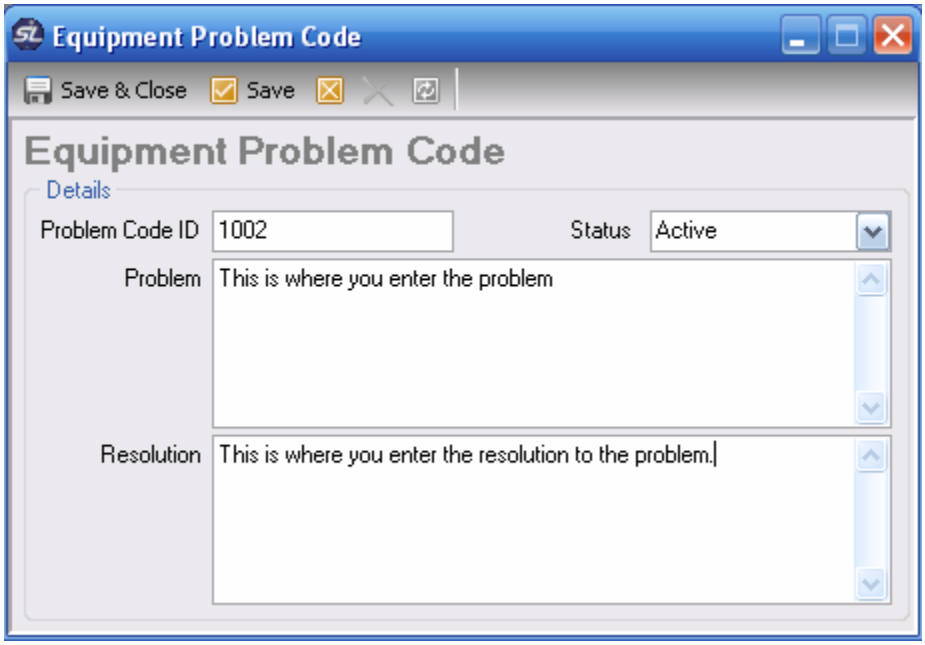
Note: There are additional options available to you when adding new items in ServiceLedger including inventory tracking, serialized inventory tracking and more. Please see the Getting Started with the Inventory Manager documentation for more information.

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.

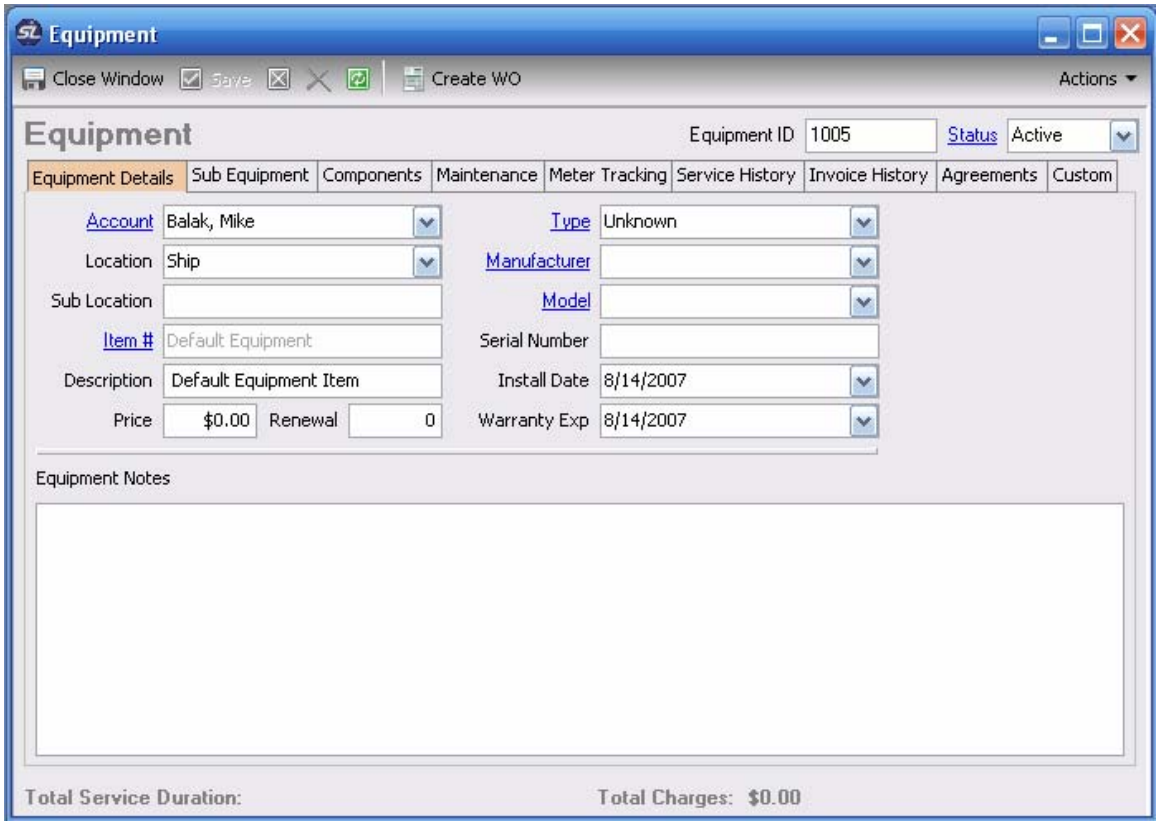
Creating Equipment Records:

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 **Equipment | Equipment List** from the **Navigator** 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 **Actions | Add Equipment** drop-down menu 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. Enter a **Sub-Location** to better identify the exact location of the equipment.
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 Sub-Equipment Records:

You can track sub-equipment records for each equipment record in ServiceLedger. This is useful if you have sub-equipment or components of equipment that requires additional service history tracking, preventative maintenance schedules and/or meter billing. Sub-equipment records are basically the same as equipment records except they are associated with a master equipment record.

To create a sub-equipment record for any equipment, click on the **Sub Equipment** tab and then click on the **Add Sub Equipment** button. Follow the same instructions as creating equipment records to create the sub-equipment record.

Tracking Equipment Components:

You can track components of an equipment record in ServiceLedger. This is useful if you want to track all of the parts that make up the equipment record. Unlike sub-equipment that allows you to track the service history, components only allow you to view the components of the equipment, but not any history related to the components.

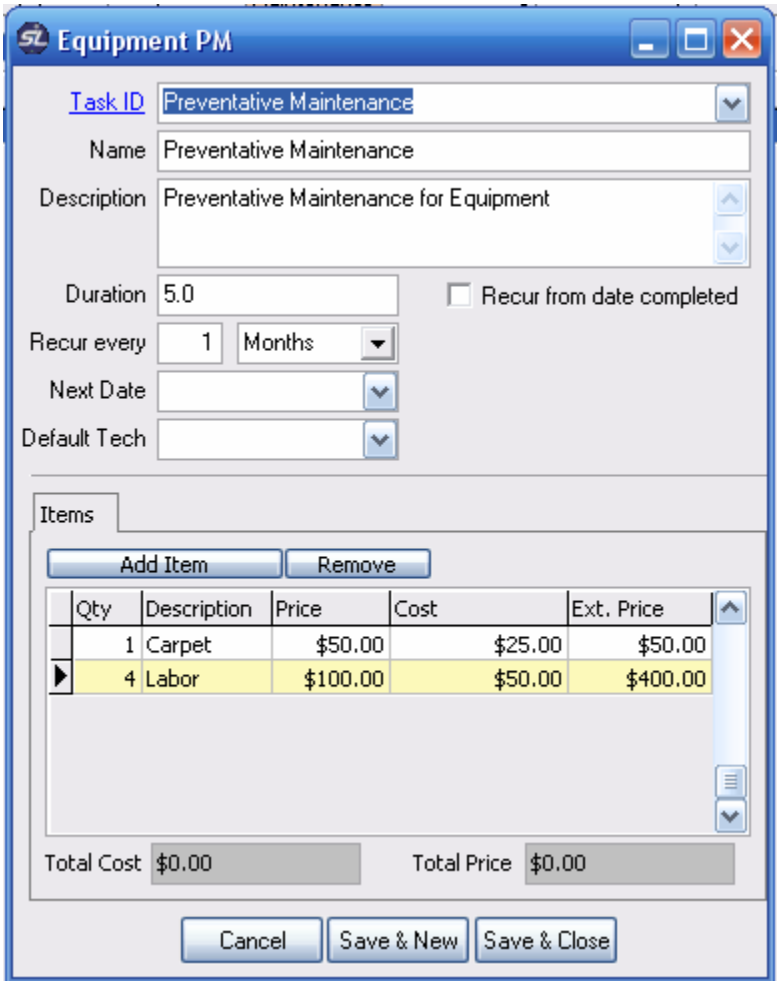
To create and/or view the components of any equipment, click on the **Components** tab to view the list. Click on the **Add** button to add new components to the list.

Tracking Equipment PM Schedules:

ServiceLedger provides you the ability to track multiple PM Schedules per equipment record. While most equipment preventative maintenance only requires one schedule, having the ability for multiple schedules allows you to define different schedules for different types of maintenance you need to perform on any equipment.

Note: The Equipment PM feature requires that you setup Service Tasks. It is recommended that you read the Getting Started with Service Tasks to understand more about how service tasks are used in ServiceLedger.

To create a PM Schedule for an equipment record, click on the **Maintenance** tab and click on the Add PM Schedule button.



1. Use the **Task ID** drop-down to select the service task to be performed.
2. The **Service Task Name** and **Description** will auto-fill for you, however you have the ability to edit the description further if you like.
3. The **Duration** field will auto-fill based upon the expected duration to perform the task.

4. **Recur Every** is the recurrence pattern you define.
5. **Next Date** is the next date scheduled, or starting date, for the preventative maintenance scheduling.
6. **Default Tech** is the technician you default the preventative maintenance work for. If no tech is assigned, you can leave it blank and assign it at the time the preventative maintenance job is created.
7. The **Items** are the default charges for the maintenance as defined in the service task.

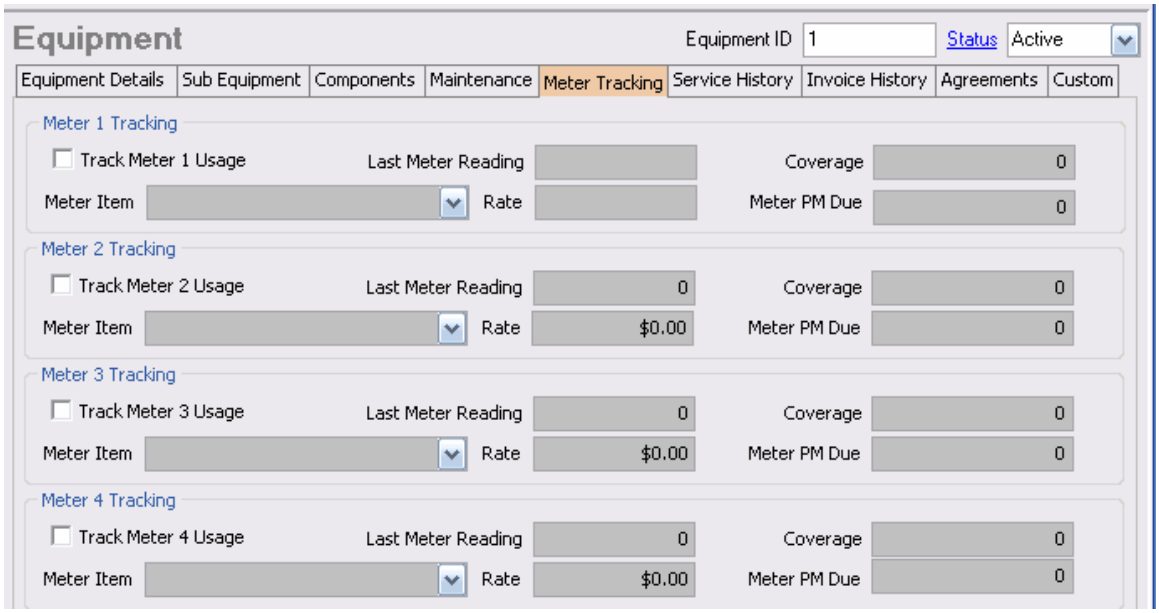
Tracking Equipment Meter Usage:

ServiceLedger 2009 now allows you to track up to four meters per equipment record and define the meter item and rate you will invoice the customer.

Meter Billing is now performed in using either the **Meter Billing Window** or can be done on the Work Order. This guide will cover both ways.

Click on the **Meter Tracking** tab from the equipment record to view the meter tracking details.

Note: While ServiceLedger can track up to four meters, you don't have to use all of them. Most customers will only track one meter, while other customers in the copier industry may support up to four.



1. To track meter usage for any meter, you must check the **Track Meter** checkbox for each meter you want to activate for tracking.
2. **Last Meter Reading** is the last meter entered in ServiceLedger. If you are just starting, you will enter the last meter reading you recorded in your previous system.

3. **Meter Item** is the item you want to use for meter billing.
4. **Rate** is the rate you want to bill per meter unit used.
5. **Coverage** is any amount you want to ignore when you perform meter billing. Example may be if the first 100 units is covered, then you would enter 100 and they will not be included in the meter billing. Leave blank if there are no covered units.
6. **Meter PM Due** is a special meter tracking function that alerts you when a meter has surpassed a threshold and requires PM. *Note: This function is different than the Equipment PM Scheduler and based solely on the meter usage instead of date driven preventative maintenance that the PM Scheduler uses.*

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.

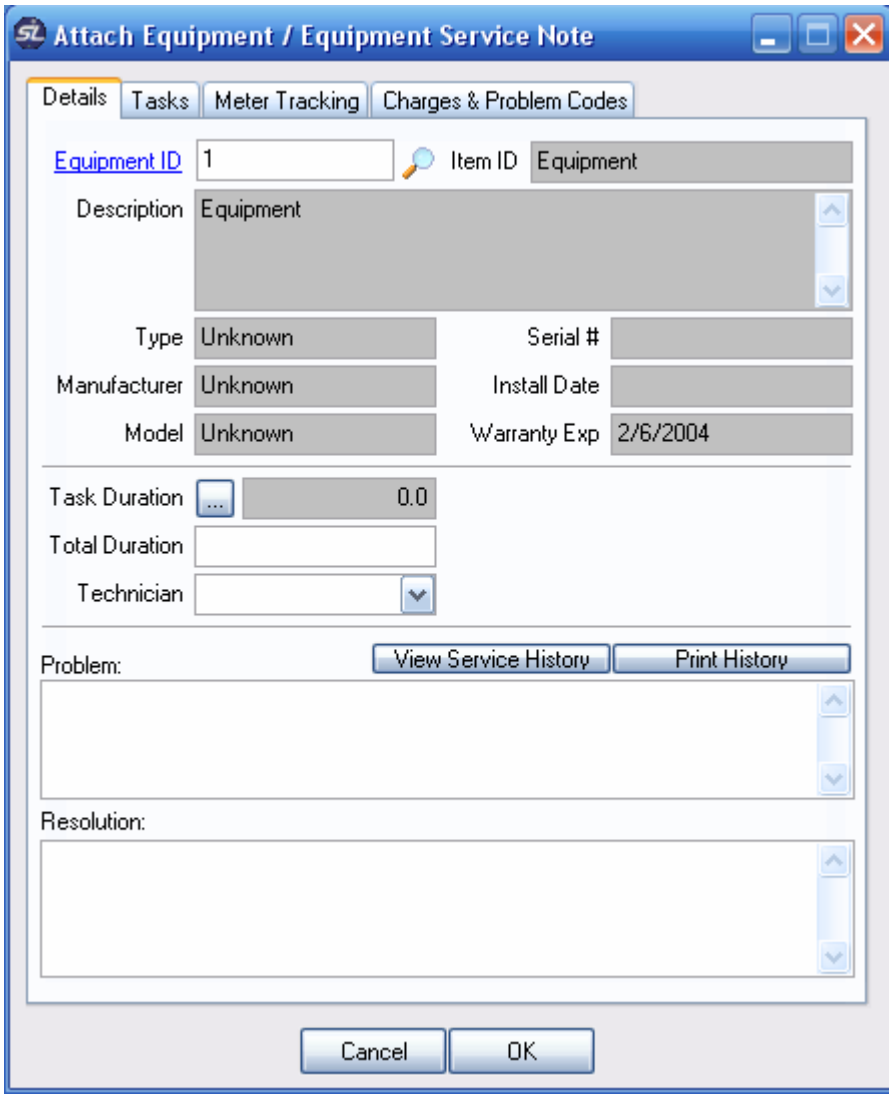
You can see a listing of all equipment records assigned to any specific account by opening the account record for the customer, selecting the **History** tab and

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. *Note: Only the equipment for the service location you are servicing will be available on the drop-down.*

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.

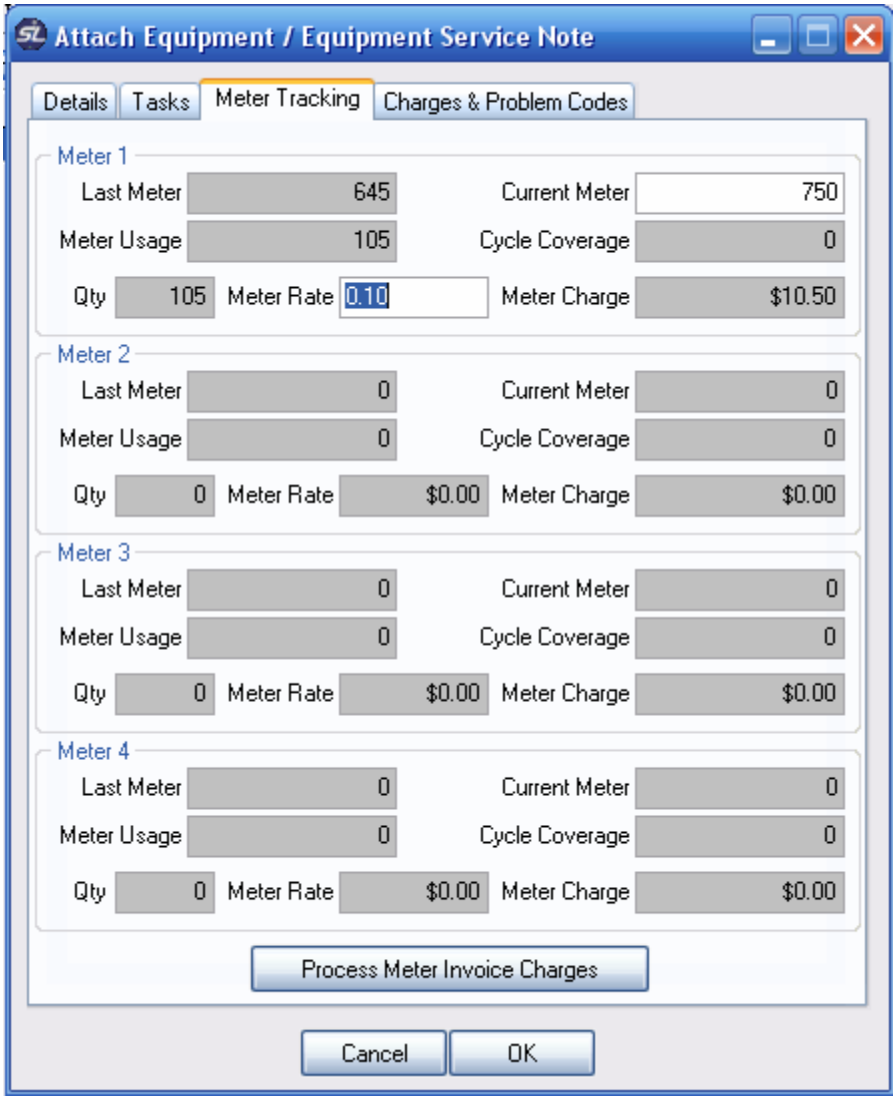
Tracking Service Tasks on Equipment Service:

Click on the **Task** tab to view service tasks or create new service tasks for the equipment service. Double-click on any service task to edit existing service tasks for the equipment or click on **Add Task** or **Add Task Group** to add a new service task for the equipment. *Note: More information about using service tasks can be found in the Getting Started with Service Tasks or Getting Started with Job Work Orders guides.*

Tracking Meter Usage & Meter Billing:

You can update meter usage and invoice for meter billing directly from the work order and bypass the **Meter Billing Entry Window**. This is beneficial if you service the equipment at the time you collect meter usage and prepare the invoice, however it is not as efficient as using the Meter Billing Entry Window if you want to record multiple meter usage for multiple equipment records.

Click on the **Meter Tracking** tab to update meter usage for each meter of the equipment.

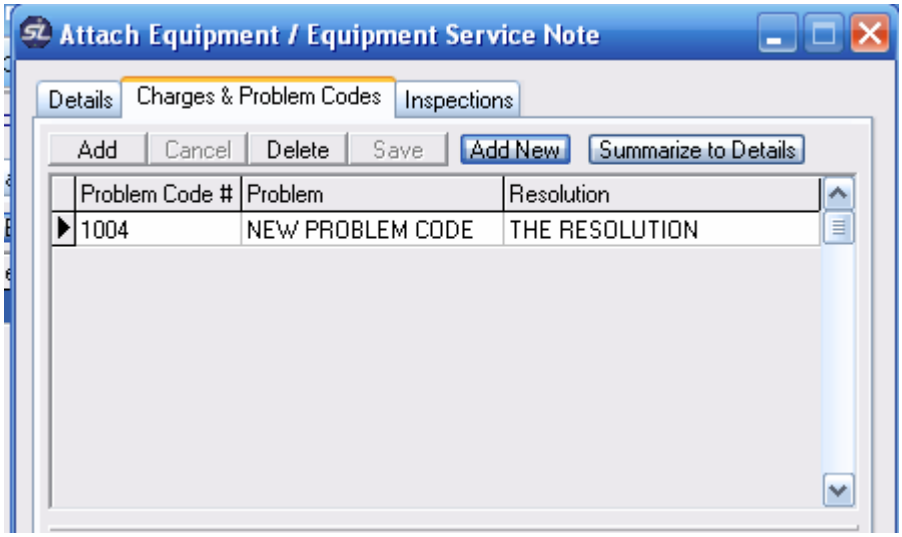


1. **Last Meter** is the meter reading for the last cycle. This field is read-only and only can be edited directly from the equipment record.
2. **Current Meter** is the current meter reading.
3. **Meter Usage** is the calculated difference between the last and current meter reading.
4. **Cycle Coverage** is the amount covered and not billed for meter billing. This field is read-only and can only be edited directly from the equipment record.
5. **Qty** is the same as the meter usage and used to calculate meter invoice billing.
6. **Meter Rate** is the rate to be charged per meter unit.
7. **Meter Charge** is the total meter billing charge.
8. Click on **Process Meter Invoice Charges** to add meter billing to the work order.

Using Problem Codes on Jobs:

You can use **Problem Codes** to quickly identify problems and resolutions on the service 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.

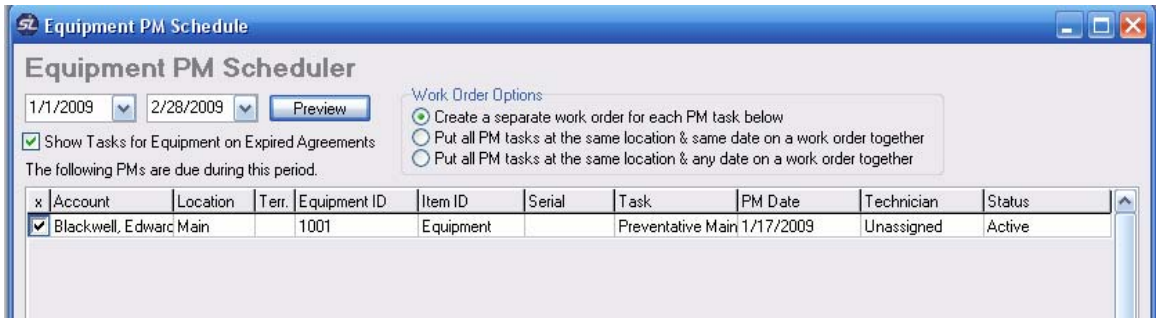
Click the **Add Invoice Charge** button to add a new invoice charge from the **Charges & Problem Code** tab on the **Equipment Service Note** window.

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.

Using the PM Scheduler:

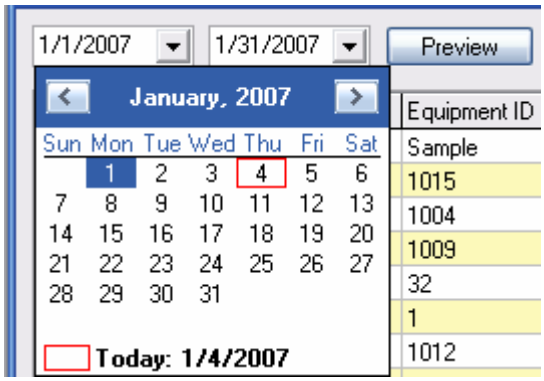
The **PM Scheduler** allows you to quickly identify what equipment is due for a specific time period and process work orders to create jobs for the equipment preventative maintenance.

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:

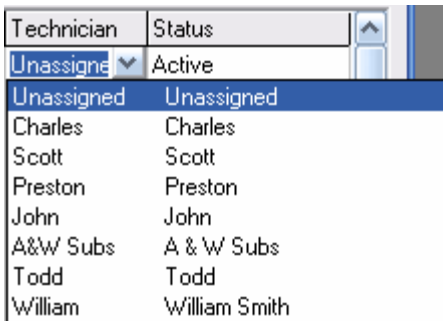
You have the ability to select what equipment you want to schedule and what equipment you want to leave alone for the time being with the **Equipment Select** option. Simply select which equipment you want to create jobs for and schedule or click on the **Check All** checkbox to select all.

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.

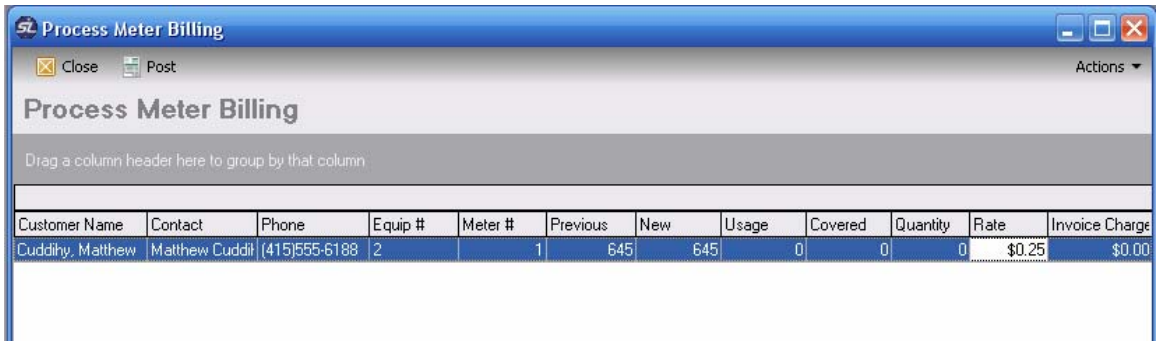


Processing Work Orders for Equipment PM's:

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.

Using the Meter Billing Entry Window

The **Meter Billing Entry Window** allows you to quickly update multiple meters for multiple equipment records from one screen. Any equipment that is selected for meter tracking will populate in the list giving you one place where you can update all meter readings. After you update the meter usage, you can post to create invoices for all meter usage.



1. All fields in the list are read-only except for **New** and **Rate** that you have the option to change.
2. The **New** field is where you will enter the **Current Meter** reading.
3. The **Rate** is where you can edit the rate to charge for the meter billing per unit.
4. When you have updated all meter readings you click on **Post** to create the meter billing invoices.

